## Domestic Direct Ship Process

1. RAs, Co-ops, SDAs, and ITOs place domestic requisitions. This is done by navigating the WBSCM Catalog, and selecting commodities that meet the customer's specifications. After making all commodity selections, the customer will display the shopping cart, and enter high level information like a delivery location.
2. SDAs & ITOs will consolidate these requisitions into a sales order. This is done using the Order Consolidation Workbench.
3. FNS approves sales order and may alter sales order type. An FNS Order Manager may transform a standard domestic sales order into a domestic emergency sales order, domestic offshore sales order, redonation sales order, third party barter sales order, barter/exchange sales order, or FOB origin freight sales order.
4. FNS determines how the order is procured. This person may opt to source to a price support warehouse, execute a barter/exchange scenario, or perform a further processing scenario or issue solicitations to the vendor community.
   - If an item is being sourced direct delivery from a vendor, the sales order is transformed into a Purchase Requisition, and a bid invitation must be created. Bids will be solicited from interested vendors. Finally when a bid is accepted, the PR becomes a Purchase Order. The PO goes to the vendor for fulfillment. The vendor picks the goods and delivery begins.
   - If an item is being sourced from a price support warehouse, FSA will create delivery document and post goods issue (PGI) the items to take it out of warehouse inventory. This indicates that the warehouse has issued the goods out to a customer. This is all done in WBSCM.
5. Goods are delivered from one domestic location to another domestic location.
   - In cases where goods are delivered to an offshore location, a slightly different procedure applies because of the offshore delivery location. Two POs are created – a commodity PO indicating the goods that are being purchased, and a freight PO indicating the cost for shipping. Vendors bid on the commodity and freight PO. Shipping proceeds differently as the commodity vendor (vendor supplying the product) will send the goods to a domestic location where the freight vendor (vendor supplying offshore shipping services) will ship them to the customer's location, for example, in the Virgin Islands.
6. The RA, Co-op, ITO, or SDA, will confirm the receipt of goods by entering a shipment receipt in WBSCM.
   - If desired, you can upload one or multiple shipment receipts.
   - For offshore orders, FSA will enter receipt of the commodity PO when it gets to the load port and enter receipt of the freight PO when it gets to the final destination.

National Warehouse Fulfillment Process
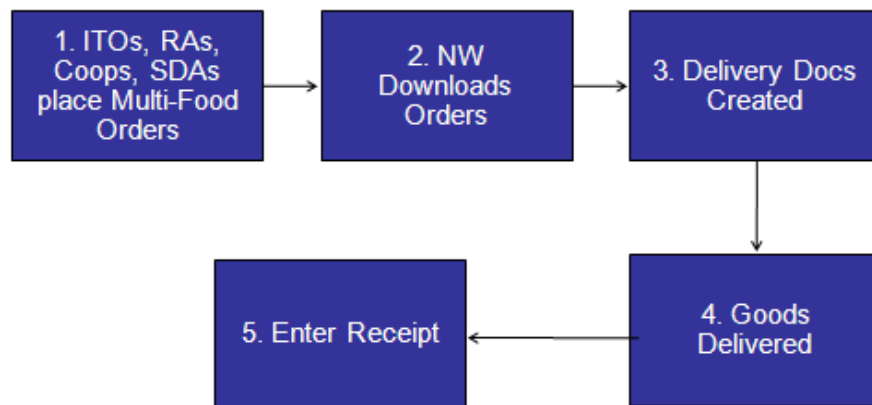
1. Multi-food Order Management starts with the creation of a requisition by Order Managers in WBSCM. Upon completion, WBSCM compiles the orders into delivery documents that will be used to provide shipment information to the National Warehouses. These delivery documents are then sent to the appropriate National Warehouse.

2. Multi-food requisitions are then downloaded by the National Warehouse. The National Warehouse Admin downloads orders placed for processing. This process is also known as Exporting Orders to National Warehouse. The file that is downloaded from WBSCM is a collection of requisitions that meet the National Warehouse's selection criteria. This is necessary to process orders from ITOs or SDAs.

3. The National Warehouse uploads a Bill of Lading (BOL) file. This process serves two purposes:

   - First, it creates a delivery document which indicates to the National Warehouse and the customer which goods are in the shipment.

   - Second, it performs a goods issue in WBSCM against orders the warehouse has fulfilled. This updates inventory levels for display and replenishment purposes. This process is useful in the event of a recall, as it is immediately known which customers received inventory from which batch. The National Warehouse will choose the source batch(es) within the appropriate storage location for the multi-food order. Information as to which batch(es) were chosen, along with ship date, will be passed to the system. The batches that were picked for the deliveries are then entered into the delivery document.

4. Goods are shipped to the customer. Customers will know when goods are in transit via the delivery document.

5. The customer plays an important role in the National Warehouse Fulfillment process by entering the receipt information after the goods have been delivered.

   The recipient will be required to complete a *Goods Receipt* transaction to close out the order in the system. The consignee user (the person who received the order within the customer organization) will access WBSCM and enter receipt information for orders. The receipt information is crucial to other processes such as creating complaints and recalls.

PROCESS OVERVIEW

Purpose

A domestic requisition is a request for items to be ordered by or on behalf of a customer organization, including the specific material(s), quantities, delivery location(s), and delivery date(s).The purpose of this transaction is for Recipient Agencies (RAs) and Cooperatives (Co-ops) to create a domestic requisition in WBSCM. These requisitions are submitted to State Distributing Agencies (SDAs) and Indian Tribal Organizations (ITOs), who will later consolidate these requisitions into full truckloads and submit the sales order to FNS for approval.

Process Trigger

Perform this transaction to create a domestic requisition in WBSCM.

Prerequisites

- A catalog view must be assigned to the organization.
- Delivery periods must be assigned for the products.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab ➜ **Order Processing** tab ➜ **Order Management** folder ➜ **Domestic Order Entry** link to go to the *Domestic Order Entry* screen.

Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - **Required (R)** – a mandatory field necessary to complete the transaction
  - **Optional (O)** – a non-mandatory field not required to complete the transaction
  - **Conditional (C)** – a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Portal Basic Navigation course for tips on creating favorites, performing searches, etc.

PROCEDURE

1. Start the transaction using the following Portal path: **Operations** tab ➜ **Order Processing** tab ➜ **Order Management** folder ➜ **Domestic Order Entry** link.

Image: Domestic Order Entry Screen

2. Click ◄ (the **Hide Navigator** button) to hide the Portal menu. Note that this can be done with any transaction in WBSCM.

3. Perform one of the following:

If	Then
The user needs to locate a specific product by keyword	Go to Step 4.
The user will browse the catalog for available products	Go to Step 7.

4. In the *Product Catalog* pane, enter at least part of the product name in the **Quick Search** field. In this example, **Beef** was entered.

5. Click [Search] (the **Search** button) to begin the **Quick** search.

(Note) [Extended Search] (the **Extended Search** option) allows the user to enter search criteria for both the product name and product number.

(Note) Search results may include different programs and options. Refer to the **Product Number (Program / Sub-Area)** column when identifying which product(s) to order.

6. Go to Step 11.

Image: Domestic Order Entry Screen
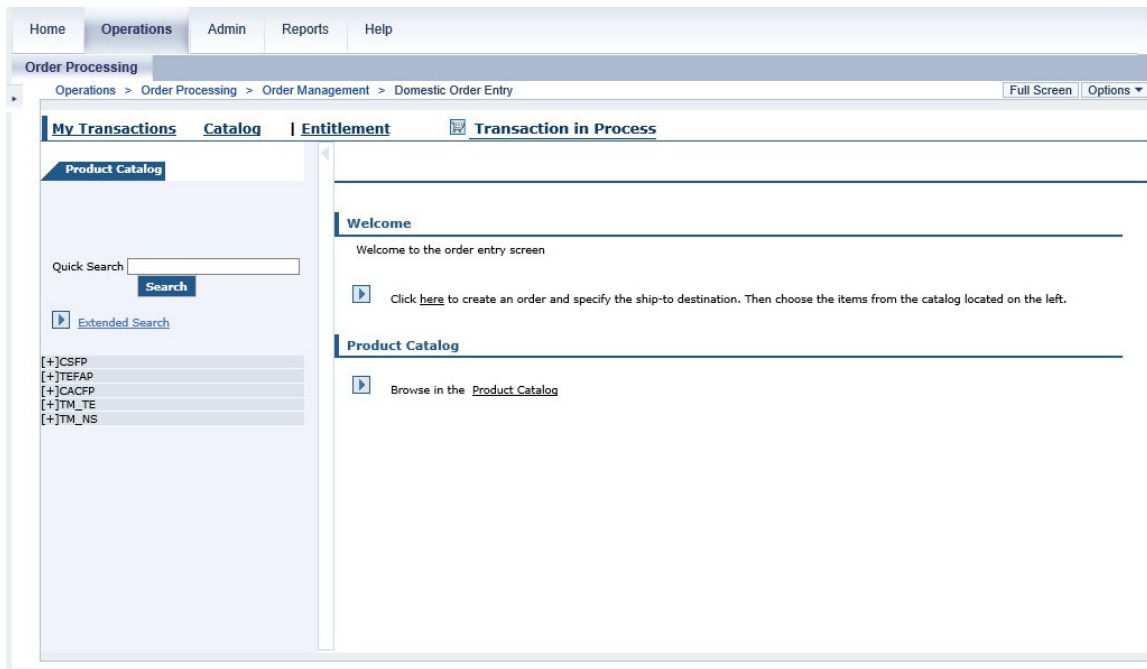
7. In the *Product* Catalog pane, click [+] (the **Plus** icon) next to the appropriate program. In this example, [+]CSFP (the **CSFP** option) was selected to place a domestic requisition through the Commodity Supplemental Food Program (CSFP).

(Note) To review the list of materials available for ordering, the user will drill down through the product catalog beginning with the program. The user should only see programs with which their RA is affiliated.

Image: Domestic Order Entry Screen
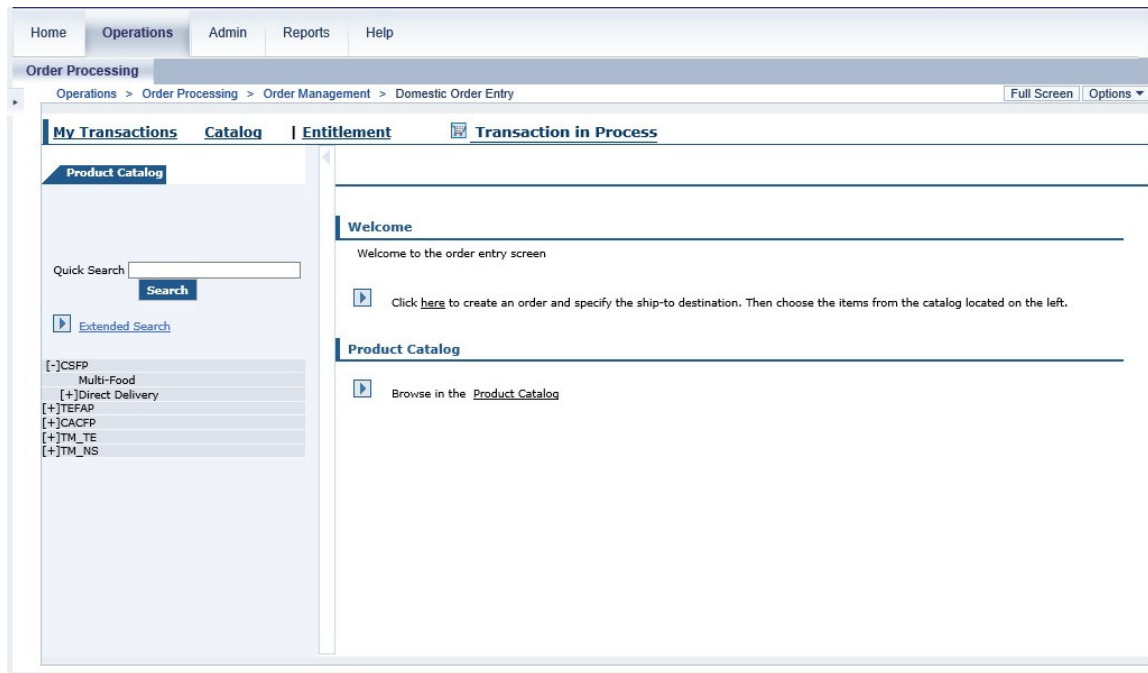
8. Click [+] (the **Plus** icon) next to the type of order. In this example [+]Direct Delivery (the **Direct Delivery** option) was selected.

(Note) Depending on the program selected, options may include:

- **Direct Delivery** - An order that is sourced from a vendor and delivered directly to the customer.
- **Multi-Food** - An order that is sourced from a National Warehouse and delivered to the customer. Multi-food orders are processed differently than domestic requisitions; refer to the Create Multi-Food Order RA work instruction for more detail.
- **Processing Diversion** - An order that is sourced from a vendor and delivered to a processor before being received in final form by the customer. For example, flour may be processed into bread.

Image: Domestic Order Entry Screen
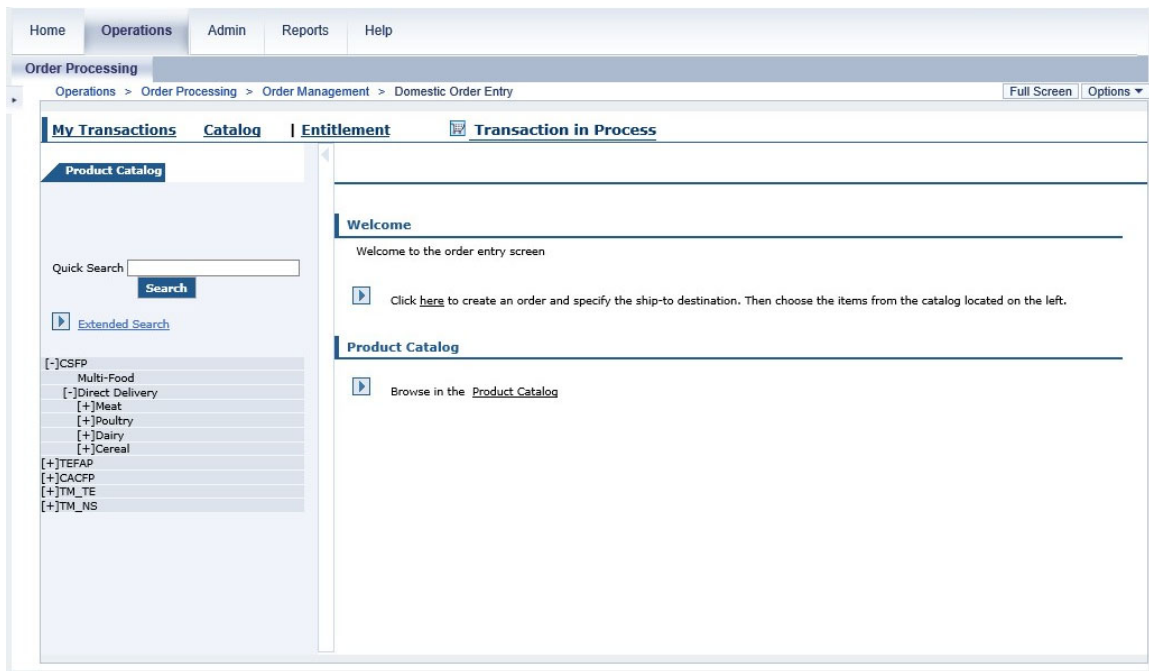
9. Click [+] (the **Plus** icon) next to the appropriate commodity group available to the user. In this example, [+]Meat (the **Meat** option) was selected under **Direct Delivery** order type.

Image: Domestic Order Entry Screen
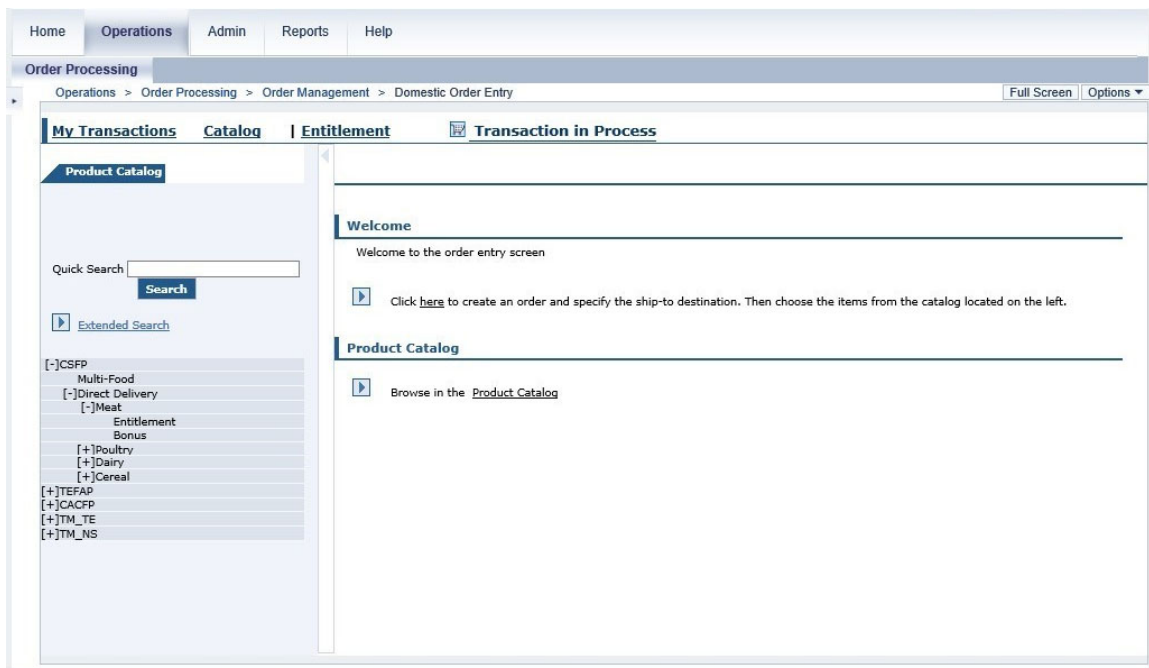
10. Select the option that corresponds to how entitlement budget is impacted. In this example, Entitlement (the **Entitlement** option) was selected under the **Meat** option.

(Note) Depending on the program selected, options may include:

- **Entitlement** - Ordering these products will decrease entitlement balance.
- **Bonus** - Ordering these products will not impact the customer's entitlement. FNS may offer bonus commodities when there is a surplus.
- **Trade Mitigation** - Ordering these products will not impact the customer's entitlement. These commodities are available through USDA's Market Facilitation Program, which supports domestic farmers faced with trade damages.

(Note) After an option is selected, the screen displays a list of all products available for the selected criteria. At the bottom of the list, the user may adjust the number of products to display on a page.

Image: Domestic Order Entry Screen

11. Click (the **Shopping Cart** icon) next to a product to view its details, including available delivery dates. Do not enter a value in the **Quantity** field from the list of products.

Image: Domestic Order Entry Screen

12.   As required, complete/review the following fields:

Field	R/O/C	Description
Delivery Date	R	Range of dates when commodities may be delivered. **Example:** 01/15/2019
Order By Date	R	Last date to submit orders for the corresponding Delivery Date. **Example:** 12/20/2018
Quantity	R	Number of items being processed. **Example:** 10 (Note) Enter the required quantity in this field.

(Note) **Delivery Date** and **Order By Date** are pre-populated from the catalog and are not editable in Domestic Order Entry.

Image: Domestic Order Entry Screen
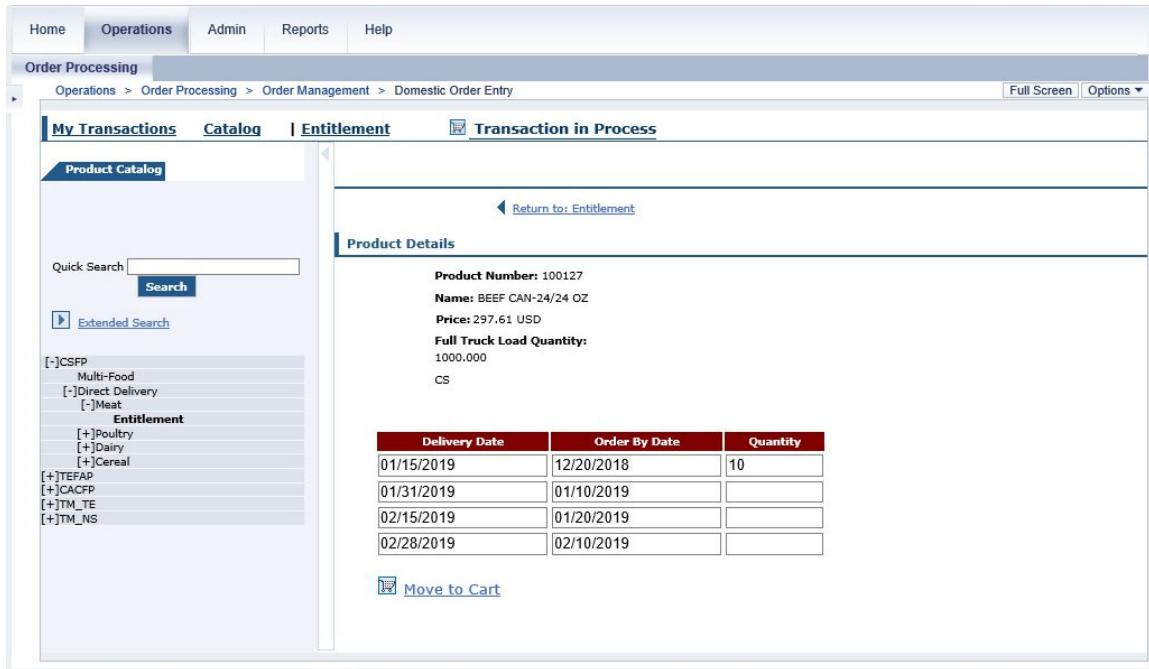
13. Click (the **Move to Cart** button) to add the selected product quantities to the shopping cart.

(Note) A summary at the top of the screen displays the number and total value of products contained in the shopping cart.

14. Perform one of the following:

If	Then
The user will add another product to the cart	Go to Step 3.
The user is ready to review the cart	Go to Step 15.

Image: Domestic Order Entry Screen
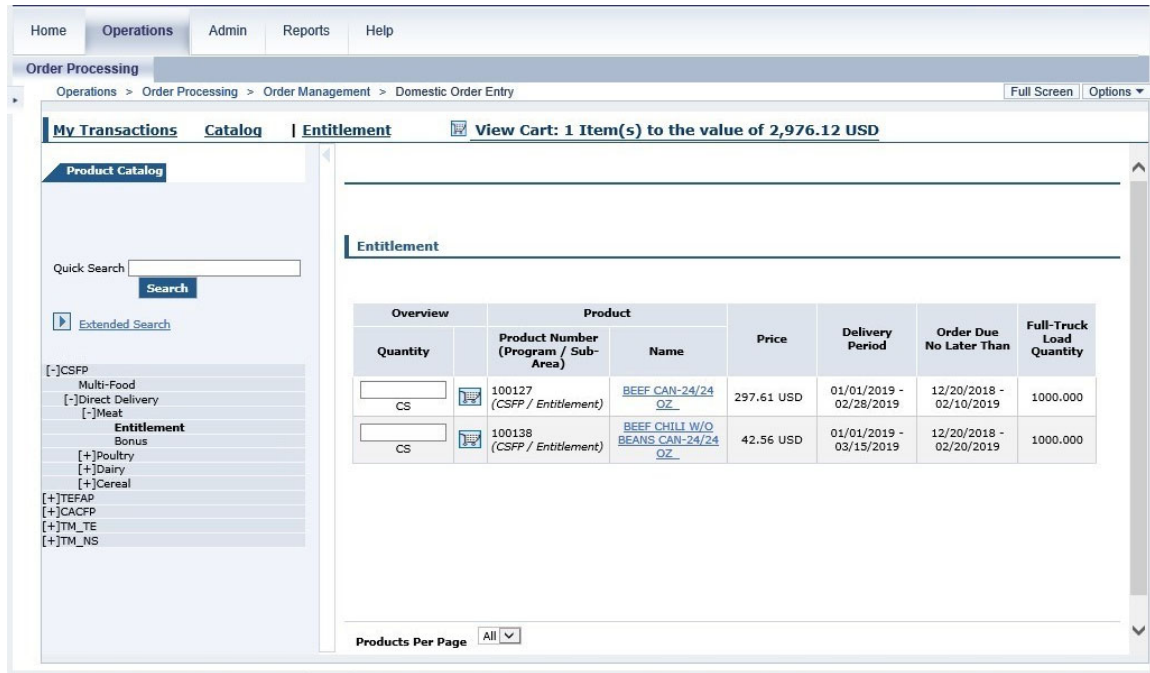
15.   Click the **View Cart** link to review the order. In this example,

 (the **View Cart: 1 Item(s) to the value of 2,976.12 USD** link was selected.

Image: Domestic Order Entry Screen

16.   To maximize the view of the cart, click (the **Hide Transactions** button) to hide the *Transaction* pane.

Image: Domestic Order Entry Screen

17.   As required, complete/review the following fields:

Field	R/O/C	Description
Your Reference:	O	A free text field which allows for further clarification of an entry by reference to other sources of information. **Example:** A000011807
Your Description:	O	A free text field describing the order or complaint issue. **Example:** 500471672 (Note) This field can be used to enter a description of the order.

(Note) The order pre-populates with the **Sold-To Party Number** and **Customer Number**. The **Your Reference** and **Your Description** fields are an optional way for an RA to recognize orders in WBSCM later.

Image: Domestic Order Entry Screen

18.   Click [dropdown] (the **Dropdown** button) in the **Deliver To:** field to select the appropriate Ship-To location. In this example, 5003642: ADVANCEPIERRE FOODS, CINCINNATI, OH (the **5003642: ADVANCEPIERRE FOODS. CINCINNATI, OH** option) was selected.

Image: Domestic Order Entry Screen

19. Perform one of the following:

If	Then
The selected Ship-To location should be applied to all line items	Click ☐ (the **Deliver-To Selection** checkbox) in the header row.
The selected Ship-To location should be applied to one or more specific line items	Click ☐ (the **Deliver-To Selection** checkbox) for each line item to be updated.

(Note) In this example, the **Deliver-To Section** checkbox in the header row was selected.

The user can click the ▼ (the **Arrow** button) next to each item number to display, add, or modify the Ship-To location at the line item level.

Image: Domestic Order Entry Screen

20. Click **Update** (the **Update** button) to apply the selected delivery location to the line item(s).

Image: Domestic Order Entry Screen

21. Confirm that the **User Status** for every line item is set to **Ready for Approval**.

22. Perform any of the following:

If	Then
The user wants to add more products to the cart	1. Click [Add more to order] (the **Add more to order** button). 2. Go to Step 4.
The user wants to adjust the quantity of the product already in the cart	1. Enter a new value in the **Quantity** field for the line item. 2. Click [Update] (the **Update** button). 3. Click [Order] (the **Order** button) to submit the domestic requisition. 4. Go to Step 23.
The user wants to remove one or more line items from the cart	1. Click ☐ (the **Check Box** button) underneath the **Trashcan** column to select the lines to be deleted. 2. Click [Update] (the **Update** button). 3. Click [Order] (the **Order** button) to submit the domestic requisition. 4. Go to Step 23.
The user is ready to submit the domestic requisition	1. Click [Order] (the **Order** button) to submit the domestic requisition. 2. Go to Step 23.

Image: Domestic Order Entry Screen
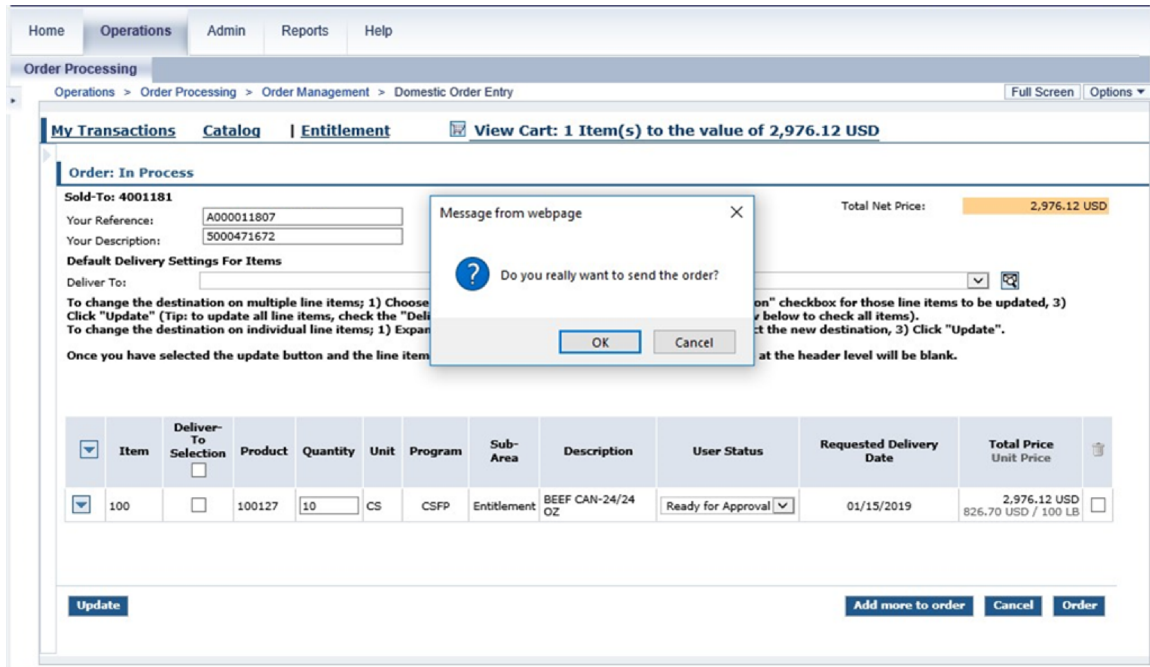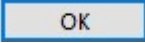
23. Click [OK] (the **OK** button) when the pop-up window displays to confirm.

Image: Domestic Order Entry Screen
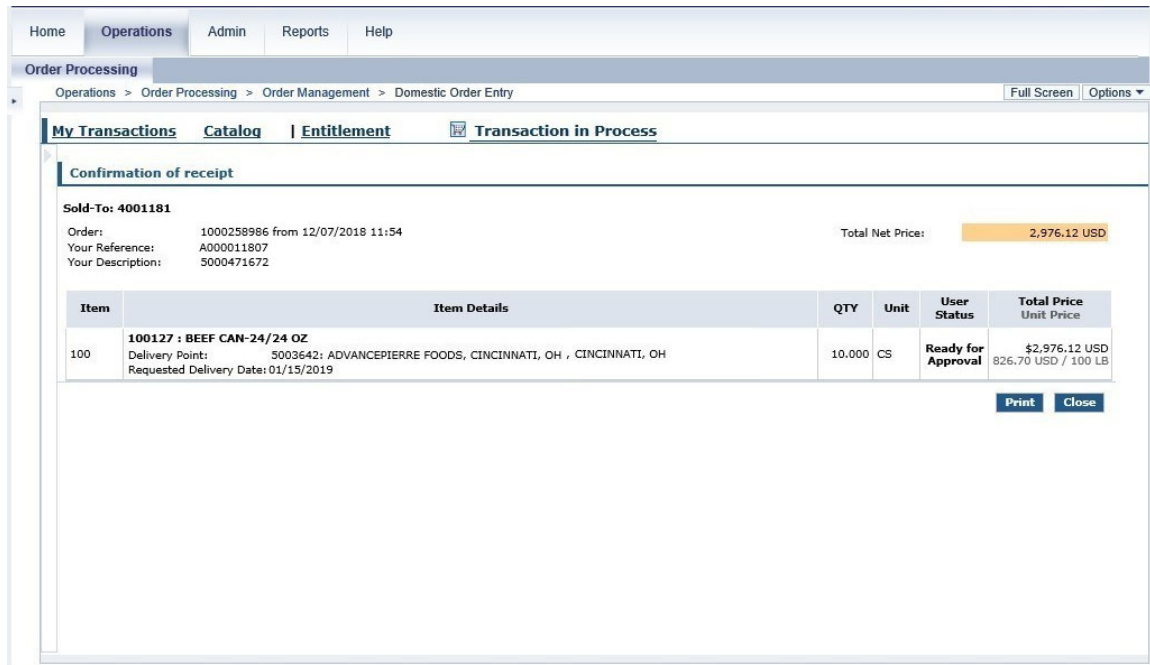
24. Click [Print] (the **Print** button) to print the order for the user's records as appropriate.

(Note) The domestic requisition order number is displayed at the top of the screen. The user will need to know the order number to display or modify this order in the future.

Image: Domestic Order Entry Screen
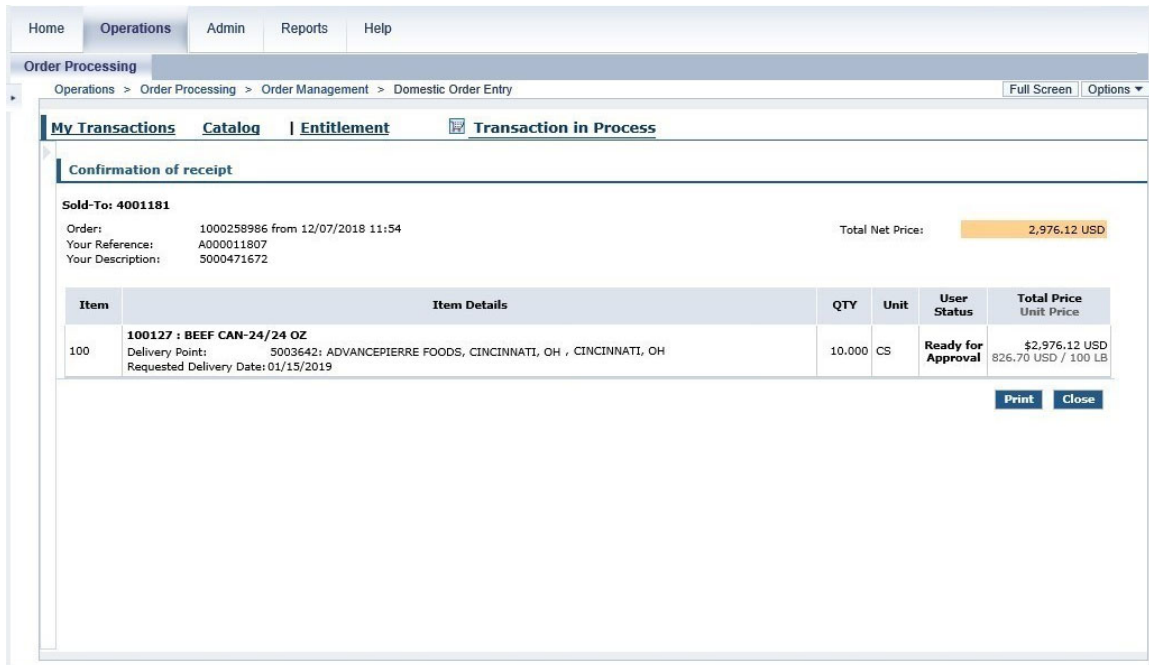
25. Click [Close] (the **Close** button) to close the transaction.
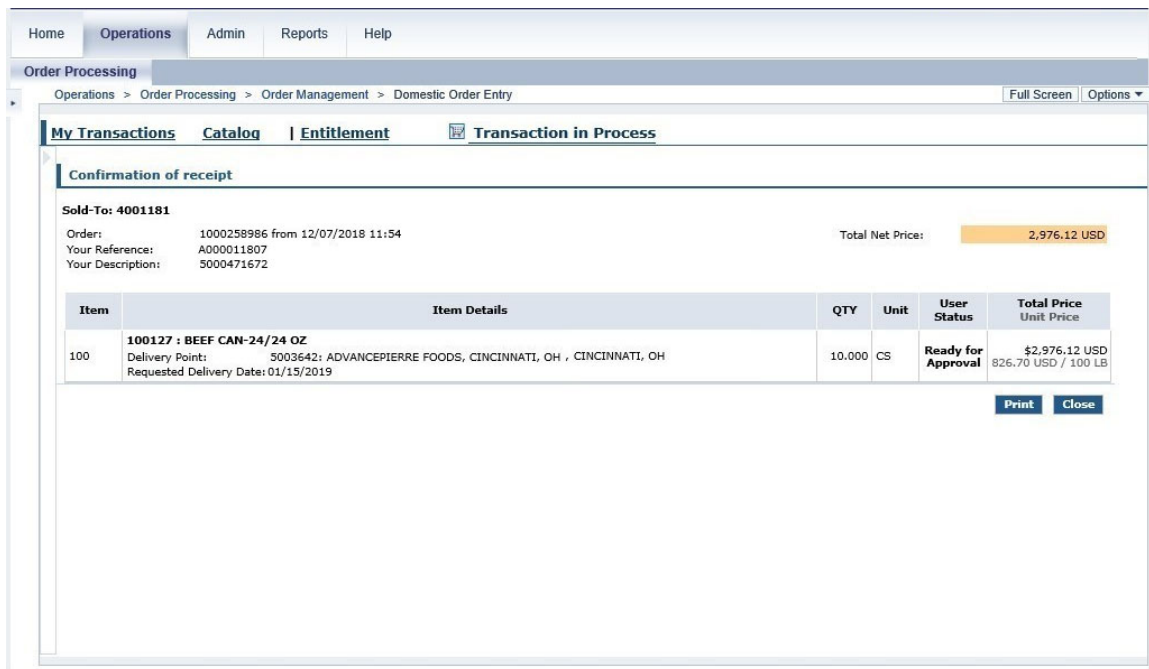
Image: Domestic Order Entry Screen

26. The transaction is complete.

RESULT

A RA has successfully created a domestic requisition using Domestic Order Entry, including adding items to the order as well as selecting Ship-To destination(s) and delivery date(s). As applicable, quantities and items may have been updated before submitting the requisition, which the SDA/ITO will later review and consolidate into sales order for USDA (FNS) approval.

PROCESS OVERVIEW

Purpose

A domestic requisition is a request for items to be ordered by or on behalf of a customer organization, including the specific material(s), quantities, delivery location(s), and delivery date(s). The purpose of this transaction is for State Distributing Agencies (SDAs) and Indian Tribal Organizations (ITOs) to create a domestic requisition in WBSCM for their own organization or on behalf of a Recipient Agency (RA). The SDA/ITO will later consolidate these requisitions into full truckloads and submit the sales order to FNS for approval.

Process Trigger

Perform this transaction to create a domestic requisition in WBSCM.

Prerequisites

- A catalog view must be assigned to the organization.
- Delivery periods must be assigned for the commodities.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab ➜ **Order Processing** tab ➜ **Order Management** folder ➜ **Domestic Order Entry** link to go to the *Domestic Order Entry* screen.

Tips and Tricks
- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries

    o **Required (R)** – a mandatory field necessary to complete the transaction
    o **Optional (O)** – a non-mandatory field not required to complete the transaction
    o **Conditional (C)** – a field that may be required if certain conditions are met, typically linked to completion of a mandatory field

- Refer to the WBSCM Portal Basic Navigation course for tips on creating favorites, performing searches, etc.

PROCEDURE

1. Start the transaction using the following Portal path: **Operations** tab ➜ **Order Processing** tab ➜ **Order Management** folder ➜ **Domestic Order Entry** link.

Image: Domestic Order Entry Screen

2. Click [image] (the **Hide Navigator** button) to hide the Portal menu. Note that this can be done with any transaction in WBSCM.

Image: Domestic Order Entry Screen

3.   Perform one of the following:

If	Then
The user is ordering on behalf of an RA	Go to Step 4.
The user is ordering for their own organization	Go to Step 5.

(Note) In this example, a requisition was created for the SDA/ITO organization.

4.   Enter the RA's BP number in the textbox or click ☷ (the **Binoculars** icon) to search for the organization.

(Note) If the textbox is not displayed, the RA may be selected from a dropdown list instead.

Image: Domestic Order Entry Screen

5.   Click [Continue] (the **Continue** link) under the *Welcome* section, to begin entering the order.

Image: Domestic Order Entry Screen

6. As required, complete/review the following fields:

Field	R/O/C	Description
Your Reference:	O	A free text field which allows for further clarification of an entry by reference to other sources of information. **Example:** A000011807
Your Description:	O	A free text field describing the order or complaint issue. **Example:** 5000471672 (Note) This field can be used to enter a description of the order or a State order ID number.

(Note) The order pre-populates with the **Sold-To Party Number** and **Customer Number**. The **Your Reference** and **Your Description** fields are an optional way for an SDA/ITO to recognize orders in WBSCM later.

Image: Domestic Order Entry Screen
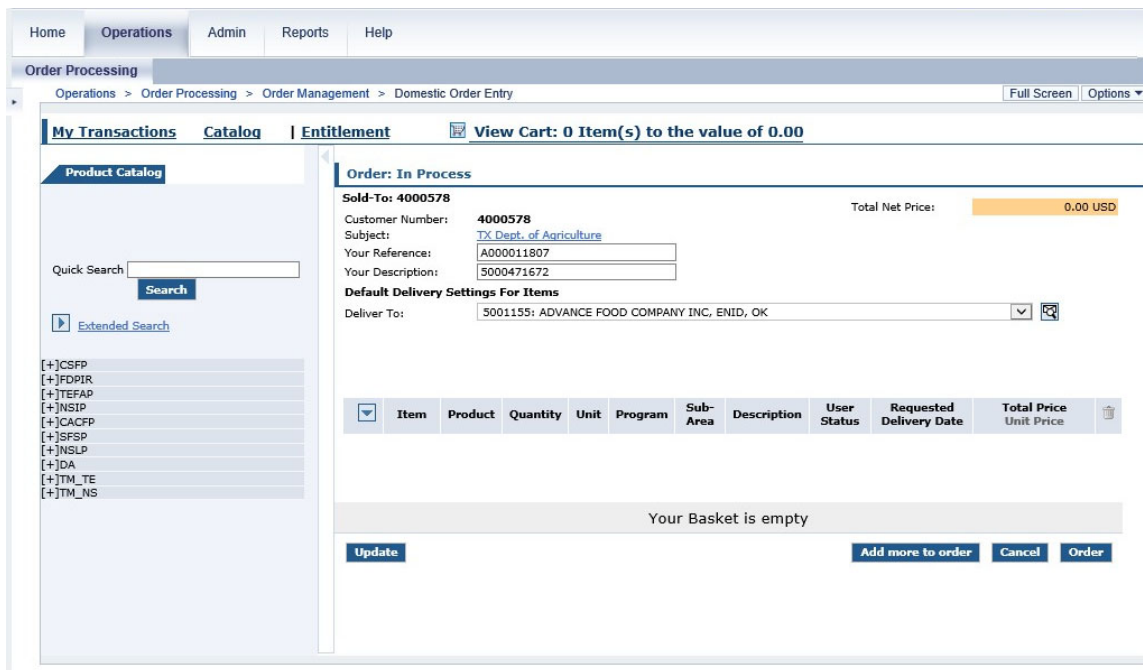
7. Click [Update] (the **Update** button) to save any optional text entered in the header.

8. Perform one of the following:

If	Then
The user needs to locate specific product by keyword	Go to Step 9.
The user will browse the catalog for available	Go to Step 12.

If	Then
products	

9. In the *Product Catalog* pane, enter at least part of the product name in **Quick Search**. In this example, **Beef** was entered.

(Note) The ▶ Extended Search (**Extended Search** option) allows the user to enter search criteria for both the product name and product number.

(Note) Search results may include different programs and options. Refer to the **Product Number (Program / Sub-Area)** columns when identifying which product(s) to order.

10. Click **Search** (the **Search** button) to begin the search.

11. Go to Step 16.

Image: Domestic Order Entry Screen
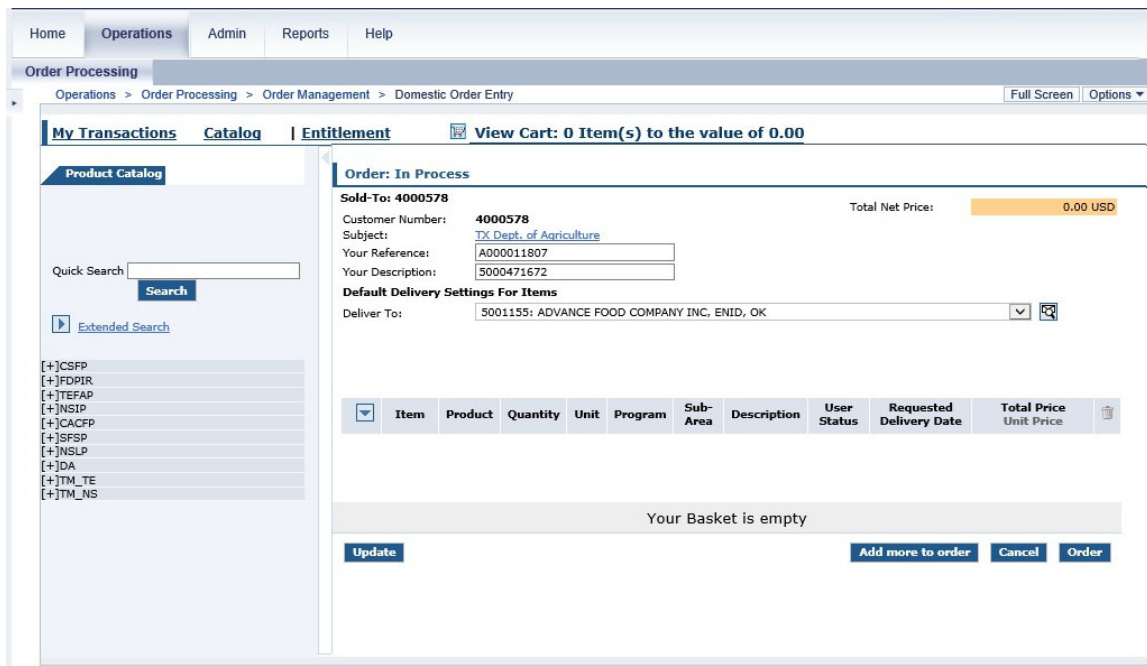
12. In the *Product Catalog* pane, click [+] (the **Plus** icon) next to the appropriate program. In this example, [+]CSFP (the **CSFP** option) was selected to place a domestic requisition through the Commodity Supplemental Food Program (CSFP).

(Note) To review the list of materials available for ordering, the user will drill down through the product catalog beginning with the program. The user will see only programs with which their SDA, ITO, or RA is affiliated.

Image: Domestic Order Entry Screen

13. Click ⌈+⌉ (the **Plus** icon) next to the type of order. In this example, ⌈+⌉Direct Delivery (the **Direct Delivery** option) was selected.

(Note) Depending on the program selected, options may include:

- **Direct Delivery** - An order that is sourced from a vendor and delivered directly to the customer.
- **Multi-Food** - An order that is sourced from a National Warehouse and delivered to the customer. Multi-food orders are processed differently than domestic requisitions; refer to the Create Multi-Food Order SDA work instruction for more detail.
- **Processing Diversion** - An order that is sourced from a vendor and delivered to a processor before being received in final form by the customer. For example, flour may be processed into bread.

Image: Domestic Order Entry Screen

14. Click [+] (the **Plus** icon) next to the appropriate product group available to the user. In this example, [+]Meat (the **Meat** option) was selected under the **Direct Delivery** order type.

Image: Domestic Order Entry Screen
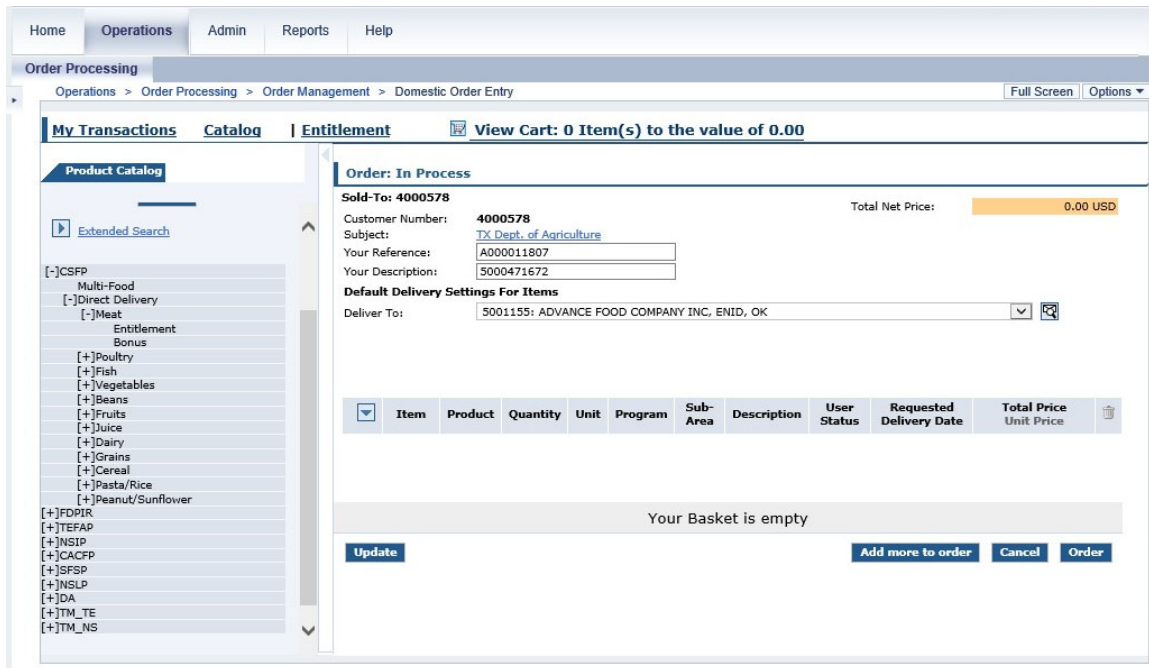
15. Select the option the corresponds to how entitlement budget is impacted. In this example, Entitlement (the **Entitlement** option) was selected under the **Meat** option.

(Note) Depending on the program selected, options may include:

- **Entitlement** - Ordering these products will decrease the customer's entitlement balance.
- **Bonus** - Ordering these products will not impact the customer's entitlement. FNS may offer bonus commodities when there is a surplus available.
- **Trade Mitigation** - Ordering these products will not impact the customer's entitlement. These commodities are available through USDA's Market Facilitation Program, which supports domestic farmers faced with trade damages.

(Note) After an option is selected, the screen displays a list of all products available for the selected criteria. At the bottom of the list, the user may adjust the number of products to display on a page.

Image: Domestic Order Entry Screen

16. Click (the **Shopping Cart** icon) next to a product to view its details, including available delivery dates. Do not enter a value in the **Quantity** field from the list of products.

Image: Domestic Order Entry Screen

17. As required, complete/review the following fields:

Field	R/O/C	Description
Delivery Date	R	Range of dates when commodities may be delivered. **Example:** 01/15/2019
Order By Date	R	Last date to submit orders for the corresponding Delivery Date. **Example:** 12/20/2018
Quantity	R	Number of items being processed. **Example:** 10

(Note) **Delivery Date** and **Order By Date** are pre-populated from the catalog and are not editable in Domestic Order Entry.

Image: Domestic Order Entry Screen
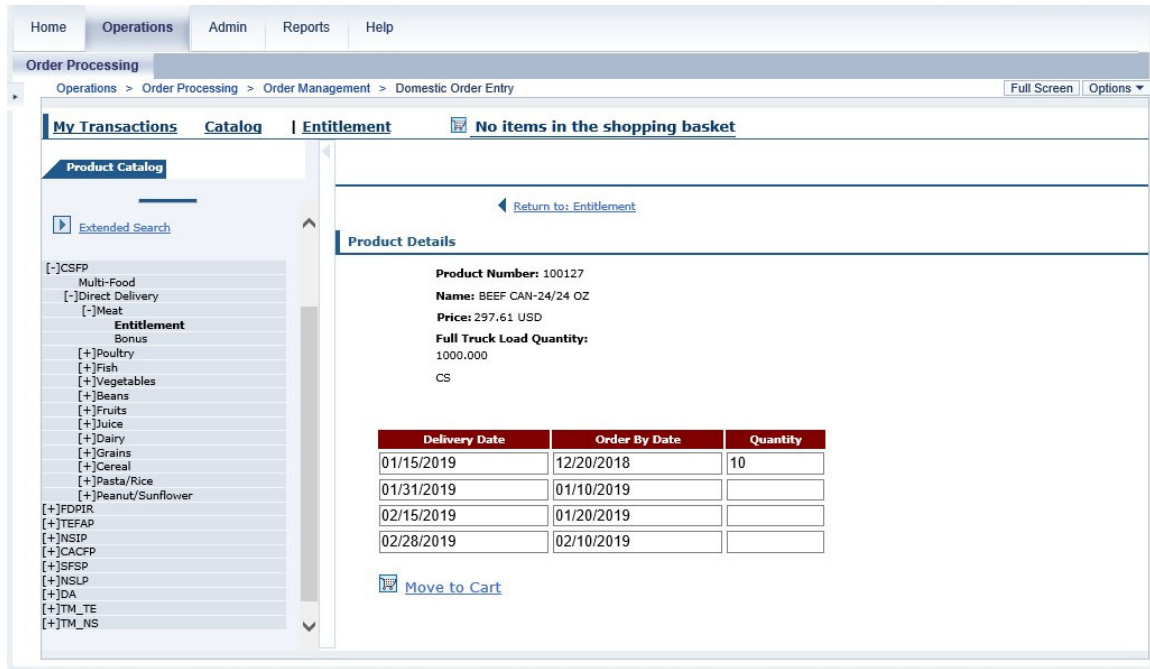
18.   Click (the **Move to Cart** button) to add the selected product quantities to the shopping cart.

 (Note) A summary at the top of the screen displays the number and total value of products contained in the shopping cart.

Image: Domestic Order Entry Screen
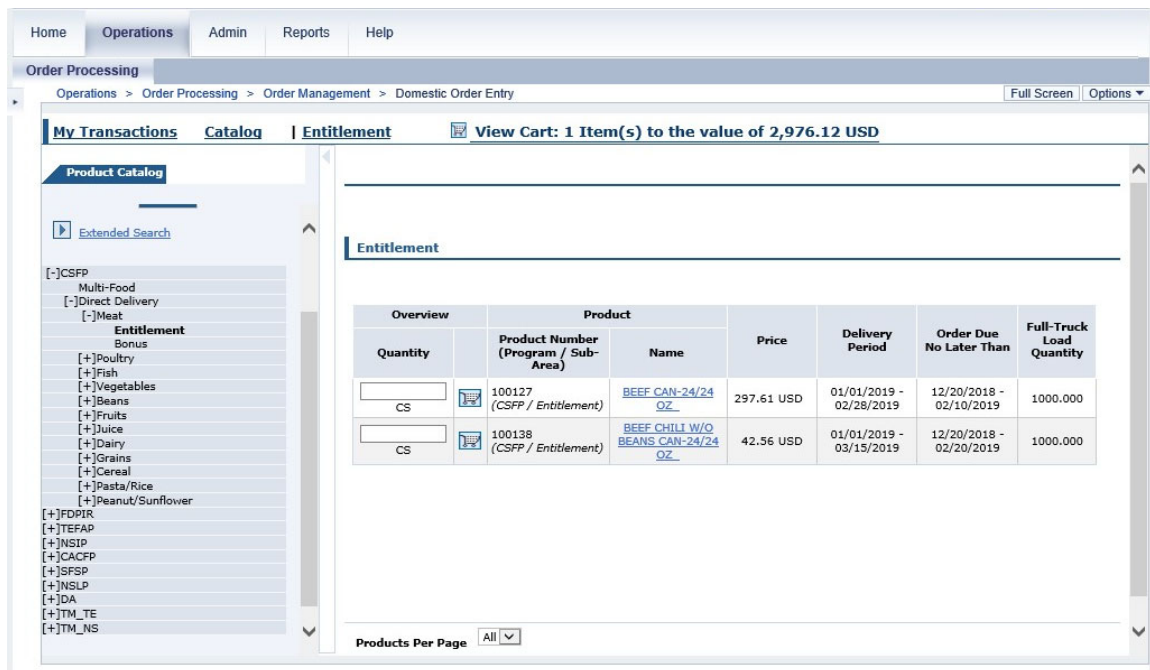
19. Click the **View Cart** link to review the order. In this example,

View Cart: 1 Item(s) to the value of 2,976.12 USD (the **View Cart: 1 Item(s) to the value of 2,976.12 USD** link) was selected.

20. Perform one of the following:

If	Then
The user will add another product to the cart	Go to Step 8.
The user is ready to review the cart	Go to Step 21.

Image: Domestic Order Entry Screen
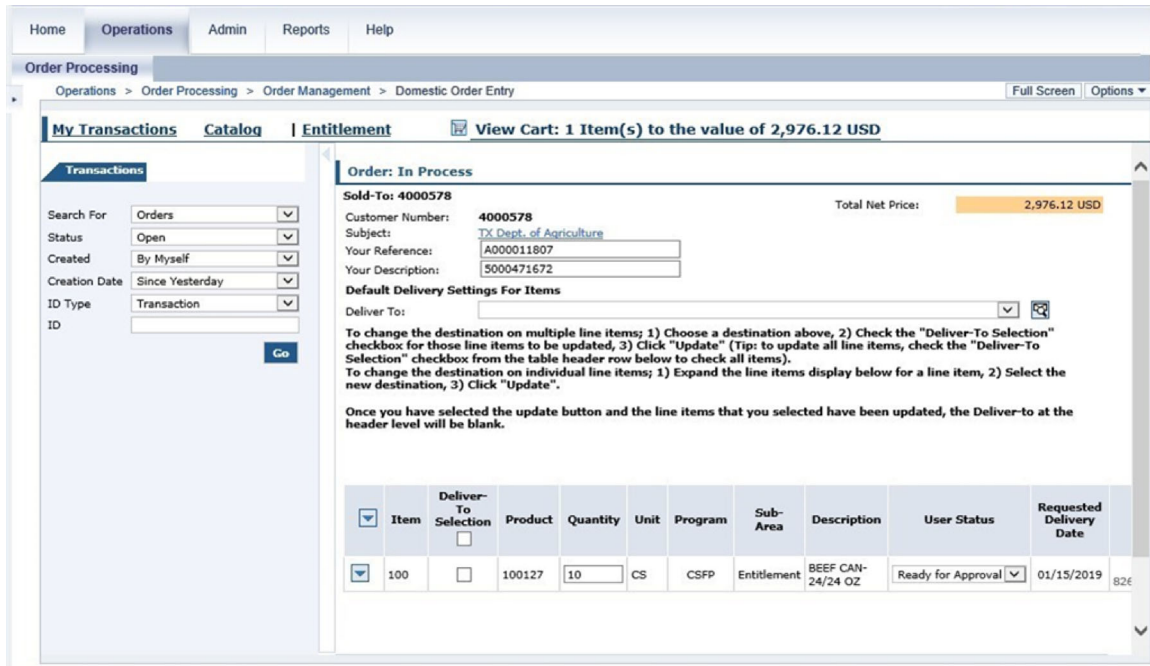
21. To maximize the view of the cart, click ◄ (the **Hide Transactions** button) to hide the *Transaction* pane.

Image: Domestic Order Entry Screen
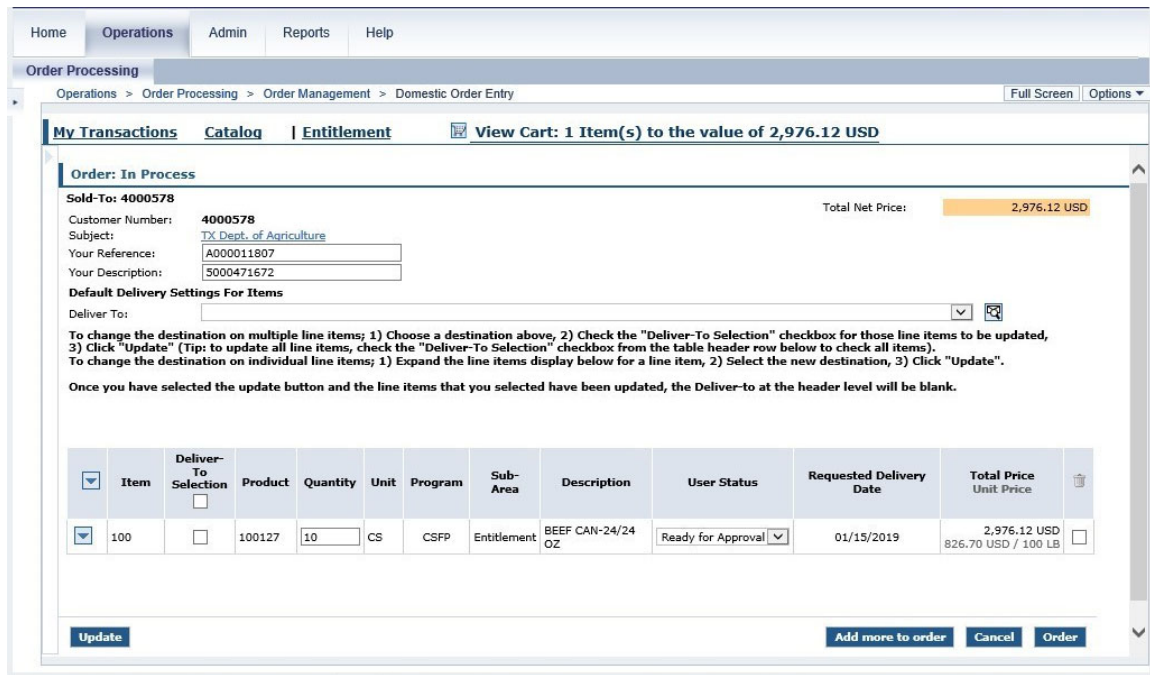
22. Click ⌄ (the **Dropdown** button) in the **Deliver To:** field to select the appropriate Ship-To location. In this example, `5003642: ADVANCEPIERRE FOODS, CINCINNATI, OH` (the **5003642: ADVANCEPIERRE FOODS, CINCINNATI, OH** option) was selected.

> (Note) The order pre-populates with the **Sold-To** and **Customer Number**. The **Your Reference** and **Your Description** fields are an optional way for an SDA/ITO to recognize their orders in WBSCM later.

23. Perform one of the following:
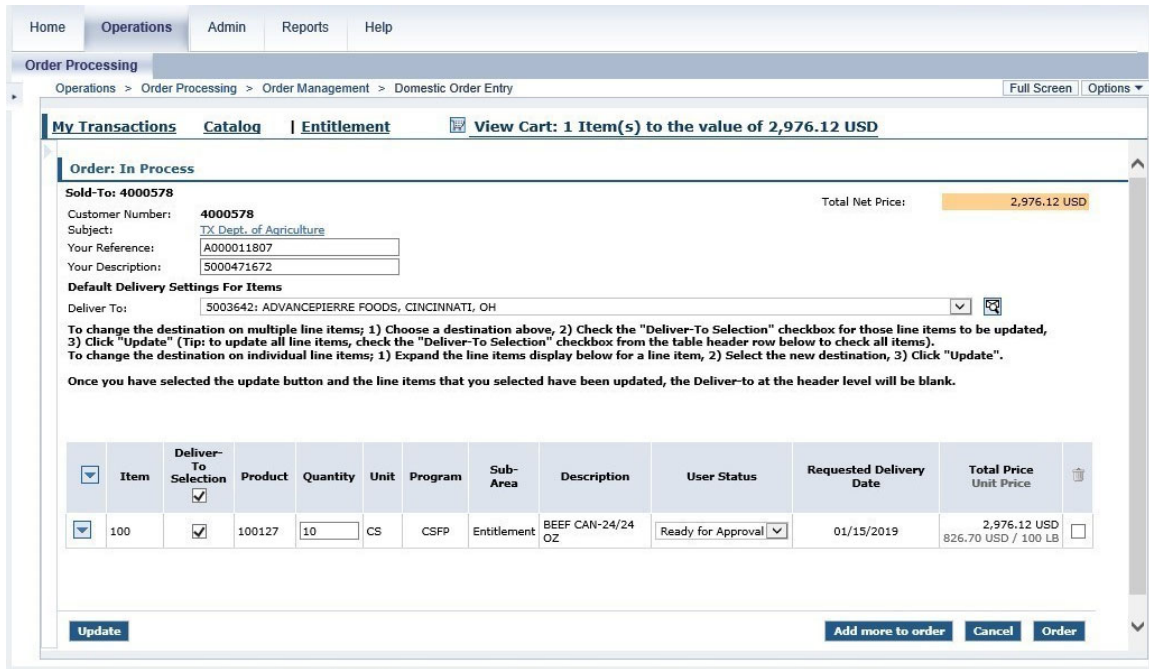
If	Then
The selected Ship-To location should be applied to all line items	Click ☐ (the **Deliver-To Selection** check box) in the header row.
The selected Ship-To location should be applied to one or more specific line items	Click ☐ (the **Deliver-To Selection** check box) for each line item to be updated.

> (Note) In this example, ☐ (the **Deliver-To Selection** check box) in the header row was checked, to apply the same Ship-To location to all line items.
>
> The user can also click ▼ (the **Arrow** button) next to each item number to display, add, or modify the selected Ship-To location at the line item level.

Image: Domestic Order Entry Screen

24. Click [Update] (the **Update** button) to apply the selected delivery location to the line item(s).

Image: Domestic Order Entry Screen

25. Confirm that the **User Status** for every line item is set to **Ready for Approval.**

26. Perform any of the following:

If	Then
The user wants to add more products to the cart	1. Click [Add more to order] (the **Add more to order** button). 2. Go to Step 8.
The user wants to adjust the quantity of product already in the cart	1. Enter a new value in the **Quantity** field for the line item. 2. Click [Update] (the **Update** button). 3. Click [Order] (the **Order** button) to submit the domestic requisition. 4. Go to Step 27.
The user wants to remove one or more line items from the cart	1. Click ☐ (the **Check Box**) underneath the **Trashcan** column to select the line items to be deleted 2. Click [Update] (the **Update** button) to save the changes. 3. Click [Order] (the **Order** button) to submit the domestic requisition. 4. Go to Step 27.
The user is ready to submit the domestic requisition	1. Click [Order] (the **Order** button) to submit the domestic requisition. 2. Go to Step 27.

Image: Domestic Order Entry Screen
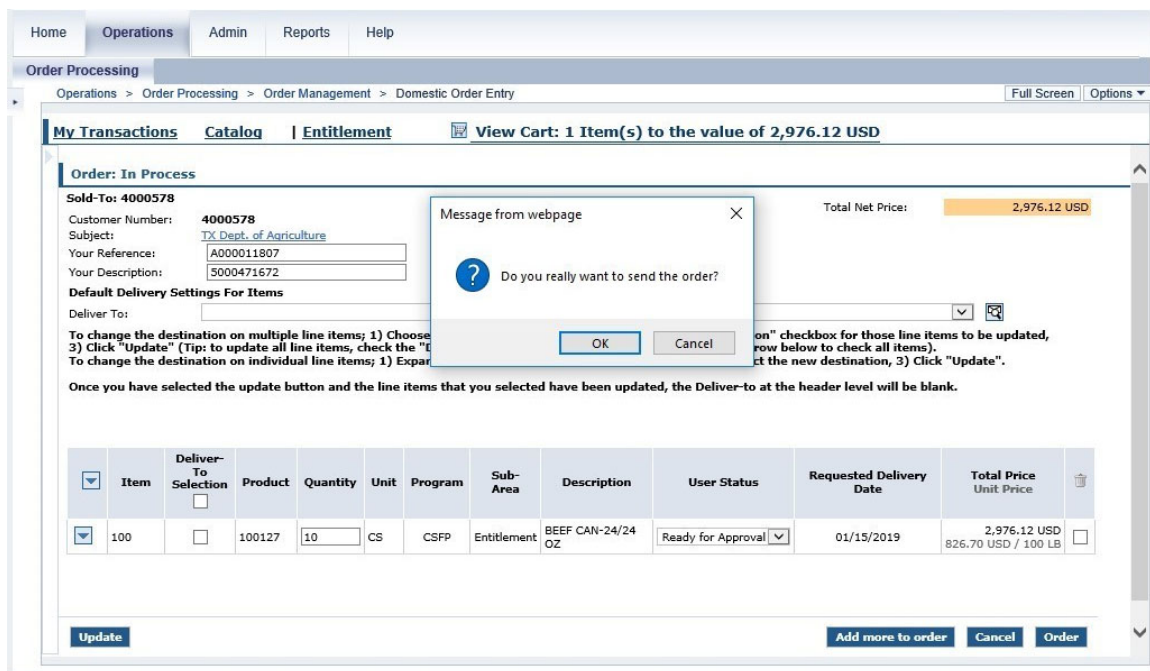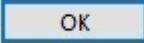
27. Click [OK] (the **OK** button) when the pop-up window displays to confirm.

Image: Domestic Order Entry Screen
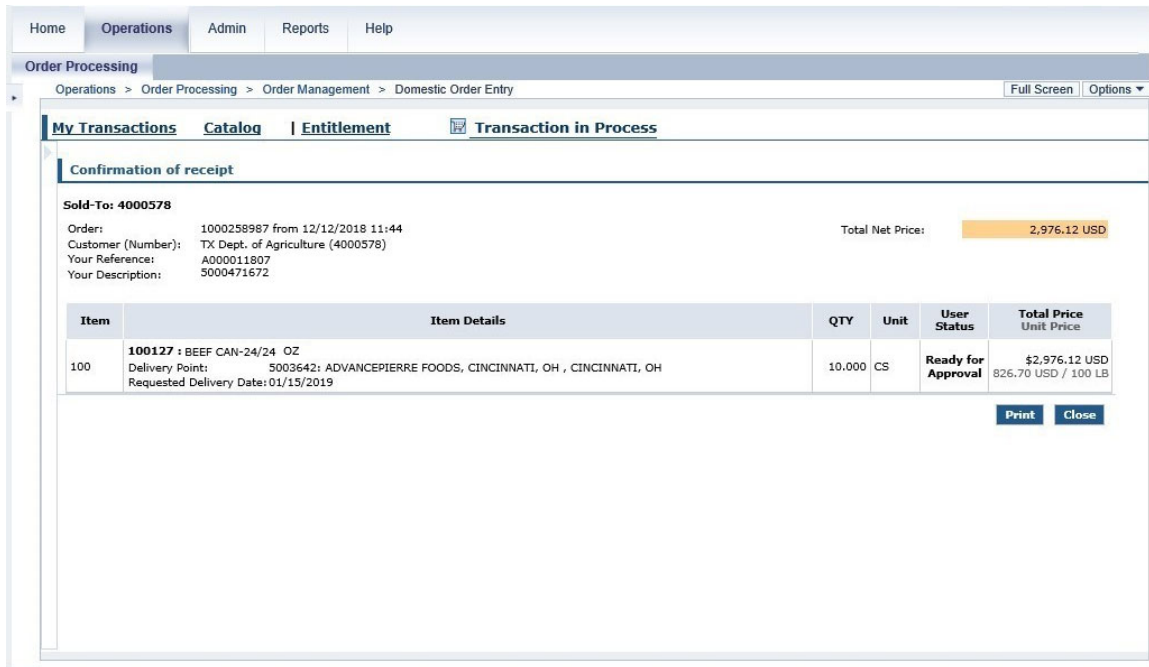
28. Click [Print] (the **Print** button) to print the order for the user's records as appropriate.

> (Note) The domestic requisition order number is displayed at the top of the screen. The user will need to know the order number to display or modify this order in the future.

Image: Domestic Order Entry Screen

29. Click Close (the **Close** button) to close the transaction.

Image: Domestic Order Entry Screen
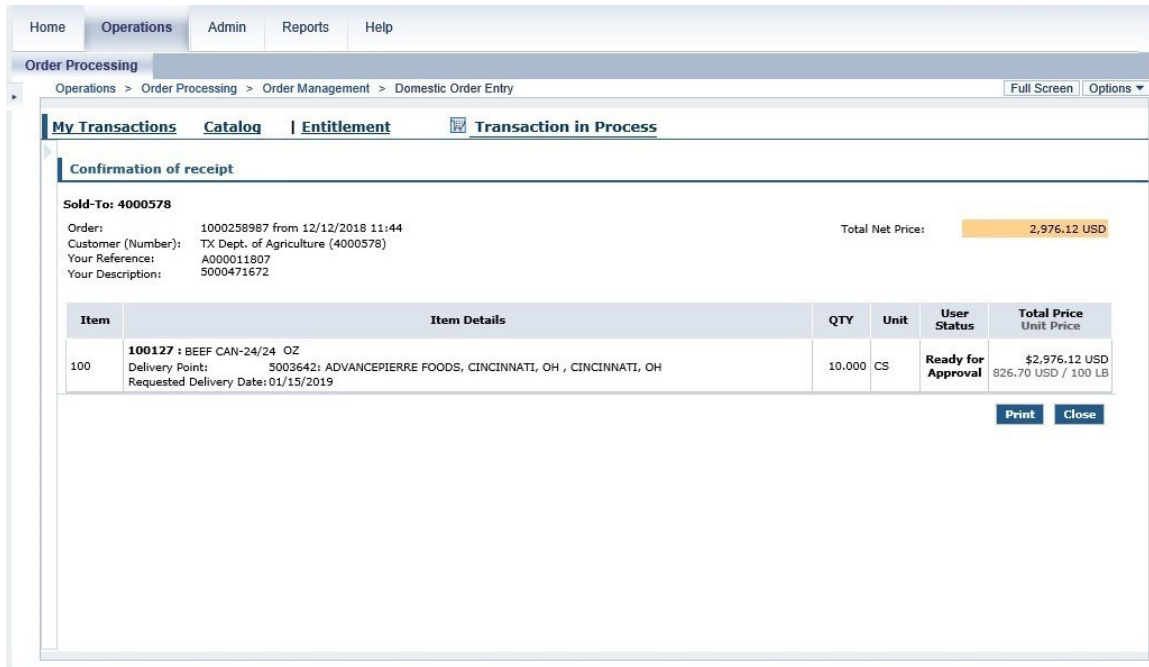
30. This transaction is complete.

RESULT

An SDA or ITO has successfully created a domestic requisition using Domestic Order Entry, including adding items to the order as well as selecting Ship-To destination(s) and delivery date(s). As applicable, quantities and items may have been updated before submitting the requisition, which the SDA/ITO will later review and consolidate into a sales order for USDA (FNS) approval.

Modify a Domestic Requisition

PROCESS OVERVIEW

Purpose

The purpose of this transaction is to modify a domestic requisition in WBSCM. Recipient Agencies (RA), Co-ops, State Distributing Agencies (SDA), and Indian Tribal Organizations (ITO) can modify a requisition in **Draft** status or that has been returned to the user. Domestic requisitions can be modified at header or line item level.

Process Trigger

Perform this transaction to modify a domestic requisition.

Prerequisites

- Domestic requisition must exist in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab ➔ **Order Processing** tab ➔ **Order Management** folder ➔ **Domestic Order Entry** link to go to the *Domestic Order Entry* screen.

Tips and Tricks

- This transaction will not allow modifications to any fields.
- The **R/O/C** acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - **Required (R)** – a mandatory field necessary to complete the transaction
  - **Optional (O)** – a non-mandatory field not required to complete the transaction
  - **Conditional (C)** – a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Portal Basic Navigation course for tips on creating favorites, performing searches, etc.

PROCEDURE

1. Start the transaction using the following Portal path: **Operations** tab ➔ **Order Processing** tab ➔ **Order Management** folder ➔ **Domestic Order Entry** link.

    Image: Domestic Order Entry Screen

2. Click [◄] (the **Hide Navigator** button) to hide the Portal menu. Note that this can be done on any transaction in WBSCM.

Image: Domestic Order Entry Screen
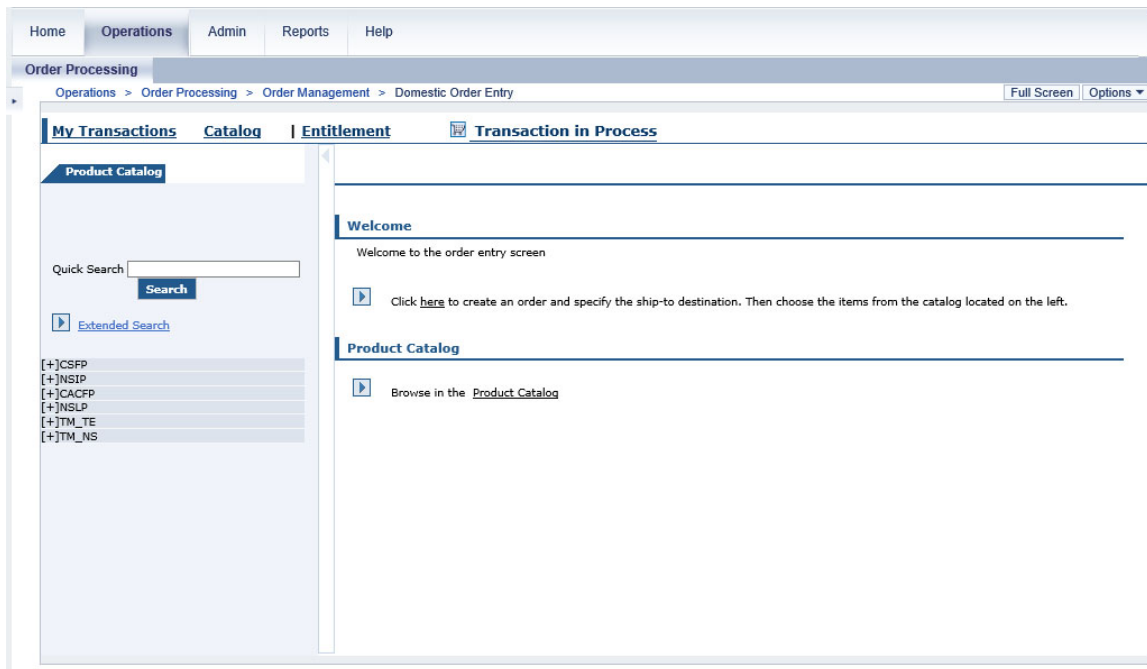
3. Click **My Transactions** (the **My Transactions** link) to search for an existing domestic requisition to be modified.

(Note) The **My Transactions** screen can also be used to search for sales orders, which comprise requisitions that have been consolidated into full truckloads by the SDA or ITO and then submitted to FNS for approval and purchase. In contrast, domestic requisitions are created by an RA, Co-op, SDA, or ITO in quantities that fulfill the needs of that organization regardless of full truckload quantities.

Image: Domestic Order Entry Screen
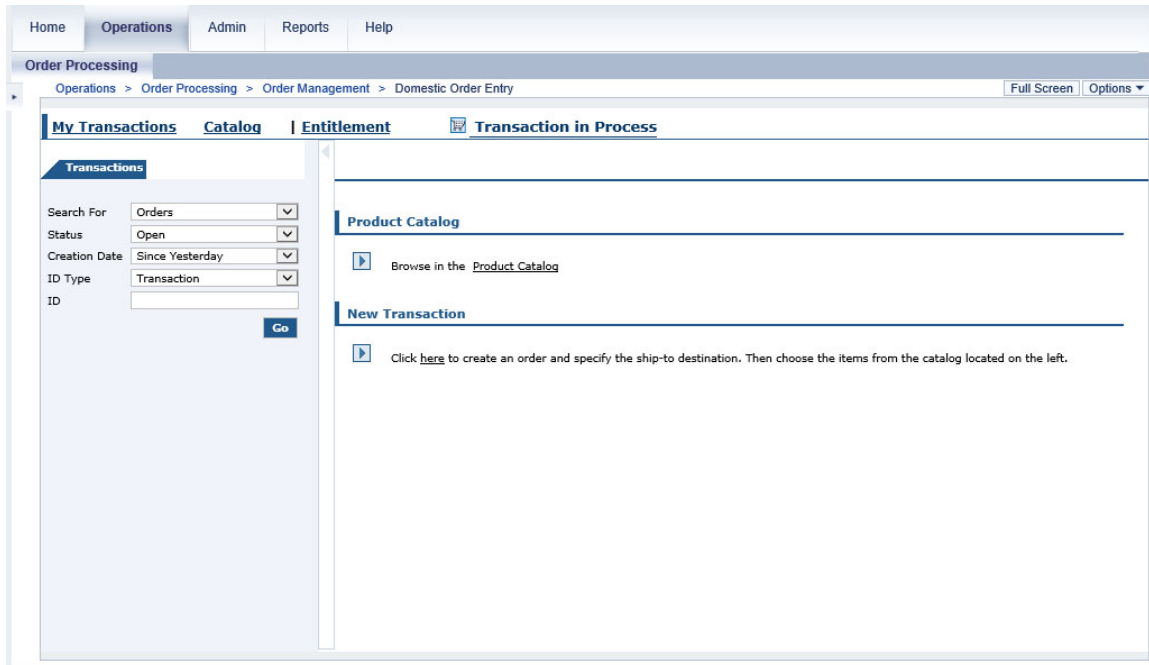
4. Select the appropriate option from the **Search For** list. In this example, ⌄ (the **Orders** option) was selected.

(Note) If the **Material** ID is known, the user may select the **Order Items** option and enter the ID number in the text field. Only orders that contain this product are displayed in the results.

Image: Domestic Order Entry Screen
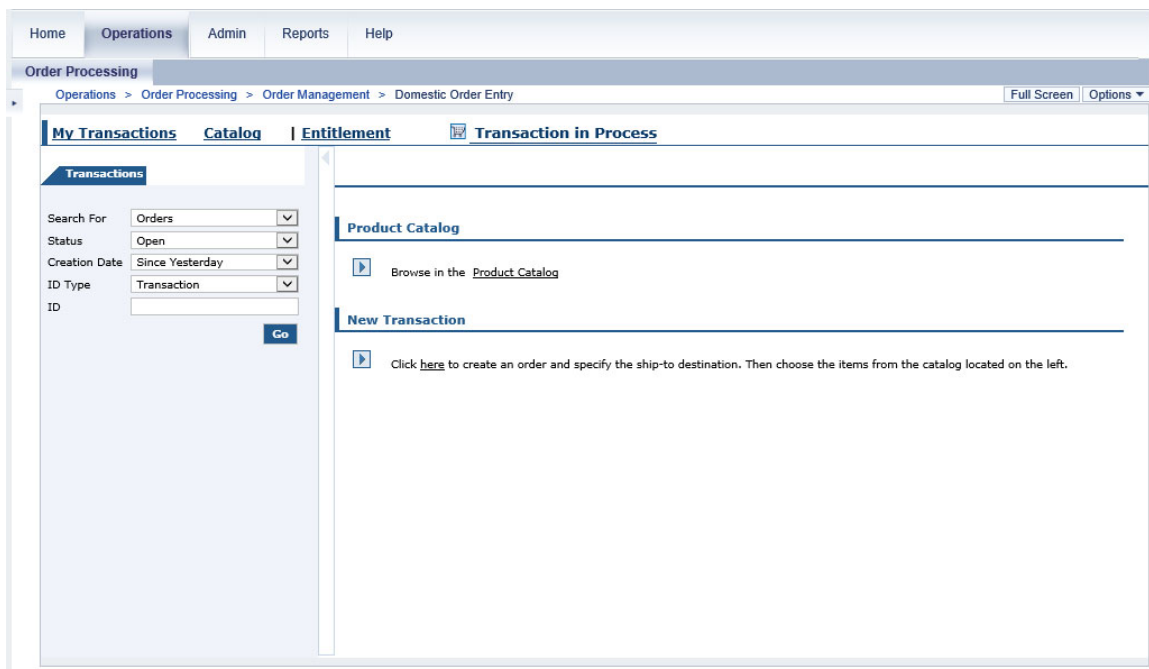
5.   Select the appropriate option in the **Status** field dropdown list. In this example, [Any] (the **Any** option) was selected.

(Note) Status options include:

- **Any** displays all requisitions regardless of status.
- **Open** will display only requisitions in open status (i.e., drafted, submitted, or approved).
- **Completed** will display only requisitions in closed status (i.e., delivered or cancelled).

Domestic Order Entry Screen
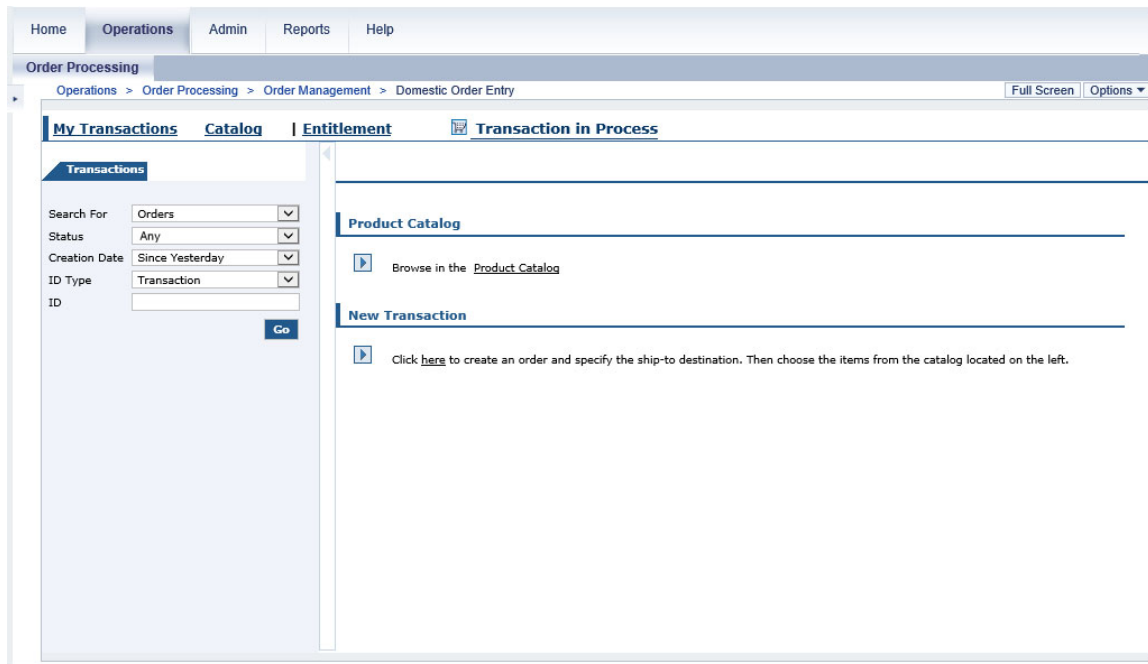
6.   Select the appropriate option in the **Creation Date** dropwdown list. In this example, ⌄ (the **Last 12 Months** option) was selected.

(Note) SDAs and ITOs will also see a **Created** field, which allows them to limit the search to only the requisitions created by their own organization (**By Myself**) or to include requisitions created by their RAs and Co-Ops (**By All Business Partners**).

The options for **Created** include:

- **By Myself** displays only requisitions created by the user's organization.
- **By All Business Partners** displays requisitions created by the user as well as its associated suborganizations such as RAs.

(Note) **Creation Date** options include:

- **Today** displays only requisitions created today.
- **Specific Date** allows users to enter a specific date in the text field and displays only requisitions for that date.
- **In Period** allows user to enter a From Date and To Date and displays only requisitions that fall between those dates

- **Since Yesterday** displays requisitions created yesterday and today.
- **Last 7 Days** displays requisitions created in the last 7 days.
- **Last 30 Days** displays requisitions created in the last 30 days.
- **Last 12 Months** displays requisitions created in the last 12 months.

7.   Perform one of the following:

If	Then
The user does not know the requisition number	Go to Step 8.
The user knows at least part of the requisition number	1. Select the **Transaction** option from the **ID Type** dropdown list. 2. Enter the requisition number of part thereof in the **ID** field, using the wildcard symbols as needed. 3. Go to Step 8.

(Note) Refer to the Wildcard and Matchcode Searches job aid for additional detail.

Image: Domestic Order Entry Screen
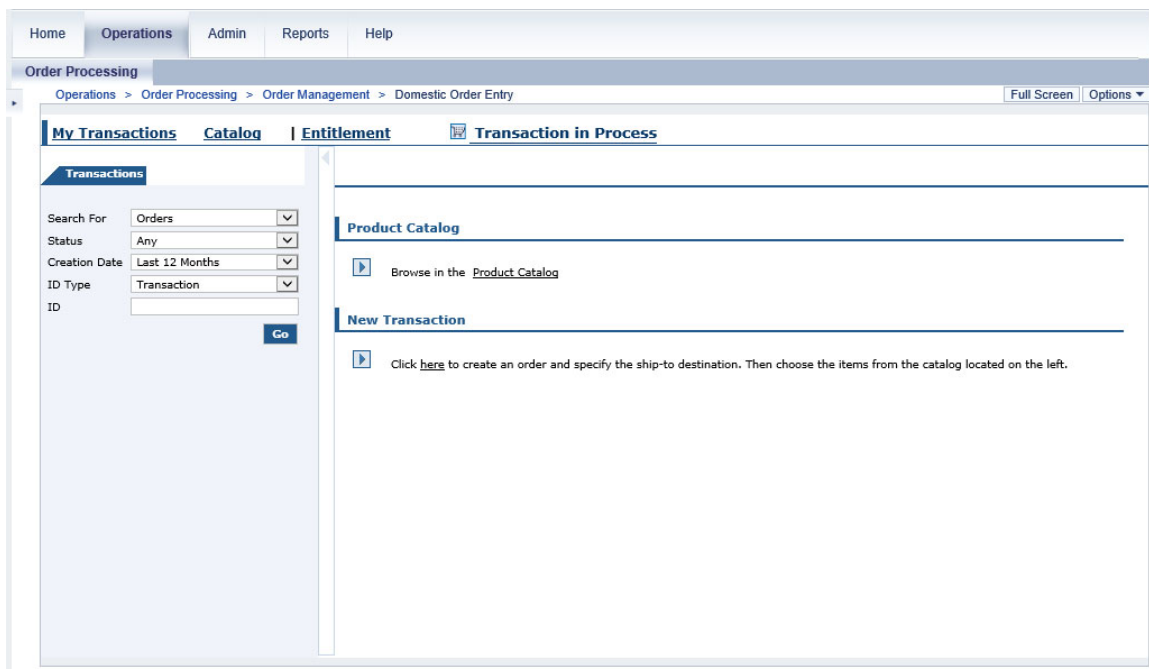
8.   Click [Go] (the **Go** button) to execute the search.

Image: Domestic Order Entry Screen
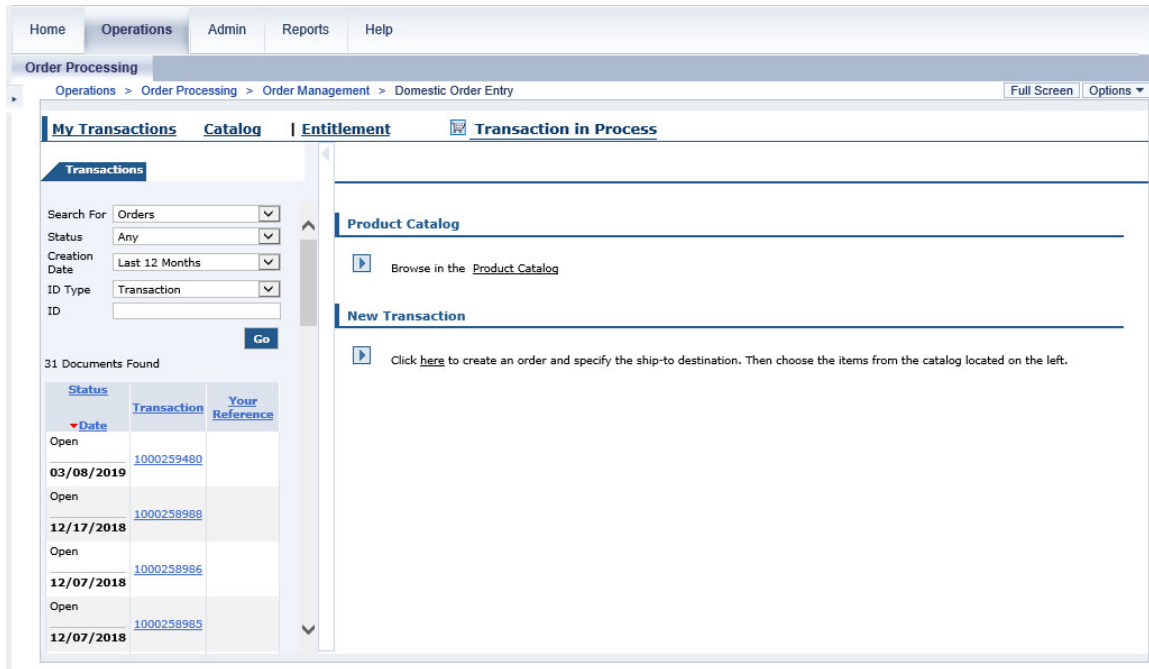
9. Select the appropriate domestic requisition to modify from the list of search results. In this example, 1000258985 (the **1000258985** link) was selected.

Image: Domestic Order Entry Screen
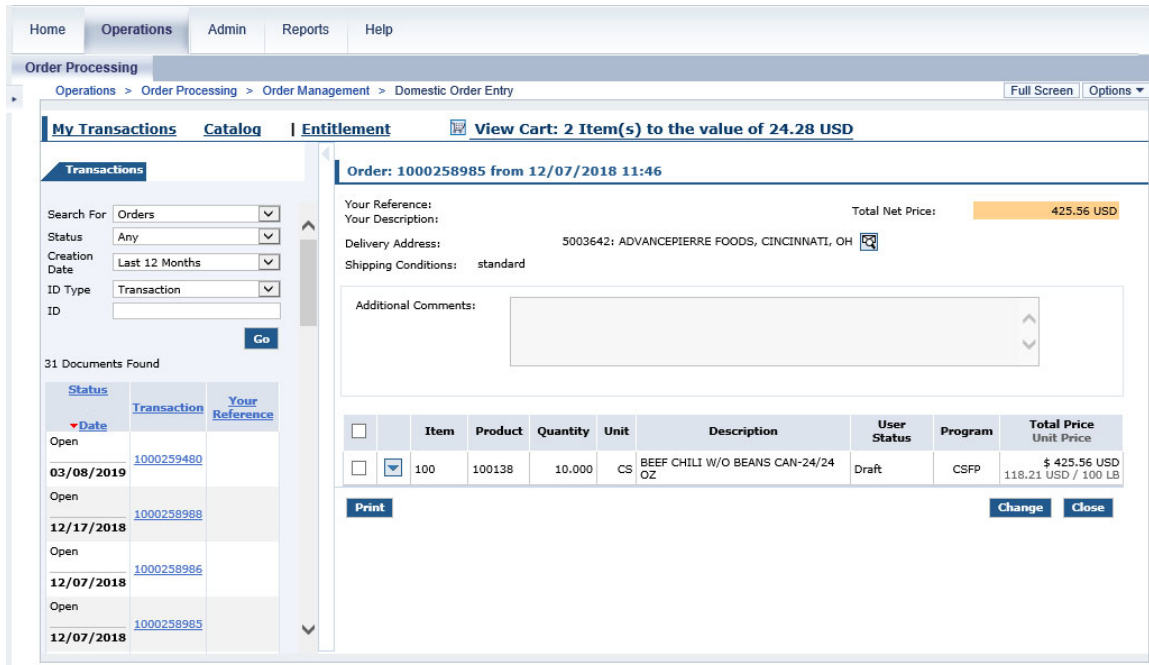
10. Click ◀ (the **Hide Navigator** button) to hide the search criteria and results. The domestic requisition displays in the main pane.

(Note) At the top of the screen, the header displays general information about the customer, delivery, and overall status and net price for this requisition. If applicable, any reference, description, or comments previously entered are also displayed. Below the header, details about specific products ordered on this requisition are listed; it may be necessary to scroll down to view the entire list.

Image: Domestic Order Entry Screen
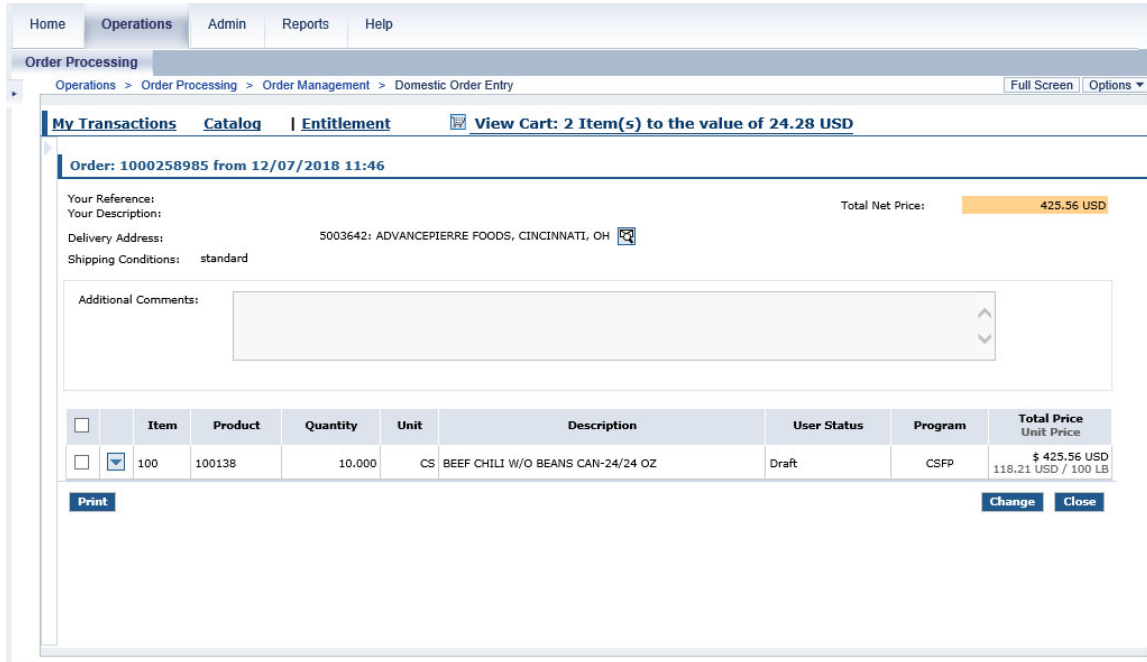
11.   Click **Change** (the **Change** button) to allow the user to modify the domestic requisition.

(Note) A domestic requisition can be modified only when the status is **Draft**, **Returned by COOP**, or **Returned by SDA**.

If ALL of the line items have the status of **Ready for Approval, Approved by COOP, Approved by SDA** and/or **Cancelled**, the requisition cannot be edited and the change button will not be available.

12.   Perform one of the following:

If	Then
The user needs to change the status	Go to Step 13. (Note) Once status of **Ready for Approval** or **Cancelled** has been saved, the requisition line cannot be edited further.
The user needs to change the Delivery Point	Go to Step 16.
The user needs to adjust the quantity of a product	Go to Step 20.
The user needs to add more products to the cart	Go to Step 23.

![WBSCM logo]

If	Then
The user needs to remove one or more product(s) from the cart	Go to Step 31. ![info icon] (Note) Once status of **Cancelled** has been saved, the requisition line cannot be edited further.
The user is ready to save the modifications	Go to Step 34.

Image: Domestic Order Entry Screen
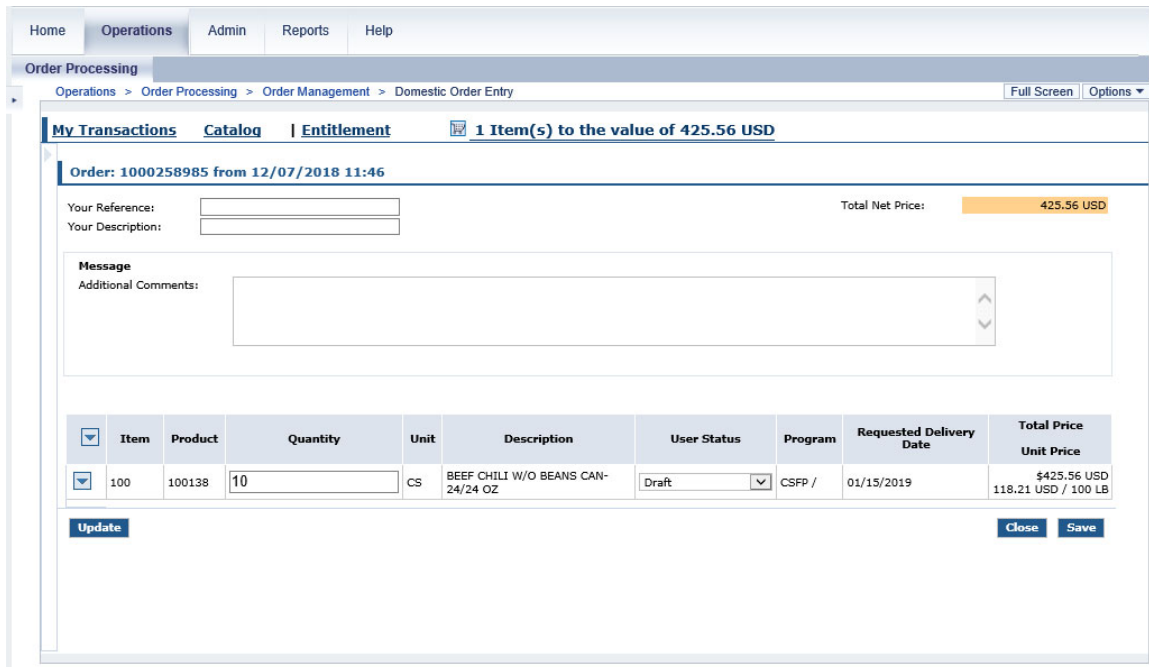
13. Select the appropriate option from the dropdown list for **User Status**. In this example,

![Draft dropdown] (the **Ready for Approval** option) was selected.

![info icon] (Note) When modifying a returned order, the user can only set the User Status field to **Ready for Approval** or **Cancelled**.

Image: Domestic Order Entry Screen

14. Click [Update] (the **Update** button) to save changes.

(Note) Once status of **Ready for Approval** or **Cancelled** has been saved, the requisition line cannot be edited further.

15. Return to Step 12.

Image: Domestic Order Entry Screen

16. Click ⬇ (the **Display Additional Fields** button) for the appropriate line item to display its details. In this example, line item **100** was selected.

(Note) To view details for all line items, click the ⬇ (the **Display All Additional Fields** button) in the top row.

Image: Domestic Order Entry Screen
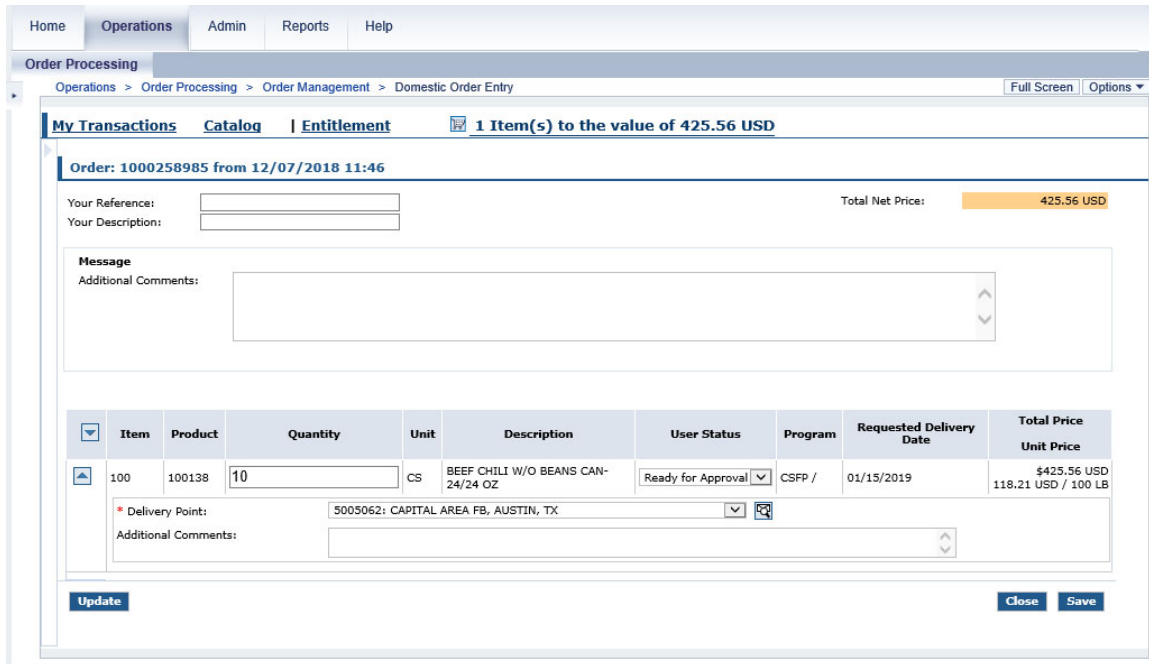
	Home	Operations	Admin	Reports	Help

Order Processing

Operations > Order Processing > Order Management > Domestic Order Entry | Full Screen | Options ▼

My Transactions   Catalog | Entitlement   📄 1 Item(s) to the value of 425.56 USD

Order: 1000258985 from 12/07/2018 11:46

Your Reference: [   ]   Total Net Price: 425.56 USD
Your Description: [   ]

Message
Additional Comments: [   ]
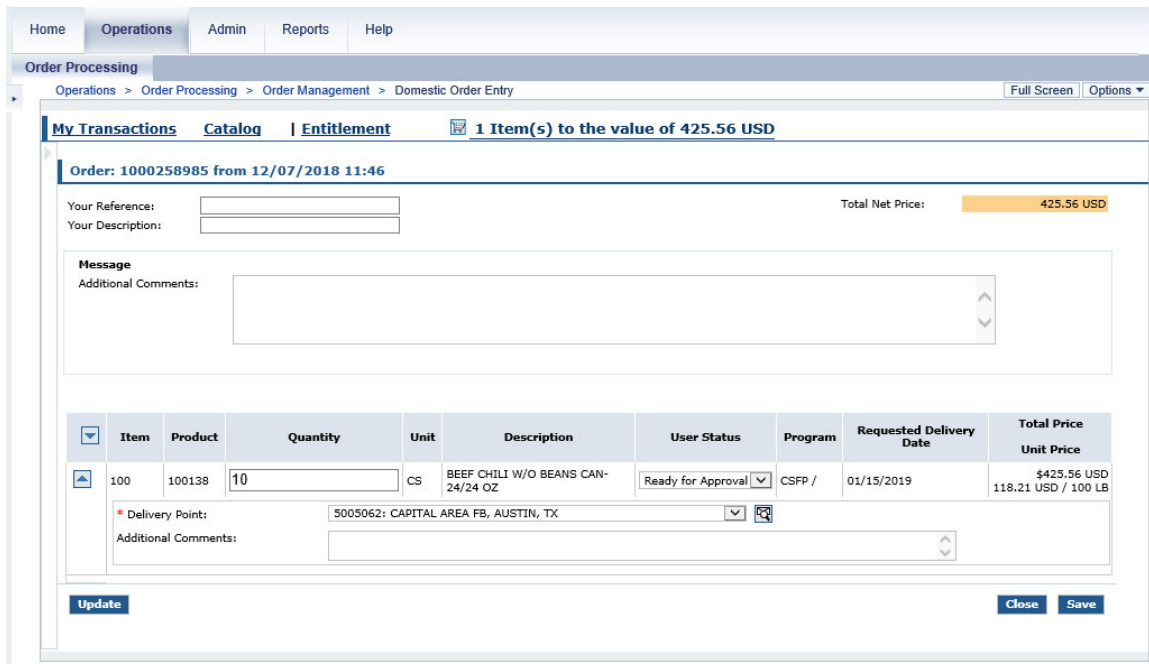
⬇	Item	Product	Quantity	Unit	Description	User Status	Program	Requested Delivery Date	Total Price / Unit Price
⬆	100	100138	10	CS	BEEF CHILI W/O BEANS CAN-24/24 OZ	Ready for Approval ▾	CSFP /	01/15/2019	$425.56 USD 118.21 USD / 100 LB
		* Delivery Point:	5001331: CAPITAL AREA FOOD BANK OF TEXAS INC, AUSTIN, TX ▾ 🔲						
		Additional Comments:	[ ]						
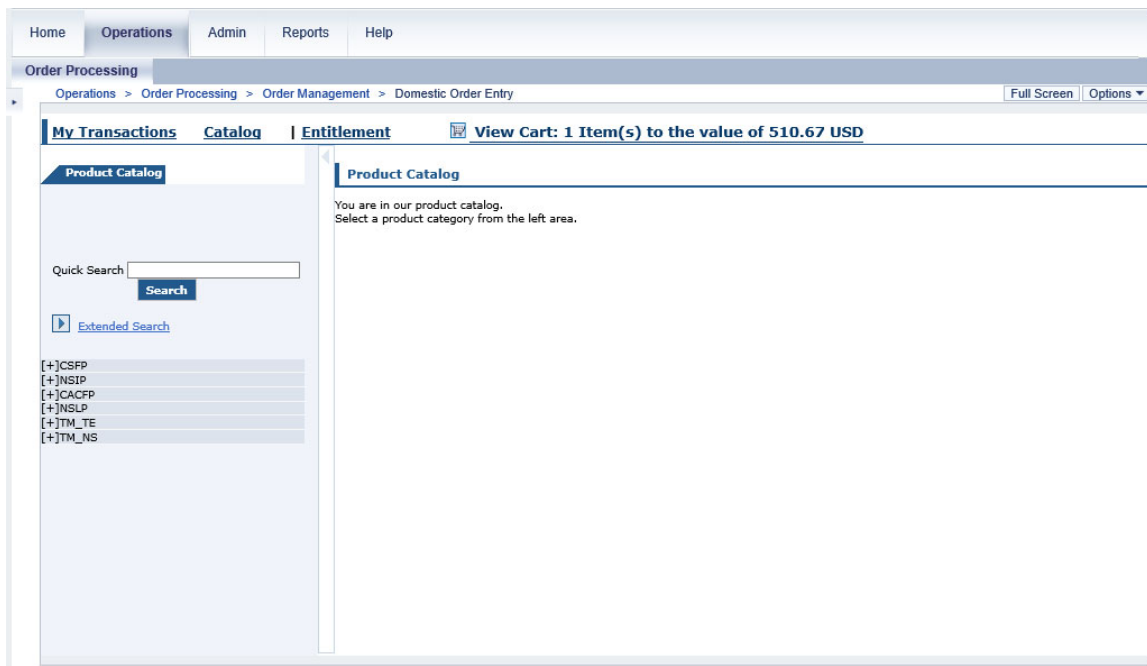
Update   Close Save

17. Select the appropriate option from the **Delivery Point** dropdown list. In this example, 5001331: CAPITAL AREA FOOD BANK OF TEXAS INC, AUSTIN, TX ▾ (the **Ready for Approval** option) was selected.

Image: Domestic Order Entry Screen

18. Click **Update** (the **Update** button) to save the new Delivery Point.

19. Return to Step 12.

Image: Domestic Order Entry Screen

20. Enter a new value for the appropriate line item in the **Quantity** column. In this example, 12 was entered in the **Quantity** column for line item 100.

Image: Domestic Order Entry Screen

21. Click [Update] (the **Update** button) to save the modifications.

22. Return to Step 12.

Image: Domestic Order Entry Screen

23. In the *Product Catalog* pane, click [+] (the **Plus** icon) next to the appropriate program. In this example, [+]CSFP (the **CSPF** option) was selected.

(Note) To review the list of materials available for ordering, the user will drill down through the product catalog beginning with the program.

Image: Domestic Order Entry Screen
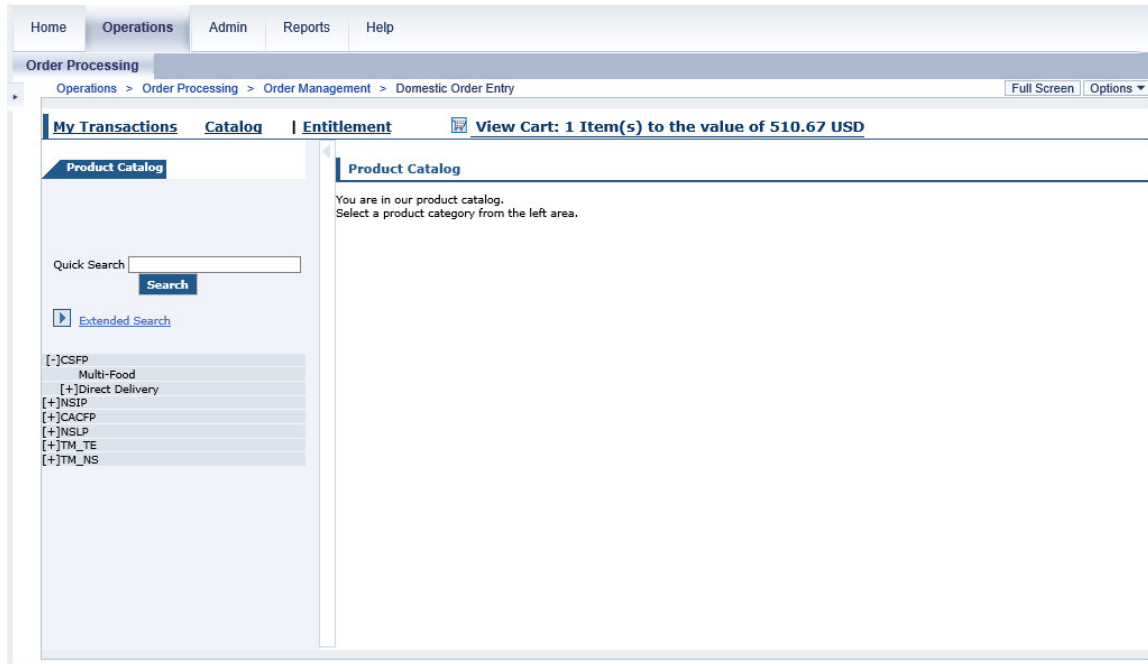
24. Click [+] (the **Plus** icon) next to the type of order. In this example, [+]Direct Delivery (the **Direct Delivery** option) was selected.

(Note) Domestic requisitions are used for the following types of orders:

- **Direct Delivery** - An order that is sourced from a vendor and delivered directly to the customer.
- **Processing Diversion** - An order that is sourced from a vendor and delivered to a processor before being received in final form by the customer. For example, flour may be processed into bread.

(Note) Multi-Food orders sourced from a national warehouse are processed differently than domestic requisitions and cannot be modified via the process described in this document. Refer to the Create Multi-Food Order RA or Create Multi-Food Order SDA work instructions for additional detail.

Image: Domestic Order Entry Screen
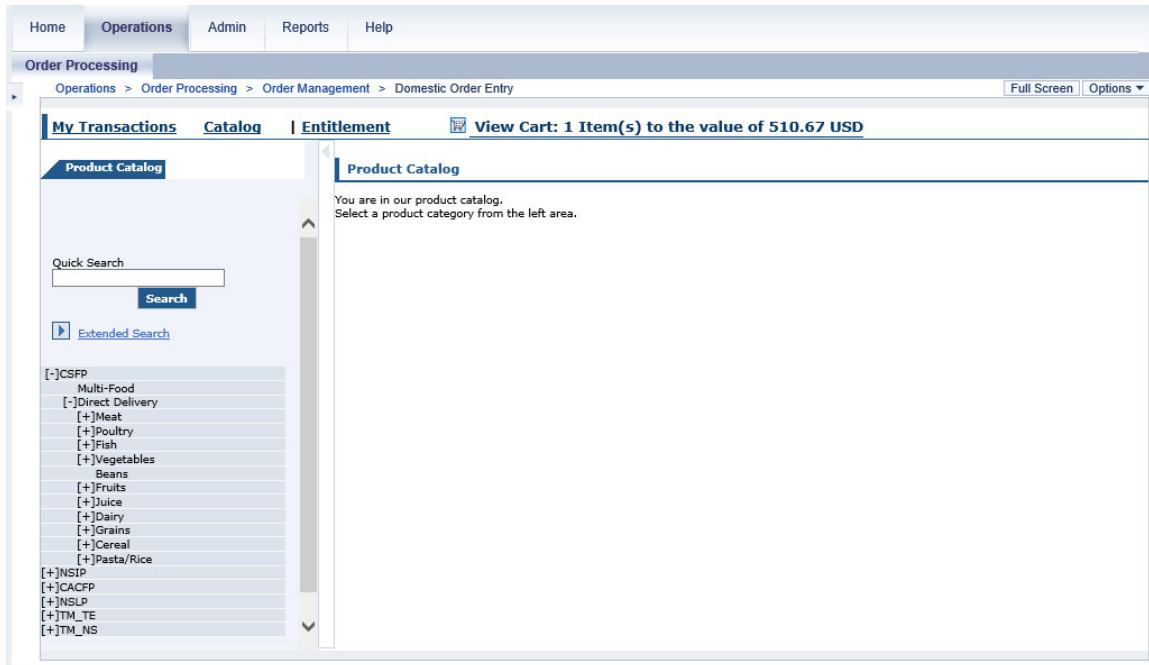
25. Click [+] (the **Plus** icon) next to the appropriate commodity group. In this example, [+]Meat (the **Meat** option) was selected under the **Direct Delivery** order type.

Image: Domestic Order Entry Screen
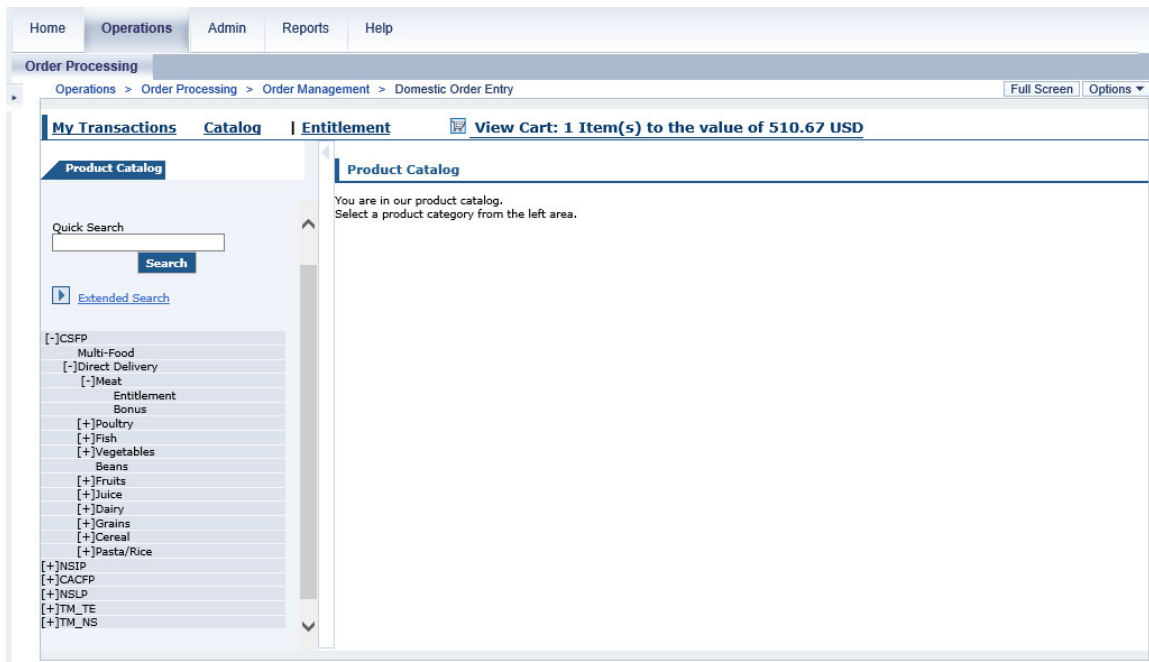
26. Select the option that corresponds to how the entitlement budget is impacted. In this example, Entitlement (the **Entitlement** option) was selected under the **Meat** option.
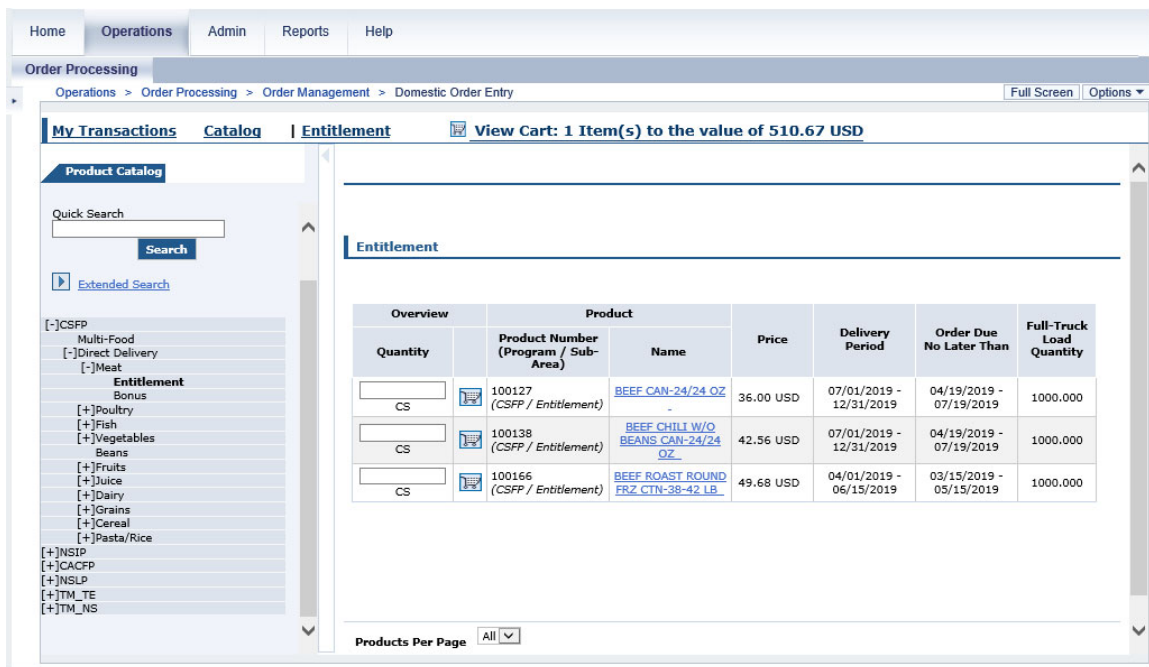
(Note) Depending on the program selected, options may include:

- **Entitlement** - Ordering these products will decrease the entitlement balance.
- **Bonus** - Ordering these products will not impact the customer's entitlement. FNS may offer bonus commodities when there is a surplus.
- **Trade Mitigation** - Ordering these products will not impact the customer's entitlement. These commodities are available through USDA's Market Facilitation Program, which supports domestic farmers faced with trade damages.

(Note) After an option is selected, the screen displays a list of all products available for the selected criteria. At the bottom of the list, the user may adjust the number of products to display on a page.

Image: Domestic Order Entry Screen

27.   Click [icon] (the **Shopping Cart** icon) next to a product to view details, including available delivery dates. Do not enter a value in the **Quantity** field from the list of products.

Image: Domestic Order Entry Screen
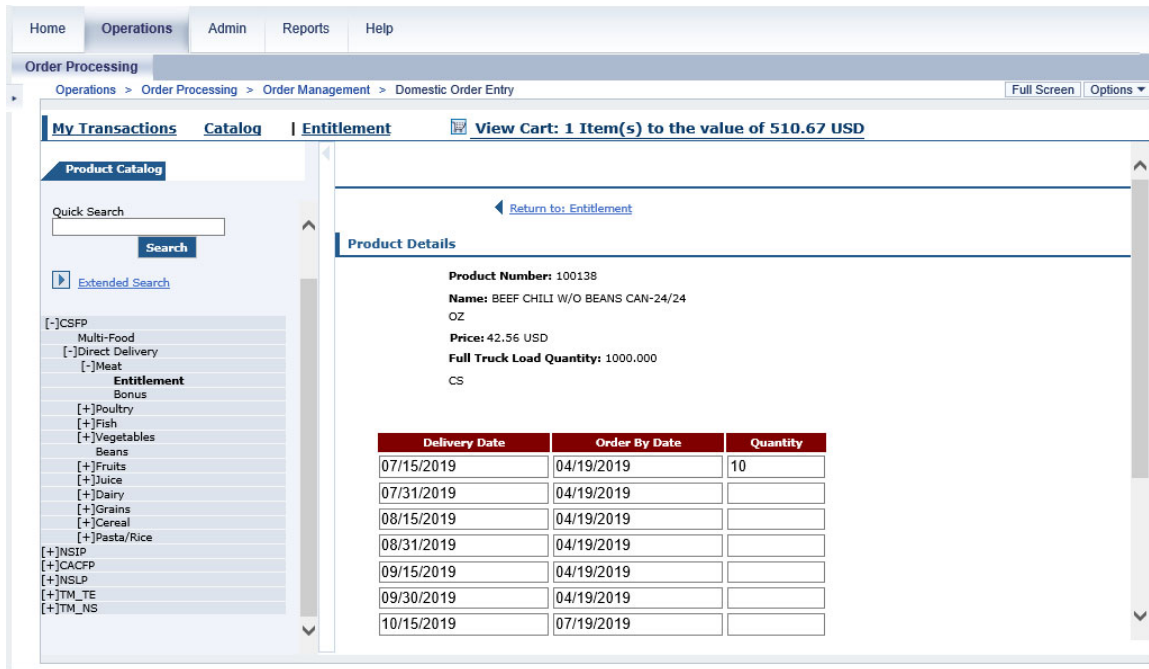
28.   As required, complete/review the following fields:

Field	R/O/C	Description
Delivery Date	R	Range of dates when commodities may be delivered. **Example:** 07/15/2019
Order By Date	R	Last date to submit orders for the corresponding Delivery Date. **Example:** 04/19/2019
Quantity	R	Number of items. **Example:** 10

Image: Domestic Order Entry Screen

29. Click   (the **Move to Cart** button) to add the selected product quantities to the shopping cart.

 (Note) A summary at the top of the screen displays the number and total value of products contained in the shopping cart.

30. Return to Step 12.

Image: Domestic Order Entry Screen

31. Select [Cancelled] (the **Cancelled** option) from the dropdown list for **User Status**.

 (Note) Once the status of **Cancelled** has been saved, the requisition line cannot be edited further.

Image: Domestic Order Entry Screen

32. Click [Update] (the **Update** button) to save the modifications.

33. Return to Step 12.

Image: Domestic Order Entry Screen

34. Click (the **Save** button) to save the modified domestic requisition.

(Note) In this example, all of the line items were updated to **Ready for Approval** status. Once saved, the requisition is sent to the SDA/ITO for consolidation and can no longer be edited by an RA.

Image: Domestic Order Entry
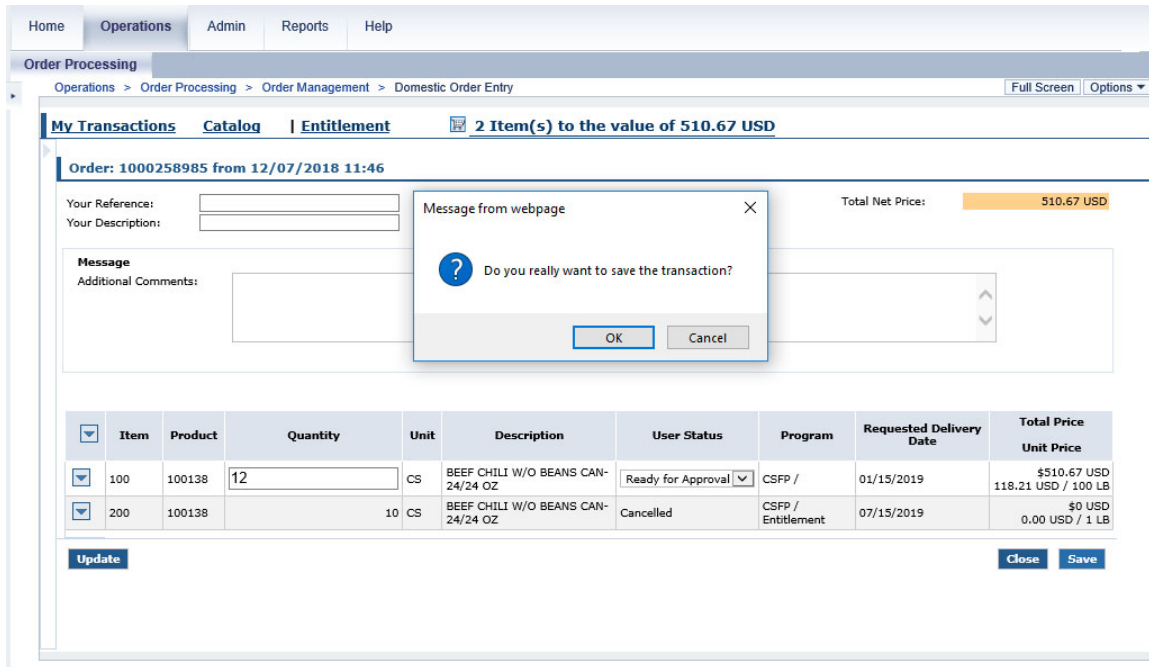
35. Click [OK] (the **OK** button) to confirm the modifications.

Image: Domestic Order Entry
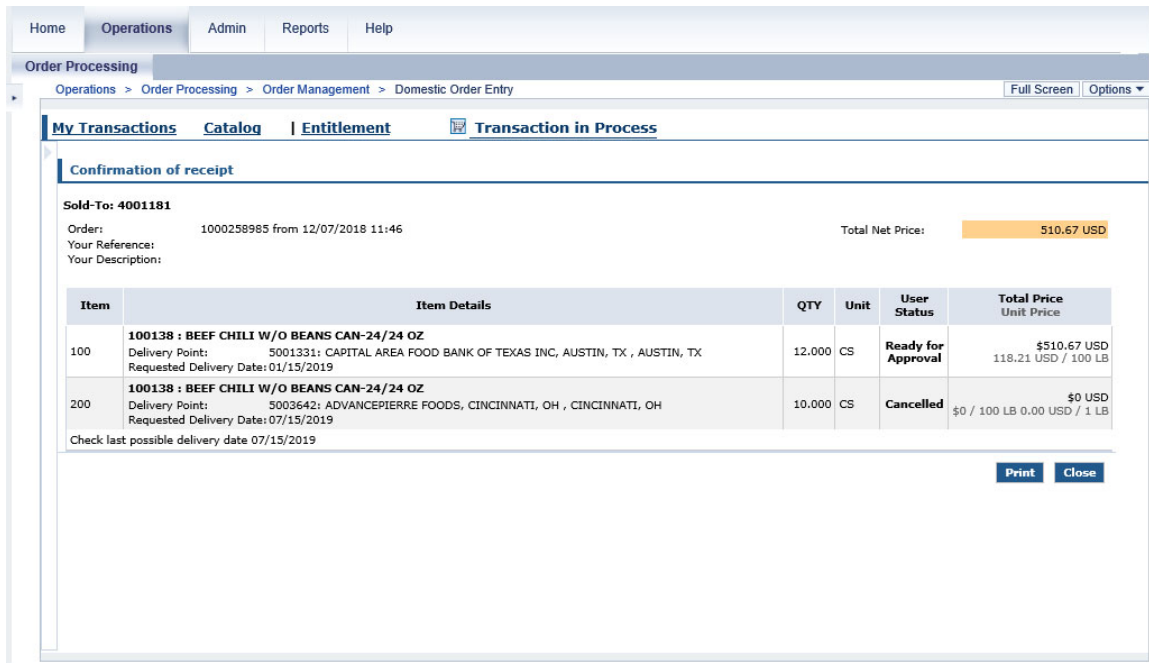
36. The transaction is complete.

RESULT

An existing domestic requisition has been modified. This may have included updating the order status, delivery location, and/or product quantity as well as adding or removing line items.

	PROCESS OVERVIEW

Purpose

The Requisition Status Report lists all requisitions created by RA Order Managers or by SDA Order Managers on behalf of their RAs. The report provides order information and status for each line item and related documents (sales order, purchase order, etc.). This report can be used to monitor activity on requisitions through the order life cycle. Status codes and their description are described in the Sales Order and Complaint Statuses job aid.

FNS Order Managers can view all requisitions in the system. SDA and USAID Order Managers can view only requisitions that they or their RAs created. RAs can view only their own requisitions.

Frequent execution of the Requisition Status Report for an organization's plants and/or warehouses, allows users to monitor material statuses, and delivery schedules.

Process Trigger

Use this report to review delivery dates, approval status, and other details for requisitions.

Prerequisites

- Requisitions must exist in WBSCM

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Reports** tab ➜ **Order Processing** folder ➜ **Requisition Status Report** link to go to the *Requisition Status Report* (Selection) screen..
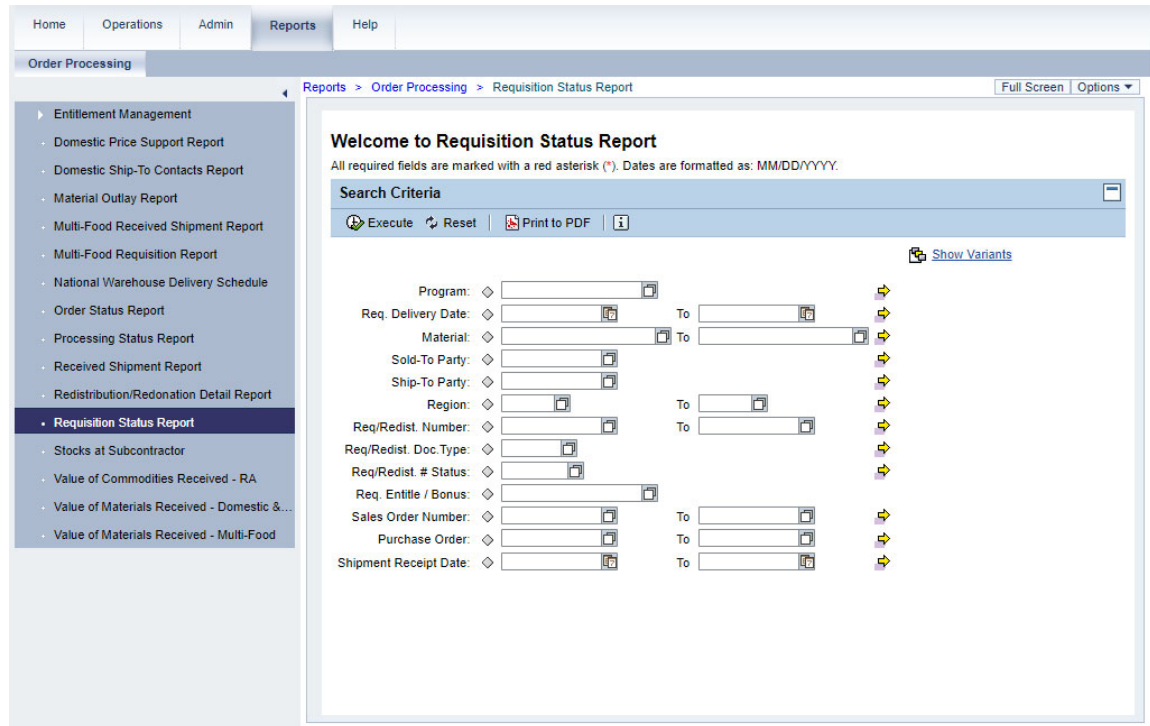
Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - o **Required (R)** – a mandatory field necessary to complete the transaction
  - o **Optional (O)** – a non-mandatory field not required to complete the transaction
  - o **Conditional (C)** – a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Help site, *Frequently Referenced Training Materials* section, for basic navigation training and tips on creating favorites, performing searches, etc.

PROCEDURE

1. Start the transaction using the following Portal path: Select **Reports** tab ➔ **Order Processing** folder ➔ **Requisition Status Report** link.

Image: Requisition Status Report Screen

2. Click ◄ (the **Hide Navigator** arrow) to minimize the Portal menu. Note this can be done with any transaction in WBSCM.

(Note) At least one value must be entered in one of the following selection fields: **Req. Delivery Date**, **Requisition Number**, **Sales Order Number**, **Purchase Order Number**, or **Shipment Receipt Date**. Additional search criteria can be used to narrow the results.

(Note) Use the **To** field to indicate the upper value of a range when needed. For example, to search for orders with a requested delivery date between March 1, 2021 and January 24, 2022, enter "03/01/2021" in the **Req. Delivery Date** field and "01/24/2022" in the adjacent **To** field.

Image: Requisition Status Report Screen
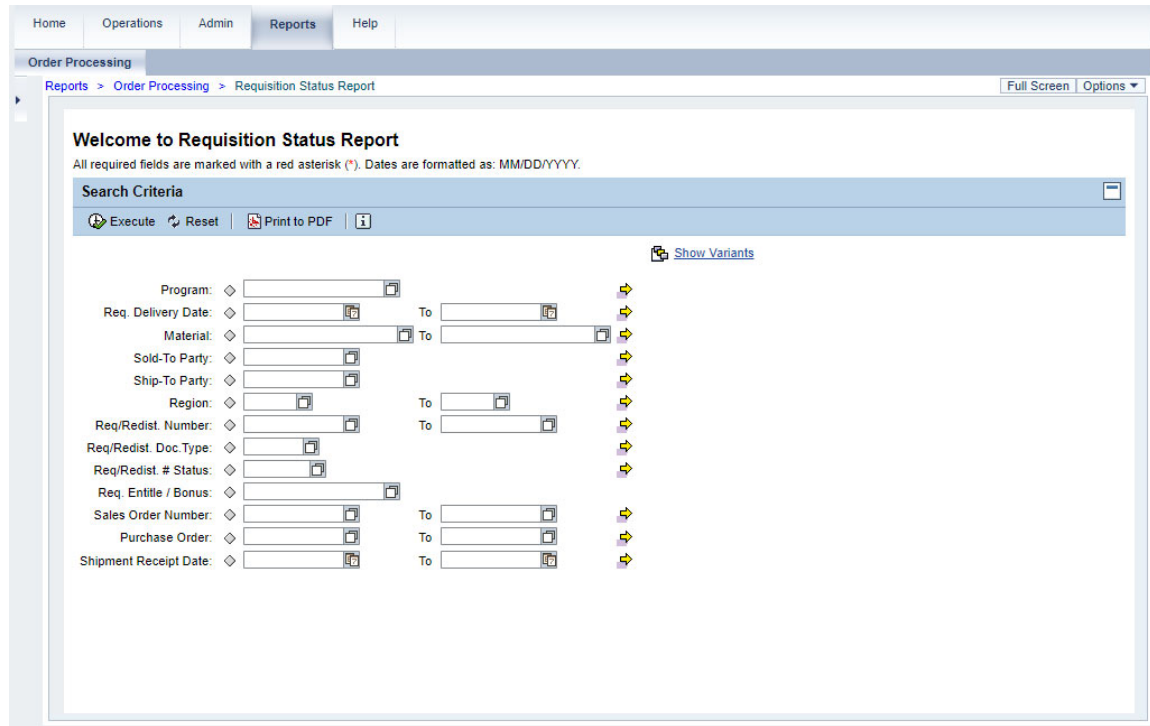
3. As required, complete/review the following fields:

Field	R/O/C	Description
Program:	O	Acronym used to identify a USDA food distribution program. **Example:** NSLP - National School Lunch Program
Req. Delivery Date:	O	Date requested by customer for delivery of ordered goods or services. **Example:** 01/24/2022
Sold-To Party:	O	Unique identifying name associated with a particular customer in WBSCM. **Example:** 8004967
Ship-to Party:	O	Unique identifying number associated with a person or company that receives the goods. **Example:** 1030631

Field	R/O/C	Description
Region:	O	In the U.S., state in which the vendor or customer resides. **Example:** VA
Req / Redist. Number:	O	The Requisition or redistribution number for the associated order. **Example:** 1000039427
Req / Redist. Doc. Type:	O	A classification that distinguishes between different types of requisition or redistribution document types. **Example:** ZREQ (Note) For more information, refer to the job aid, Domestic Order Code Definitions
Req / Redist. # Status:	O	Code for the current status of order. **Example:** E0001 (Note) For more information, refer to the job aid, Sales Order and Complaint Statuses.
Req. Entitle / Bonus:	O	Indicates the type of funds. **Example:** All
Sales Order Number:	O	Unique identifying number associated with a sales order in WBSCM. **Example:** 5000050962
Purchase Order:	O	Unique number identifying the Purchase Order. **Example:** 4100008931
Shipment Receipt Date:	O	The date the shipment is received. **Example:** 05/05/2021

Image: Requisition Status Report Screen

4. Click [Execute] (the **Execute** button) to generate the report.

Image: Requisition Status Report Screen

5.   As required, complete/review the following fields:

Field	R/O/C	Description
Req/Redist. Doc.Type	O	A classification that distinguishes between different types of requisition document types. **Example:** ZREQ
Req/Redist. Order #	R	Requisition or redistribution order number. **Example:** 1000258987
Req/Redist. Item #	O	The item number identified on the requisition or redistribution order number. **Example:** 100
Req/Redist. Status	O	The approval process stage for the line item on the requisition or the redistribution. **Example:** Approved by SDA (Note) For more information, refer to the job aid, Sales Order and Complaint Statuses.
Sold-To Party	O	Unique identifying name associated with a particular customer in WBSCM. **Example:** 4000578
Sold-To Name	O	Unique identifying name associated with a particular customer in WBSCM. **Example:** TX - Dept. of Agriculture - EDI
RA ID	O	Unique identifier assigned to a particular RA by the SDA. **Example:** 4000632
Ship-to party	O	Unique identifying number associated with a person or company that receives the goods. **Example:** 5001120

Field	R/O/C	Description
Ship-to Name	O	Unique identifying number associated with a person or company that receives the goods. **Example:** AMOROSO BAKING COMPANY
Material	O	Unique six-digit number representing a specific material/commodity in WBSCM. **Example:** 130530
Material Desc.	O	Text containing up to 40 characters that describes the material/commodity in detail. **Example:** CEREAL CORN FLKS -SUBST
Product hierarchy	O	Alphanumeric character string for grouping materials by combining various characteristics used for valuation and pricing purposes. **Example:** CEREAL/CORN AND RICE/BOX
Requested Del. Date	O	Date requested by customer for delivery of ordered materials or commodities. **Example:** 01/24/2022
Program	O	Acronym used to identify a USDA food distribution program. **Example:** CSFP
Entitlement/Bonus Ind	O	Indicates whether the document is Entitlement or Bonus order and the program year. **Example:** ENTITLE-CY16
Requested Qty.	O	Number of sales units of material requested by the customer. **Example:** 250.000
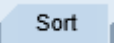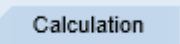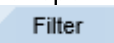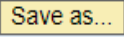
Field	R/O/C	Description
Sales Unit	O	Unit of measure upon which the price is typically based. **Example:** CS
Net Dollar Value	O	Dollar amount of the line item. **Example:** 4,289.96
Sales Order #	O	Unique identifying number associated with a sales order in WBSCM. **Example:** 5000050706
Sales Order Item #	O	The item number identified on the Sales Order. **Example:** 600
Sales Order Status	O	The approval process stage for the line item on the sales order. **Example:** Approved by SDA (Note) For orders that have been receipted with a missing ASN, the **Sales Order Status** field will display the status of **Order Received**. (Note) The most common order statuses are listed below. For more information refer to the job aid, Sales Order and Complaint Statuses. • **Approved by SDA** - SDA has applied the RA's requisition in a consolidated sales order. • **Approved by SpAgency** - FNS has approved the consolidated sales order from the SDA. • **On Invitation** - Sales Order is currently on a solicitation to be purchased. No changes can be made until purchased. • **Purchased** - Purchase Order (contract) has been created. • **Cancelled** - Order was cancelled. Entitlement returned to customer account. • **Order Received** - Order has

Field	R/O/C	Description
		been delivered to distributor.
Purchase Order #	O	Unique number identifying the Purchase Order. **Example:** 4100008939
PO Item #	O	Line item on the Purchase Order. **Example:** 2
Date Received	O	The date the materials were received. **Example:** 05/09/2021 (Note) This date reflects the most recent goods receipt date.

6. Perform any of the following, as needed:

If	Then
The user needs to customize the report output	1. Use ▸ 👤 (the **Open Settings Dialog** icon) to display the Settings dialog. 2. Select **Column Selection** (the **Column Selection** tab) to add/remove columns and change the sequence of the displayed columns. 3. Select **Sort** (the **Sort** tab) to sort the results by specified field and direction. 4. Select **Calculation** (the **Calculation** tab) to insert a calculated value based on available report fields. 5. Select **Filter** (the **Filter** tab) to apply filter(s) to your report. 6. Click **Apply** (the **Apply** button) to generate the results. 7. As necessary, click **Save as...** (the **Save as...** button) to save your selections as a new View. In the save prompt window, enter a descriptive name. 8. Click **OK** (the **OK** button) to go back to

If	Then
	the previous screen.
The user needs to export the report	1. Select Export ⊿ (the **Export** button). 2. Click Export to Microsoft Excel (the **Export to Microsoft Excel** option) to open the report data in Excel or a compatible application. 3. Click ⌃ (the **Arrow** button) in the dialog box. 4. Click Open (the **Open** option) in the dialog box. 5. Review and modify the report as needed. 6. As necessary, save the Excel spreadsheet for later reference. 7. Close Excel.
The user needs to print to PDF	1. Select Print to PDF (the **Print to PDF** button). 2. Click ⌃ (the **Arrow** button) in the dialog box. 3. Click Open (the **Open** option) in the dialog box. 4. Review, print, and save the PDF output as needed. 5. Close the PDF document.

7. The transaction is complete.

RESULT

The Requisition Status Report for the selected criteria has been displayed and reviewed. As applicable, the report may also have been customized and/or exported to Excel or PDF format.

PROCESS OVERVIEW

Purpose

The purpose of this transaction is to consolidate domestic requisitions to create a standard domestic sales order. Order Managers from State Distributing Agencies (SDAs) and Indian Tribal Organizations (ITOs) receive domestic requisitions from their Recipient Agencies (RAs). They are tasked with consolidating these requisitions along with any requisitions they create in order to create full truckloads. The requisitions can be consolidated by Material, Ship-to, and Delivery Date and linked together via the group number field.

Process Trigger

Perform this transaction to consolidate domestic requisitions into standard domestic sales orders.

Prerequisites

- Domestic requisitions in Ready for Approval status must exist in WBSCM.
- Requisitions must be from an RA/Co-op or SDA/ITO as part of your SDA/ITO organization.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab ➜ **Order Processing** tab ➜ **Order Management** folder ➜ **Consolidate Requisitions** link to go to the *Consolidate Requisitions* screen.

Tips and Tricks

- The R/O/C acronyms in the field table represent Required, Optional, or Conditional field entries.
  - **Required (R)** – a mandatory field necessary to complete the transaction
  - **Optional (O)** – a non-mandatory field not required to complete the transaction
  - **Conditional (C)** – a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Help site, *Frequently Referenced Training Materials* section, for basic navigational training and tips on creating favorites, performing searches, etc.

1.   Start the transaction using the following Portal path: **Operations** tab ➔ **Order Processing** tab ➔ **Order Management** folder ➔ **Consolidate Requisitions**

Image: Consolidate Requisitions Screen
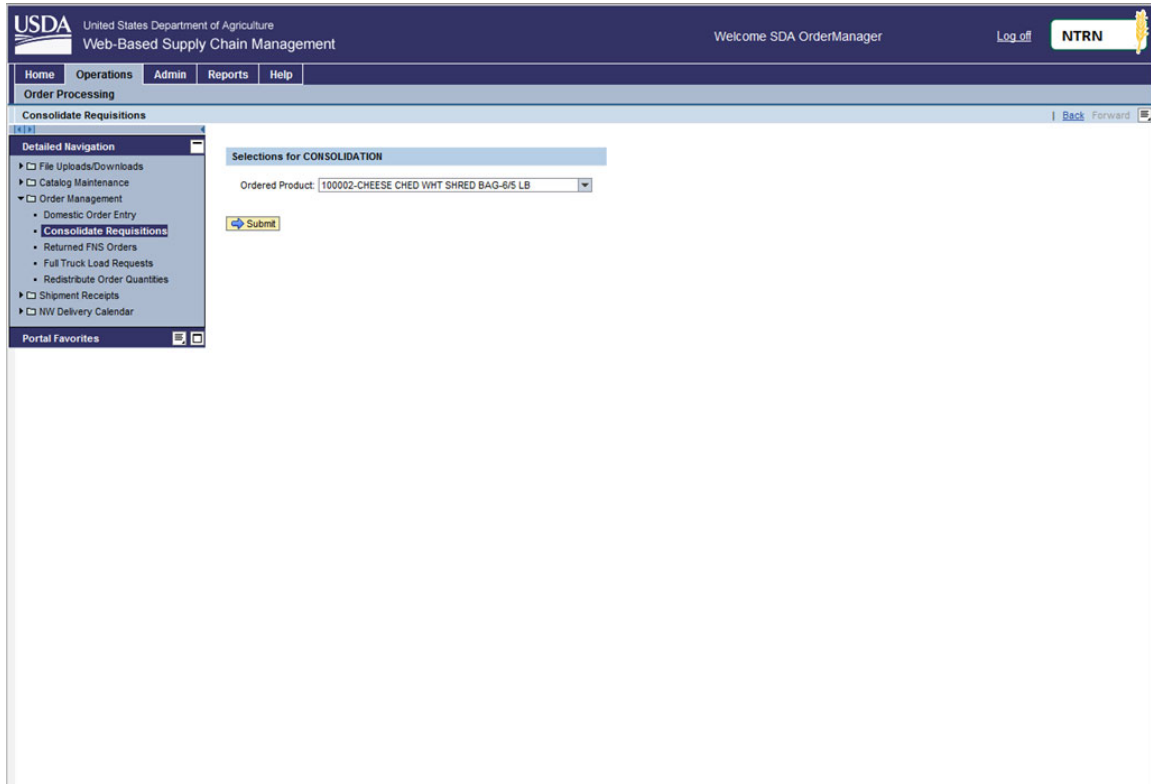
2.   Click ◀ (the **Hide Navigator** arrow) to minimize the Portal menu. Note that you can do this with any transaction in WBSCM - not just fulfillment transactions.

Image: Consolidate Requisitions Screen
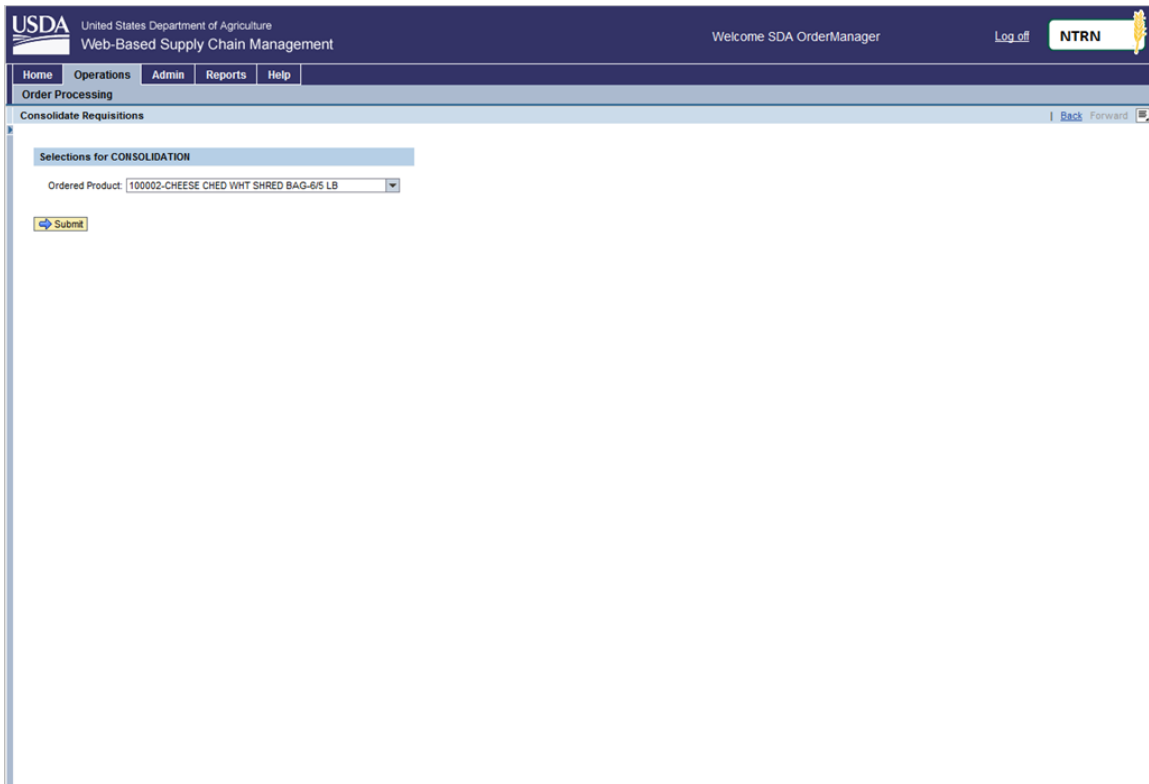
3. In the **Ordered Product** field, click on the **Dropdown** button to select a product.

Image: Consolidate Requisitions Screen
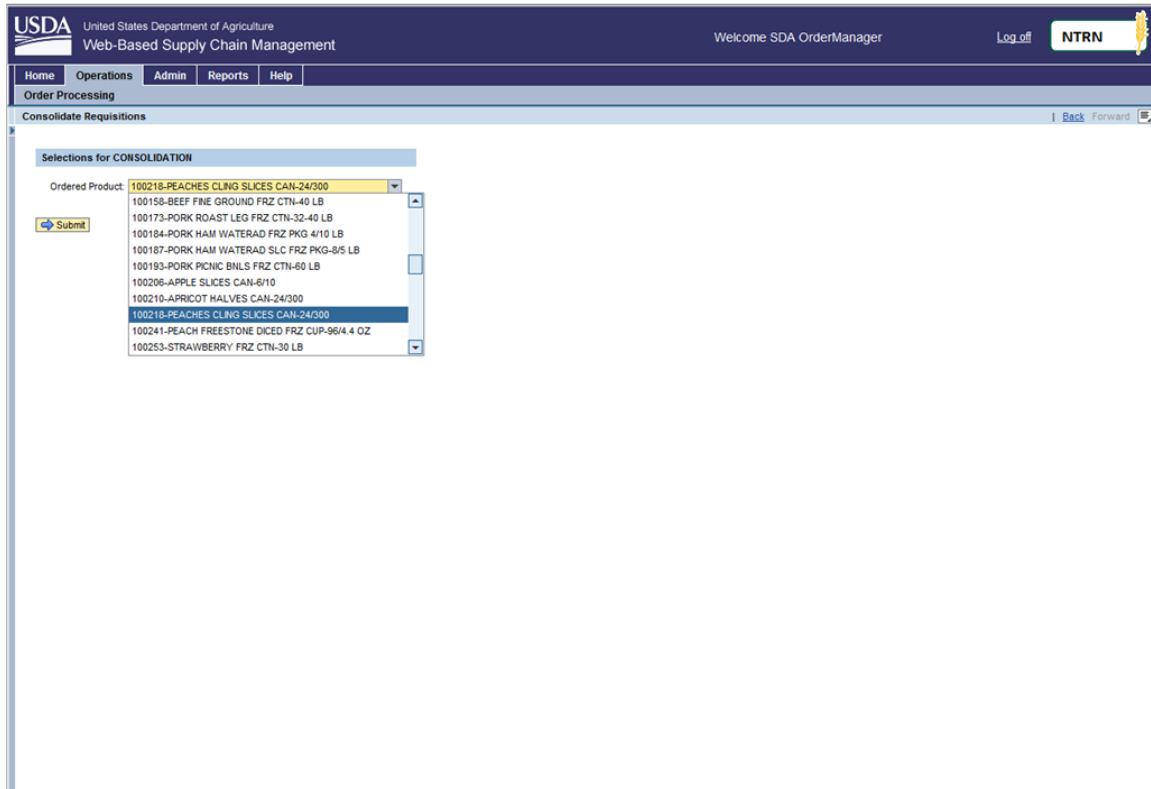
4. Select the material you wish to consolidate from the dropdown list. In this case, we selected 100218-PEACHES CLING SLICES CAN-24/300 (the **100218-PEACHES CLING SLICES CAN-24/300** option).

Image: Consolidate Requisitions Screen
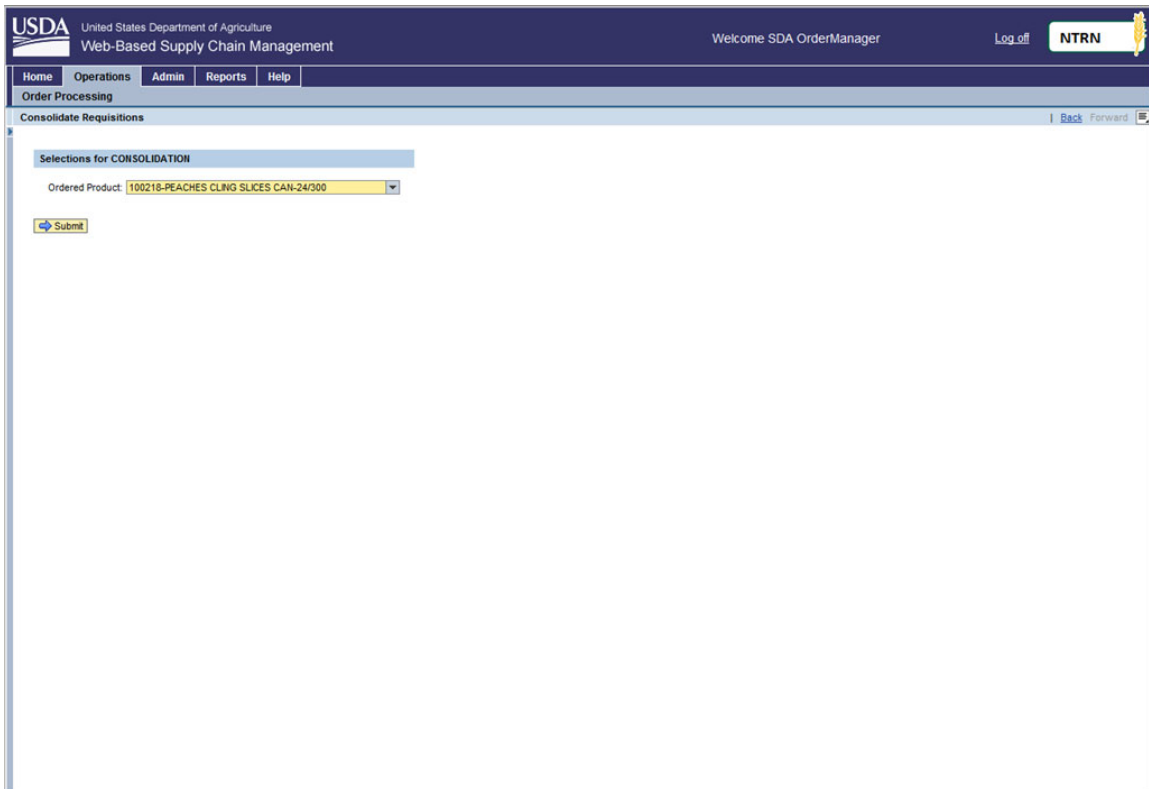
5. Click ![Submit](submit button) (the **Submit** button) to submit your selection.

Image: Consolidate Requisitions Screen
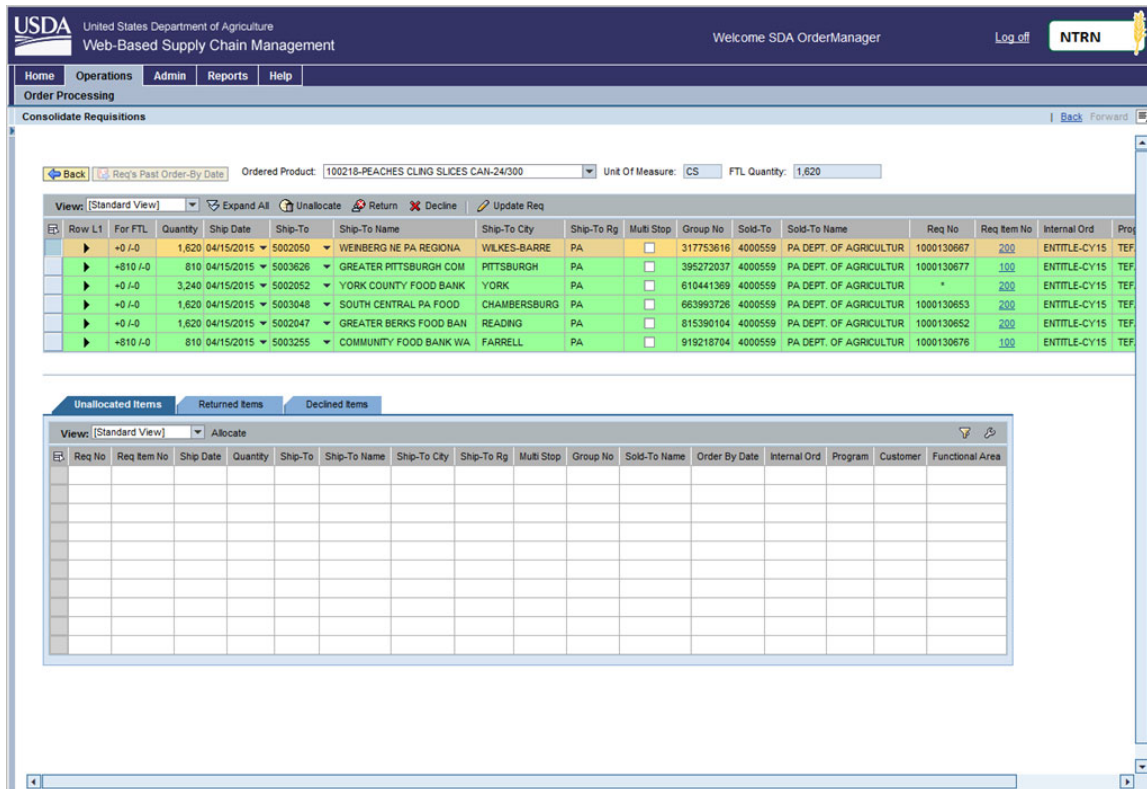
6. When RAs, Co-ops, SDAs, or ITOs submit their requisitions, WBSCM automatically consolidates all requisitions by material (which is selected on the previous screen), ship date, and ship-to location. For example, all requisitions for the same ship-to location that are scheduled to ship on 5/30/2011 will be displayed beneath, an aggregated line (a proposed order is indicated by a green line item).To view all fields, use the horizontal scrollbar and scroll to the right.

(Note) You will be able to view the following information about each line item on each requisition:

Row L1 - This column contains an arrow that corresponds to each proposed order (each green row). Clicking the arrow lets you minimize or maximize the line item detail on the proposed order.

For FTL - This column indicates the quantity of items required to make a full truckload as is defined for each material in the Material Master. For example, if this cell reads "+200/-600" that means you may either add 200 units of the item to the order, or remove 600 units from the order if you wish to consolidate to a full truckload. You may have multiple Full Truckloads (FTLs) on a consolidated sales order.

Quantity - The quantity of items being ordered.

Ship Date - The date when goods will ship from the vendor to the recipient. Note that all line items on a proposed order must have the same ship date for them to be included in the order.

Ship-To - The ID number associated with the Ship-To Location. Note that there may be multiple Ship-To Locations on a given order, such as where there is a multi-stop. Remember that the order will consist of requisitions that are being shipped to multiple different Sold-To Parties.

Ship-To Name - The name of the Ship-To Location for each of the line items.

Ship-To City - City where the ship-to location is located.

Ship-To Rg - State where the ship-to location is located.

Multi-Stop - This column contains a checkbox that corresponds to each proposed order (each green row). When a multi-stop is created between two orders shown on this screen, the system automatically checks this box. When a multi-stop is created between states, you must manually check this box. This box indicates that the order has multiple ship-to destinations.

Group No - This is the group number, a unique identifying number associated with a proposed order.

Image: Consolidate Requisitions Screen

7. If desired, click the [ ] (the **Settings** icon) to change the display. The Settings feature allows you to add/remove columns from the output, change the order of columns, change the sorting (A->Z, Z->A, etc.) for each of the columns, add totaling/subtotaling functionality, or change the color scheme of the table

Clicking [ ] (the **Filter** icon) will add a filter row to the report. Specific filtering criteria can then be entered. For example, if you wish to filter the results only to include items related to **Ship-To City**, click inside the blank filter row in the **Ship-To City** column. Type York in the field. The results only containing York as the **Ship-To City** will display.

Scroll back to the left of the screen.

(Note) Additional information about each line item on each requisition include:

Sold-To - This is the Sold-To Party Number, a unique identifying number associated with the Sold-To Party for each line item.

Sold-To Name - This is the name of the Sold-To Party for the requisition.

Req No - A Requisition is a proposed order submitted by RA, SDA/ITOs before consolidation. Each white line item underneath an aggregate line represents a requisition line item. Each requisition has a unique identifying Requisition Number that was assigned to it when the requisition was placed.

Req Item No - Requisition Item Number is a sequence line number on each requisition. This denotes the order of the line item on the requisition. For example, line 100 was the first line item on the requisition, line 200 was the second item, etc. Selecting the Req Item No button allows you to see the details of the particular line item.

Internal Ord - This refers to an account assignment that will be used for the particular order. It is used by finance personnel. It will automatically be derived based on the program and ship date combination. Different values for this field will point to different account assignments.

Program - This refers to the program through which the commodity was ordered.

Order By Date - Date when the requisition must be consolidated into a Sales Order and submitted to FNS for it to be considered valid. Requisitions that are not consolidated by the order-by date will be automatically moved into a separate queue, the *Req's Past Order-By Date* queue. You will be able to revisit these requisitions by clicking the **Req's Past Order-By Date** button (see Step #22 for instructions on how to view and update requisitions in this queue so that they may be reprocessed for order creation).

Image: Consolidate Requisitions Screen
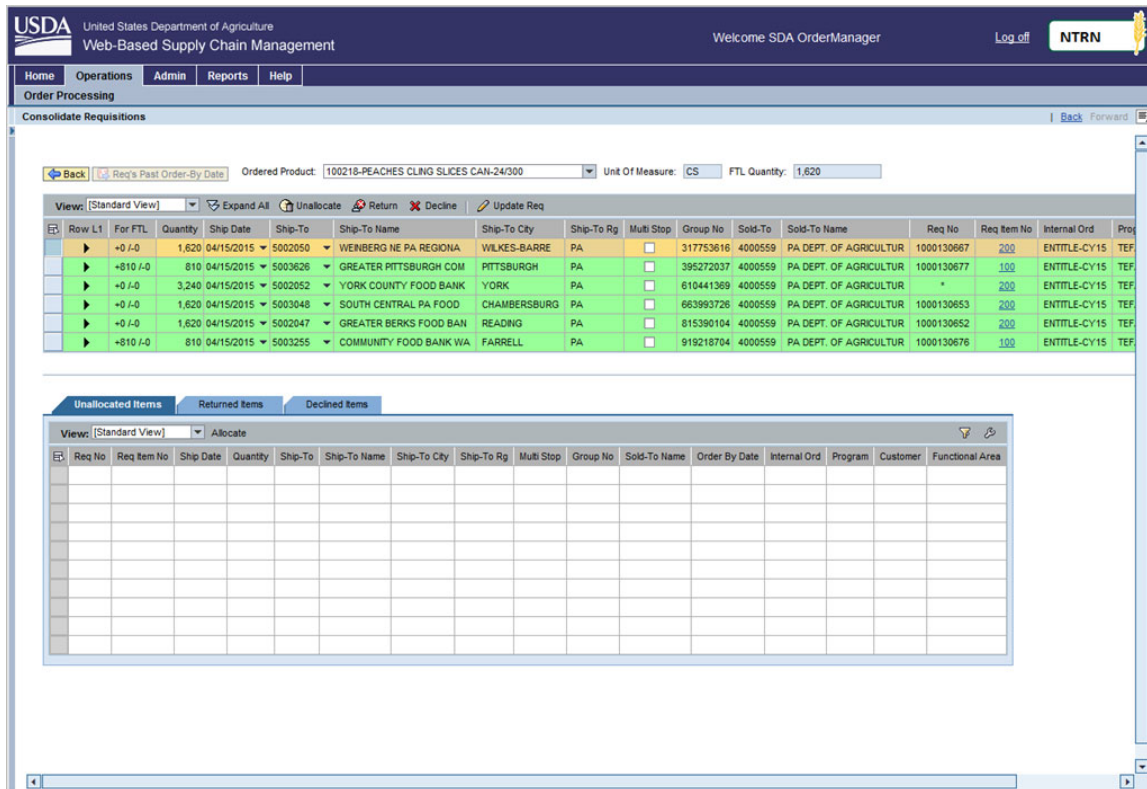
8. Refer to the *Row L1* column. Click [arrow] (the **arrow** button) to expand a proposed order. This will display all of the requisitions that are a part of the proposed order.

(Note) If your Co-ops or RAs under a Co-op (if applicable) create requisitions, these reqs will be grouped under a blue line when a proposed order (green row) is expanded.

There are several buttons on this screen which can benefit you in the order consolidation process. These buttons are as follows:

Expand All - This button will expand all the proposed orders so you can view all the white line items (the requisitions) beneath each proposed order (green aggregated line item) without having to expand each individually. This button will not display when all proposed orders are already expanded.

Collapse All - When all proposed orders are expanded, this button appears, allowing you to collapse (minimize) the line items.

Unallocate - If you wish to remove a line item from a proposed order, or an entire proposed line item select the box next to the line item, and click **Unallocate**. This button will remove the line item from the proposed order, and move it to the queue at the bottom. You may then reallocate the line item back into the workbench now or at a later time during this session, if desired.

Return - If you wish to return a requisition to the Sold-To Party that submitted it, use the *Return* functionality. Generally you would return a requisition if there is a change that you would like the Sold-To Party to make. Select the blue box next to the line item you wish to return, then click the **Return** button. The requisition will be returned to the Sold-To Party when you have clicked the *UpdateReq* button. The Sold-To Party can make the corrections and then resubmit the requisition

for processing.

Decline - Use this button if you wish to decline a line item from a proposed order. Select the blue box next to the line item and click **Decline**. This button will remove the line item from the proposed order. It will also cancel the line item for this commodity and notify the Sold-To Party once the UpdateReq button has been selected. Generally, the *Decline* feature will only be used when a requisition was entered incorrectly, duplicate requisitions were accidentally created, or there is not enough demand to place a sales order for that commodity and delivery date.

Update Req - Use this button to update the requisitions with any changes and reallocations that have been made (including reqs that have been returned or declined). Note that after you click the Update Req button, you will no longer be able to make changes on the Order Consolidation screen for the commodity you are working on unless you exit out of the workbench and come back into the workbench. If the commodity is still being processed for requisition update, an error message will display.

Submit for Sales Order Creation - Use this button to submit your order for confirmation and processing. You must select the proposed orders (aggregate green lines) that you wish to submit for sales order creation. However, you do not have to submit any orders if you do not want to at this time. The updates that you have made are saved after you clicked the *UpdateReq* button. This button only displays after you have updated the requisition by clicking the **Update Req** button. That is why you do not see it in the screenshot above.

Req's Past Order-By Date - Requisitions have an expired order-by date. When it is past the order-by date, and no order has been placed, the requisition is no longer included in the Order Consolidation table, but is available on a separate screen for the commodity you are viewing in the workbench. Click the **Req's Past Order-By Date** button to access this screen (see Step #22 for instructions on how to view and update requisitions in this queue so that they may be reprocessed for order creation).

Image: Consolidate Requisitions Screen
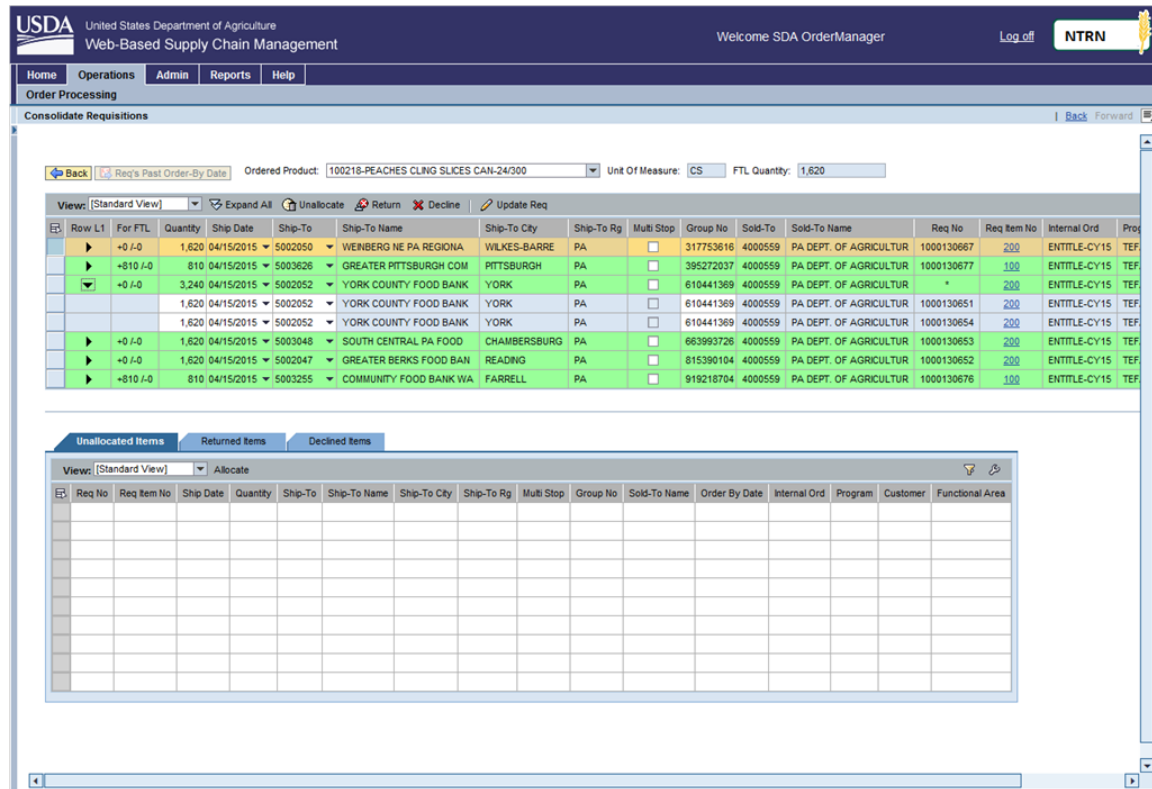
9. Select the **Blue** box beside line items to choose the aggregated grouping you wish to work on. By selecting the blue box for each proposed order, the white line items beneath it will automatically be selected as well. If you wish to select all the line items on the screen, instead of selecting each individually, click ![Table Selection Menu icon] (the **Table Selection Menu** button) and click the **Select All** option. You can also select the **Deselect all** option to deselect all line items.

> (Note) You do not need to select the **Blue** Box beside the line item to edit the line item.
>
> If you wish to select multiple consecutive rows, hold down the *Shift* key and select the beginning and end row boxes. If you wish to select non-consecutive rows, hold down the *Ctrl* key and select each blue box.
>
> If you have a change that applies to all the requisitions within the aggregated group, you do not need to expand the row. Simply making changes the aggregated line (e.g., Quantity change, Ship-to change, Ship Date change) will update all associated requisitions within the aggregated group.
>
> When deselecting requisition line items for unallocation, return, or decline (applies to both SDAs and Co-ops):
>
> > If the aggregate lines are on expanded mode:
> >
> > - Click ![Table Selection Menu icon] (the **Table Selection Menu** button) to select all the aggregate and req line items in the workbench
> > - While pressing the **Ctrl** key on your keyboard, first deselect the aggregate line(s) followed by the individual requisition line item(s) underneath that aggregate group

- Click the **Unallocate/Return/Decline** button
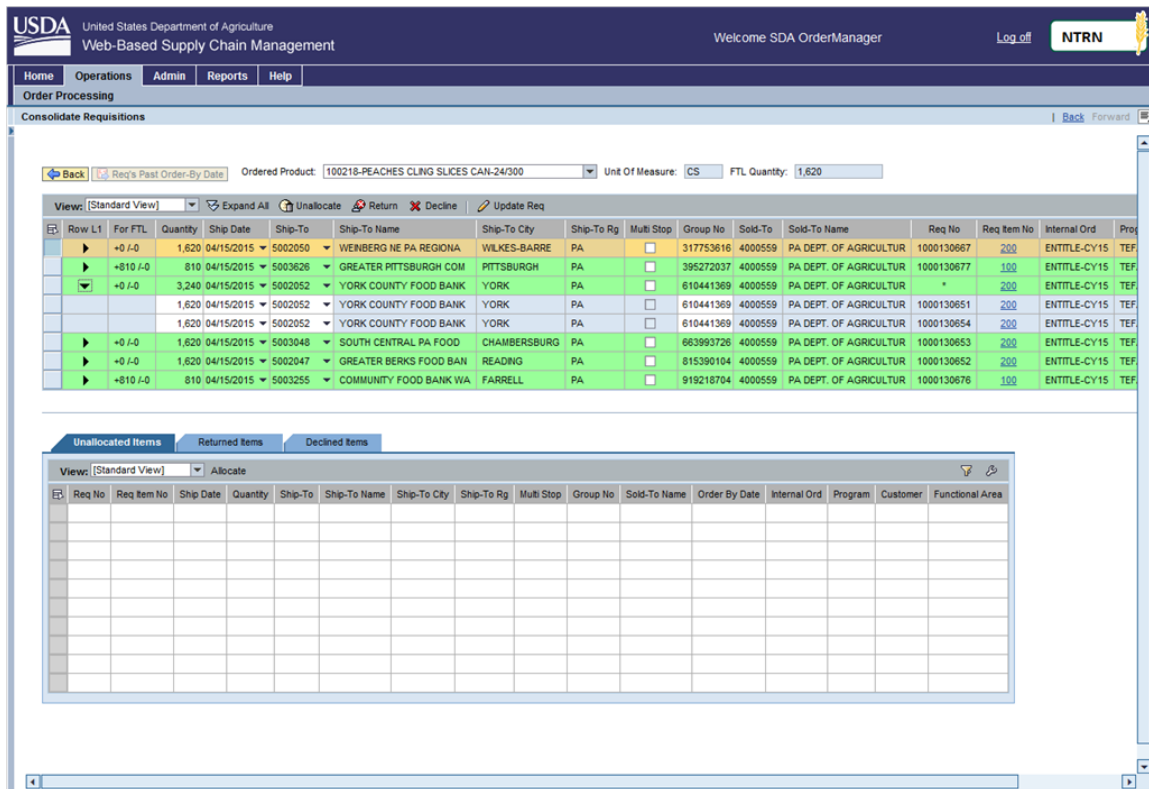
  This will keep all the deselected requisition line item(s) on the workbench while moving the rest of the reqs down to the queue at the bottom of the screen.

  If the aggregate lines are on collapsed mode:

- Click ⊞ (the **Table Selection Menu** button) to select all the aggregate line items in the workbench
- While pressing the **Ctrl** key on your keyboard, deselect only the aggregate line(s) (you don't need to select individual requisition line item(s) underneath that aggregate group)
- Click the **Unallocate/Return/Decline** button

  This will keep all the deselected aggregate line item(s) on the workbench while moving the rest down to the queue at the bottom of the screen.

Image: Consolidate Requisitions Screen

10. After you have selected the **Blue** box next to a line item you wish to work on, click the appropriate button from the options listed in Step #8. In this case, we need to unallocate several line items, as we do not want to work with them at this time. This will move the selected line items to the **_Unallocated Items_** queue at the bottom of the screen. To do this, click ⟳ Unallocate (the **Unallocate** button) after selecting the line items.

(Note) Unallocating provides one method for reducing the number of line items you are working with, however, an alternative method is to create a filter for the table. To do this, scroll to the right side of the screen. Click the **Filter** link. A filter row will display, and you will be able to enter criteria that you wish to filter by. For example, if you wish to display line items with a ship date of

04/15/2015, enter **04/15/2015** in the blank filter row of the **Ship Date** column and press **enter**. The table will reorganize accordingly.

To remove the filter, click the **Delete Filter** link.

Image: Consolidate Requisitions Screen

11. We are now only working with two proposed orders in the workbench. All other requisitions have moved to the **Unallocated Queue** at the bottom of the screen. Click [Expand All] (the **Expand All** button) to expand all the rows beneath the proposed orders (the green aggregated line items).

(Note) Requisitions that have the same ship date, and ship-to location will automatically be consolidated together. To do an automatic consolidation, make changes to the ship date and ship-to location to ensure that your two line items have the same ship date and ship-to location. The **Ship Date** field can be modified by clicking the field, and selecting a new ship date. The **Ship To** field can be changed by clicking the field, and selecting a new ship-to location.

There may be cases where you wish to create a multi-stop shipment where a truck is routed to two different locations to drop off commodities. In situations like these, you will need to manually copy and paste the group number. The group number is a value that unites all requisitions to be included in the same truckload. To do this, highlight the first group number. Hold down the **Ctrl** button and the **C** button on your keyboard at the same time. This will copy the value to your computer's clipboard. Locate the second group number field. Highlight or delete the value in the field and then hold down the **Ctrl** button and the **V** button on your keyboard at the same time. This will paste the value into the blank field.

The rows displayed could include automatically merged cells. This occurs when the same data

applies to multiple rows. However, the rows are still independent and can be selected separately.

After you have manually copied and pasted the group number into both fields, press **Enter** on your keyboard. Then continue with the subsequent steps to update the requisitions and submit for sales order creation.

In this example, we will practice consolidating to a multi-stop order.

Image: Consolidate Requisitions Screen

12.   As required, complete/review the following fields:

Field	R/O/C	Description
Group No	O	A unique identifying number that links together all requisitions that are part of the same proposed order. **Example:** 651362746

(Note) In this example, both proposed orders have the same ship-to date. However, they have different ship-to locations. This is an example of a multi-stop order where multiple requisitions will be combined on the same order, and a truck will stop at multiple locations to drop off product.

In this step, we are copying the group number from one proposed order to the other. As the proposed orders do not have the same ship-to location, they will not automatically group. The group number manually links the two lines together. Using the group number, you can manually combine proposed orders with different ship-to locations.

The multi-stop checkbox will automatically be checked if you have grouped together aggregated

lines to create a multi-stop.

13. Press the **Enter** button your keyboard to process your entries.

(Note) After entering a new value in the **Group No** or **Quantity** fields, it is critical that you press **Enter** on your keyboard, as this will process the entries. If you do not press **Enter**, your changes may not be saved and you will need to redo them.

Image: Consolidate Requisitions Screen

14. As required, complete/review the following fields:

Field	R/O/C	Description
Quantity	R	Number of items being processed. **Example:** 940

(Note) The **For FTL** field provides you with two numbers - a positive value and a negative value. The positive value represents the quantity of items that must be added to the proposed order to create a full truckload. The negative value represents the quantity of items that must be removed from the proposed order to create a full truckload. Notice that the full truckload quantity is also displayed at the top of the screen along with the ordered product and unit of measure.

You may need to add items or you may need to remove items in order to get to the correct amount, as indicated in the **For FTL** (For Full Truckload) column. When you reach "+0/-0", the

order is ready to be submitted.

There are two ways to modify the quantity. The first way is shown here. In this case, we knew that the FTL quantity was 1620 (refer to the top of the screen to see the FTL quantity for the material). Therefore, we changed the order quantity for the proposed order (the green row) to 1620. Then press the Enter key on your keyboard. An algorithm on the back end will redistribute the 1620 items between the requisitions to ensure each recipient gets the appropriate quantity, based on the quantity originally ordered.

The second way is to manually change each recipient's quantity. To do this, alter the value in the **Quantity** field for each of the line items (the white rows). Then press the **Enter** key on your keyboard.

Continue to make changes as needed, altering the Quantity, Ship Date, and Ship-To Location.

Also note that an asterisk displays on the proposed order (green row) if multiple values exist under the same column within a group.

15.   Press the **Enter** button your keyboard to process your entries.

(Note) After entering a new value in the **Group No** or **Quantity** fields, it is critical that you press the **Enter** button on your keyboard, as this will process the entries. If you do not press **Enter**, your changes may not be saved and you will need to redo them.

Image: Consolidate Requisitions Screen

16.   Click [Update Req] (the **Update Req** button) to update the requisitions with any changes.

(Note) You do not need to select records for update before clicking the *UpdateReq* button. All records with changes made in the workbench will be updated.

Clicking the **Update Req** button serves two purposes. First, it updates the requisition with changes you have made to the quantity, ship date, and ship-to location. The second purpose is to confirm that you are done with the entries you are working on and are ready to submit for order creation. After clicking the **Update Req** button, you will no longer be able to make changes to the proposed order, unless you exit and reenter the workbench without submitting your entries for order creation. You do not have to submit requisitions for order creation at this time, but changes will be retained.

Image: Order Consolidation Pop Up

17. Click [Yes] (the **Yes** button) to confirm.

(Note) A confirmation message displays at the top of the screen indicating that the Requisitions have been submitted for update in Background task.

Image: Consolidate Requisitions Screen

18.   Select the **blue** box beside the proposed order(s) that you wish to submit for sales order
       creation.

       (Note) You can click ▣ (the **Table Selection Menu** button) and choose the **Select All or
       Deselect all** option when you have a long list of requisitions or proposed line items to Update or
       Submit for Sales Order Creation.

Image: Consolidate Requisitions Screen

19. After selecting the order(s), click [Submit for Sales Order Creation] (the **Submit for Sales Order Creation** button) to submit the proposed order(s).

(Note) Notice the **Submit for Sales Order Creation** button is now visible on the screen. Use this button to submit your order for confirmation and processing. This button only displays after you have updated the requisition by clicking the **Update Req** button.

Remember that the unallocated requisition remains unaffected, and is still in the queue at the bottom of the screen. When you exit the transaction, the unallocated requisitions will return to the Order Consolidation Workbench; they do not remain in the *Unallocated* queue.

Returned requisitions go back to the Sold-To Party that submitted it. Generally you would return a requisition if there is a change that you would like the Sold-To Party to make. The requisition will be returned to the Sold-To Party when you have clicked the *Update Req* button. The Sold-To Party can make the corrections and then resubmit the requisition for processing.

Declining a requisition will remove that line item from the proposed order. It will also cancel the line item for this commodity. Generally, the Decline feature will only be used when a requisition was entered incorrectly, duplicate requisitions were accidentally created, or there is not enough demand to place a sales order for that commodity and delivery date. The requisition is cancelled after you have clicked the *Update Req* button.

Image: Consolidate Requisitions Screen
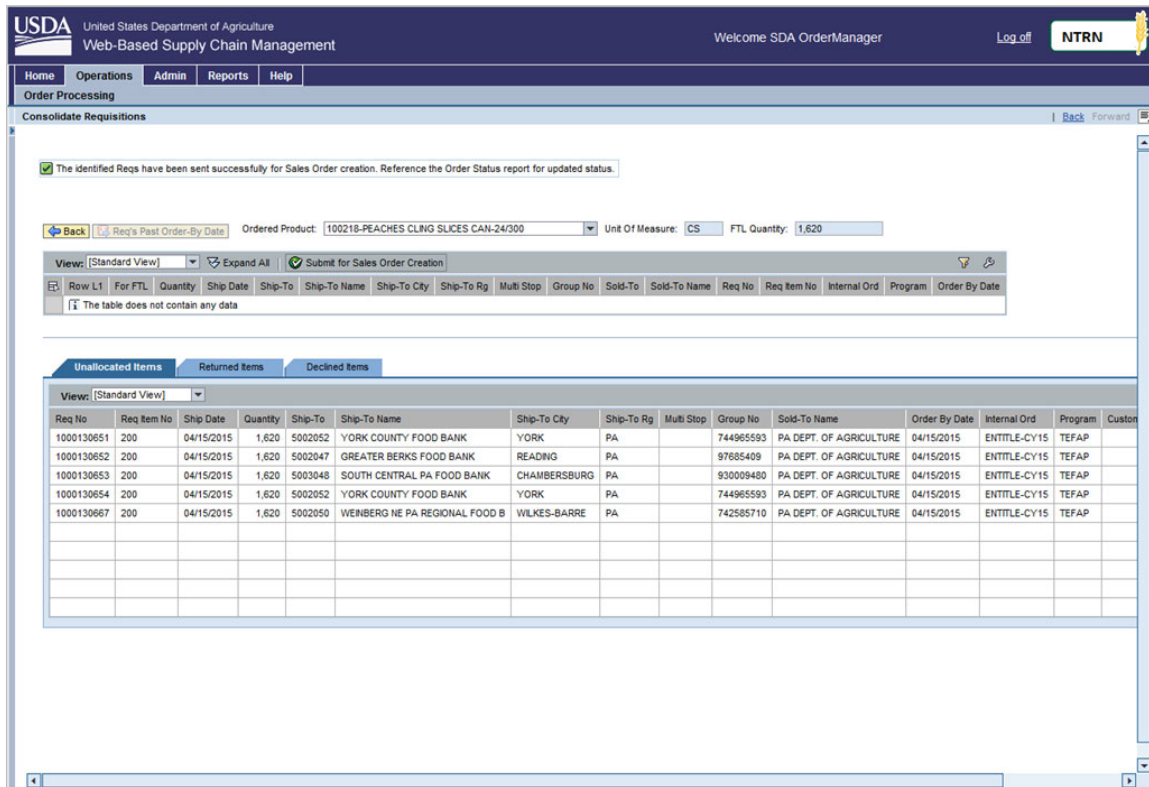
20. View the confirmation message: "The identified reqs have been sent successfully for Sales Order creation. Reference the Order Status Report for updated status." This confirms there were no errors updating the requisition lines.

We will now go over the process of submitting requisitions past order-by date to the consolidation workbench.

(Note) Note, when a user from your SDA organization is working with a specific material on the *Order Consolidation* screen, that material will be locked for editing. Another user from your SDA may not make changes to requisitions that contain this material at the same time. Only one user can make changes to a specific material at a time. If you arrive at the *Order Consolidation* screen for a material while another user is already in the process of consolidating the same material, you will receive an error message which will tell you the User ID that is currently consolidating this material. You can then speak to the user outside of WBSCM and find out when the screen will be available for your changes.

Another error message you may receive indicates that the requisitions are being updated in the background process. You will receive this message if any line item on the requisition is currently undergoing processing (e.g., requisition update or sales order creation). If you receive this message, you will need to return to the screen at a later time to process the entries. The average wait time varies with the number of reqs.

Whenever you submit a proposed order, you must exit the *Order Consolidation* screen for the material - either by performing a different transaction, logging out of WBSCM, or beginning consolidation for a different material. After submission, that material will remain locked until the

order is created.

Image: Consolidate Requisitions Screen

21. Since the ***Req's Past Order-By Date*** button is grayed out for this material, we know that this material does not have any requisitions that have passed the order-by date. We will need to select a different material. Click ⬛100002-CHEESE CHED WHT SHRED BAG-6/5 LB⬛ (the **10002-CHEESE CHED WHT SHRED BAG-6/5 LB** option).

Image: Consolidate Requisitions Screen

22.   Click (the **Req's Past Order-By Date** button) to view requisitions that
have passed the order-by date.

Image: Consolidate Requisitions Screen

23.   All requisitions that have an order-by date in the past are displayed. Scroll to the right to view additional fields.

(Note) Fields that are displayed are the Req No, Req Item No, Quantity, Ship-To Date, Unit, Ordered Product, Internal Ord, Sold-To, Product Description, Program, Functional Area, Ship-To Name, Ship-To, City, Rg, Order By Date, Group No, Split Ship, Customer, and Sold-To Name. Refer to Steps 6-7 for definitions of these fields.

Image: Consolidate Requisitions Screen

24. Scroll back to the left of the screen.

Image: Consolidate Requisitions Screen
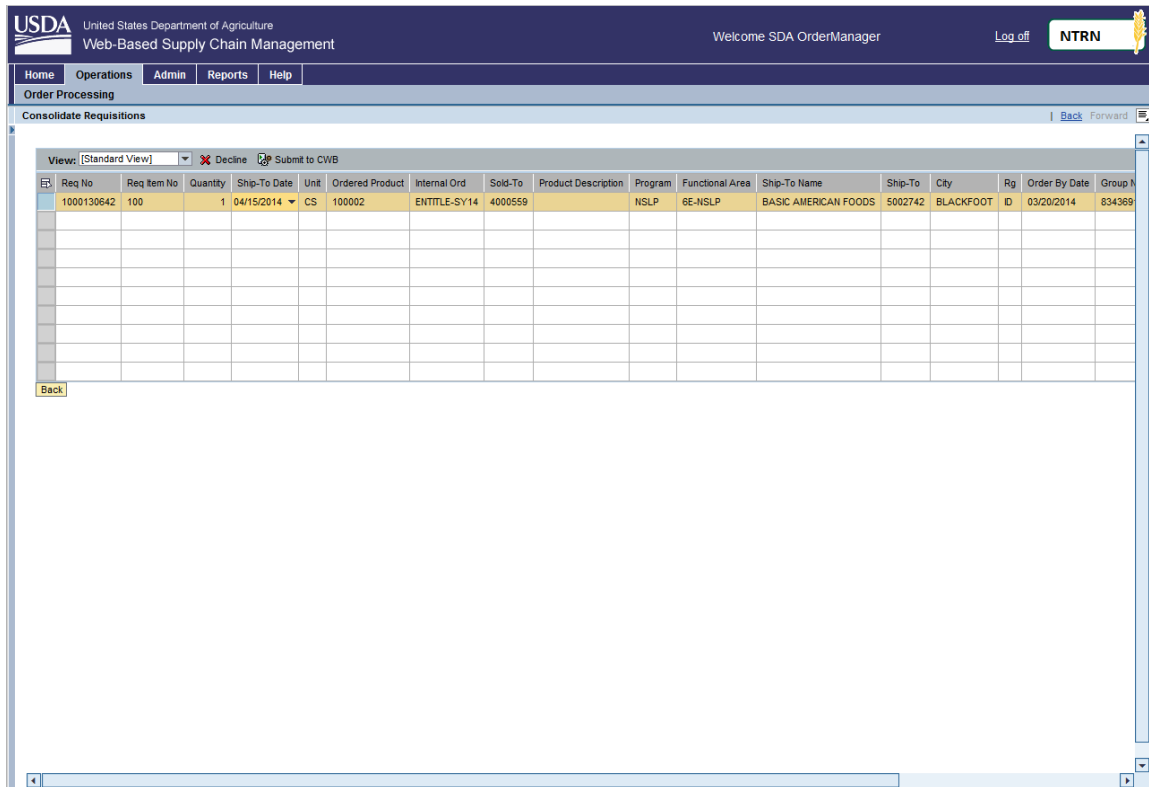
25. In the **Ship-To Date** field, click on the **Dropdown** button.

(Note) In order to move these requisitions to the consolidation workbench, you are required to change the Ship-To Date field to a future date. If you do not change the Ship-To Date to a future date, you will get the error: "Select future date for the following Requisitions : XXXXXXXXXX-XXX".

Image: Consolidate Requisitions Screen
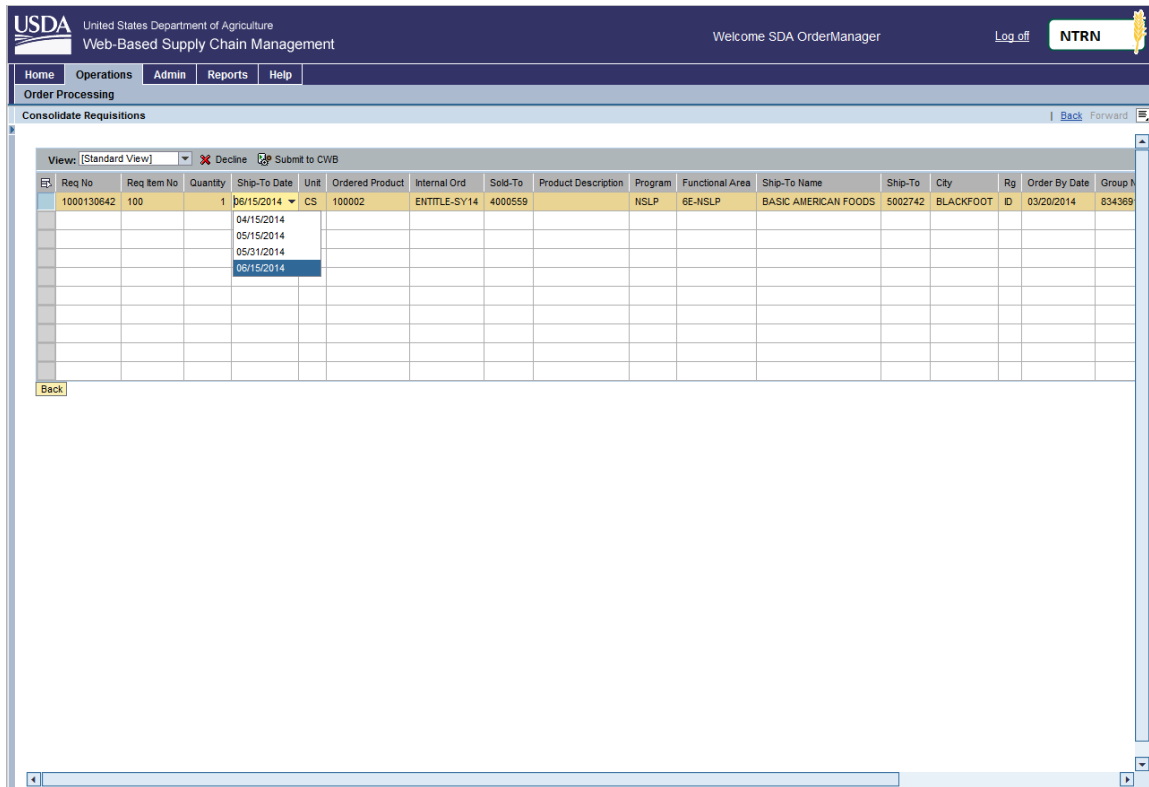
26. From the Dropdown list, select 06/15/2014 (the **06/15/2014** option).

(Note)There may be no ship-to dates available and therefore the order may need to be declined which is the same as cancelling the order.
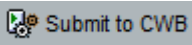
Image: Consolidate Requisitions Screen
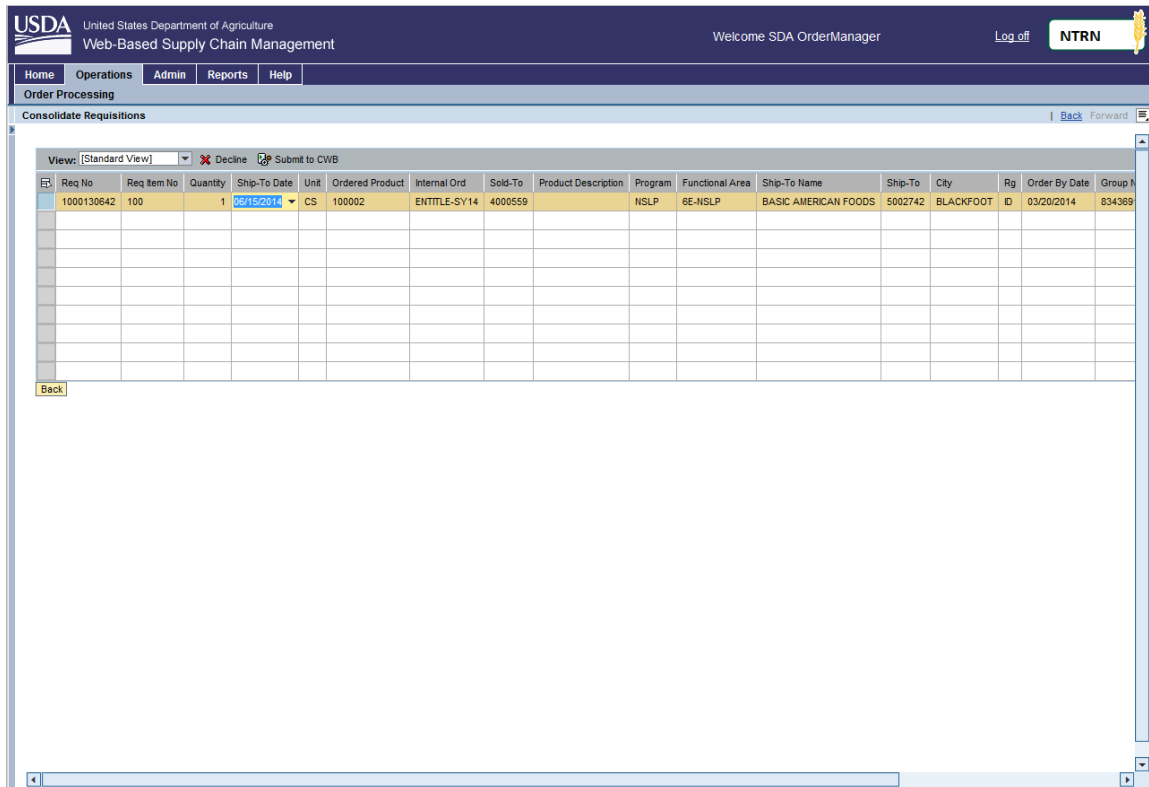
27. Select the **blue** box beside the requisition you wish to submit to the consolidation workbench.

Image: Consolidate Requisitions Screen
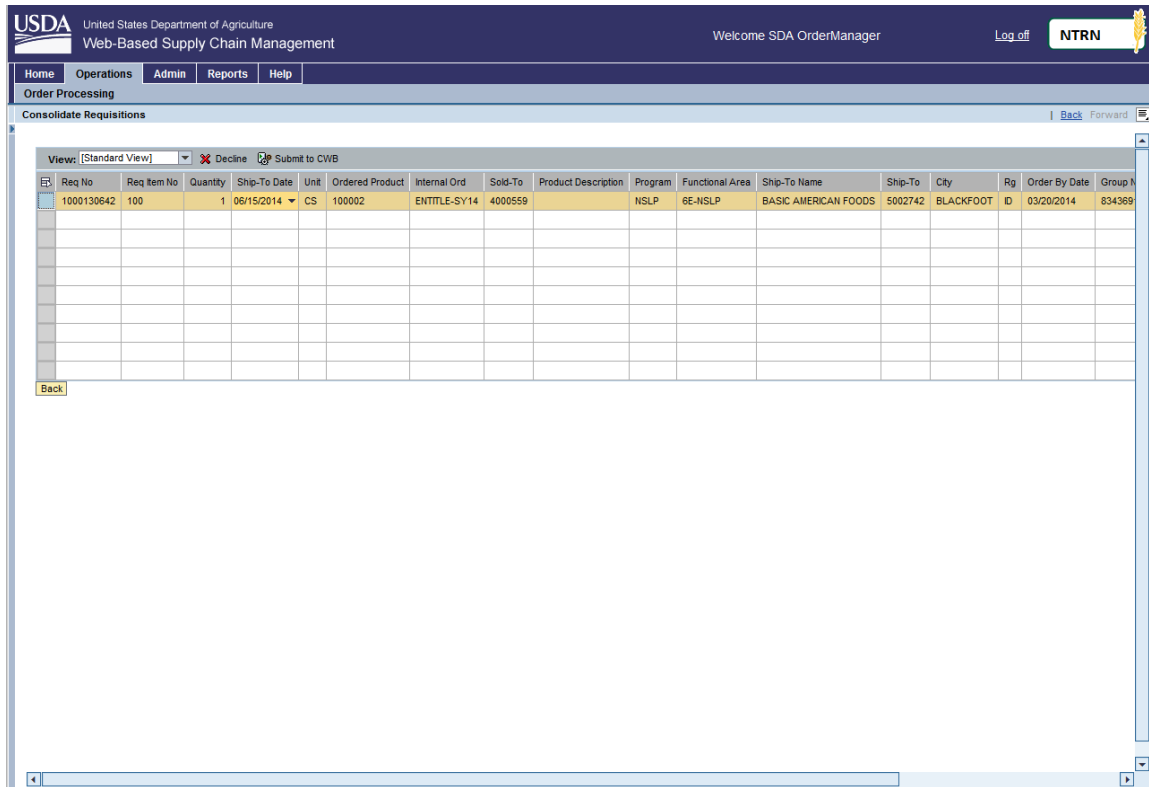
28. Click [Submit to CWB] (the **Submit to CWB** button).

(Note) When you successfully submit a requisition past order-by date to the consolidation workbench, the requisition will disappear from the Requisitions Past Order-By Date screen and will reappear in the consolidation workbench.

Image: Consolidate Requisitions Screen
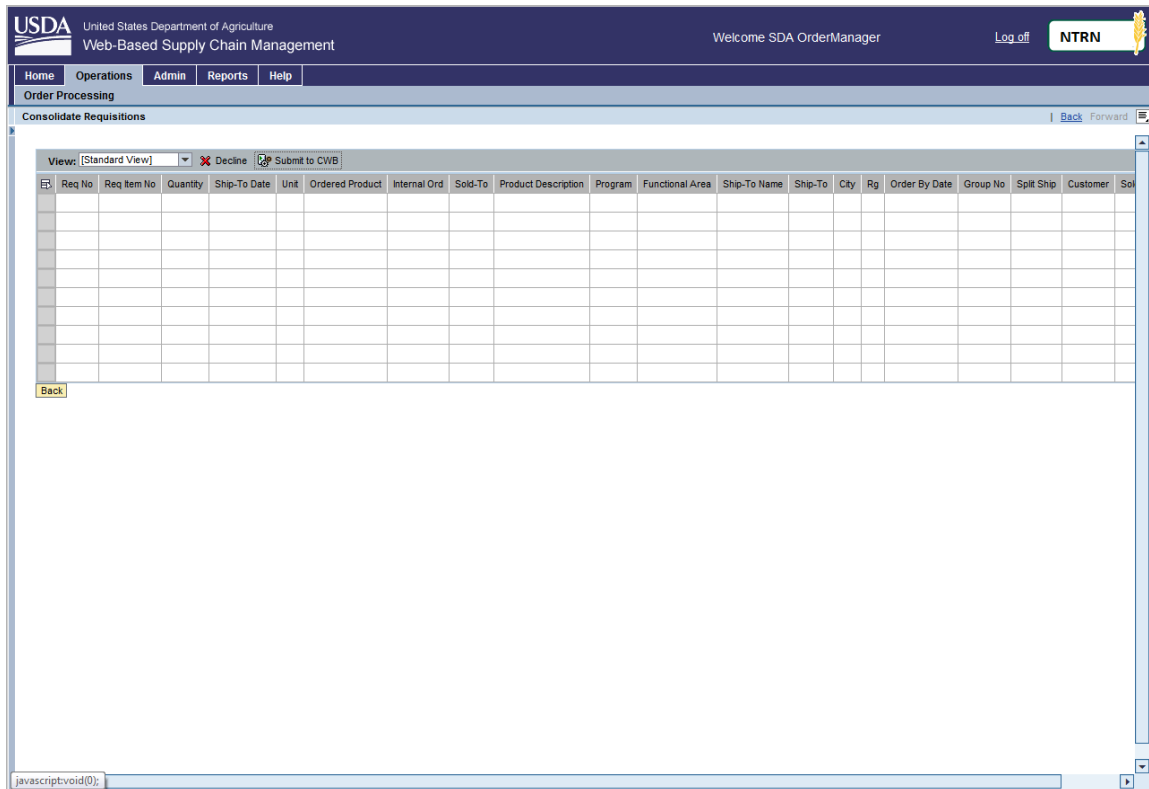
29. Now, we want to decline a requisition past its order-by date. Click [Back] (the **Back** button) to return to the Consolidate Requisitions screen.

Image: Consolidate Requisitions Screen
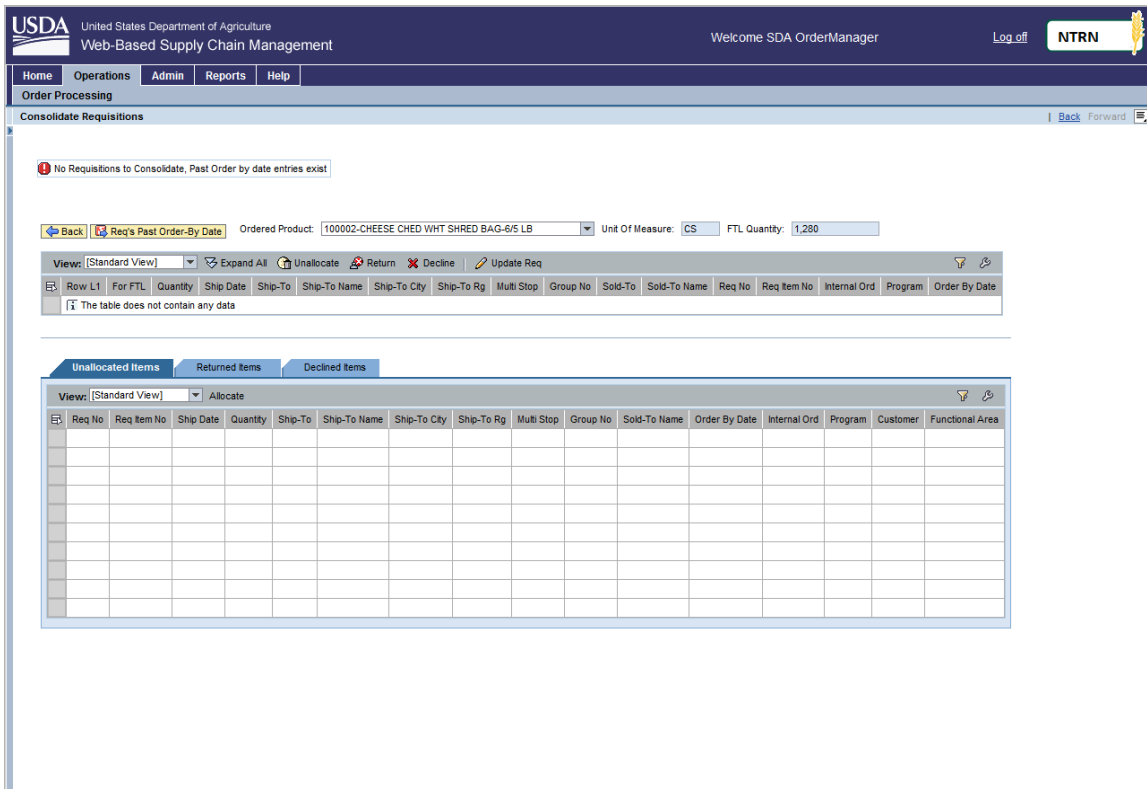
30.   Click control In the **Ordered Product** field, click on the **Dropdown** button to select a product. Select the material you wish to consolidate from the dropdown list. In this case, we selected 100002-CHEESE CHED WHT SHRED BAG-6/5 LB (the **100046-EGGS WHOLE FRZ CTN-6/5 LB** option).
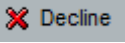
Image: Consolidate Requisitions Screen
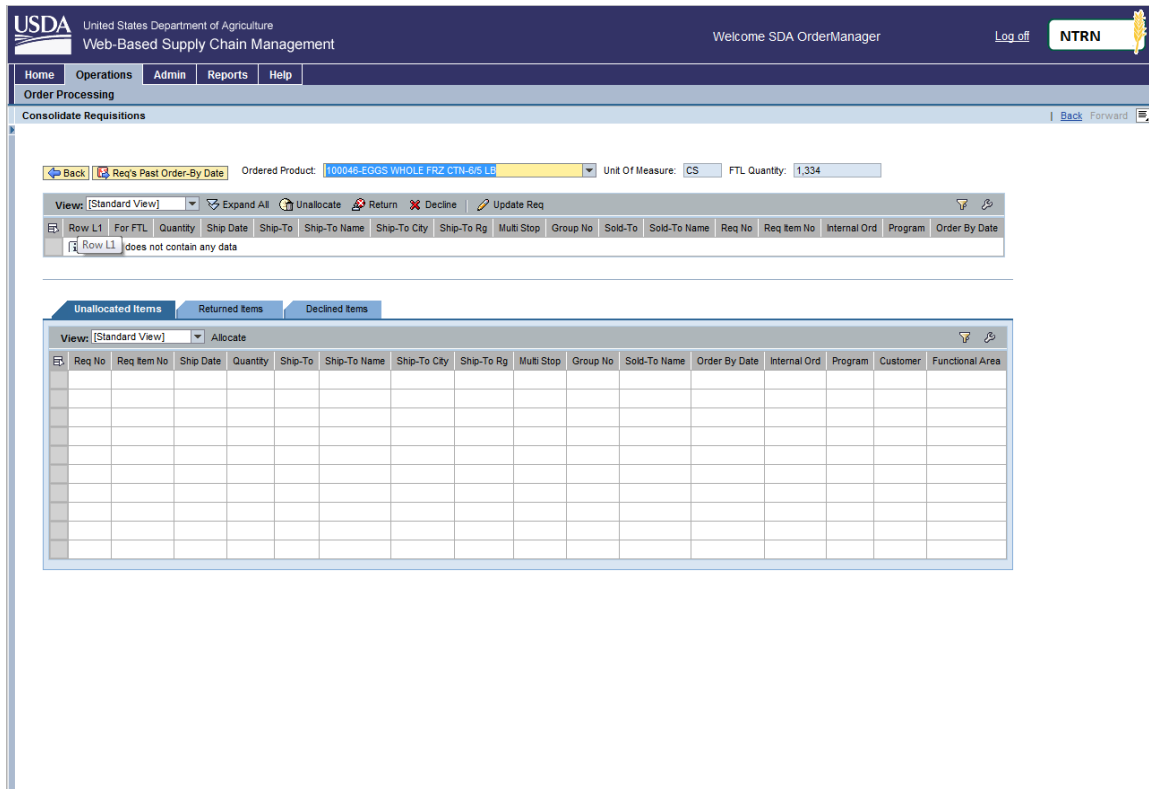
31.   Click (the **Req's Past Order-By Date** button) to view requisitions that have passed the order-by date

Image: Consolidate Requisitions Screen

Req No	Req Item No	Quantity	Ship-To Date	Unit	Ordered Product	Internal Ord	Sold-To	Product Description	Program	Functional Area	Ship-To Name	Ship-To	City	Rg	Order By Date	Gr
1000127663	600	20	01/15/2014	CS	100046	ENTITLE-SY14	4003548		NSLP	6E-NSLP	KEYCO DISTRIBUTORS	5000568	WILKES-BARRE	PA	10/21/2013	59
1000128515	300	4	01/15/2014	CS	100046	ENTITLE-SY14	4003281		CACFP	6E-CACFP	KEYCO DISTRIBUTORS	5000568	WILKES-BARRE	PA	10/09/2013	59
1000128515	2100	10	01/15/2014	CS	100046	ENTITLE-SY14	4003281		CACFP	6E-CACFP	KEYCO DISTRIBUTORS	5000568	WILKES-BARRE	PA	10/09/2013	59
1000128759	300	50	01/15/2014	CS	100046	ENTITLE-SY14	4004002		NSLP	6E-NSLP	KEYCO DISTRIBUTORS	5000568	WILKES-BARRE	PA	10/21/2013	59
1000127382	800	2	01/15/2014	CS	100046	ENTITLE-SY14	4003067		NSLP	6E-NSLP	REINHART FOOD SERVICE	5002588	COAL TOWNSHIP	PA	10/21/2013	15
1000128091	100	30	01/15/2014	CS	100046	ENTITLE-SY14	4001269		NSLP	6E-NSLP	REINHART FOOD SERVICE	5002588	COAL TOWNSHIP	PA	10/21/2013	15
1000128761	1100	4	01/15/2014	CS	100046	ENTITLE-SY14	4003299		NSLP	6E-NSLP	REINHART FOOD SERVICE	5002588	COAL TOWNSHIP	PA	10/21/2013	15
1000119802	100	10	01/15/2014	CS	100046	ENTITLE-SY14	4003316		NSLP	6E-NSLP	IMLER'S POULTRY	5003534	DUNCANSVILLE	PA	10/21/2013	72
1000127079	1300	2	01/15/2014	CS	100046	ENTITLE-SY14	4003616		NSLP	6E-NSLP	IMLER'S POULTRY	5003534	DUNCANSVILLE	PA	10/21/2013	72
1000127221	400	3	01/15/2014	CS	100046	ENTITLE-SY14	4004305		NSLP	6E-NSLP	IMLER'S POULTRY	5003534	DUNCANSVILLE	PA	10/21/2013	72

32.   Select the **blue** box beside the requisition you wish to decline. Click [Decline] (the **Decline** button).

(Note) When a requisition is declined, it will also cancel the line item for this material.

Image: Consolidate Requisitions Screen

33. Click [Back] (the **Back** button) to return to the Consolidate Requisitions Screen.

(Note) Notice the confirmation message: "Requisition Items Updated Successfully".

Image: Consolidate Requisitions Screen
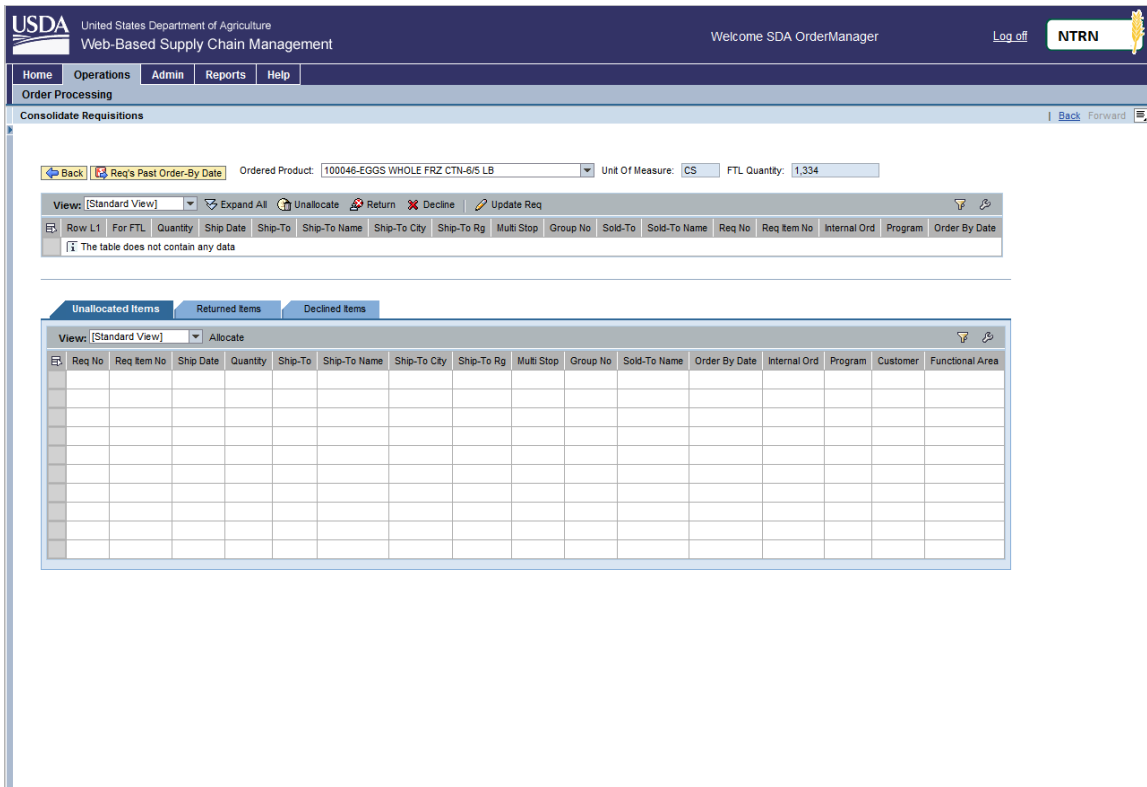
34. To select the material you wish to consolidate, click on the **Ordered Product** field **Dropdown** button. In this case, we selected (the 100046-EGGS WHOLE FRZ CTN-6/5 LB option). Notice the requisition that was submitted to the consolidation workbench is now displayed.

Image: Consolidate Requisitions Screen

35.   Scroll to the right of the screen to display additional fields. You can confirm this requisition by validating the Req No and Req Item No.

Image: Consolidate Requisitions Screen
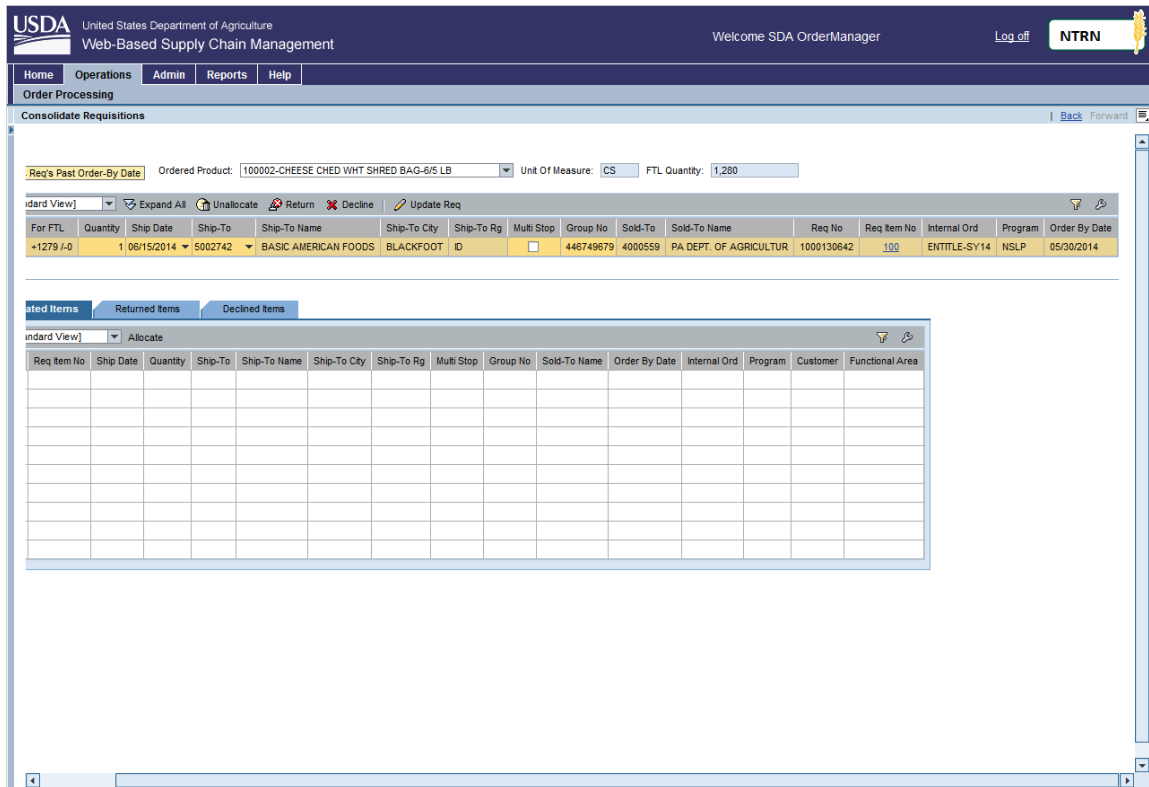
36. Click [Update Req] (the **Update Req** button) to save your changes.

(Note) If you do not click the Update Req button, your requisition that was moved to the consolidation workbench will return to the Req's Past Order-By Date button. You must click the Update Req button to save your changes and ensure your requisition stays on the consolidation workbench.

Image: Order Consolidation Pop Up
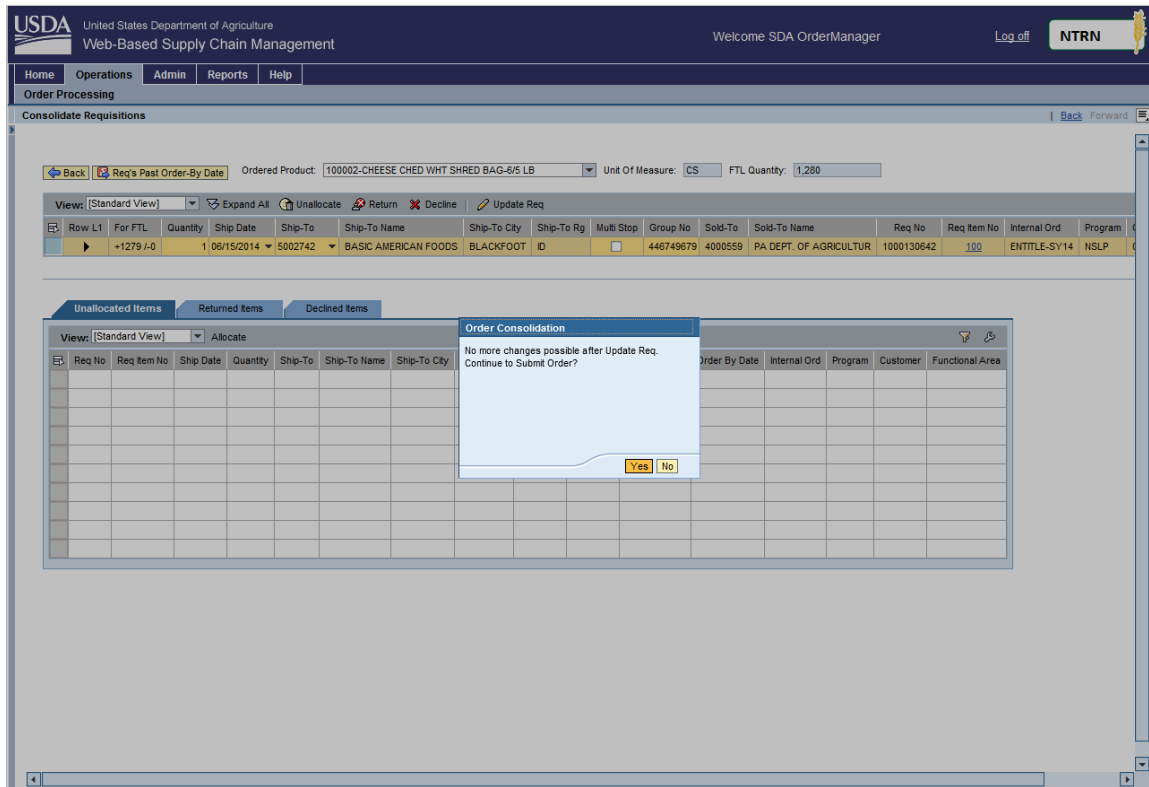
37. Click [Yes] (the **Yes** button) to confirm. After you have completed this step, repeat steps 18-19 to submit your requisitions for sales order creation.

38. You have completed this transaction.

RESULT

The transaction has been successfully completed.

PROCESS OVERVIEW

Purpose

The purpose of this transaction is to return or decline domestic requisitions. Order Managers from State Distributing Agencies (SDAs), Co-ops and Indian Tribal Organizations (ITOs) receive domestic requisitions from their Recipient Agencies (RAs). They are tasked with consolidating these requisitions along with any requisitions they create in order to make Sales Orders with full truckloads.

SDAs/Co-ops/ITOs should **Return** a requisition if there is a change that they would like the Sold-To Party (RA) to make. This feature returns the requisition to the RA with the *Returned by Co-Op/Returned by SDA* status. SDAs/Co-ops/ITOs should **Decline** a requisition if it was entered incorrectly, duplicate requisitions were accidentally created, or there is not enough demand to place a sales order for that commodity and delivery date. This feature will cancel the requisition.

Process Trigger

Perform this transaction to return or decline domestic requisitions.

Prerequisites

- Domestic requisitions with a status of Ready for Approval, must exist in WBSCM.
- Requisitions must be from an RA/Co-op or SDA/ITO as part of your SDA/ITO organization.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab ➔ **Order Processing** tab ➔ **Order Management** folder ➔ **Consolidate Requisitions**

Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - A **Conditional** field: an entry that becomes required as a result of entering something previous to it, which then deems it required
  - An **Optional** field: you may enter information in an optional field, but an entry is not required for the completion of the transaction
- Refer to WBSCM Portal Basic Navigation course for tips on creating favorites, performing searches, etc.
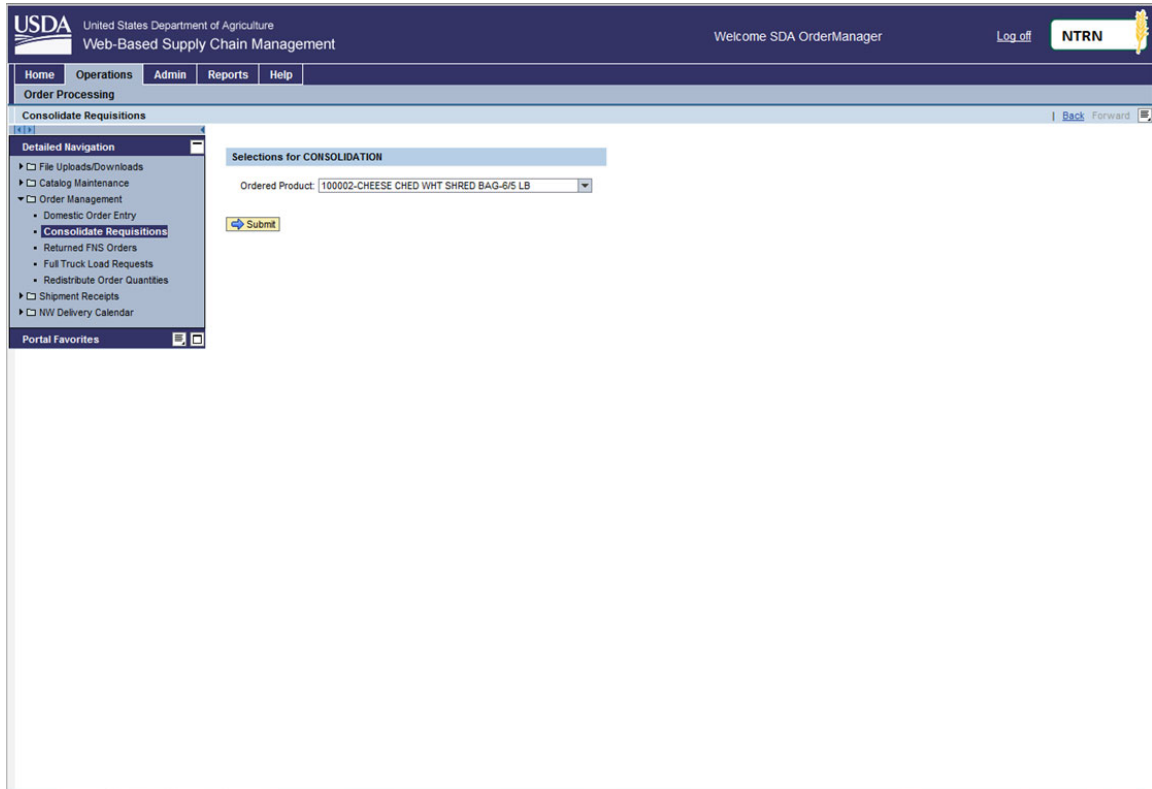
Reminders

- Remember to check your work
- Refer to the Help Option in the Portal for further assistance. Screenshot below shows the Help Option icon in the Portal:

PROCEDURE

1. Start the transaction using the Portal path: **Operations** tab ➔ **Order Processing** tab ➔ **Order Management** folder ➔ **Consolidate Requisitions**

Consolidate Requisitions Screen
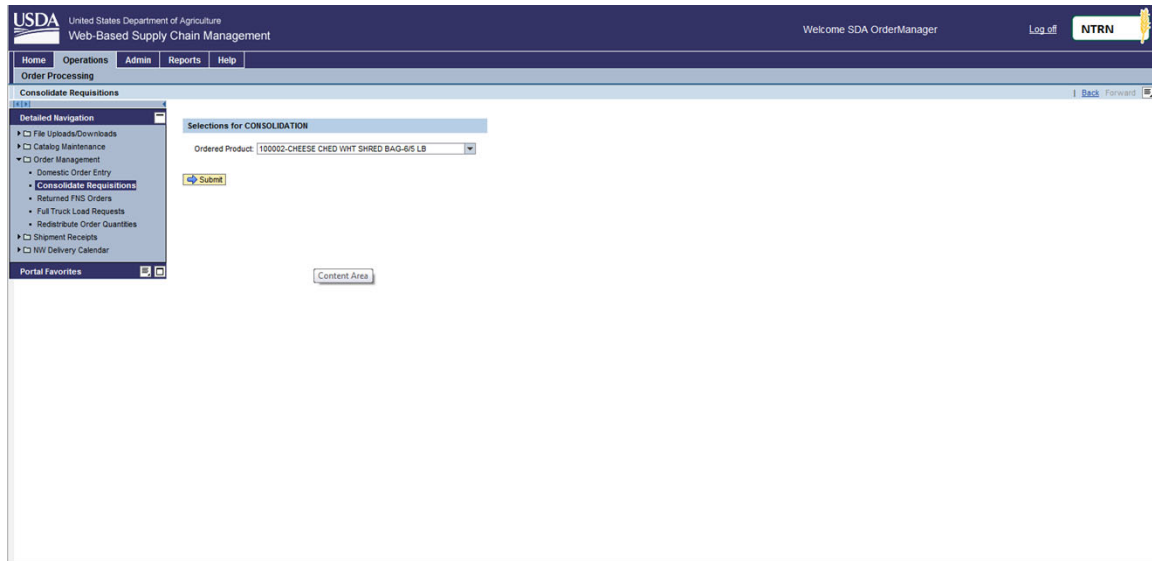
2. Click ◀ (the **Hide Navigator** arrow) to minimize the Portal menu. Note that you can do this with any transaction in WBSCM - not just fulfillment transactions.
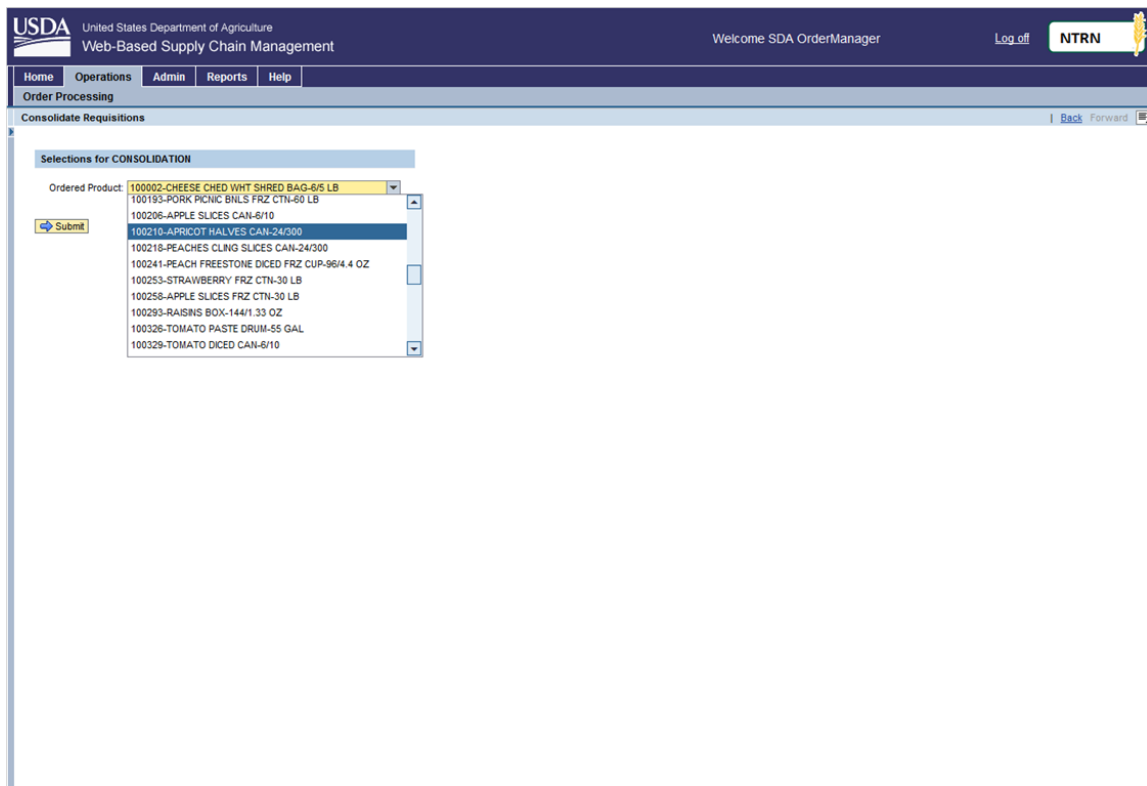
(Note) The steps to **Return** and to **Decline** a requisition are the same with the exception of clicking either the *Return* button or the *Decline* button.

Consolidate Requisitions Screen
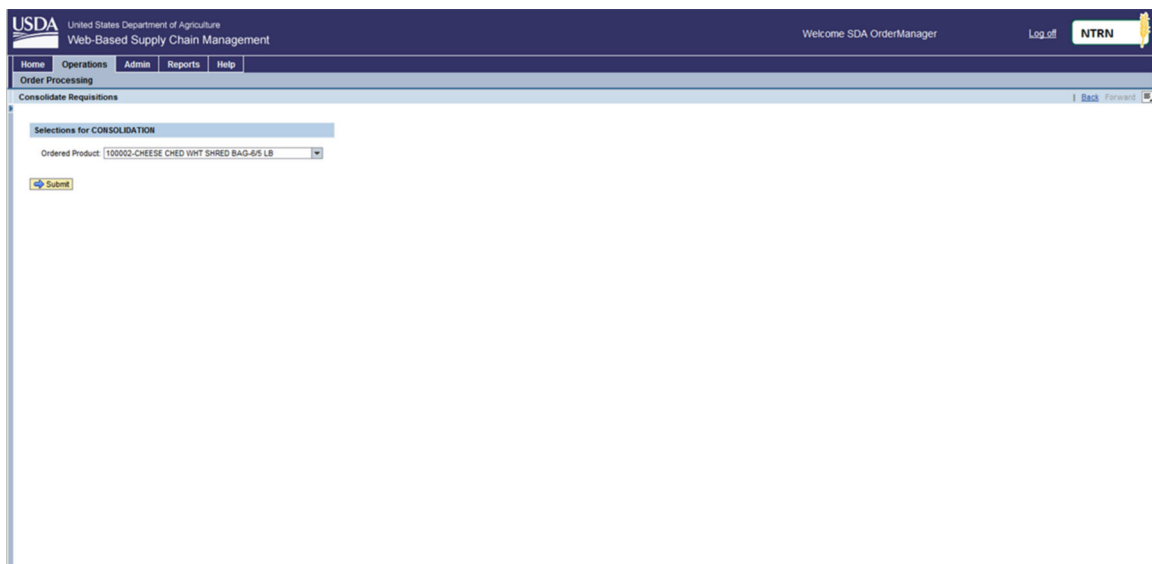
3. Click ▼ (the **Dropdown** button) in the *Ordered Products* field to select the commodity that you wish to return.

Consolidate Requisitions Screen
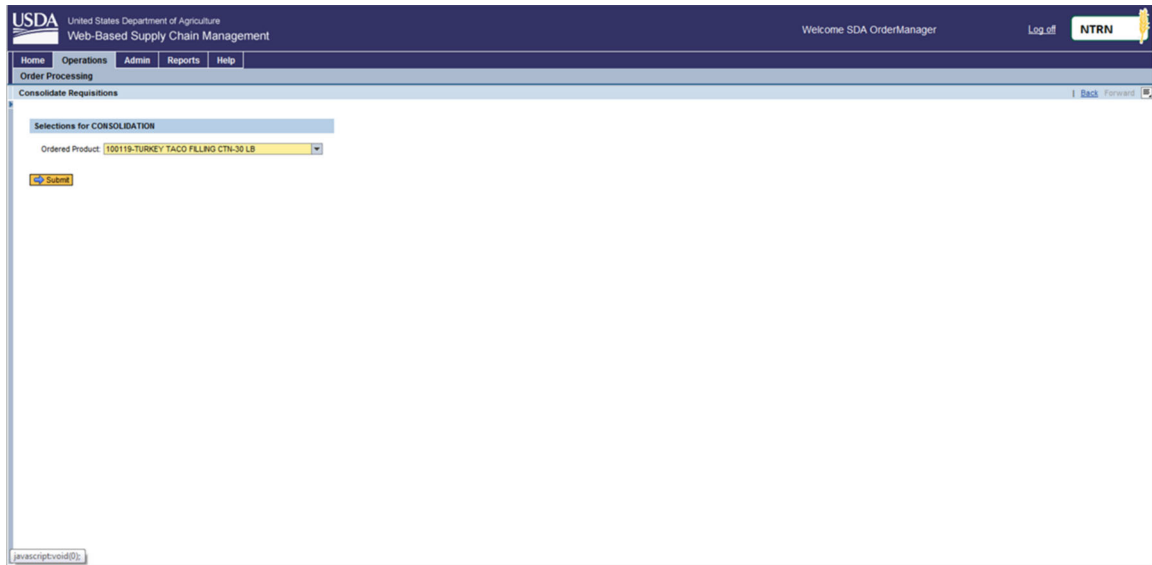
4. Click [Submit] (the **Submit** button).

Consolidate Requisitions Screen
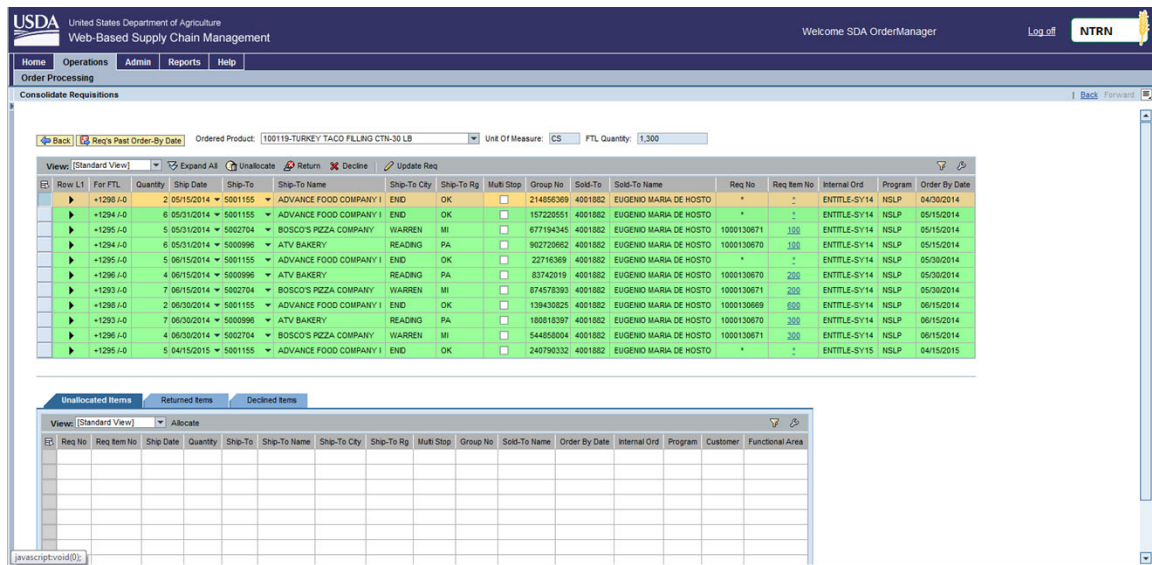
5. After RAs, Co-ops, SDAs, or ITOs submit their requisitions: WBSCM automatically consolidates all requisitions by material (see previous screen shot) ship date, and ship-to location. For example, all requisitions for the same ship-to location that are scheduled to ship on 9/30/2013 will be displayed beneath one proposed order (a proposed order is indicated by a green line item). Scroll to the right to display additional columns.

Click [▶] (the **Dropdown** button) to display the proposed requisition consolidation.

Consolidate Requisitions Screen
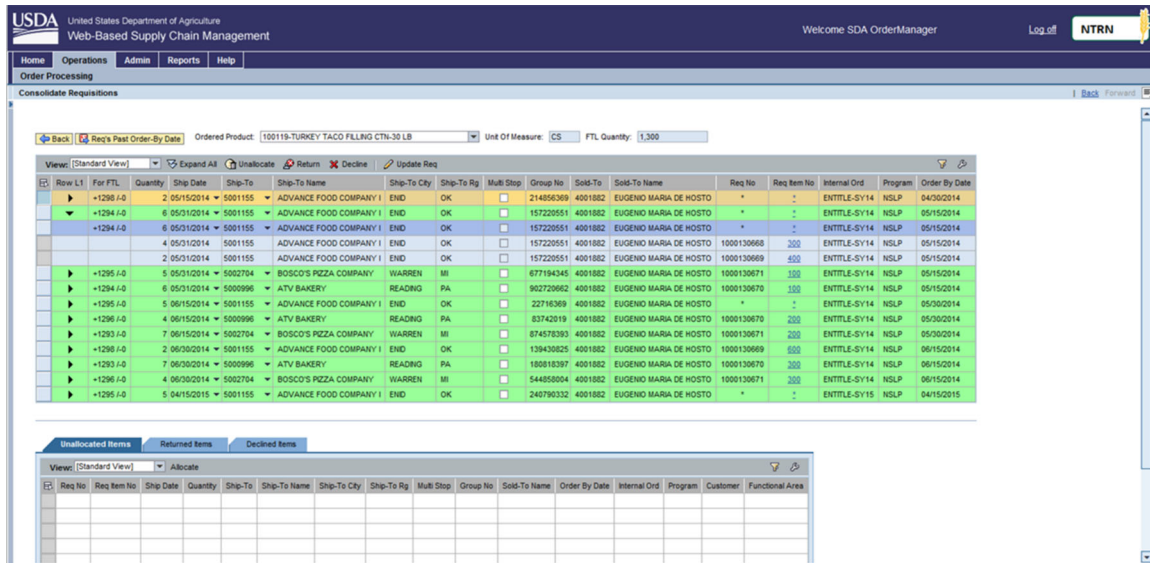
6. Click ▢ (the **Blue Box** button) to next to requisition, or proposed order that you would like to return.

(Note) When you select the blue box for a proposed order (green line), the white line items beneath it will automatically be selected as well. If you have a change that applies to all the requisitions within the aggregated group, you do not need to expand the row. Simply making changes the aggregated line (e.g., Quantity change, Ship-to change, Ship Date change) will update all associated requisitions within the aggregated group.

If you wish to select all the line items on the screen, instead of selecting each individually, click ▤ (the **Table Selection Menu** button) and click the **Select All** option. You can also select the **Deselect all** option to deselect all line items.

If you wish to select multiple consecutive rows, hold down the *Shift* key and select the beginning and end row boxes. If you wish to select non-consecutive rows, hold down the *Ctrl* key and select each blue box.

Also note that you do not need to select any rows unless you are declining, returning or unallocating requisitions.

Consolidate Requisitions Screen

7. Click [Return] (the **Return** button) to move the requisition to the **Returned Items** tab in the workbench.

Consolidate Requisitions Screen

8. Click [Update Req] (the **Update Req** button) to update the entire workbench. Returned line items do not need to be highlighted for the update to occur.

> (Note) After clicking the **Update Req** button, you will no longer be able to make changes to the proposed order unless you exit and reenter the workbench without submitting your entries for order creation. You do not have to submit requisitions for order creation at this time, but changes will be retained.

Consolidate Requisitions Screen

9. Click [Yes] (the **Yes** button) to confirm the requisition return.

Consolidate Requisitions Screen

10. A confirmation message displays - Requisitions submitted for update in Background Task!

The requisition will be sent back to the RA with the status: *Returned by Co-Op/Returned by SDA.*

(Note) The requisition is still located in the Returned Items tab, but can no longer be selected for changes. Once you leave the Consolidation Work Bench, the returned items will no longer display.

Consolidate Requisitions Screen

11. Use Steps #12 - #18 to **Decline** a requisition.

Click button ▶ (the **Dropdown** button) to display the proposed requisition consolidation.

Consolidate Requisitions Screen

12. Click [ ] (the **Blue Box** button) to next to requisition, or proposed order that you would like to decline.

> (Note) When you select the blue box for a proposed order (green line), the white line items beneath it will automatically be selected as well. If you have a change that applies to all the requisitions within the aggregated group, you do not need to expand the row. Simply making changes the aggregated line (e.g., Quantity change, Ship-to change, Ship Date change) will update all associated requisitions within the aggregated group.
>
> If you wish to select all the line items on the screen, instead of selecting each individually, click
>
> [ ] (the **Table Selection Menu** button) and click the **Select All** option. You can also select the **Deselect all** option to deselect all line items.
>
> If you wish to select multiple consecutive rows, hold down the *Shift* key and select the beginning and end row boxes. If you wish to select non-consecutive rows, hold down the *Ctrl* key and select each blue box.
>
> Also note that you do not need to select any rows unless you are declining, returning or unallocating requisitions.

Consolidate Requisitions Screen

13. Click [✗ Decline] (the **Decline** button) to move the requisition to the **Declined Items** tab in the workbench.

Consolidate Requisitions Screen

14. Click ![Update Req] (the **Update Req** button) to update the entire workbench. Declined line items do not need to be highlighted for the update to occur.

(Note) After clicking the **Update Req** button, you will no longer be able to make changes to the proposed order unless you exit and reenter the workbench without submitting your entries for order creation. You do not have to submit requisitions for order creation at this time, but changes will be retained.

Consolidate Requisitions Screen

15. Click [Yes] (the **Yes** button) to confirm this transaction.

Consolidate Requisitions Screen

16. A confirmation message displays - Requisitions submitted for update in Background Task!

The requisition will be cancelled and the status of the requisition will change to *Cancelled.*

(Note) The requisition is still located in the **Declined Items** tab, but can no longer be selected for changes.

RESULT

You have returned or declined domestic requisitions.

PROCESS OVERVIEW

Purpose

The purpose of this transaction is to consolidate domestic requisitions to create a multi-stop domestic sales order. A multi-stop domestic sales order is where multiple requisitions will be combined on the same order, and they will be delivered to multiple locations. Order Managers from State Distributing Agencies (SDAs) and Indian Tribal Organizations (ITOs) receive domestic requisitions from their Recipient Agencies (RAs). They are tasked with consolidating these requisitions along with any requisitions they create in order to create full truckloads. SDAs and ITOs also can work together to consolidate their requisitions into full truckloads when they share bordering ship-to locations.

Process Trigger

Perform this transaction to consolidate domestic requisitions into multi-stop sales orders.

Prerequisites

- Domestic requisitions with a Ready for Approval must exist in WBSCM.
- Requisitions must be from an RA/Co-op or SDA/ITO as part of your SDA/ITO organization.

Portal Path

Follow the Portal path below to complete this transaction:

- Select the **Operations** tab ➜ **Order Processing** tab ➜ **Order Management** folder ➜ **Consolidate Requisitions**➜Consolidate Requisitions Screen

Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - o A **Conditional** field: an entry that becomes required as a result of entering something previous to it, which then deems it required
  - o An **Optional** field: you may enter information in an optional field, but an entry is not required for the completion of the transaction
- Refer to WBSCM Portal Basic Navigation course for tips on creating favorites, performing searches, etc.

Reminders

- Remember to check your work
- Refer to the Help Option in the Portal for further assistance.

PROCEDURE

1. Start the transaction using the Portal path: **Operations** tab ➜ **Order Processing** tab ➜ **Order Management** folder ➜ **Consolidate Requisitions**➜ Consolidate Requisitions Screen

Consolidate Requisitions Screen

2. Click ◀ (the **Hide Navigator** arrow) to minimize the Portal menu. Note that you can do this with any transaction in WBSCM - not just fulfillment transactions.

Consolidate Requisitions Screen

3. In the **Ordered Product** field, click ▼ (the **Dropdown** button) to select a product.

Consolidate Requisitions Screen

4. Select a material to consolidate from the dropdown list.

In this case, we selected 100210-APRICOT HALVES CAN-24/300 (the **100210-APRICOT HALVES CAN-24/300** option).

Consolidate Requisitions Screen

5. Click ➡ Submit (the **Submit** button) to submit your selection.

Consolidate Requisitions Screen

6. After RAs, Co-ops, SDAs, or ITOs submit their requisitions, WBSCM automatically consolidates all requisitions by material, which was shown on the previous sceen capture, ship date, and ship-to location. For example, all requisitions for the same ship-to location that are scheduled to ship on 04/15/2015 will be displayed beneath one proposed order (a proposed order is indicated by a green line item). Scroll to the right to display additional columns.

In this example, all proposed orders have the same ship-to date. However, they have different ship-to locations. This is an example of a multi-stop order where multiple requisitions will be combined on the same order, and they will be delivered to multiple locations.

Consolidate Requisitions Screen

7. In this step, we are copying the group number from one proposed order and pasting it to the other. Since the proposed orders do not have the same ship-to location, they will not automatically group. Using the group number, you can manually combine proposed orders with different ship-to locations.

Copy the Group Number 381207062 (**381207062)** of the WILKES-BARRE PA requisition.

Consolidate Requisitions Screen

8. Paste the Group Number (**381207062**) into the Group Number text box of the YORK PA and CHAMBERSBURG PA requisitions.

Press the **Enter** button your keyboard to process your entries.

(Note) After entering a new value in the **Group No** field, it is critical that you press **Enter** on your keyboard, as this will process the entries. If you do not press **Enter**, your changes may not be saved and you will need to redo them.

Consolidate Requisitions Screen

9. The three requisitions have been combined into a proposed Multi-Stop order.

Click ▶ (the **arrow** button) to expand a proposed order. This will display all of the requisitions that are a part of the proposed order.

Consolidate Requisitions Screen

10. The multi-stop checkbox will automatically be checked if you have grouped together aggregated lines to create a multi-stop. An asterisk marks fields where the requisitions have different information.

The user must select the *Multi-Stop* checkbox **manually** if it is a multi-stop between two states. This step is in addition to having to share group number with the other state user. The users for both states will need to communicate with each other to ensure that the same group number is used on both orders. See the *Consolidation for Multi-State Stop Job Aid* for more details on this process.

Consolidate Requisitions Screen
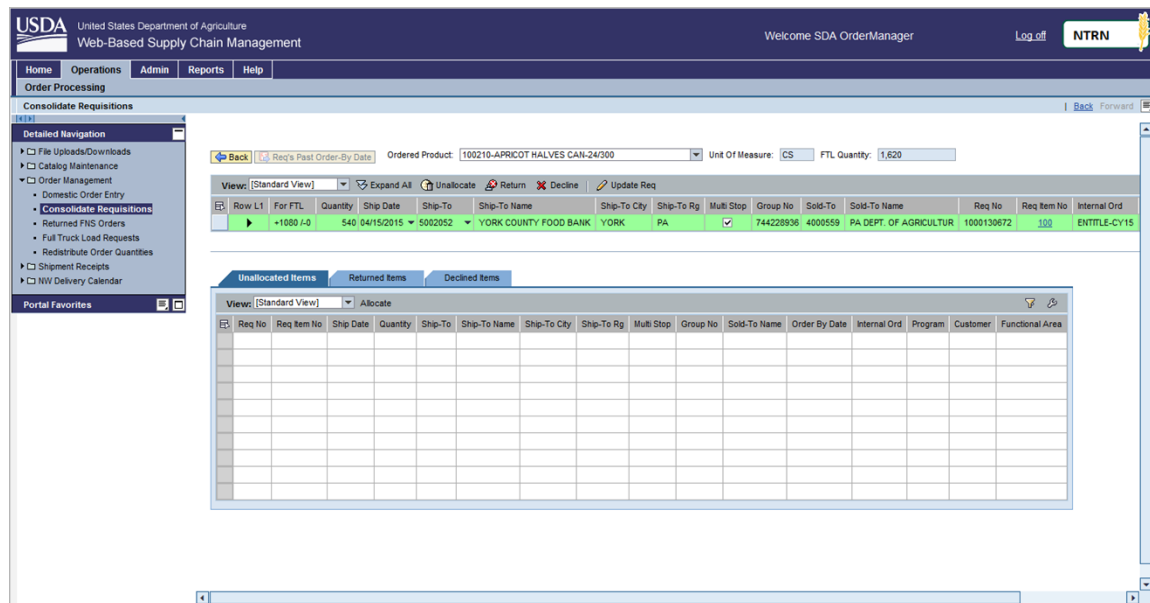
11. Click [Update Req] (the **Update Req** button) to update the requisitions with any changes.

(Note) You do not need to select records for update before clicking the *UpdateReq* button. All records with changes made in the workbench will be updated.

Clicking the **Update Req** button serves two purposes. First, it commits the updates to the requisitions you have made to the quantity, ship date, ship-to location, returned and declined line items. The second purpose is to confirm that you are done with the entries you are working on and are ready to submit for order creation or to save the changes you have made to the consolidation workbench. After clicking the **Update Req** button, you will no longer be able to make changes to the proposed order, unless you exit and reenter the workbench without submitting your entries for order creation. You do not have to submit requisitions for order creation at this time, but changes will be retained.

Consolidate Requisitions Screen

12. Click [Yes] (the **Yes** button) to confirm.

(Note) A confirmation message displays at the top of the screen indicating that the Requisitions have been submitted for update in the Background task.

Consolidate Requisitions Screen

13. Select the ⬜ **blue** box beside the proposed order(s) that you wish to submit for sales order creation. By selecting the blue box for each proposed order, the white line items beneath it will automatically be selected as well.

(Note) You can click 🔲 (the **Table Selection Menu** button) and choose the **Select All or Deselect All** option when you have a long list of requisitions or proposed line items to Update or Submit for Sales Order Creation.

Consolidate Requisitions Screen

14. After selecting the order(s), click (the **Submit for Sales Order Creation** button) to submit the proposed order(s).

> (Note) Notice the **Submit for Sales Order Creation** button is now visible on the screen. Use this button to submit your order for confirmation and processing. This button only displays after you have updated the requisition by clicking the **Update Req** button.
>
> Remember that the unallocated requisition remains unaffected, and is still in the queue at the bottom of the screen. When you exit the transaction, the unallocated requisitions will return to the Order Consolidation Workbench; they do not remain in the *Unallocated* queue.
>
> Returned requisitions go back to the Sold-To Party that submitted it. Generally you would return a requisition if there is a change that you would like the Sold-To Party to make. The requisition will be returned to the Sold-To Party when you have clicked the *Update Req* button. The Sold-To Party can make the corrections and then resubmit the requisition for processing.
>
> Declining a requisition will remove that line item from the proposed order. It will also cancel the line item for this commodity. Generally, the Decline feature will only be used when a requisition was entered incorrectly, duplicate requisitions were accidentally created, or there is not enough demand to place a sales order for that commodity and delivery date. The requisition is cancelled after you have clicked the *Update Req* button.

Consolidate Requisitions Screen

15. View the confirmation message: "The identified reqs have been sent successfully for Sales Order creation. Reference the Order Status Report for updated status." This confirms there were no errors updating the requisition lines.

You have completed this transaction.

RESULT

The transaction has been successfully completed.

PROCESS OVERVIEW

Purpose

The purpose of this transaction is to maintain full truck load requests in WBSCM. The *Full Truck Load and Transfer Requests* forum is a message board where State Distributing Agencies (SDAs) and Indian Tribal Organizations (ITOs) can communicate with one another regarding split shipments. It is best practice to list the material number, group number, and ship-to location in a forum post.

Process Trigger

Use this procedure to coordinate a split shipment with another SDA or ITO.

Prerequisites

- None

Portal Path

Follow either Portal path below to complete this transaction:

- **Home ➔ News and Alerts➔Full Truck Load and Transfer Requests** link
- **Operations ➔ Order Management** folder **➔Full Truck Load and Transfer Requests** link

Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
    - **Required (R)** – a mandatory field necessary to complete the transaction
    - **Optional (O)** – a non-mandatory field not required to complete the transaction
    - **Conditional (C)** – a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Portal Basic Navigation course for tips on creating favorites, performing searches, etc.

PROCEDURE

1. Start the transaction using either of the above Portal paths. In this example, **Home➔ News and Alerts** portal path is selected.

Image: News and Alerts Screen
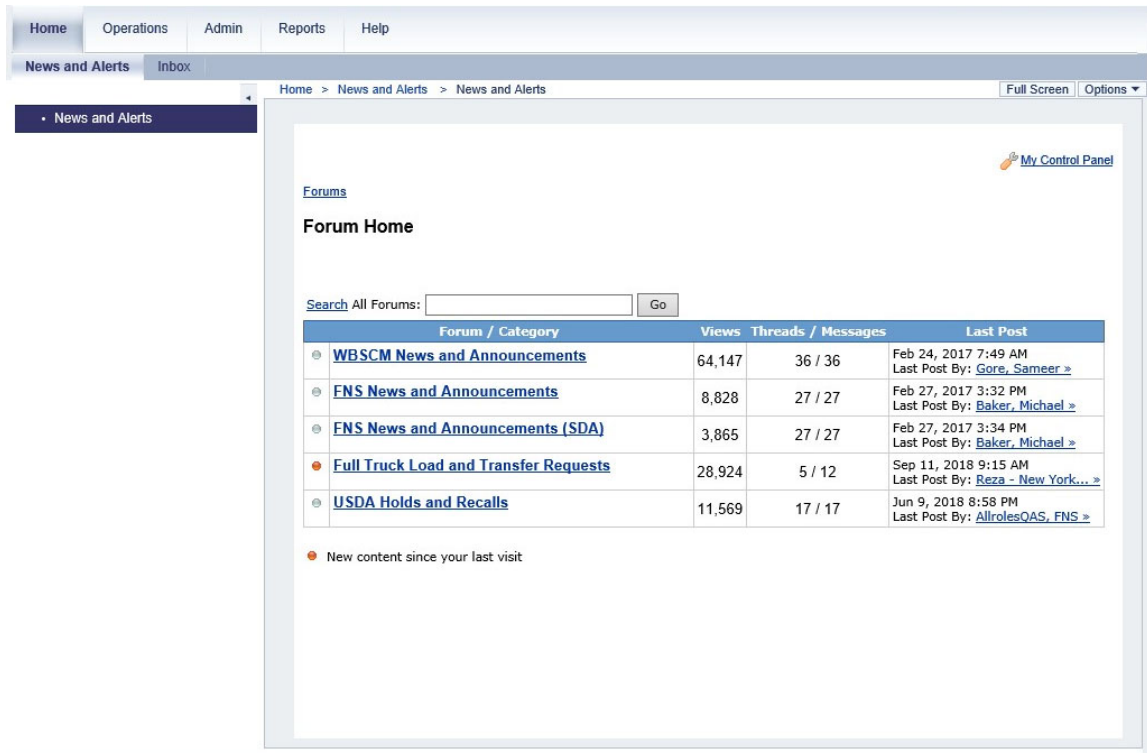
2. Click ◄ (the **Hide Navigator** arrow) to minimize the Portal menu. Note that this can be done with any transaction in WBSCM.

Image: News and Alerts Screen
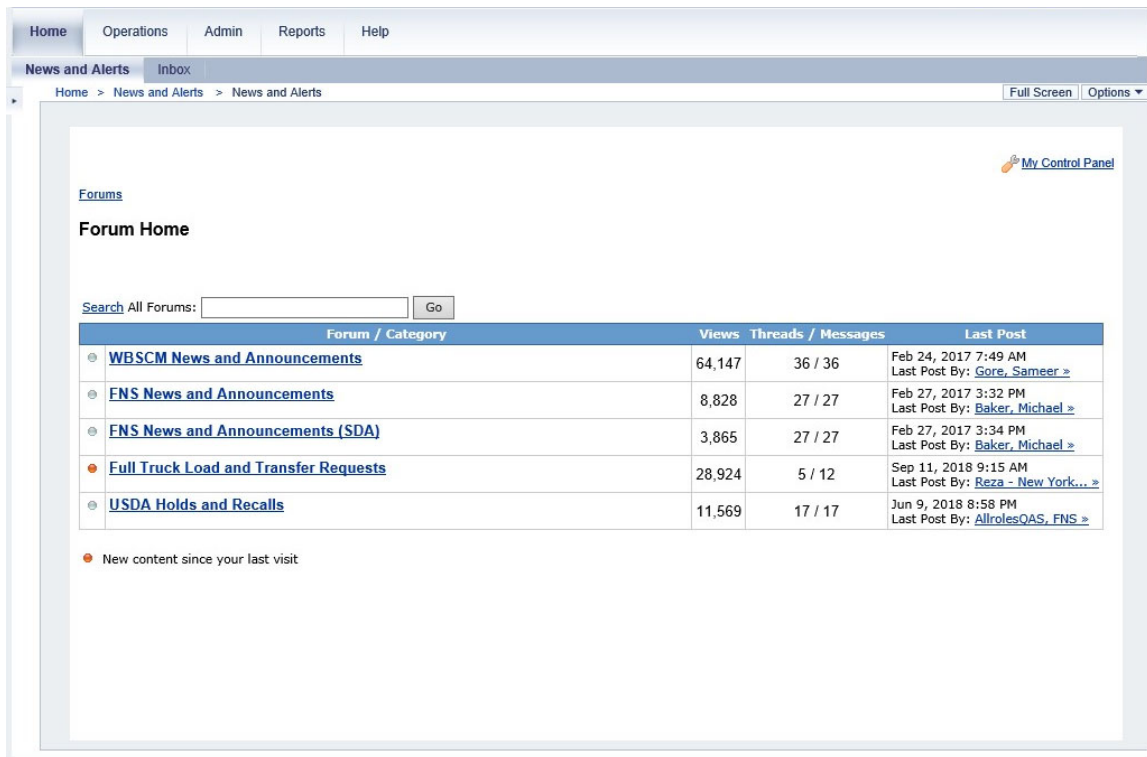
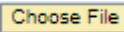
3. Click **Full Truck Load and Transfer Requests** (the **Full Truck Load and Transfer Requests** link) to open the *Full Truck Load and Transfer Requests* forum.

Image: News and Alerts Screen
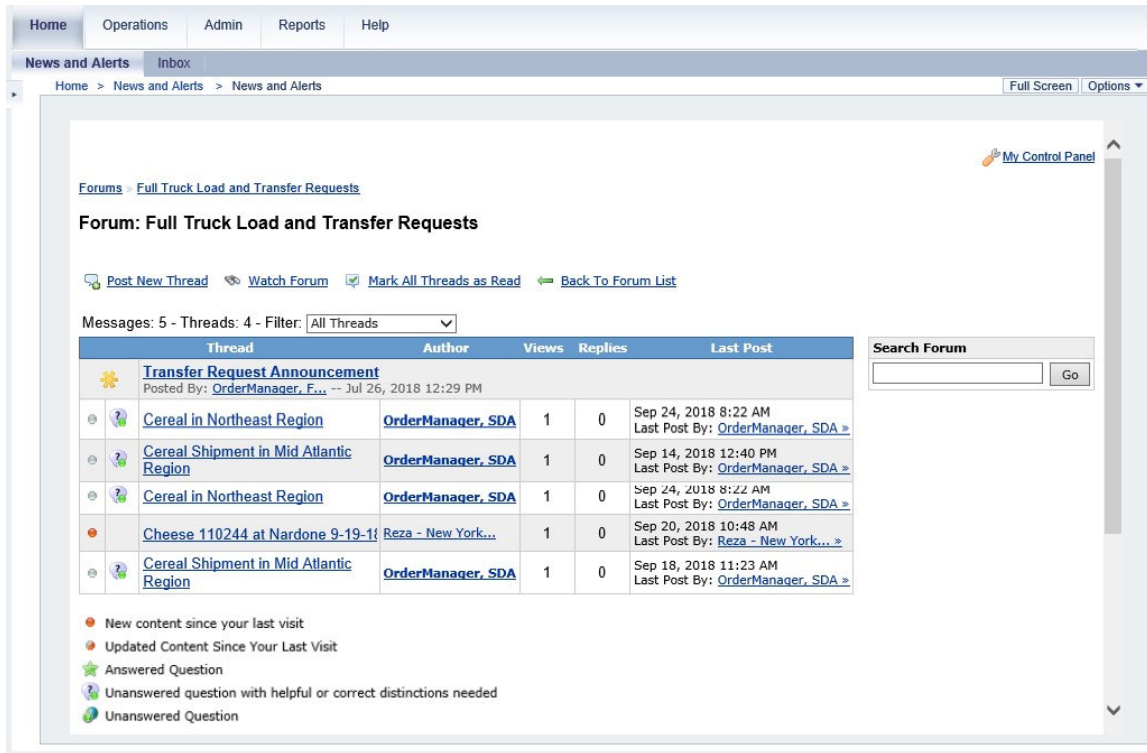
4. Click **Post New Thread** (the **Post New Thread** link) to add a new thread.

(Note) The benefit of posting a thread is that other SDAs or ITOs can respond to the post with questions or offers to split. It is also possible to post an announcement; however, an announcement does not allow others to reply.

Use the **Watch Forum** link to watch the forum. Whenever a response, new thread, or an announcement is posted, users will receive an email notification.

Use the **Search Forum** link to perform a search for keywords on the discussion forum.

For more information on WBSCM forums, refer to the **WBSCM Forums Notification Settings** job aid located at **Help ➜ Job Aids ➜ General Help ➜ WBSCM Forum Notification Settings** link.

Image: News and Alerts Screen

5. As required, complete/review the following fields:

Field	R/O/C	Description
Subject:	R	Subject of the message being posted to the forum. **Example:** Cereal Shipment in Northeast Region
Message:	C	Message being posted to the forum. This is a free text field that allows entry of a message. **Example:** Are you interested in splitting with us? We have 500 cases of cereal (material code 100530) going to Boston on 12/31/2018. We need someone to order 400 more cases in order to make a full truck. When you are consolidating, enter group number 50000193 to link your order with ours so that they go on the same truck.

Image: News and Alerts Screen
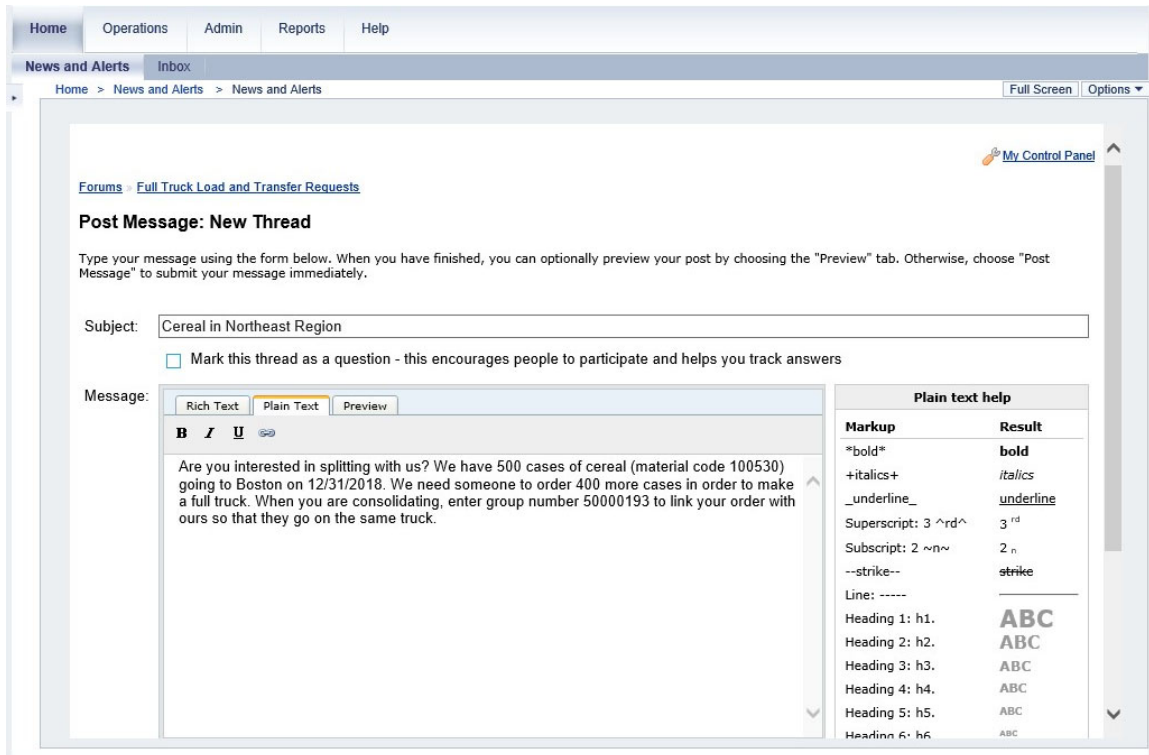
6. Select ☐ (the **"Mark this thread as a question - this encourages people to participate and helps you track answers"** check box).

7. Click ⌄ (the **Down** arrow) on the vertical scrollbar to scroll to the bottom of the page.

Image: News and Alerts Screen
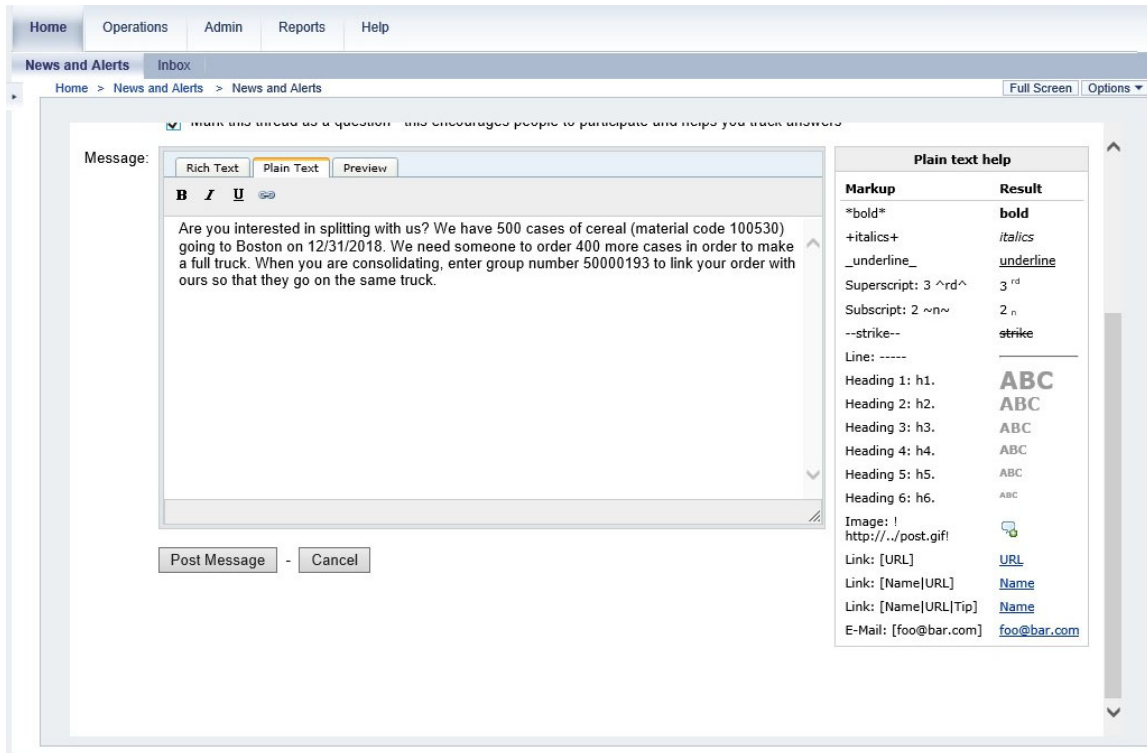
8. Click **Post Message** (the **Post Message** button).

Image: News and Alerts Screen
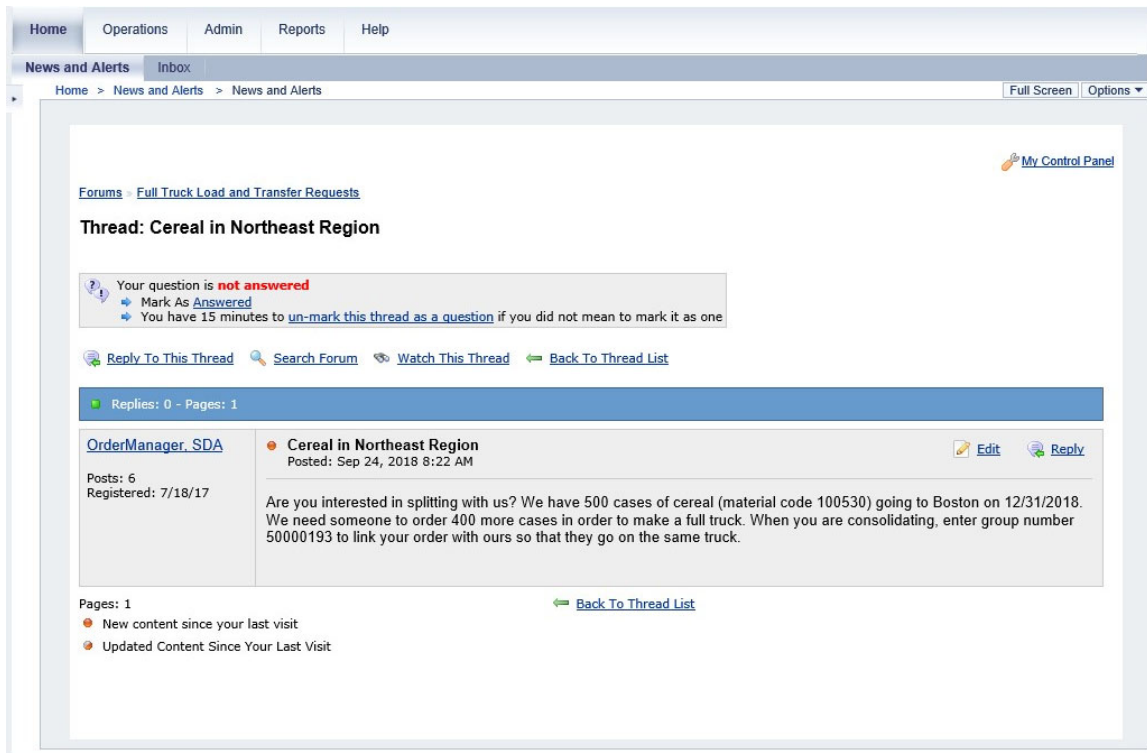
9.   The transaction is complete.

(Note) A thread will be deleted 90 days after the most recent post. This means that once the most recent post is 90 days old, the entire thread will be deleted. Each time there is a new post, the 90-day counter starts over.

Use the **Watch This Thread** link to receive an email notification whenever a response is posted. Use the **Back To Thread List** link to return to the *Full Truck Load Request* forum page. For more information on WBSCM forums, refer to the **WBSCM Forum Notification Settings** job aid located at **Help ➔ Job Aids ➔ General Help ➔ WBSCM Forum Notification Settings** link.

RESULT

A thread has been successfully posted on the *Maintain Full Truck Load and Transfer Requests* forum.

PROCESS OVERVIEW

Purpose

The purpose of this transaction is to update an SDA sales order by uploading sales order XML files to WBSCM.

Process Trigger

Use this procedure to upload an XML file containing updated information for one or multiple sales orders.

Prerequisites

- An XML file containing sales order information (such as valid Sold-To, Ship-To, correct delivery date, material ID, Program Code, Quantity, UOM, Entitlement/Bonus, Correlation ID) must be available to the SDA user.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab ➔ **Order Processing** tab ➔ **File Uploads/Downloads** folder ➔ **Upload SDA Sales Order** link to go to the *Upload SDA Sales Order* Screen

Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - **Required (R)** – a mandatory field necessary to complete the transaction
  - **Optional (O)** – a non-mandatory field not required to complete the transaction
  - **Conditional (C)** – a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Help site, *Frequently Referenced Training Materials* section for basic navigation training and tips on creating favorites, performing searches, etc.

PROCEDURE

1. Start the transaction using the Portal path: **Operations** tab ➔ **Order Processing** tab ➔ **File Uploads/Downloads** folder ➔ **Upload SDA Sales Order** link.

Image: Upload SDA Sales Orders Screen
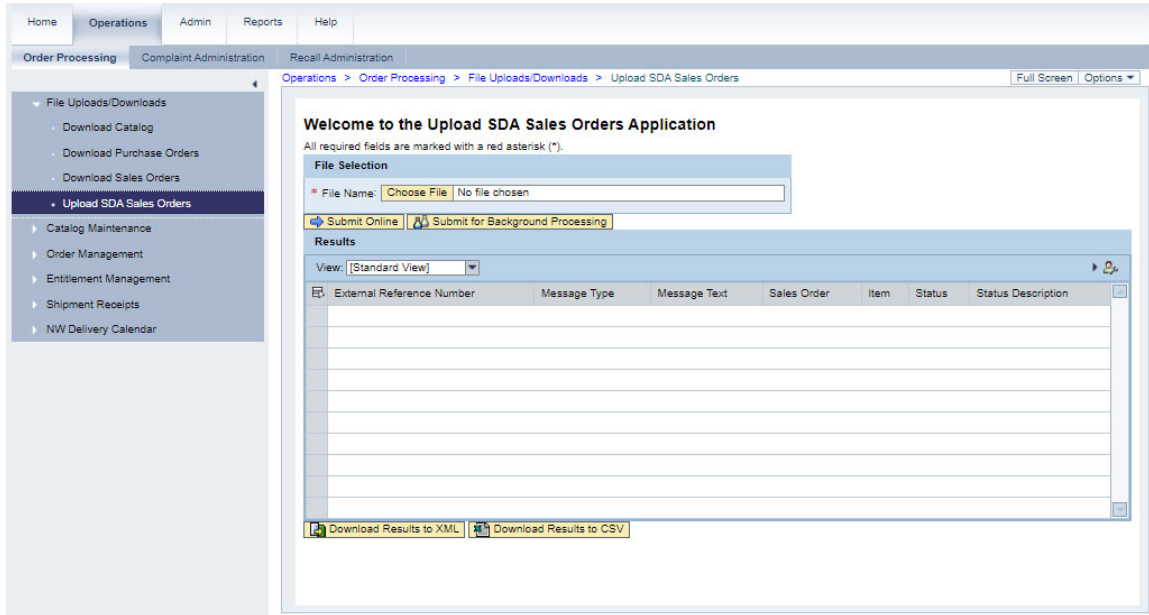
2. Click ◀ (the **Hide Navigator** arrow) to minimize the Portal menu. Note that this can be done with any transaction in WBSCM.

Image: Upload SDA Sales Orders Screen
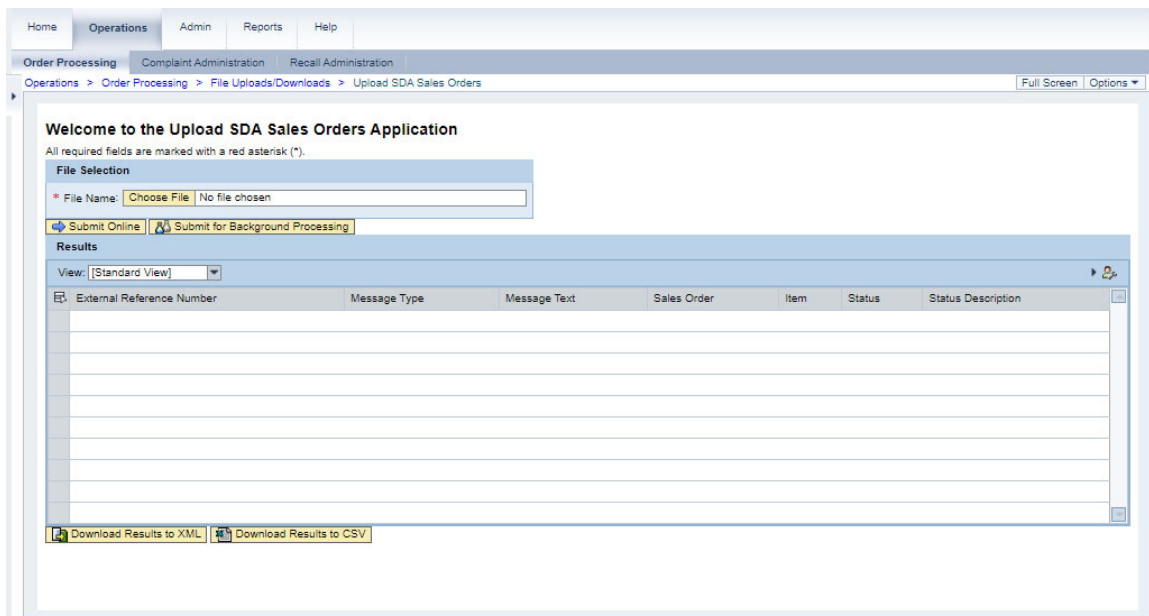
3. Click [Choose File] (the **Choose File** button) to locate the SDA Sales Order XML file to be uploaded.

Image: Upload SDA Sales Orders Screen
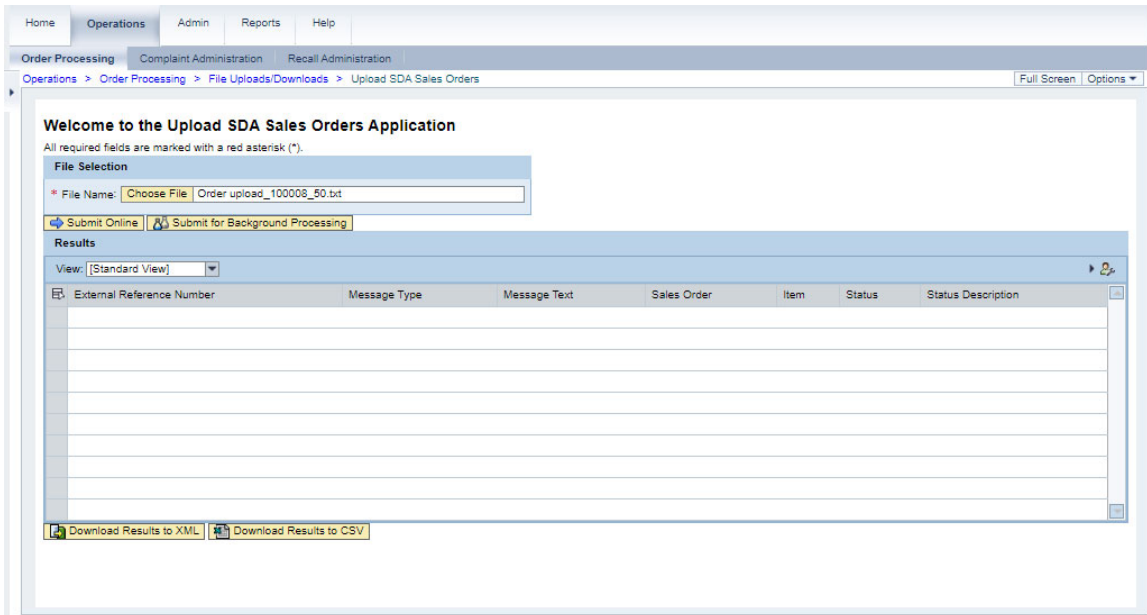
4. Perform one of the following:
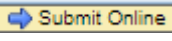
If	Then
The Sales Order XML document contains fewer than 50 records	Go to Step 6.
The Sales Order XML document contains 50 records or more	Go to Step 9.
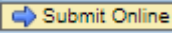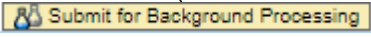
(Note) The user located and selected the XML file. In this example, **Order upload_100008_50.txt** was selected.

Image: Upload SDA Sales Orders Screen
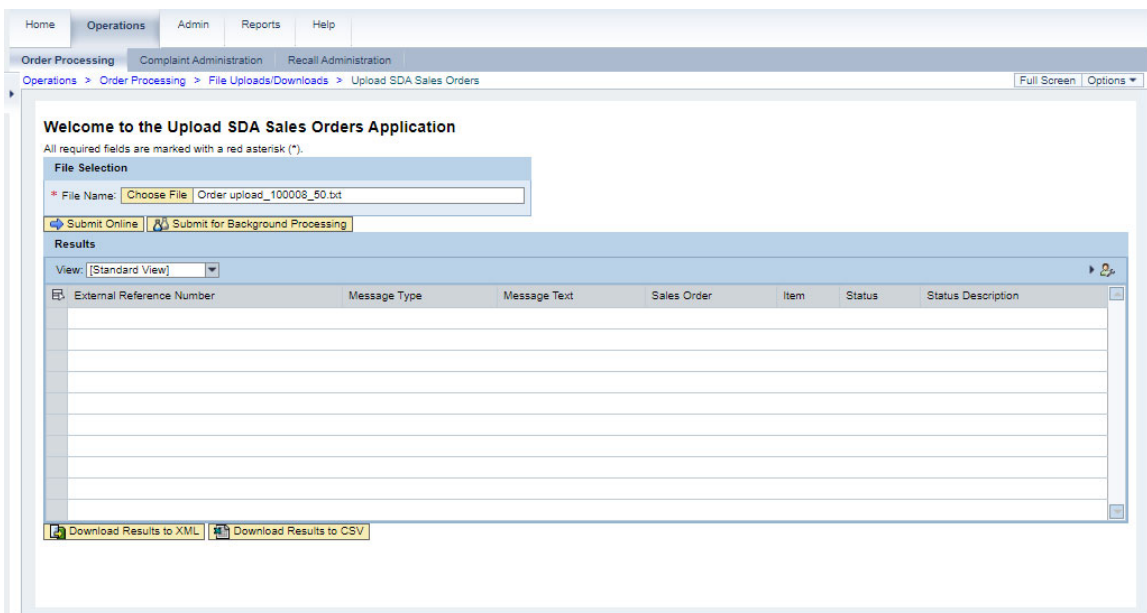
5.   Click [Submit Online] (the **Submit Online** button).

(Note) The **Submit Online** option is used to upload or process an XML file with fewer than 50 orders or records. If there are more than 50 orders, and [Submit Online] (the **Submit Online** button) is used, an error message displays asking to use [Submit for Background Processing] (the **Submit for Background Processing** button):

"Your file has more than 50 Records. Please use the 'Submit for background processing' option to process the XML file."

Image: Upload SDA Sales Orders Screen
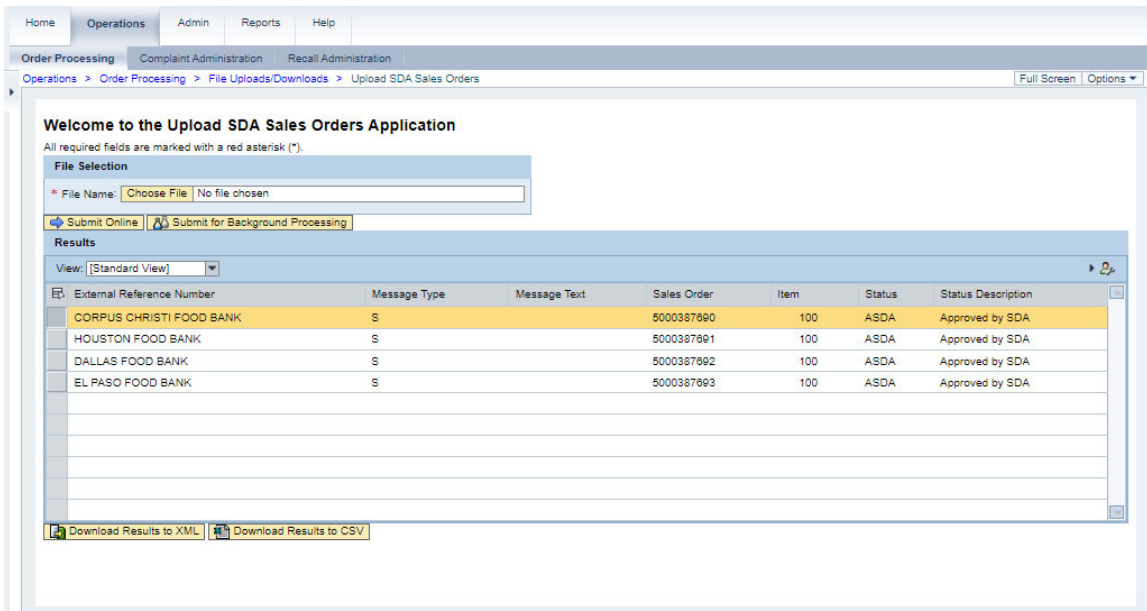
6.   As required, complete/review the following fields:

Field	R/O/C	Description
External Reference Number	O	The Sold-To Party's external reference information. **Example:** Corpus Christi Food Bank
Message Type	O	Specific interpretation scheme for electronically transmitted data. **Example:** S (Note) Options for this field are S (Success), E (Error), W (Warning), I (Information), or A (Abort)

Field	R/O/C	Description
Message Text	O	The text of the system message. Note that this field may not populate if there is no message provided.
Sales Order	O	Legal document created with sales information such as name of customer, materials purchased, quantities requested, and price. **Example:** 5000387690
Item	O	The line item on the document. **Example:** 100
Status	O	The code for status of the document. **Example:** ASDA
Status Description	O	The definition of the status code. **Example:** Approved by SDA

Image: Upload SDA Sales Orders Screen

7. Perform one of the following:

If	Then
To download results in XML format	Click [Download Results to XML] (the **Download Results to XML** button).
To download results in CSV format	Click [Download Results to CSV] (the **Download Results to CSV** button).
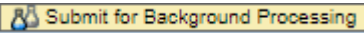
(Note) Note [Download Results to XML] (the **Download Results to XML)** and [Download Results to CSV] (the **Download Results to CSV** button) are only enabled after clicking the **Submit Online** button.

The download step is optional. Perform the download to validate the upload results.

8. Go to Step 12.

Image: Upload SDA Sales Orders Screen
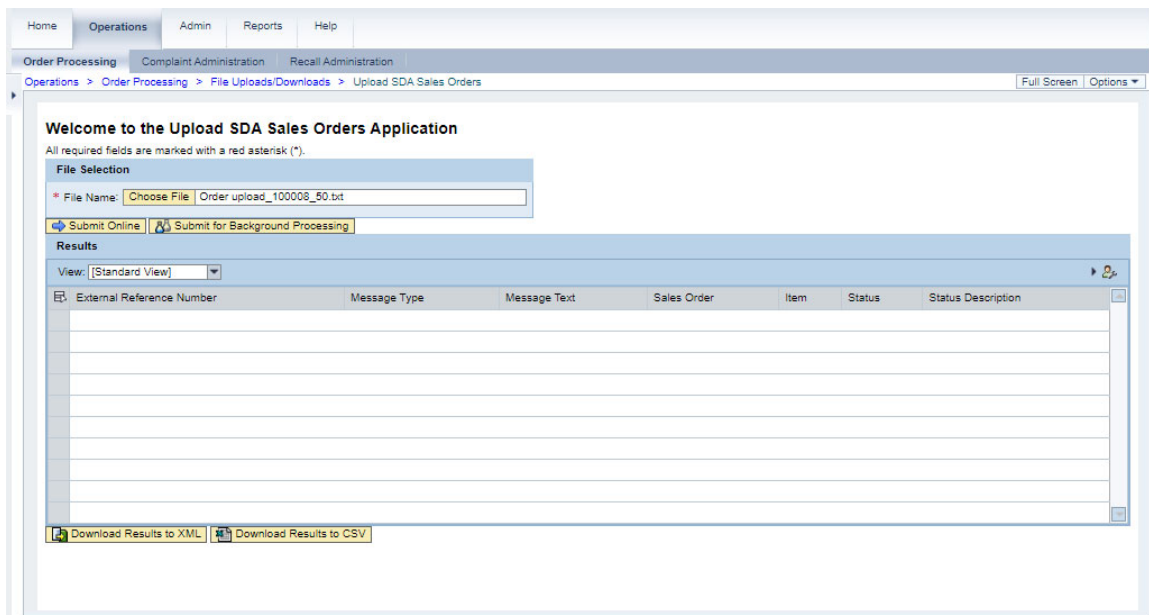
9. Click [Submit for Background Processing] (the **Submit for Background Processing** button) to process the Sales Order XML file with 50 or more records.

(Note) The system performs validations to ensure the XML file formatting is correct, data is valid (i.e. Sold-To, Ship-To, and Material ID, Program Code, Req Delivery Periods, FTL quantity, UOM, Correlation ID, Ent/Bonus indicator) and that the user has a valid email address on their profile.

Image: Upload SDA Sales Orders Screen
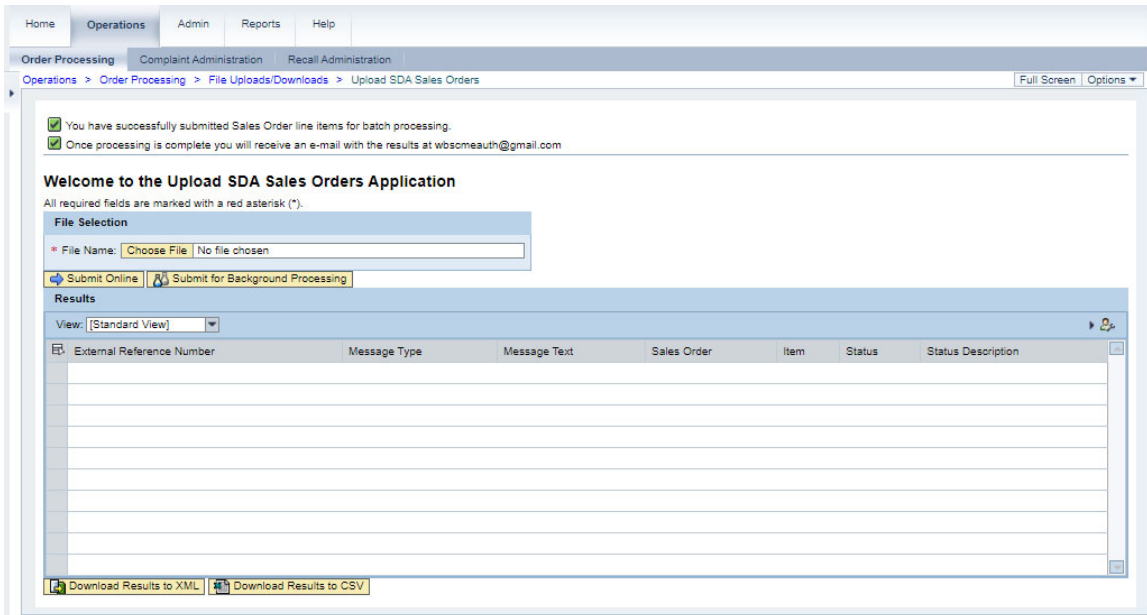
10. Review the confirmation messages.

Image: WBSCM Notification
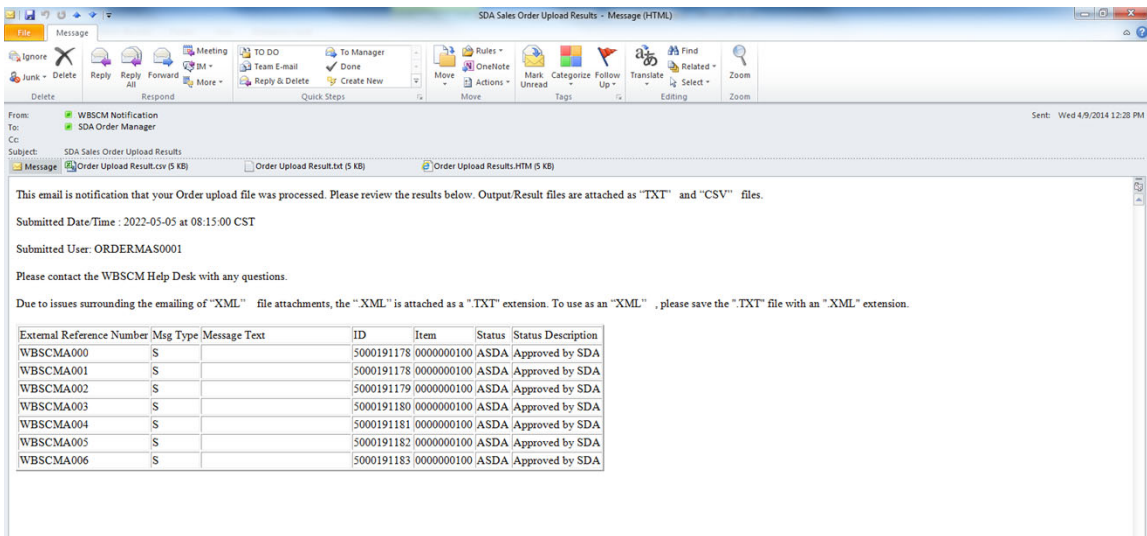
11. Access the email account linked to the WBSCM User ID used when performing the sales order update. Locate and view the WBSCM Notification email.

(Note) The order upload results will be attached in CSV, TXT and HTM file formats.

12. The transaction is complete.

RESULT

The SDA sales order has been updated by uploading an XML file. The XML file has been uploaded one of two ways:

- Less than 50 files – Submitted online
- More than 50 files – Submitted for background processing

PROCESS OVERVIEW

Purpose

This transaction will demonstrate how to modify and resubmit returned sales orders from FNS. As the SDA Order Manager, you have the ability to go into the Returned FNS Orders Workbench and access the orders returned by FNS. From this screen, you are able to view and make updates to the order. After modifying the returned order, this will be submitted back to FNS for approval.

Process Trigger

Perform this transaction to display, modify, decline, return to workbench and resubmit returned sales orders from FNS.

Prerequisites

- Sales Order must be returned by FNS.
- Original Sales Order must have been created by SDA from consolidating requisitions or Sales Order Upload.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab ➜ **Order Processing** tab ➜ **Order Management** folder ➜ **Returned FNS Orders** link to go to the *Returned FNS Orders* screen.

Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.

  - A **Conditional field**: an entry that becomes required as a result of entering something previous to it, which then deems it required

  - An **Optional field:** you may enter information in an optional field, but an entry is not required for the completion of the transaction

- Refer to WBSCM Portal Basic Navigation course for tips on creating favorites, perform searches, etc.
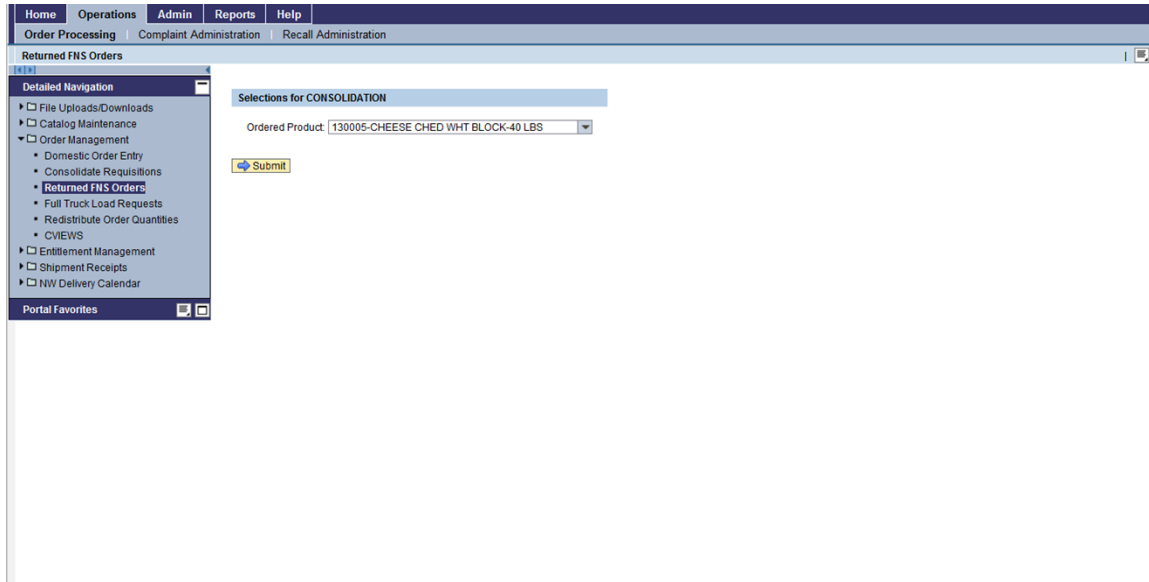
Reminders

- Remember to check your work
- Refer to the Help Option (to the right of the screen) in the Portal for further assistance.

PROCEDURE

1. Start the transaction using the following Portal path: **Operations** tab ➜ **Order Processing** tab ➜ **Order Management** folder ➜ **Returned FNS Orders**

Returned FNS Orders Screen

2. Click [image] (the **Hide Navigation** arrow button) to minimize the Portal menu. Note that you can do this with any transaction in WBSCM - not just fulfillment transactions.

Returned FNS Orders Screen

3. In the **OrderedProduct** field, click [image] (the **Down** arrow) to display products tied to orders that you have submitted that have been rejected/returned by FNS.

Returned FNS Orders Screen

4. Select the product you wish to reallocate from this list. For this example, click 130010-CHEESE NATURAL AMER FBD BARREL-500 LB (the **130010-CHEESE NATURAL AMER FBD BARREL-500 LB** option).

Returned FNS Orders Screen
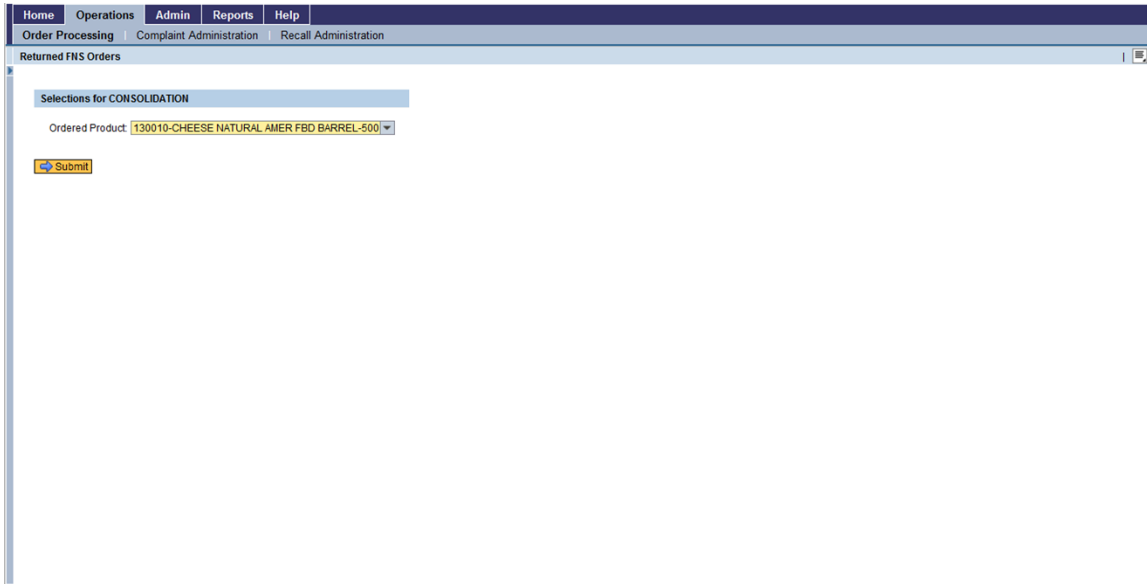
5.   Click ![Submit](Submit button image) (the **Submit** button) to continue with the reallocation.

FNS Returned Orders Screen
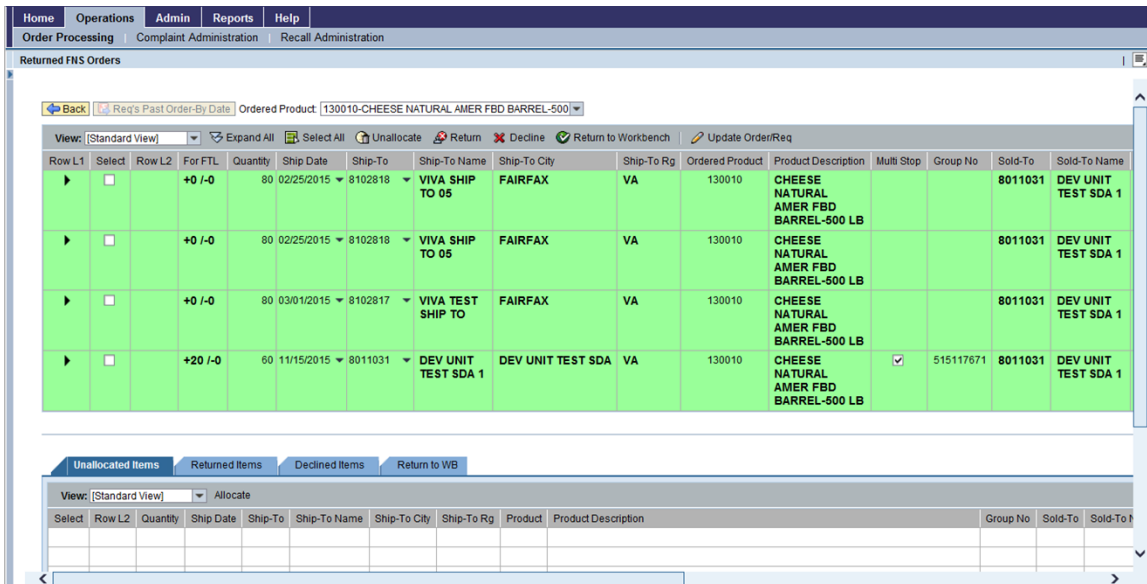
6.   A list of FNS Returned orders will display. Next to each consolidated order, there is an arrow icon. You can use this icon to display all the requisitions that were part of that sales order. For this example, click ▶ (the **Arrow** icon) beside the first sales order to display the requisitions.

FNS Returned Orders Screen

7.   All requisitions associated to the sales order in line item 1 are displayed.

Modifications that can be made to sales order line items include:

• Changing Quantity, Ship Date and Ship-To information
• Removing Group No. by deselecting the Multi Stop checkbox.
• Unallocating a sales order from the list of sales orders displayed
• Declining a sales order
• Returning sales order to Workbench

FNS Returned Orders Screen

8.　As required, complete/review the following fields:

Field	R/O/C	Description
Quantity	R	Number of items being processed. **Example:** 70

(Note) When changing a sales order, the Quantity, Ship Date and Ship-To fields can be modified. For this step, the quantity will be changed. When modifying the quantity, users may change from FTL to Split or from Split to FTL quantity. When changing quantity from Split to FTL, adjust the quantity to FTL and uncheck the Multi Stop checkbox. After refreshing, the Group No. values will be deleted automatically.

The changes made here will automatically update the associated requisition line items when the sales order is updated and then the RAs and Co-ops can view the changes on their Domestic Order Entry screen under My Transactions. They may also view the updated quantities in the Requisition Status Report & Order Status Report.

Returned FNS Orders Screen

9.   A sales order can be unallocated from the work area if user chooses to work on it at a later time. First, click ☐ (the **Checkbox**) beside the desired sales order or aggregate line, in this case for aggregate line item 2.

Returned FNS Orders Screen

10.   Click ⟁ Unallocate (the **Unallocate** button).

Returned FNS Orders Screen

11. The sales order has been removed from the top frame and is now visible in the **Unallocated** tab in the lower portion of the screen for this transaction. When you run the transaction again, it will be visible in the upper frame.

If you would like to restore this sales order to the upper frame, click the checkbox beside the sales order in the **Unallocated** tab and then click the **Allocate** button.

Next, to decline a sales order, click ☐ (the **Checkbox**) beside the desired sales order.

Returned FNS Orders Screen

12. Click ✖ **Decline** (the **Decline** button) if you choose to cancel the sales order and the associated requisition(s).

Returned FNS Orders Screen

13. The sales order has been removed from the top frame and is now visible in the **Declined Items** tab in the lower portion of the screen. If you would like to restore the sales order to the upper frame, click the checkbox beside the sales order and then click the **Allocate** button.

Important: once the screen is updated by clicking the **Update Order/Req** button, any declined sales orders will be canceled and removed from the list of returned sales orders for this material.

Next, to return a sales order to the Workbench, click ☐ (the **Checkbox**) beside the desired sales order.

Returned FNS Orders Screen

14. Click [Return to Workbench] (the **Return to Workbench** button) to cancel the sales order and return the requisition(s) back to the Consolidation Workbench.

Returned FNS Orders Screen

15. The sales order has been removed from the top frame and is now visible in the **Return to Workbench** tab in the lower portion of the screen. If you would like to restore the sales order to the upper frame, click ☐ (the **Checkbox**) beside the sales order and then click the **Allocate** button. Once the screen is updated, any return to workbench sales orders will be removed from the list of returned sales orders for this material and you will not be able to Allocate back again.

Returned FNS Orders Screen

16. Click [Allocate] (the **Allocate** button).

FNS Returned Orders Screen

17. The sales order has been removed from the **Return to Workbench** tab and is now visible in the upper frame.

After any modifications have been made to the sales order(s), click [Update Order/Req] (the **Update Order/Req** button) to execute the changes.
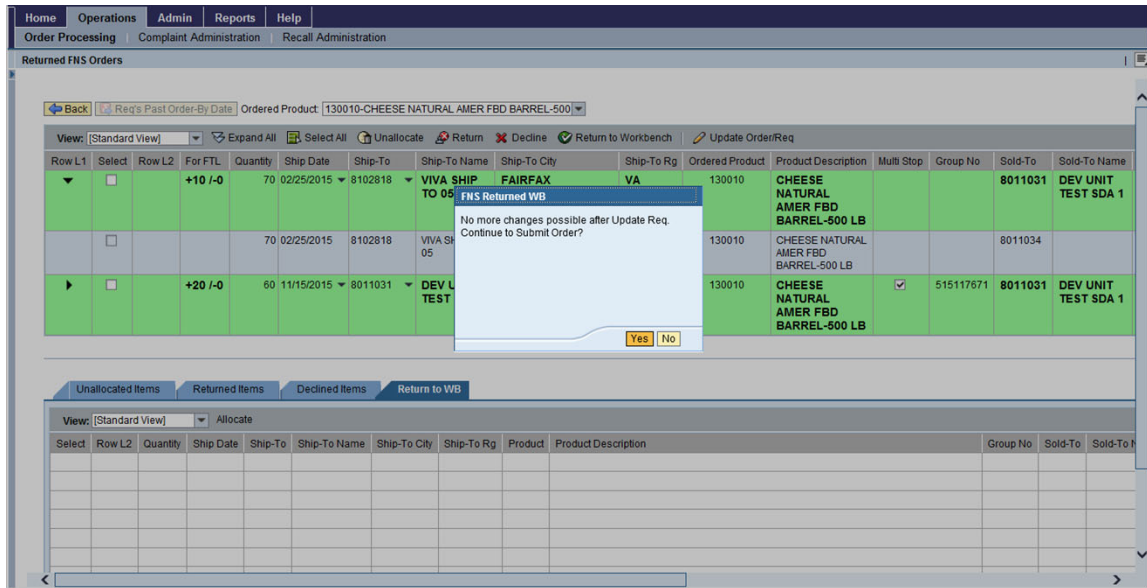
(Note)   In the event that you receive the error message shown below after clicking the **Update Order/Req** button, wait a few minutes and try again. The error occurs when the Sales Order is locked by another user (or system process).
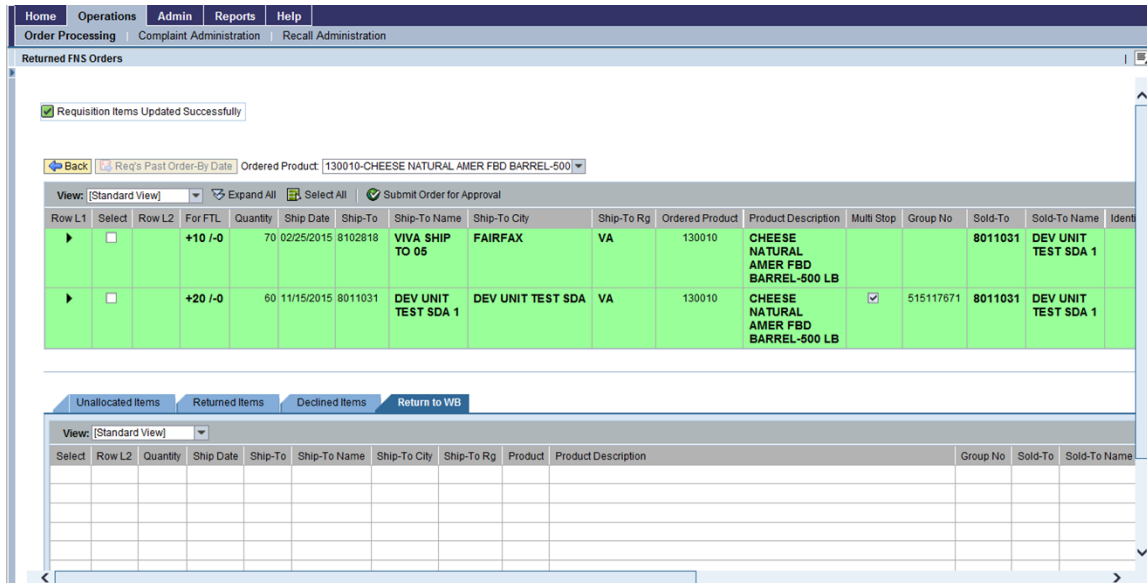

"Request Failed: Following Document(s) are being processed : Transaction <Document Number> is being processed by user <USER ID>"

FNS Returned Orders Pop-up

18. Click [Yes] (the **Yes** button) to continue to submit the order(s).

FNS Returned Orders Screen

19. Finally, before submitting for FNS approval, select the check box beside the order(s) to which you are making the changes.

(Note) Notice the green checkmark at the upper left side of the screen indicating that the requisition item(s) were updated successfully.

(Note) In the event that you receive the error message shown below after clicking the **Submit Order for Approval** button, wait a few minutes and try again. This error occurs

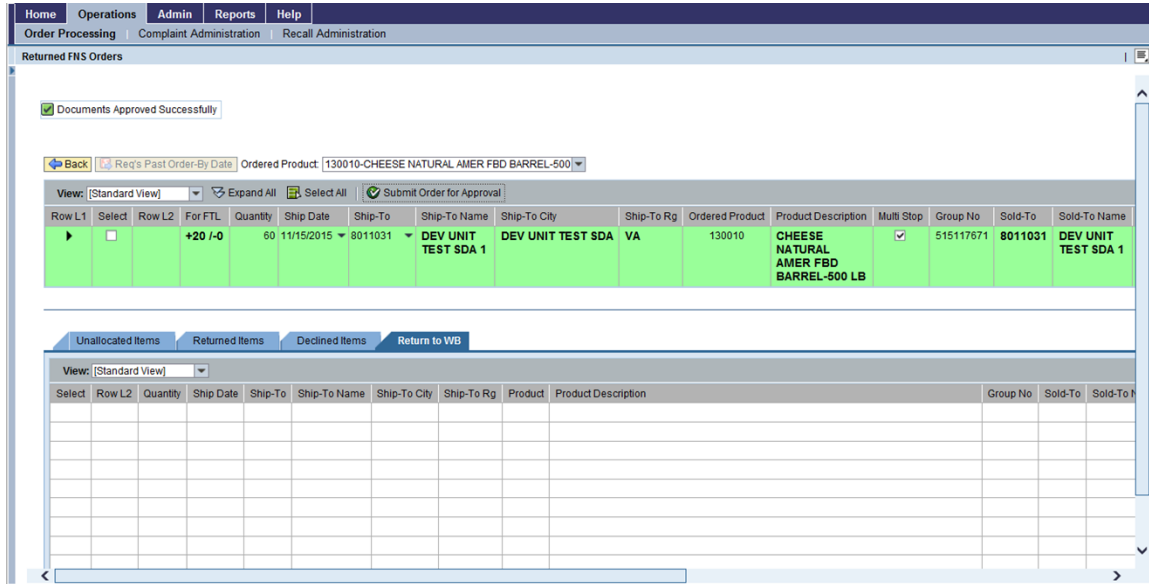when the Sales Order is locked by another user (or system process).

Request Failed: Document 5000269560 is being processed by user REZAM0001

"**Request Failed: Following Document(s) are being processed : Transaction <Document Number> is being processed by user <USER ID>**"

(Note) If you do not submit your orders for approval, they will not be processed by FNS.

FNS Returned Orders Screen

20. You have completed this transaction.

(Note) Notice the message that indicates the order was approved successfully.

RESULT

The transaction has been successfully completed.

PROCESS OVERVIEW

Purpose

State Distribution Agencies (SDAs), Indian Tribal Organizations (ITOs), and third-party barter Order Managers can generate orders in separate systems and then upload those orders into WBSCM. Periodically, Order Managers will download order information from WBSCM and then upload this data to their system of record to capture order status, updates, and other changes. The purpose of the transaction described in this document is to download all pertinent sales order data in a format that can be uploaded into third-party systems. The download file includes only sales orders from the Order Managers own organization.

Process Trigger

Use this procedure to download sales orders from WBSCM.

Prerequisites

- Sales orders from the SDA/ITO or third-party barter company must exist in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab ➜ **Order Processing** tab ➜ **File Uploads/Downloads** folder ➜ **Download Sales Orders** link to go to the *Download Sales Orders* screen.

Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
    - o **Required (R)** - a mandatory field necessary to complete the transaction.
    - o **Optional (O)** - a non-mandatory field not required to complete the transaction.
    - o **Conditional (C)** - a field that may be required if certain conditions are met, typically linked to completion of a mandatory field.
- Refer to the WBSCM Portal Basic Navigation course for tips on creating favorites, perform searches, etc.
- Refer to the **Upload SDA Sales Order** work instruction for instructions on how to upload sales orders into WBSCM.

PROCEDURE

1. Start the transaction using the following Portal path: **Operations** tab ➔ **Order Processing** tab ➔ **File Uploads/Downloads** folder ➔ **Download Sales Orders** link.

Image: Download Sales Orders Screen

2. Click ◀ (the **Hide Navigator** arrow) to minimize the Portal menu. Note that this can be done with any transaction in WBSCM.

Image: Download Sales Orders Screen

3. As required, complete/review the following fields:

Field	R/O/C	Description
Sold-To Party:	R	Unique identifying number associated with a particular customer in WBSCM. **Example:** 4000491 (Note) Order Managers can only display sales orders for their own organization.
Requested Delivery Date:	C	Date when customer would like the material/commodity to arrive at the Ship-To. **Example:** 06/12/2017
Shipment Receipt Date:	C	The date the shipment is received. (Note) Users need to limit date ranges to within one year.
Last Updated:	O	Most recent date for update.

Field	R/O/C	Description
Order Number:	C	This can be a sales order number, purchase order number, or delivery document number. When entering this number, the customer ensures that they are receipting against the correct order. In the case of inbound to warehouse receipts, only enter a purchase order number in this field. (Note) The order number here represents the sales order number.

(Note) Users are required to enter either **Requested Delivery Date**, **Shipment Receipt Date**, or **Order Number** and other criteria as appropriate.

(Note) To search for orders that fall within a range, enter the lowest value in the required field on the left; then, enter the highest value for the range after "To". For example, to search for orders requested for delivery between June 12, 2017 and June 12, 2018, enter "6/12/2017" next to **Requested Delivery Date** and "6/12/2018" after **To** in the same row.

Image: Download Sales Orders Screen
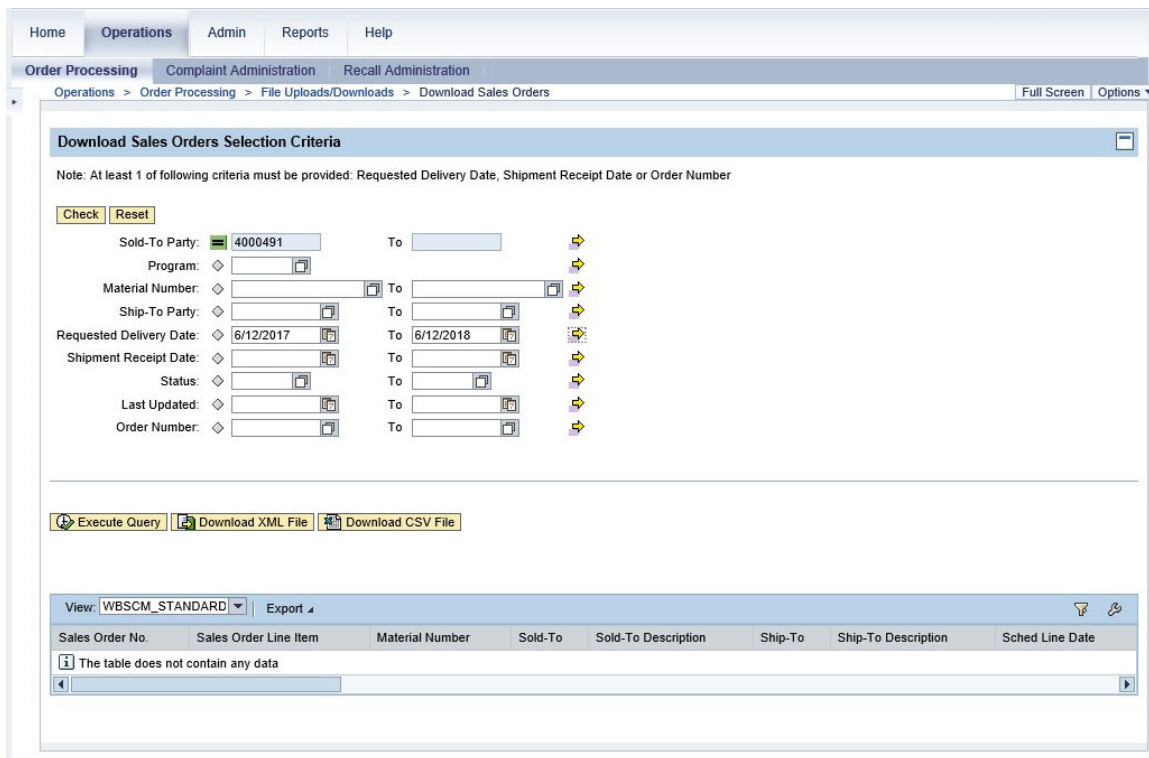
4. Click [Execute Query] (the **Execute Query** button) to generate a list of sales orders.

(Note) Order Managers can download sales orders as an XML, CSV, or Excel file. Select the file format based on upload requirements for the organization's system of record.
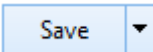
Image: Download Sales Orders Screen

5. Perform one of the following:

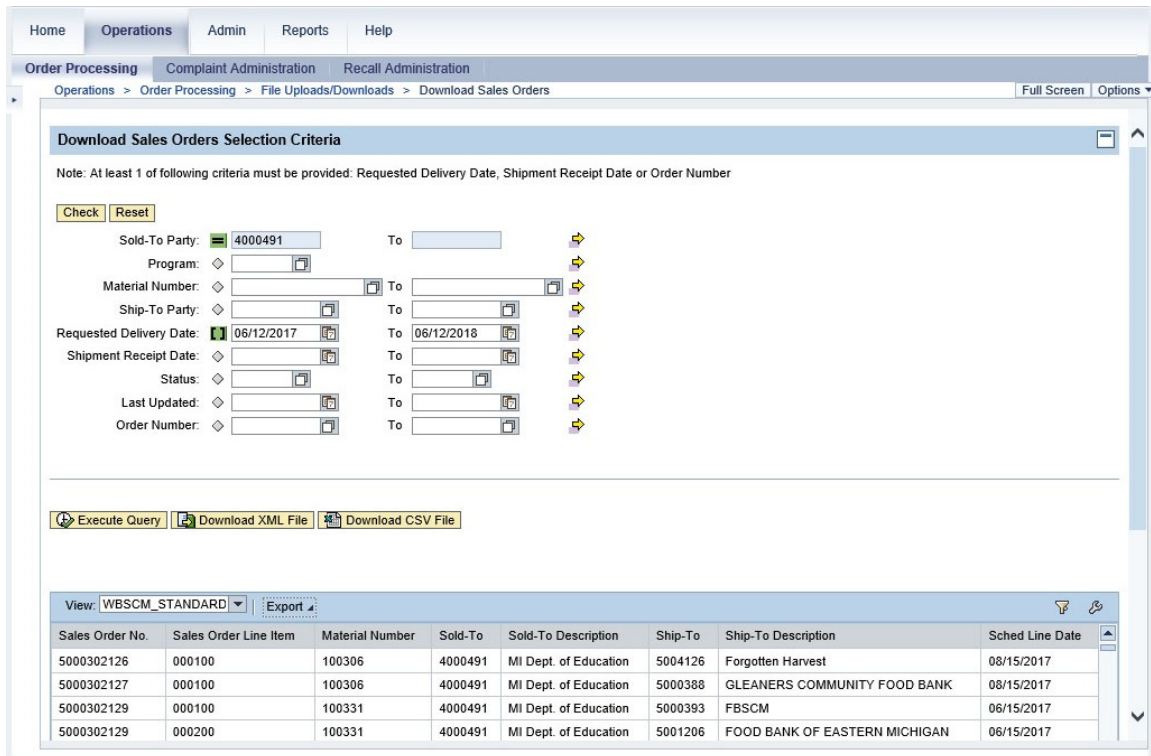| If	Then
The user needs to download the sales orders to an XML file	Click [Download XML File] (the **Download XML File** button) to save the XML file locally.
The user needs to download the sales orders to a CSV file	Click [Download CSV File] (the **Download CSV File** button) to save the CSV file locally.
The user needs to download the sales orders to an Excel file	1. Click [Export] (the **Export** button). 2. Click [Export to Microsoft Excel] (the **Export to Microsoft Excel** list item) to save the Excel file locally. (Note) The headings in the Excel spreadsheet specify the information that is displayed in each column.

6. Click [Save] (the **Save** button) to open the *Download Options* window and save the file.

(Note) [Save] (The **Save** button) appears after the initial selection.

(Note) In the **Purchase Order** column the number starts with a 4. In cases where sales orders were converted to a forecast, the **Purchase Order** column will show the allocation

document number which begins with a 7 instead of the purchase order number.

Image: Download Sales Orders Screen

7. This transaction is complete.

RESULT

Sales orders have been downloaded from WBSCM as XML, CSV, or Microsoft Excel files.

PROCESS OVERVIEW

Purpose

The Order Status Report summarizes the life cycle of an order from initial entry through receipt. In addition to the current order status, this report provides details about the order, including the expected delivery date and the type and quantity of item(s) ordered. State Distributing Agencies (SDAs) and Indian Tribal Organizations (ITOs) may use this information to coordinate deliveries with processors or other partners. The status code are described in the Sales Order and Complaint Statuses job aid.

Process Trigger

This report is intended for FNS Order Managers, SDAs/ITOs, and Ship-Tos to review delivery dates, approval statuses, and other order details.

Prerequisites

- Orders must exist in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Reports** tab ➜ **Order Processing** folder ➜ **Order Status Report** link
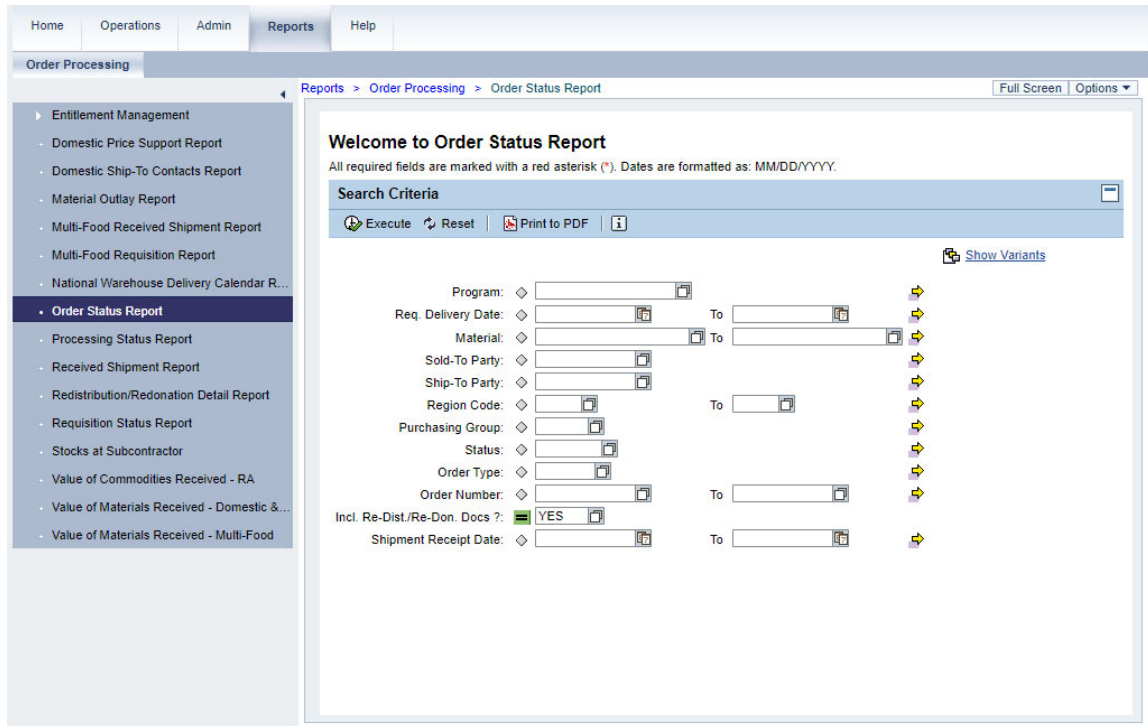
Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - **Required (R)** – a mandatory field necessary to complete the transaction
  - **Optional (O)** – a non-mandatory field not required to complete the transaction
  - **Conditional (C)** – a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Help site, *Frequently Referenced Training Materials* section for basic navigation training and tips on creating favorites, performing searches, etc.
- Refer to the Reporting Navigation Job Aid for tips for using WBSCM reports.

PROCEDURE

1. Start the transaction using the following Portal path: **Reports** tab ➔ **Order Processing** folder ➔ **Order Status Report** link.

   Image: Order Status Report Screen

2. Click [icon] (the **Hide Navigator** arrow) to minimize the Portal menu. Note this can be done with any transaction in WBSCM.

   [info icon] (Note) A value must be entered in at least one of the following selection fields: **Req. Delivery Date**, **Shipment Receipt Date**, or **Order Number**. Additional search criteria can be used to narrow the results.

   [info icon] (Note) Use the **To** field to indicate the upper value of a range when needed. For example, to search for orders with a requested delivery date between March 1, 2021 and January 24, 2022, enter "03/01/2021" in the **Req. Delivery Date** field and "01/24/2022" in the adjacent **To** field.

Image: Order Status Report Screen
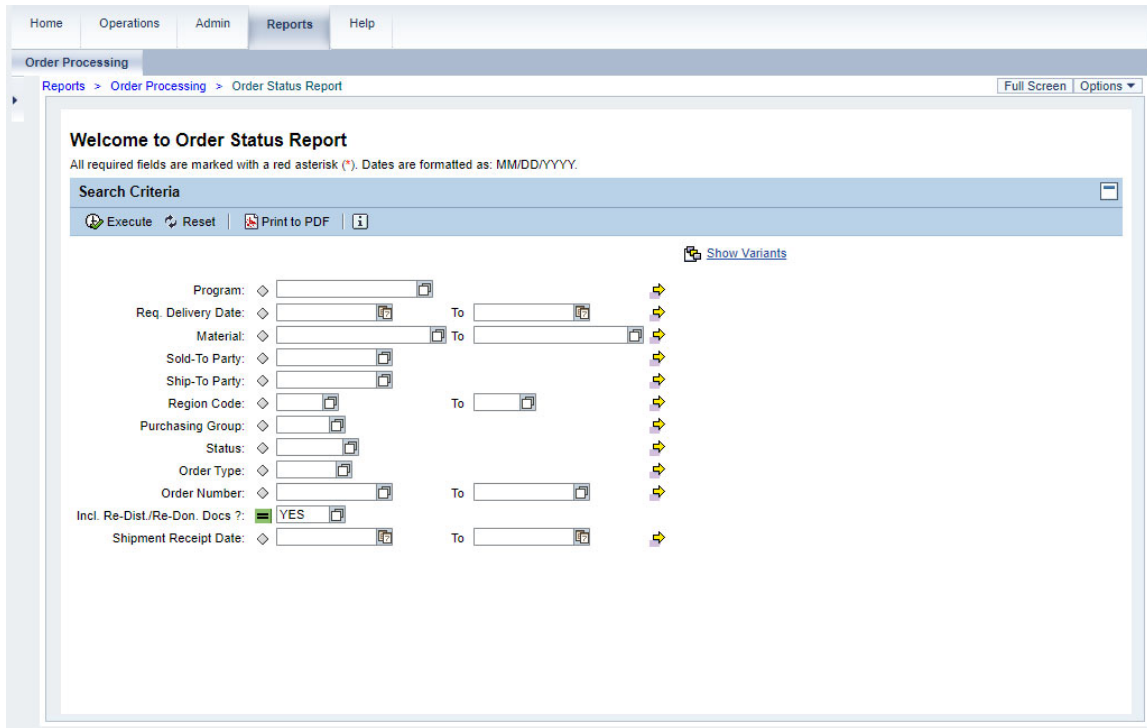
3.   As required, complete/review the following fields:

Field	R/O/C	Description
Program:	O	Acronym used to identify a USDA food distribution program. **Example:** CSFP
Req. Delivery Date:	O	Date requested by customer for delivery of ordered goods or services. **Example:** 03/01/2021
Material:	O	Unique six-digit number representing a specific material/commodity in WBSCM. **Example:** 130603
Sold-To Party:	O	Unique identifying name associated with a particular customer in WBSCM. **Example:** 8004967

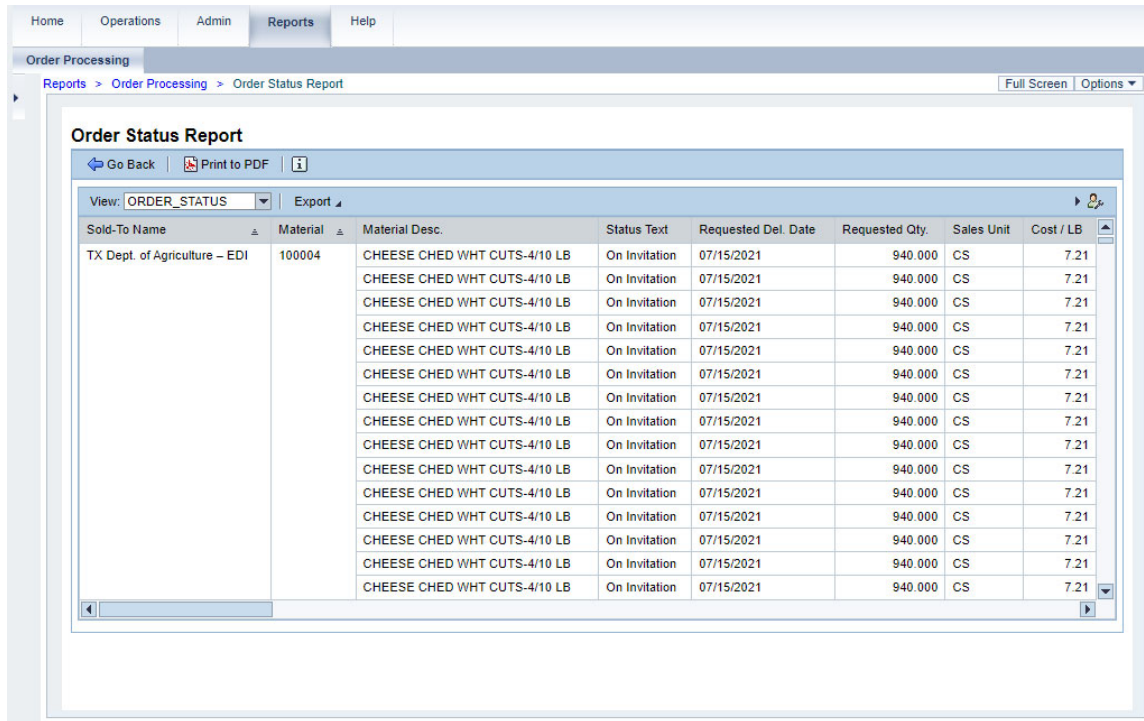| Field	R/O/C	Description
Ship-To Party:	O	Unique identifying number associated with a person or company that receives the goods. **Example:** 8011355
Region Code:	O	A number corresponding to one of the seven regions where FNS delivers orders. **Example:** 03
Purchasing Group:	O	Buyer or group of buyers responsible for purchasing activities. Also signifies a group of specialists who purchase similar items. **Example:** 120
Status:	O	The code for status of the document. **Example:** Approved by SDA (Note) For more information, refer to the job aid, Sales Order and Complaint Statuses.
Order Type:	O	A classification code for the type of order document. Type of orders include domestic/international sales order, entitlement credit/debit, and re-donation. **Example:** ZDOM (Note) For more information, refer to the job aid, Domestic Order Code Definitions.
Order Number:	O	This can be a sales order number, purchase order number, or delivery document number. When entering this number, the recipient ensures that they are receipting against the correct order. In the case of inbound to warehouse receipts, only enter a purchase order number in this field. **Example:** 5000050408 (Note) In this work instruction the Order Number refers to a sales order.

Field	R/O/C	Description
Incl. Re-Dist./Re-Don. Docs ?:	O	Including re-distribution or re-donation documents. **Example:** YES The report automatically includes the Re-Distribution/Re-Donation documents. Change the field value to **NO** to omit these documents from the report.
Shipment Receipt Date:	O	The date the shipment is received. **Example:** 01/15/2022 (Note) Users need to limit date ranges to within one year.

Image: Order Status Report Screen

4. Click [Execute] (the **Execute** button) to generate the report.

Image: Order Status Report

5. As required, complete/review the following fields:

Field	R/O/C	Description
Sold-To Name	O	Unique identifying name associated with a particular customer in WBSCM. **Example:** TX Dept. of Agriculture - EDI
Material	O	Unique six-digit number representing a specific material/commodity in WBSCM. **Example:** 100004
Material Desc.	O	Text containing up to 40 characters that describes the material/commodity in detail. **Example:** CHEESE CHED WHT CUTS-4/10 LB
Status Text	O	Description of the approval level for the item reviewed. **Example:** On Invitation ![info icon] (Note) For orders that have been received with a missing ASN, the field will display the status of **Order**

Field	R/O/C	Description
		Received.
		(Note) The most common order statuses are listed below. For more information refer to the job aid, Sales Order and Complaint Statuses. • **Approved by SDA** - SDA has applied the RA's requisition in a consolidated sales order. • **Approved by SpAgency** - FNS has approved the consolidated sales order from the SDA. • **On Invitation** - Sales Order is currently on a solicitation to be purchased. No changes can be made until purchase. • **Purchased** - Purchase Order (contract) has been created. • **Cancelled** - Order was cancelled. Entitlement returned to customer account. • **Order Received** - Order has been delivered to distributor.
Requested Del. Date	O	Date requested by customer for delivery of ordered materials or commodities. **Example:** 07/15/2021
Requested Qty.	O	Number of sales units of material requested by the customer. **Example:** 940,000
Sales Unit	O	Unit of measure upon which the price is typically based. **Example:** CS
Cost / LB	O	Cost of material or commodity measured in pounds. **Example:** 7.21
Net Dollar Value	O	Dollar amount of the line item. **Example:** 24,281.69

Field	R/O/C	Description
Program	O	Acronym used to identify a USDA food distribution program. **Example:** NSLP
Entit/Bonus Indicator	O	Indicates whether the document is Entitlement or Bonus order and the program year. **Example:** BONUS-SY17
Ship-To Party	O	Unique identifying number associated with a person or company that receives the goods. **Example:** 8101252
Ship-To Name	O	Unique identifying number associated with a person or company that receives the goods. **Example:** Hawaii Foodbank
Ship-To City	O	The city to which the item is shipped. **Example:** Hilo
Ship-To State	O	The state to which the materials or commodities are shipped. **Example:** HI
Sales Order #	O	Unique identifying number associated with a sales order in WBSCM. **Example:** 5000051561
SO Item #	O	The item number identified on the Sales Order. **Example:** 100
Allocation # / Corr.	O	Unique number to group line items into Full Truck Loads (FTL) for creating multi-stop deliveries. **Example:** 0913892820

Field	R/O/C	Description
		(Note) For more information, refer to the work instruction, Consolidation for a Multi-Stop Domestic Sales Order.
Purch. Requisition #	O	Document used to request materials and services. Purchase requisitions are converted to purchase orders so materials can be procured externally. **Example:** 1000039427
PR Item #	O	The line item on the purchase requisition referring to the material/commodity. **Example:** 100
PR Qty.	O	Total quantity on the purchase requisition. **Example:** 16,994.590
PR Base UoM	O	The base unit of measure for the items on the purchase requisition. **Example:** LB
Purchase Order #	O	Unique number identifying the Purchase Order. **Example:** 4100008660
PO Line Item	O	The line item on the purchase order referring to the materials/commodity order line item. **Example:** 10
PO Qty.	O	Total quantity on the purchase order. **Example:** 38,000

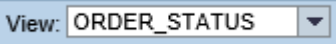| Field	R/O/C	Description
PO Base UoM	O	Base unit of measure on the purchase order. **Example:** LB
Vendor #	O	Business partner number assigned by WBSCM when a vendor's master records are created. **Example:** 1200030
Vendor Name	O	Business partner that provides materials or services. **Example:** Imperial Freezer Services
Purchasing Group	O	Buyer or group of buyers responsible for purchasing activities. Also signifies a group of specialists who purchase similar items. **Example:** 130
ASN #	O	A unique number assigned to an Advanced Shipment Notification (ASN) when it is created. **Example:** 6100015132
ASN Qty	O	Quantity on the Advanced Shipment Notification. **Example:** 39,950.000 (Note) The **ASN Qty.** field displays the updated quantity if the vendor has updated the ASN. For multiple ASNs, each quantity is separated by a semicolon.
Var. Wt. Material?	O	Indicator that one package for the item may have a different weight for the same material. **Example:** Yes
Date Received	O	The date the materials were received. **Example:** 11/03/2021 (Note) This date reflects the most recent goods receipt date.
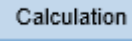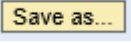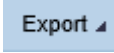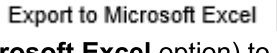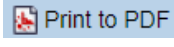
Field	R/O/C	Description
Good Qty. (in CS)	O	The amount of material/commodity received in good condition, ready for use entered in cases. This field is only used when the material is a variable weight. **Example:** 940.000
Good Qty.	O	The amount of materials/commodities received in good condition, equal to or less than the ordered amount, in pounds (LB). **Example:** 39,950.000
Over Qty.	O	The amount of materials/commodities receipted for a PO line as **Good Qty** or **Good Qty (in CS)** that exceeds the ordered amount. **Example:** 0.00
Damage Qty.	O	Total quantity of materials/commodities damaged due to transport, unloading, or improper storage. **Example:** 0.00
Received Qty UoM	O	The unit of measure of the received items. **Example:** LB
Mult. Rcpts exist?	O	Report output indicating multiple receipt status. **Example:** Yes
Statistical Rx.?	O	Statistical receipt refers to a non payment related receipt. **Example:** Yes
Order Type	O	A classification code for the type of order document. Type of orders include domestic/international sales order, entitlement credit/debit, and re-donation. **Example:** ZDOM

Field	R/O/C	Description
		(Note) For more information, refer to the job aid, Domestic Order Code Definitions.
Doc. Type Descr.	O	Description of the document type key that identifies to which group of documents this document will be assigned. **Example:** SO - Domestic
SO Item Category	O	A classification that distinguishes between different types of items and determines how the system processes the item. **Example:** ZTDS

6. Perform any of the following, as needed:

If	Then
The user needs to include the fields relevant to processing order modifications and order returns from SDAs to FNS	1. Click View: ORDER_STATUS ▼ (the **View**: dropdown arrow) to display alternative views for this report. 2. Select the following view: **SO_SDA_MODIFICATION_REQUEST**.
The user needs to customize the report output	1. Use (the **Open Settings Dialog** icon) to display the Settings dialog. Select **Column Selection** (the **Column Selection** tab) to add/remove columns and change the sequence of the displayed columns. 2. Select **Sort** (the **Sort** tab) to sort the results by specified field and direction. 3. Select **Calculation** (the **Calculation** tab) to insert a calculated value based on available report fields. 4. Select **Filter** (the **Filter** tab) to apply filter(s) to your report. 5. Click **Apply** (the **Apply** button) to generate the results. 6. As necessary, click **Save as…** (the **Save as**… button) to save your selections as a new View. In the save prompt window,

If	Then
	enter a descriptive name.
	7. Click [OK] (the **OK** button) to go back to the previous screen.
The user needs to export the report	1. Select Export ◢ (the **Export** button).
	2. Click Export to Microsoft Excel (the **Export to Microsoft Excel** option) to open the report data in Excel or a compatible application.
	3. Click ^ (the **Arrow** button) in the dialog box.
	4. Click Open (the **Open** option) in the dialog box.
	5. Review and modify the report as needed.
	6. As necessary, save the Excel spreadsheet for later reference.
	7. Close Excel.
The user needs to print to PDF	1. Select 📄 Print to PDF (the **Print to PDF** button) to open a formatted print-ready document.
	2. Click ^ (the **Arrow** button) in the dialog box.
	3. Click Open (the **Open** option) in the dialog box.
	4. Review, print, and save the PDF output as needed.
	5. Close the PDF document.

7. The transaction is complete.

RESULT

The Order Status Report for the selected criteria, such as order number, delivery date, or receipt date, has been displayed and reviewed. As applicable, the report may also have been customized and/or exported to Excel or PDF format.

Domestic Sales Order Statuses

Status Code	Status	Definition
E0001	Applied	Redonations, Redistributions, Entitlement Increments and Decrements have occurred on an order
E0002	Cancelled	Requisition / Sales Order cancelled
E0003	Ready for Approval	Requisition created & submitted to Co-op or SDA for approval
E0004	Returned by Co-op	Requisition returned by Co-op for changes
E0005	Approved by Co-op	Requisition approved by Co-op
E0006	Returned by SDA	Requisition returned by SDA for changes
E0007	Approved by SDA	Sales Order approved by SDA
E0008	Returned by SpAgency	Sales Order returned by FNS
E0009	Approved by SpAgency	Sales Order approved by FNS
E0010	Returned by FSA / AMS	Sales Order returned by FSA/AMS
E0011	On Invitation	Sales Order placed on a bid invitation
E0012	Purchased	Sales Order fully purchased
E0014	Order Received	Sales Order received **Note:** For eINV orders, the status will be updated to **Order Received** after both receipt and ASN have been submitted.
E0015	Resubmit to FSA/AMS	Sales Order resubmitted to FSA/AMS

Order Change Notification Email Option

Purpose	This Job Aid shows how to turn on/off the option of receiving notifications for Order changes
Portal Navigation Path	Admin > Manage Users > Maintain User Profile> My Profile
User Group / Role	FNS, USAID, FAS, SDA, RA and Co-op Order Managers, PVOs and Freight Forwarders
Order Change Notification Email Option	• Users have the ability to turn on or off the reception of email notifications for Order Changes. • The **Opt out from the following e-mails** frame includes the following instructions: **NOTE: To unsubscribe from an email – Check the option below:** • To opt out of receiving these notifications, select the "Order Change Notification" checkbox.

PROCESS OVERVIEW

Purpose

Use this procedure to allow State Distribution Agencies (SDAs) and Indian Tribal Organizations (ITOs) to redistribute order quantities to Recipient Agencies (RAs). SDAs and ITOs can redistribute requisitions, sales orders, and re-donated orders. SDAs can also cancel previously created redistributions.

Process Trigger

Perform this procedure when the SDA/ITO needs to redistribute order quantities from one Sold-To Party to another.

Prerequisites

- Order must exist in WBSCM
- Sold-To Parties are known and exist in WBSCM

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab ➔ **Order Processing** tab ➔ **Order Management** folder ➔ **Redistribute Order Quantities** link to go to the *Redistribute Order Quantities* screen.

Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - **Required (R)** – a mandatory field necessary to complete the transaction
  - **Optional (O)** – a non-mandatory field not required to complete the transaction
  - **Conditional (C)** – a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Portal Basic Navigation course for tips on creating favorites, performing searches, etc.

PROCEDURE

1. Start the transaction using the Portal path: **Operations** tab ➜ **Order Processing** tab ➜ **Order Management** folder ➜ **Redistribute Order Quantities** screen.

Redistribute Order Quantities Screen

2. Click ◄ (the **Hide Navigator** arrow) to minimize the Portal menu. Note this can be done with any transaction in WBSCM.

Select Orders

3. As required, complete/review the following fields:
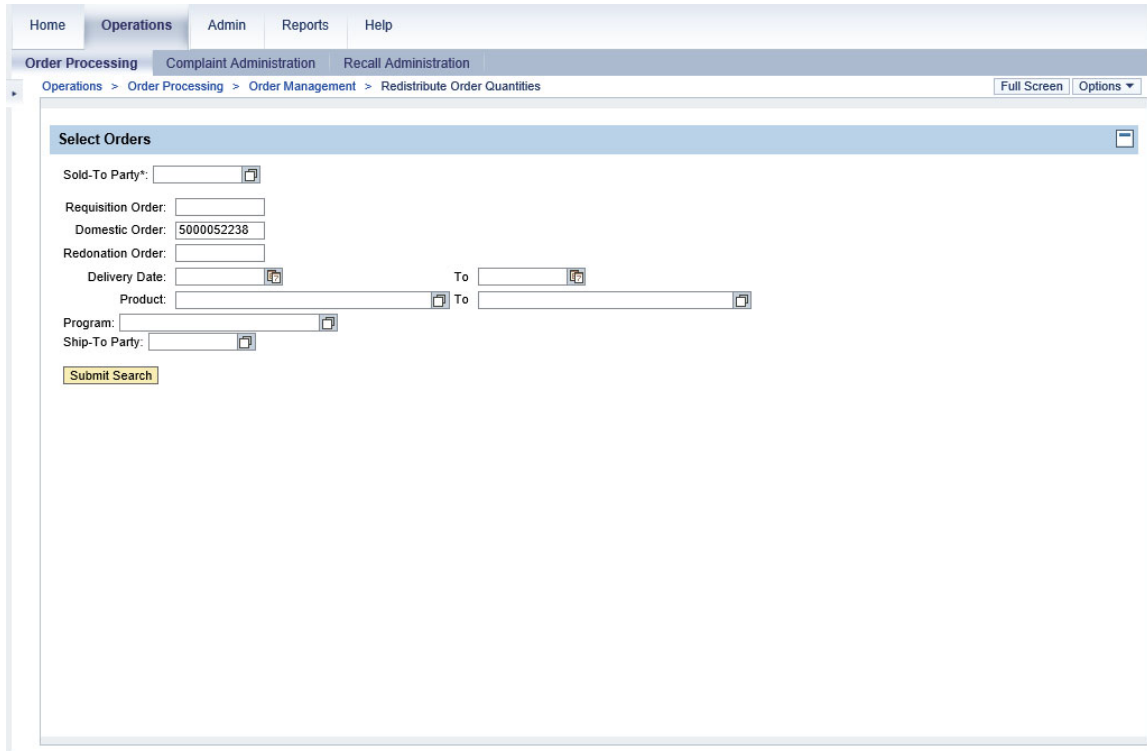
Field	R/O/C	Description
Sold-To Party*:	O	A unique identifying number associated with a particular customer in WBSCM. If the sold-to party number is unknown, use the search functionality to search for it.
Requisition Order:	O	Unique identifying number associated with a requisition order in WBSCM.
Domestic Order:	O	Unique identifying number associated with a sales order in WBSCM. **Example:** 5000033828
Redonation Order:	O	Unique identifying number associated with a redonation order in WBSCM.
Delivery Date:	O	The date when the commodity or commodities are either requested to be delivered to the customer or were delivered to the customer. (Note) In this example, the requested date is the date the customer requests delivery.1EA42E9629D548D187FD882 22DE5565B61DAE25139534354BB633 24476A7D0BC
Product:	O	Food commodity being ordered.
Program:	O	Acronym to identify a USDA food distribution program. (Note) Some examples of programs are NSLP, TEFAP, SFSP, CACFP, NSIP.1EA42E9629D548D187FD88222 DE5565B61DAE25139534354BB63324 476A7D0BC

Field	R/O/C	Description
Ship-To Party:	O	Unique identifying number associated with a person or company that receives the goods.

(Note) In this example, the *Domestic Order:* number is used as the search criteria.

Redistribute Order Quantities Screen

4. Click [Submit Search] (the **Submit Search** button) to locate orders based on the search criteria. In this example, a redonation order is located by searching for the domestic order number.

(Note) The following error message displays if both the domestic order number and redonation order number are used in the search:

Please enter either Domestic Order or Redonation Order, not both

Redistribute Order Quantities Screen

5. Perform one of the following:

If	Then
A requisition has not been created	Click **Create Req** (the **Create Req** link). (Note) Only Redonated Orders or Sales Orders that do not have requisitions require this action. In most cases, the requisition has already been created and the Requisition Number displays in the same line as the Redonation Order field.
A requisition already exists and the user needs to redistribute order quantities	Go to Step 6.
A requisition already exists and the user needs to cancel the redistribution order	Go to Step 12.

(Note) There are four options to sort the Sales / Redistribution Order results. Sort options retain the relationship between the ZREQ (requisition) document and any ZRE (redistribution) documents associated with the requisition.

- Sorted by ZREQ # - ZREQ Item # (Default view)
- Sorted by ZREQ Order Qty
- Sorted by ZREQ Open Qty
- Sorted by ZREQ Sold to (BP#)

Redistribute Order Quantities Screen

	Sales/ Redon. Order	Item	Requsition #	Redist. Doc #	Doc. type	Item	Material	Material Description	Order Qty	UoM	Redist. Qty	Open Qty	Sold To	Sol
	5000052238	100	1000040141		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	118.000	CS	14.000	104.000	8011127	UP
				1900001471	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	4.000	CS	0.000	0.000	8011037	Co
				1900001469	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	8.000	CS	0.000	0.000	8011036	RA
				1900001447	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	2.000	CS	0.000	0.000	8011036	RA
	5000052238	200	1000040142		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	184.000	CS	0.000	184.000	8011128	UP
	5000052238	100	1000040143		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	72.000	CS	0.000	72.000	8011129	UP
	5000052238	200	1000040144		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	131.000	CS	10.000	121.000	8011130	UP
				1900001477	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	6.000	CS	0.000	0.000	8011037	Co
				1900001473	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	2.000	CS	0.000	0.000	8011033	RA
				1900001437	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	2.000	CS	0.000	0.000	8011134	UP

Sort options

- ● Sorted by ZREQ # - ZREQ Item # (Default view)
- ○ Sorted by ZREQ Order Qty
- ○ Sorted by ZREQ Open Qty
- ○ Sorted by ZREQ Sold to (BP#)

Back to Search   Refresh the Screen   Cancel Redist.

6.   Click the requisition number in the **Requisition #** column to select the line item for redistribution. In this example, **1000040141** (the **1000040141** requisition number link) is used to begin redistribution.
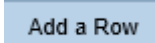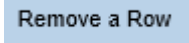
Redistribute Order Quantities Screen

7. As required, complete/review the following fields:
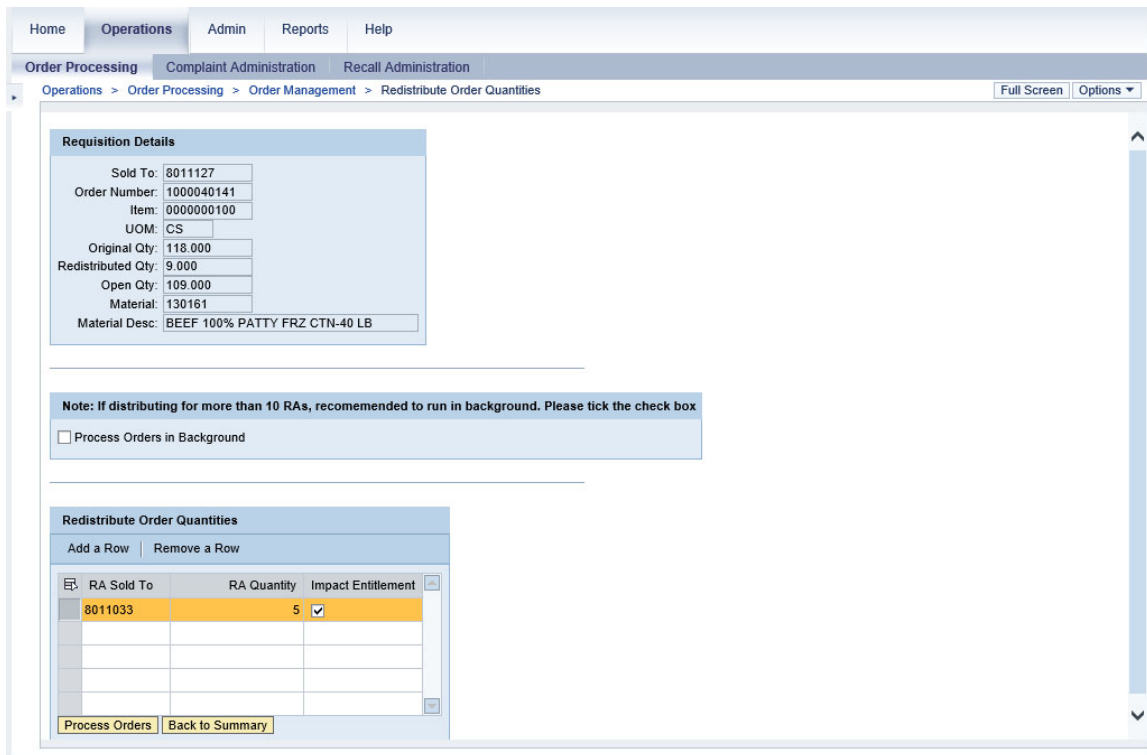
Field	R/O/C	Description
RA Sold To	R	This is the Recipient Agency (RA) sold-to party number. The order quantities will be redistributed to this RA. **Example:** 8011033 (Note) Use the search functionality to view the RA sold-to number.
RA Quantity	R	Recipient Agency (RA) Quantity indicates the quantity of orders being redistributed. **Example:** 5 (Note) In this example, 5 cases will be redistributed from SDA 8011127 to RA 8011033. Users will receive an error if attempting to redistribute order quantities in excess of the open quantity on the requisition.

8. Perform any of the following:

If	Then
The redistribution impacts the entitlements of both business partners	Select ☐ (the **Impact Entitlement** check box).

If	Then
The order quantities need to be distributed to more than one RA	1. Click [Add a Row] (the **Add a Row** button). 2. Complete the **RA Sold-to** field with the RA Sold-to number. 3. Complete the **RA Quantity** field with the redistribution quantity. 4. Select ☐ (the **Impact Entitlement** check box) if appropriate.
The user needs to remove an RA from the list	1. Click ☐ (the **Selection box**) for the RA line item to be removed. 2. Click [Remove a Row] (the **Remove a Row** button).
There are more than 10 RAs on the list	Select ☐ (the **Process Orders in Background** check box). (Note) While the background task is running, the SDA can navigate to another screen or log out of WBSCM. The SDA Order Manager will receive an email notification with a list of the redistribution orders and credits created at completion of the background task as well as any errors generated during the process, if applicable. Approximate processing time for the background job is based on the number of RAs an SDA is redistributing quantities to, as follows: **# RAs** **Approximate Processing Time** 10 2-3 minutes 20 4-6 minutes 40 8-12 minutes 80 16-24 minutes

Redistribute Order Quantities Screen

9. Click [Process Orders] (the **Process Orders** button) to redistribute the order quantities.

 (Note) Review any messages at the top of the screen.

Redistribute Order Quantities Screen

10. Click [Back to Summary] (the **Back to Summary** button) to return to the list of requisitions under the specified Sold-To.

(Note) A redistribution order and redistribution credit order have been created. Redistribution order numbers begin with 19XXXXXXXX. The redistribution order is created for the recipient RA and the redistribution credit is created for the SDA or RA donor, who redistributed order quantiies.

11. Perform one of the following:

If	Then
The user needs to cancel a redistribution order	Go to Step 12.
The user is finished redistributing order quantities	Go to Step 16.

Redistribute Order Quantities Screen

12. To cancel a redistribution order, click ☐ (the **Selection** box) beside the redistribution order to be canceled. In this example, redistribution order # 1900001481 will be canceled.

(Note) A line item was created with the Transaction Type ZRE (Redistribution Order).

13. Perform one of the following:

If	Then
The user needs to select multiple redistribution orders	1. Hold down the Ctrl key 2. Click the selection boxes to select individual redistribution orders (ZRE) to cancel.
The user needs to select all redistribution orders	1. Click ▦ (the **Select All** icon).
The user needs to select most redistribution orders	1. Click ▦ (the **Select All** icon). 2. Hold down the CTRL key. 3. Click the requisitions (ZREQ) to de-select.

Redistribute Order Quantities Screen

14. Click **Cancel Redist.** (the **Cancel Redist.** button) to cancel the redistribution order.

(Note) The Redistribution Documents are automatically canceled when the corresponding Sales Requisition Line Items are canceled.

Redistribute Order Quantities Pop-up

15. Click [Yes] (the **Yes** button) to confirm the cancelation.

(Note) A confirmation message indicating that the redistribution credit order (ZRCR) and redistribution order (ZRE) were canceled is displayed at the top of the screen. The canceled quantity has been added back to the original requisition' open quantiy , and is available to be redistributed to another RA as needed.

Redistribute Order Quantities Screen

	Sales/ Redon. Order	Item	Requsition #	Redist. Doc #	Doc. type	Item	Material	Material Description	Order Qty	UoM	Redist. Qty	Open Qty	Sold To	Sol
	5000052238	100	1000040141		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	118.000	CS	9.000	109.000	8011127	UP
				1900001479	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	5.000	CS	0.000	0.000	8011033	RA
				1900001471	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	4.000	CS	0.000	0.000	8011037	Co
	5000052238	200	1000040142		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	184.000	CS	0.000	184.000	8011128	UP
	5000052238	100	1000040143		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	72.000	CS	0.000	72.000	8011129	UP
	5000052238	200	1000040144		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	131.000	CS	2.000	129.000	8011130	UP
				1900001437	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	2.000	CS	0.000	0.000	8011134	UP
	5000052238	100	1000040145		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	112.000	CS	0.000	112.000	8011131	UP
	5000052238	200	1000040146		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	184.000	CS	0.000	184.000	8011031	De
	5000052238	100	1000040147		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	98.000	CS	0.000	98.000	8011131	UP
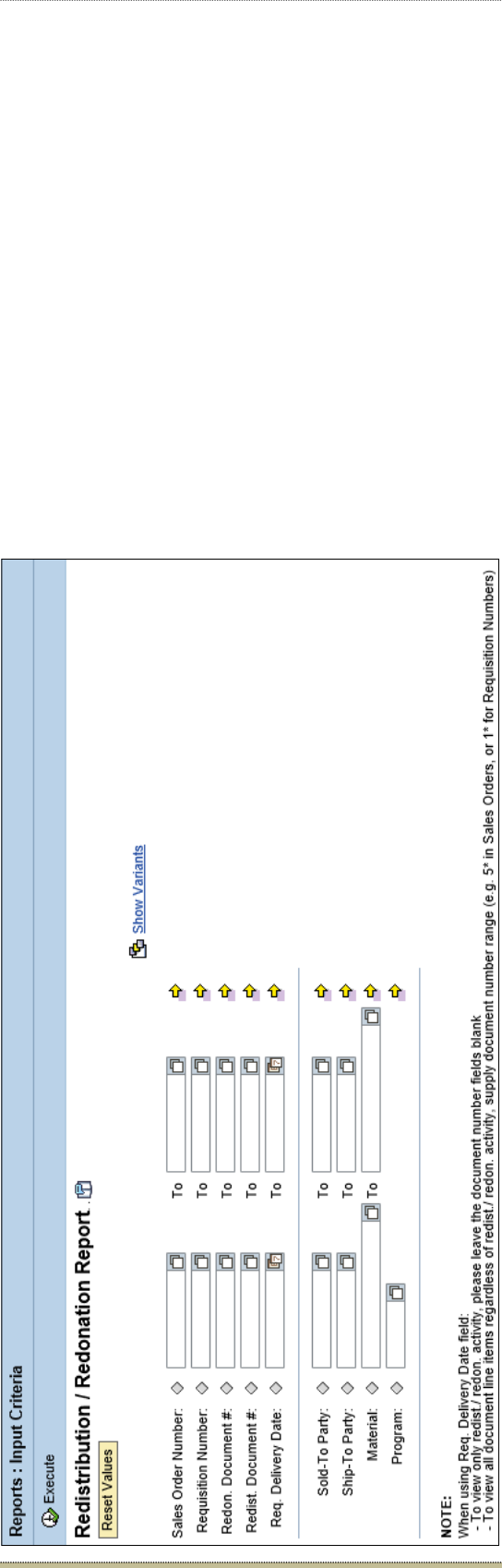
16. The transaction is complete.

RESULT

The order quantities have been redistributed by the SDA from one RA to another. A redistribution order was canceled.

Report Title	Redistribution / Redonation Report
Purpose	This report provides detail on redistribution and redonation transactions that match the selection criteria.
Portal Navigation Path	**Reports** tab → **Order Processing** tab → **Redistribution / Redonation Detail Report** link
Target Audience	FNS, SDA, RA, and Ship-To

Report Selection Screen

Reports : Input Criteria

Execute

Redistribution / Redonation Report

Reset Values

		To	
Sales Order Number:		To	
Requisition Number:		To	
Redon. Document #:		To	
Redist. Document #:		To	
Req. Delivery Date:		To	
Sold-To Party:		To	
Ship-To Party:		To	
Material:		To	
Program:			

Show Variants

NOTE:
When using Req. Delivery Date field:
- To view only redist./ redon. activity, please leave the document number fields blank
- To view all document line items regardless of redist./ redon. activity, supply document number range (e.g. 5* in Sales Orders, or 1* for Requisition Numbers)

Enter selection criteria using ☐ (the **Matchcode** icon) to search and populate the fields or type directly into the fields.

- The user must enter at least one of the following search criteria: **Sales Order Number, Requisition Number, Redon. Document #, Redist. Document #, or Req. Delivery Date.**

- When using the **Req. Delivery Date:**

  o To view only redistribution/redonation activity, leave the document number fields blank.

  o To view all line items regardless of activity, enter a range for **Sales Order Number** (5*) and/or **Requisition Number** (*1).

- Selecting multiple criteria will narrow the search and result in faster report output.

Click Execute (the **Execute** button) to apply selection criteria and generate the report.

Report Output

Redistribution / Redonation Report

◆ Go Back | View: REDISTRIBUTION ▼ | Print Version | Export ▲

Sales Order #	SO Item	SO Sold-to party	SO Sold-to name	SO Status	Re-Don. Doc	Re-Don. Item	Requisition #
5000297596	400	4000530	NC Dept. of Ag and Consumer Service	Approved by SDA			1000312508
5000297596	400	4000530	NC Dept. of Ag and Consumer Service	Approved by SDA			
5000297596	400	4000530	NC Dept. of Ag and Consumer Service	Approved by SDA			
5000297533	100	4000530	NC Dept. of Ag and Consumer Service	Approved by SDA			1000312510
5000297533	100	4000530	NC Dept. of Ag and Consumer Service	Approved by SDA			
5000297554	100	4000530	NC Dept. of Ag and Consumer Service	Approved by SDA			
5000297557	100	4000530	NC Dept. of Ag and Consumer Service	Approved by SDA			

Note: To view additional fields (columns), use the horizontal scrollbar; to view additional records (rows), use the vertical scrollbar.

The default View (**REDISTRIBUTION**) includes the following fields:

Fields 1 – 7	Fields 8 – 14	Fields 15 – 21	Fields 22 – 28
• Sales Order #	• Requisition #	• Doc. Type descr.	• Program
• SO Item	• Requisition Item	• Status text	• Entitlement/Bonus
• SO Sold-to party	• Re-Dist. Doc	• Ship-to party	• Requested Qty.
• SO Sold-to name	• Re-Dist. Item	• Ship-to name	• Sales unit
• SO Status	• Sold-to Party	• Material	• Net Value
• Re-Don. Doc	• Sold-to name	• Material Descr.	• Entitlement Imp.
• Re-Don. Item	• Document Type	• Req. Del. Date	

Note: For orders that have been received with a missing ASN, the **SO Status** field will display the status of **Order Received.**

Users can create and save a customized layout via the 🔧 (the **Open Settings Dialog** button). Users may also select a different layout (default or previously saved) from the **View** drop-down list.

Click the Print Version (the **Print Version** button) to produce a formatted print-ready document (cannot be edited). Use Export ▲ (the **Export** button) to work with the report data in Microsoft Excel or a similar application.

Refer to the Reporting Navigation job aid for additional guidance.

PROCESS OVERVIEW

Purpose

The purpose of this document is for a Recipient Agency to create a multi-food order. Multi-food orders are sourced from a warehouse; a multi-food order is not the same as a domestic requisition and is not consolidated. When navigating through the catalog, all available multi-food products are displayed after clicking on the multi-food link. Currently multi-food is available only to CSFP and FDPIR programs. Multi-food delivery calendars are set by the National Warehouse Admin. The available delivery dates and Ship-To locations are displayed when creating a multi-food order.

Process Trigger

Use this transaction to create a multi-food order.

Prerequisites

- A catalog view must be assigned to the organization.
- Delivery dates must be assigned to Sold-To and Ship-To locations.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab ➜ **Order Processing** tab ➜ **Order Management** folder to go to the *Domestic Order Entry* link

Tips and Tricks

- The **R/O/C** acronyms in the field tables represent Required, Optional, or Conditional field entries.
    - **Required (R)** – a mandatory field necessary to complete the transaction
    - **Optional (O)** – a non-mandatory field not required to complete the transaction
    - **Conditional (C)** – a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Portal Basic Navigation course for tips on creating favorites, performing searches, etc.

PROCEDURE

1. Start the transaction using the Portal path: **Operations** tab ➜ **Order Processing** tab ➜ **Order Management** folder ➜ **Domestic Order Entry** link.

   Image: Domestic Order Entry Screen

2. Click ◄ (the **Hide Navigator** button) to hide the Portal menu. Note that this can be done with any transaction in WBSCM.

   Image: Domestic Order Entry Screen

3. Click ![here] (the **here** link) under the *Welcome* section to begin entering the order.

Image: Domestic Order Entry Screen

4. As required, complete/review the following fields:

Field	R/O/C	Description
Your Reference:	O	A free text field which allows for further clarification of an entry by reference to other sources of information. **Example:** A000011807
Your Description:	O	A free text field describing the order or complaint issue. **Example:** Multi-food Order (Note) This field can be used to enter a description of the order or an external order ID number.

(Note) The order pre-populates with the **Sold-To Party Number** (customer number). The **Your Reference** and **Your Description** fields are an optional way for an RA to recognize orders in WBSCM later.

Image: Domestic Order Entry Screen
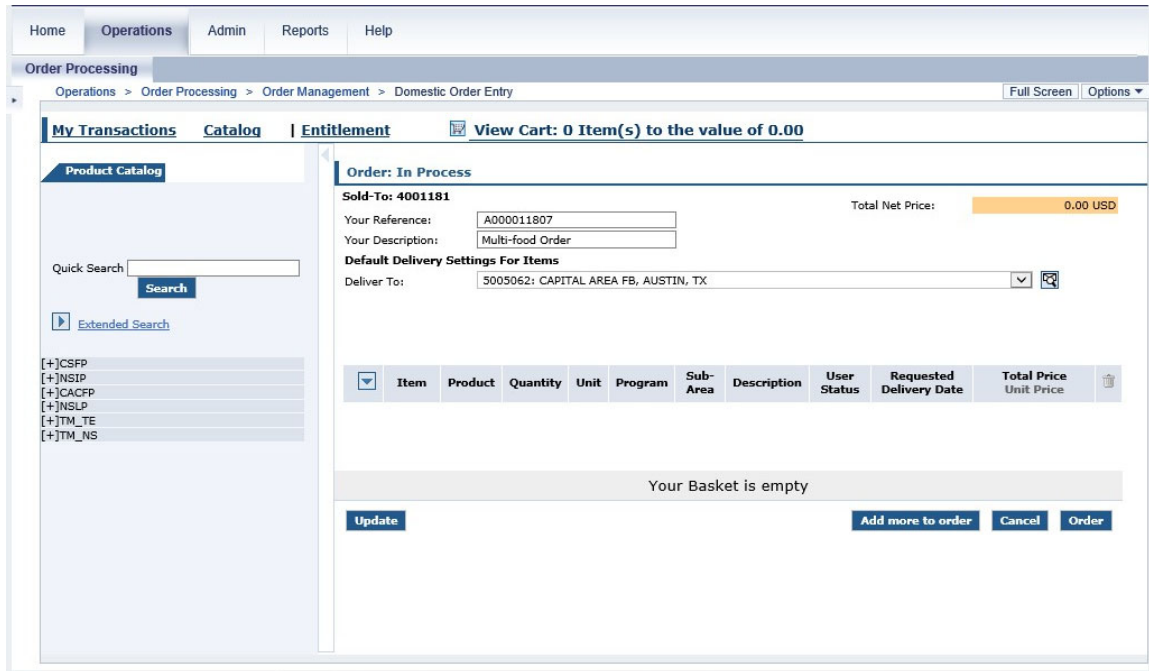
5. Click ☑ (the **Dropdown Arrow** button) to change the **Deliver To**: location.

Image: Domestic Order Entry Screen
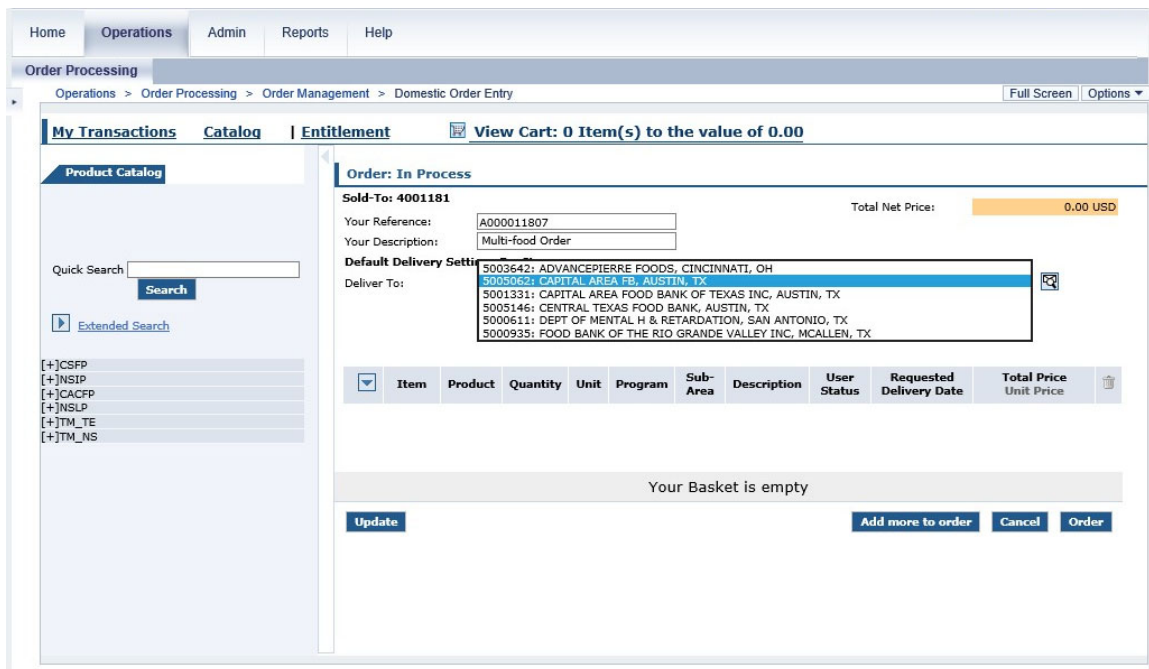
6. Select the desired Ship-To destination from the **Deliver To:** dropdown list. In this example, 5005062: CAPITAL AREA FB, AUSTIN, TX (the **5005062: CAPITAL AREA FB, AUSTIN, TX** option) was selected.
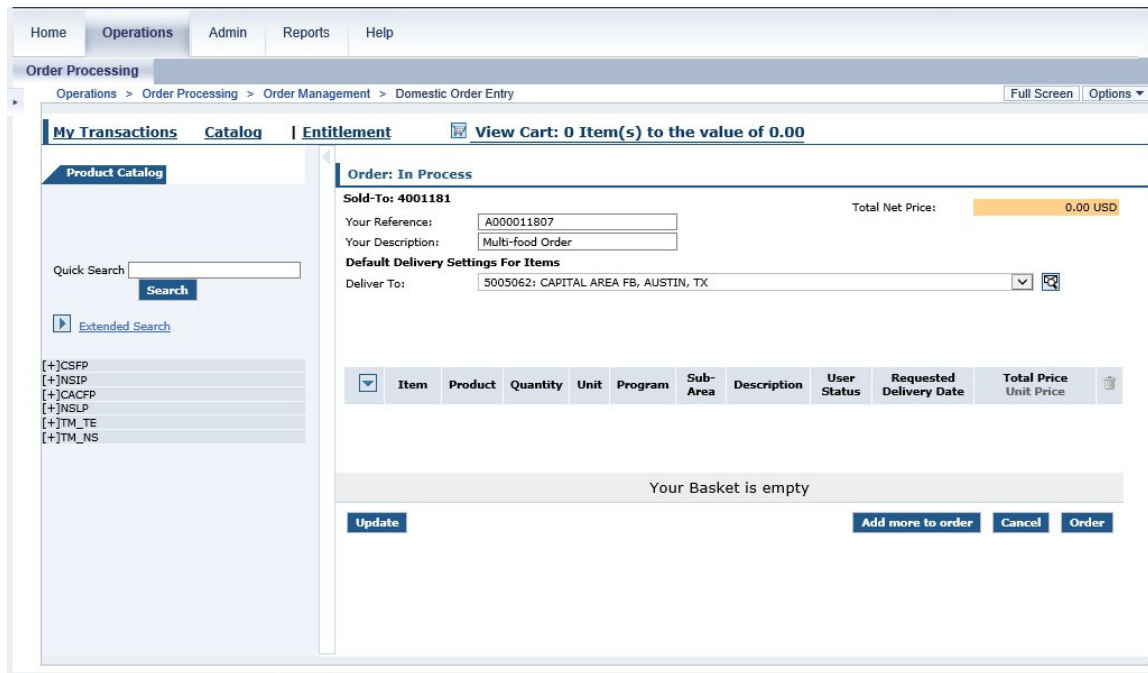
Image: Domestic Order Entry Screen

7. Click ![Update](the **Update** button) to save the **Deliver To:** destination and any optional text entered in the header.

Image: Domestic Order Entry Screen
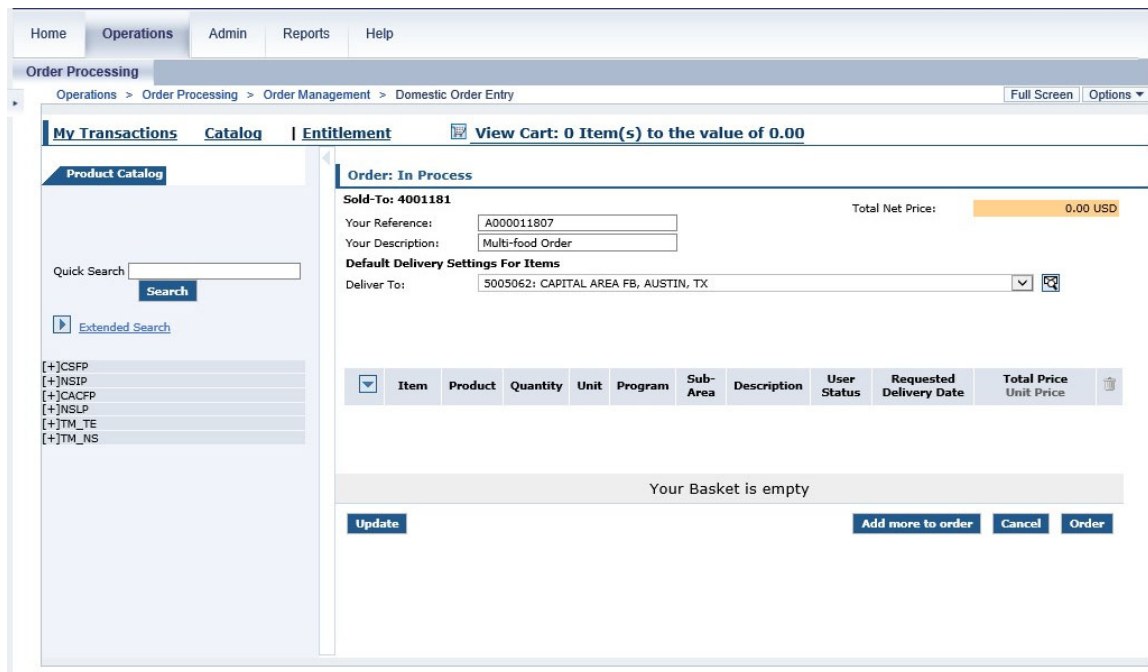
8. In the Product Catalog, click ![plus] (the **Plus** icon) next to the appropriate program. In this example, ![+]CSFP (the **CSFP** option) was selected.

(Note) To review the list of materials available for ordering, the user will drill down through the product catalog beginning with the program. The user will see only programs with which their RA is affiliated. Multi-food orders are available only to the CSFP and FDPIR programs.

Image: Domestic Order Entry Screen
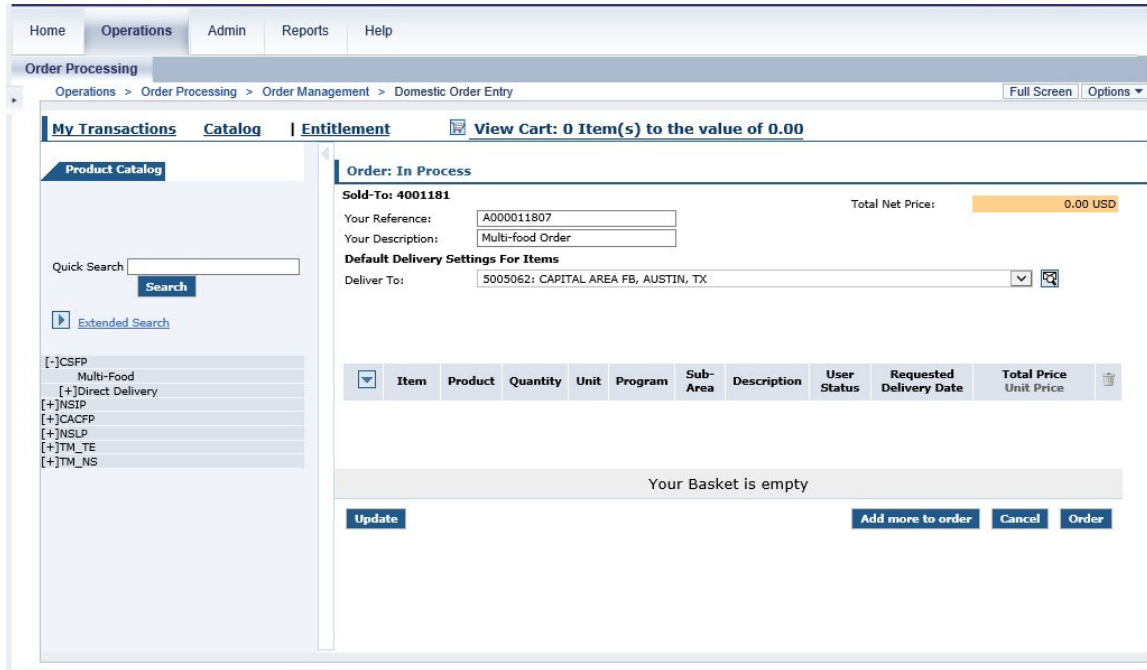
9. Click Multi-Food (the **Multi-Food** link) after selecting the desired program. In this example, Multi-Food (the **Multi-Food** option) under **CSFP** was selected.

(Note) After selecting the **Multi-Food** link, all the available products will display on the right-hand side of the screen.

Image: Domestic Order Entry Screen
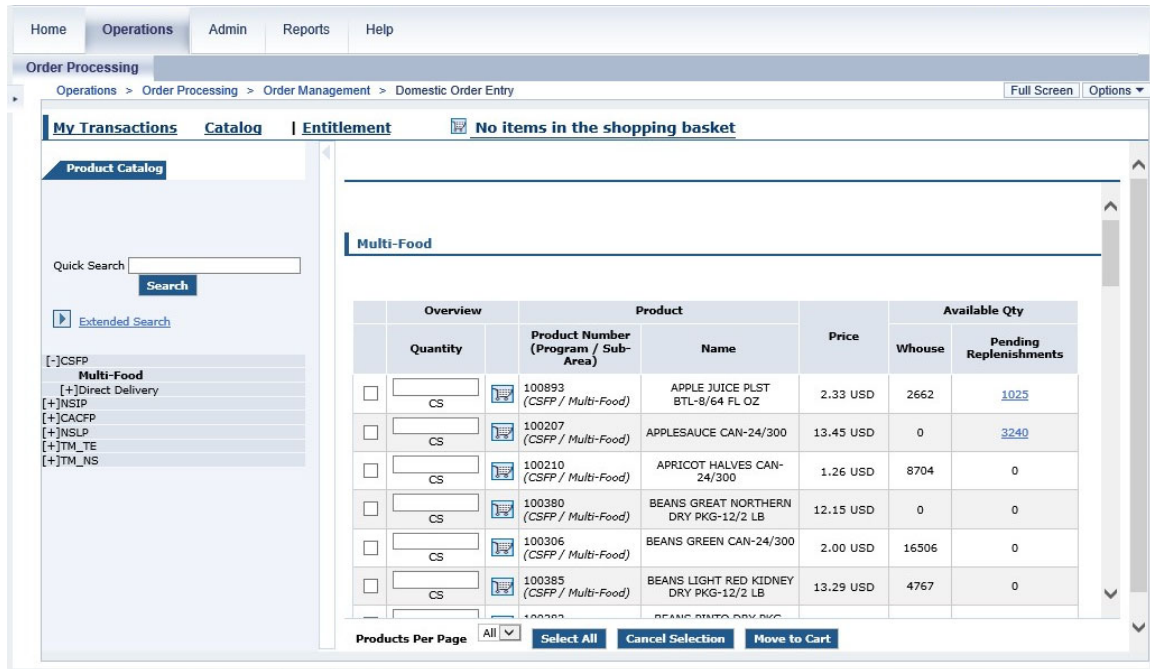
10. Click ☐ (the **Check Box** icon) next to the line item for the required product to add it to the cart. In this example, the line item for product number **100893** was selected.

Image: Domestic Order Entry Screen
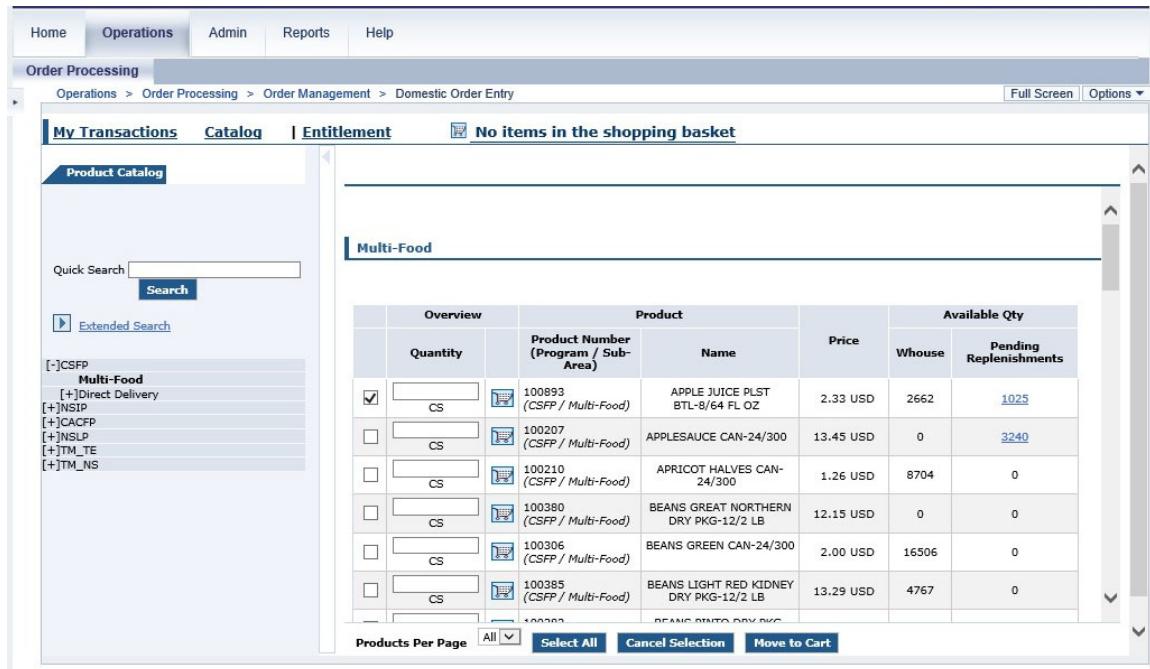
11. As required, complete/review the following fields:

Field	R/O/C	Description
Quantity	R	Number of items. **Example:** 5

(Note) The **Available Qty** columns reflect the quantity currently on hand at the national warehouses and quantities on order for replenishment. Orders that exceed available quantities may not be processed or are subject to being cancelled or delayed.

Image: Domestic Order Entry Screen

12. Click (the **Shopping Cart** button) to add the product to the cart.

Image: Domestic Order Entry Screen

13. Click ![View Cart:] (the **View Cart:** link) to view the items added to the cart. In this example, the

![View Cart: 1 Item(s) to the value of 11.66 USD] (the **View Cart: 1 Item(s) to the value of 11.66 USD** link) was selected.

Image: Domestic Order Entry Screen
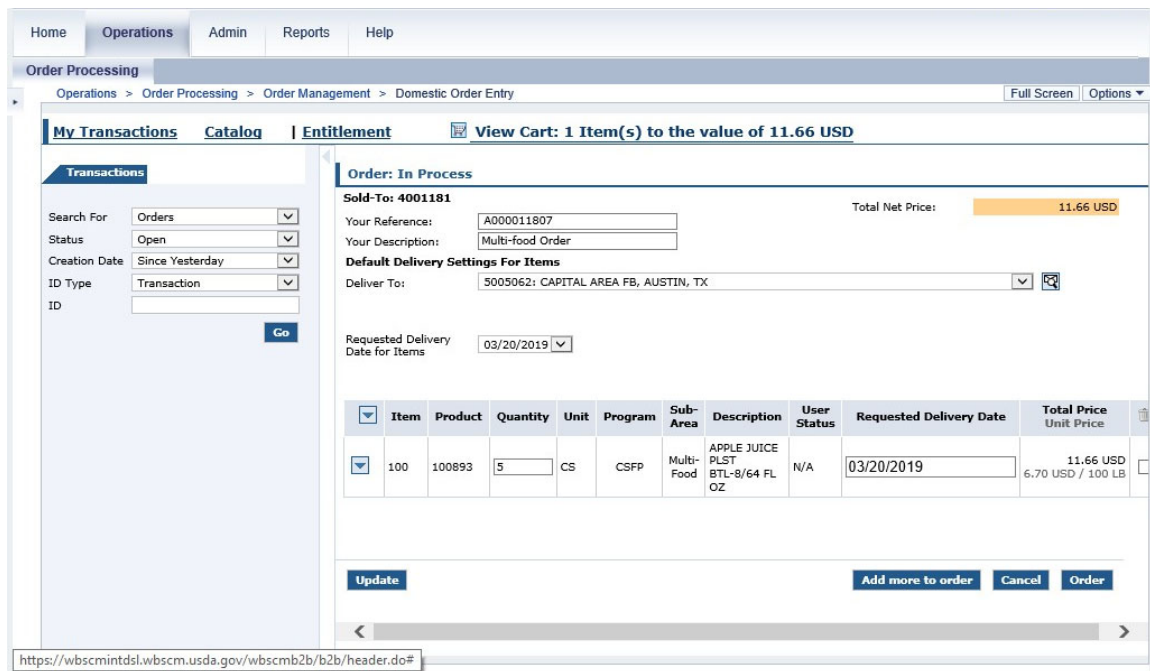
14. Select the appropriate delivery date from the **Requested Delivery Date** dropdown list. In this example, ![03/20/2019] (the **03/20/2019** date) was selected.

(Note) Click [ ] (the **Hide Navigator** button) to hide the *Transaction* Pane to maximize the view.

(Note) Once selected, the delivery date for each product will be displayed in the **Requested Delivery Date** column.

15. Perform one of the following:

If	Then
The user needs to add another item to the order	Go to Step 16.
The user needs to update quantity for an item in the cart	Go to Step 22.
The user needs to delete items from the order	Go to Step 25.
The user is ready to submit the order	Go to Step 28.

Image: Domestic Order Entry Screen
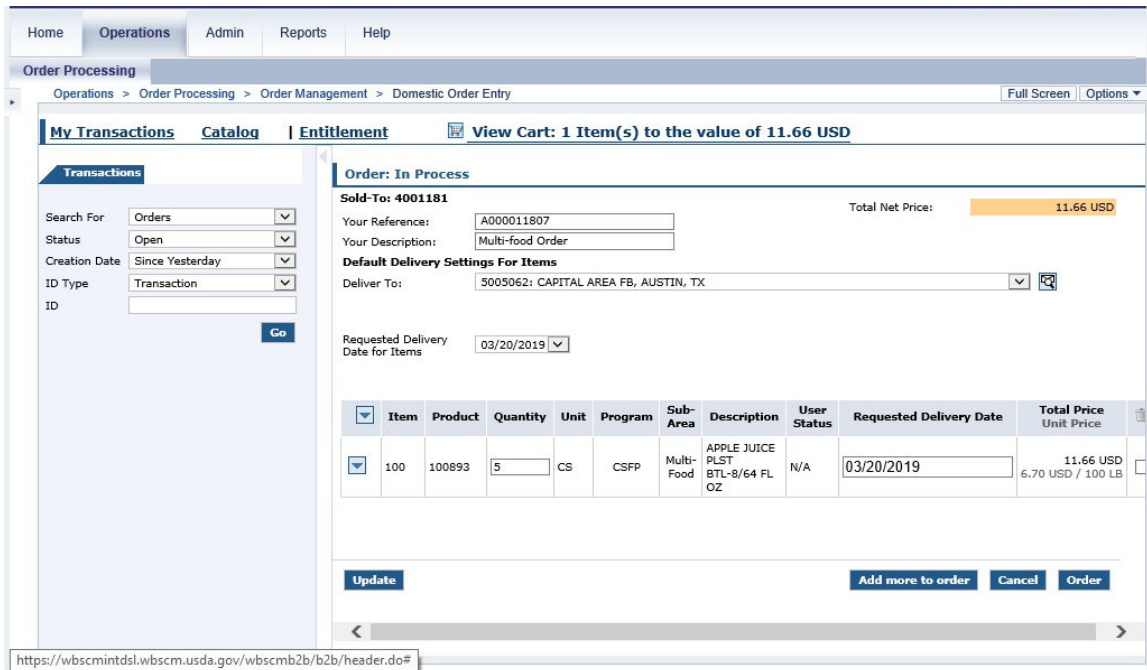
16. Click [Add more to order] (the **Add more to order** button) to add a new product to this order.

Image: Domestic Order Entry Screen
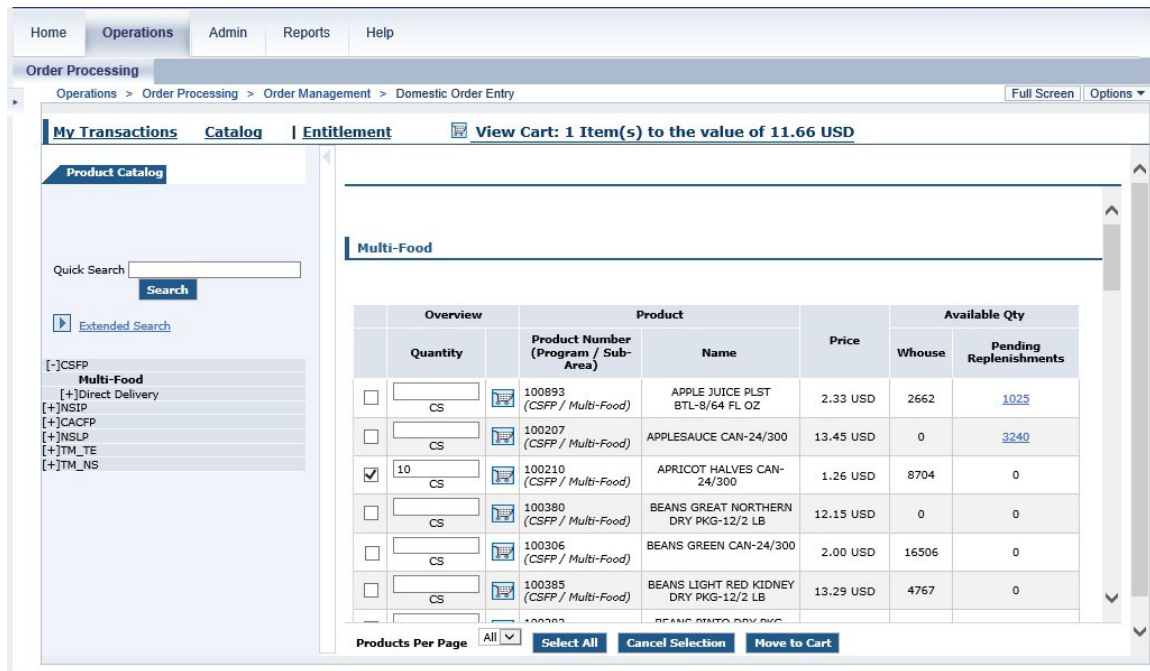
17. Click ☐ (the **Check Box** icon) beside the product(s) to add it to the order.

(Note) All checked products can be added to the cart at the same time.

Image: Domestic Order Entry Screen
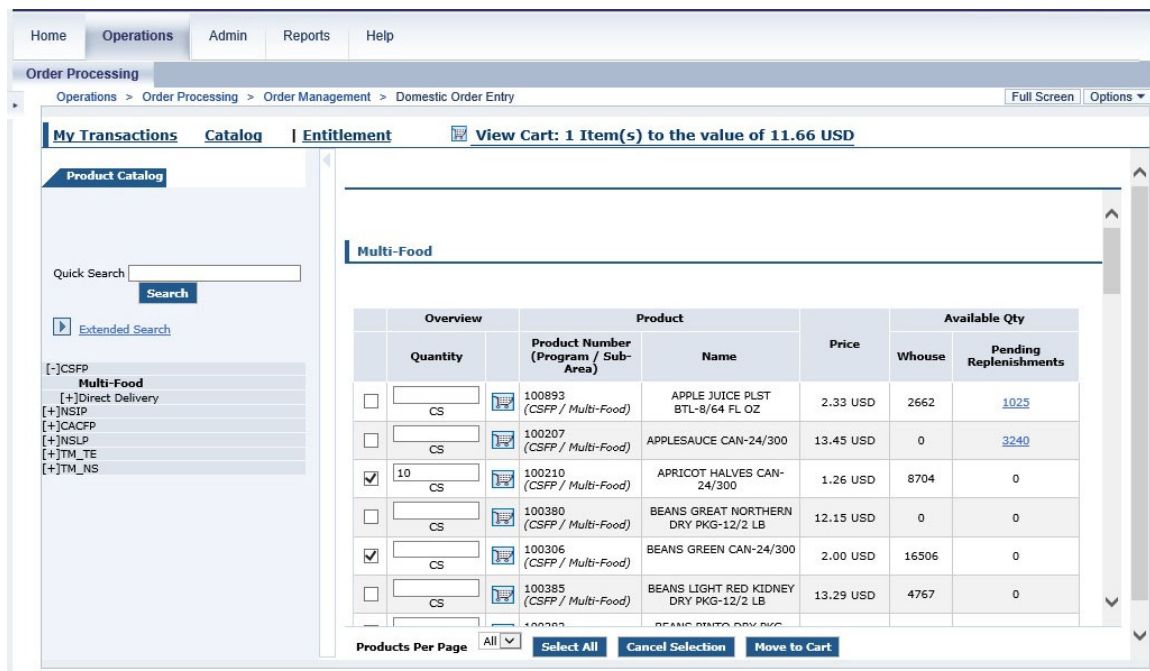
18. Enter the desired quantity in the **Quantity** field. In this example, **5** was entered in the **Quantity** field.

Image: Domestic Order Entry Screen
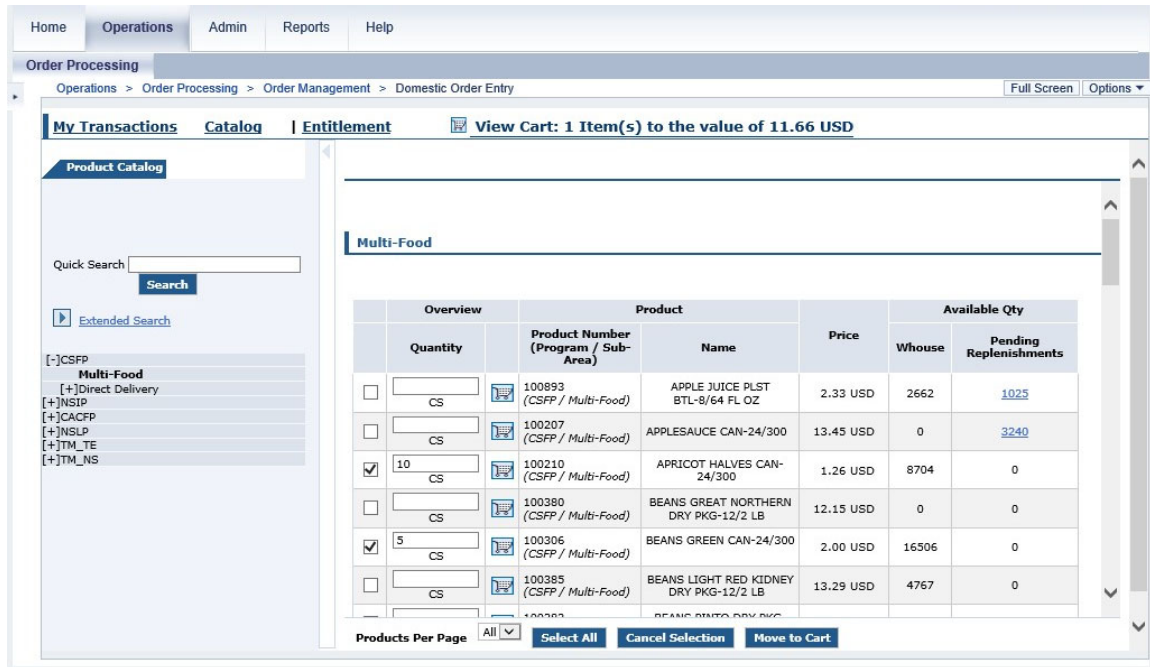
19. Click [Move to Cart] (the **Move to Cart** button) on the bottom of the screen.

Image: Domestic Order Entry Screen

20. Click [View Cart:] (the **View Cart:** link) to view items added to the cart. In this example, [View Cart: 3 Item(s) to the value of 34.29 USD] (the **View Cart: 3 Item(s) to the value of 34.29 USD** link) was selected.

Image: Domestic Order Entry Screen

21.   Click ◄ (the **Hide Navigator** button) to hide the *Transaction* Pane.

Image: Domestic Order Entry Screen

22.   Update the **Quantity** field, as appropriate, for the required line items.

Image: Domestic Order Entry Screen

23. Click **Update** (the **Update** button) to apply changes.

24. Return to Step 15.

Image: Domestic Order Entry Screen

25. Click ☐ (the **Check Box** icon) underneath the **Trashcan** column to select a line to delete. In this example, the last line item was selected.

Image: Domestic Order Entry Screen

26. Click [Update] (the **Update** button) to delete the selected line(s).

27. Return to Step 15.

Image: Domestic Order Entry Screen

28. Click [Order] (the **Order** button) to submit this order.

Image: Domestic Order Entry Screen

29. Click [OK] (the **OK** button) in the pop-up window to confirm order submission.

Image: Domestic Order Entry Screen
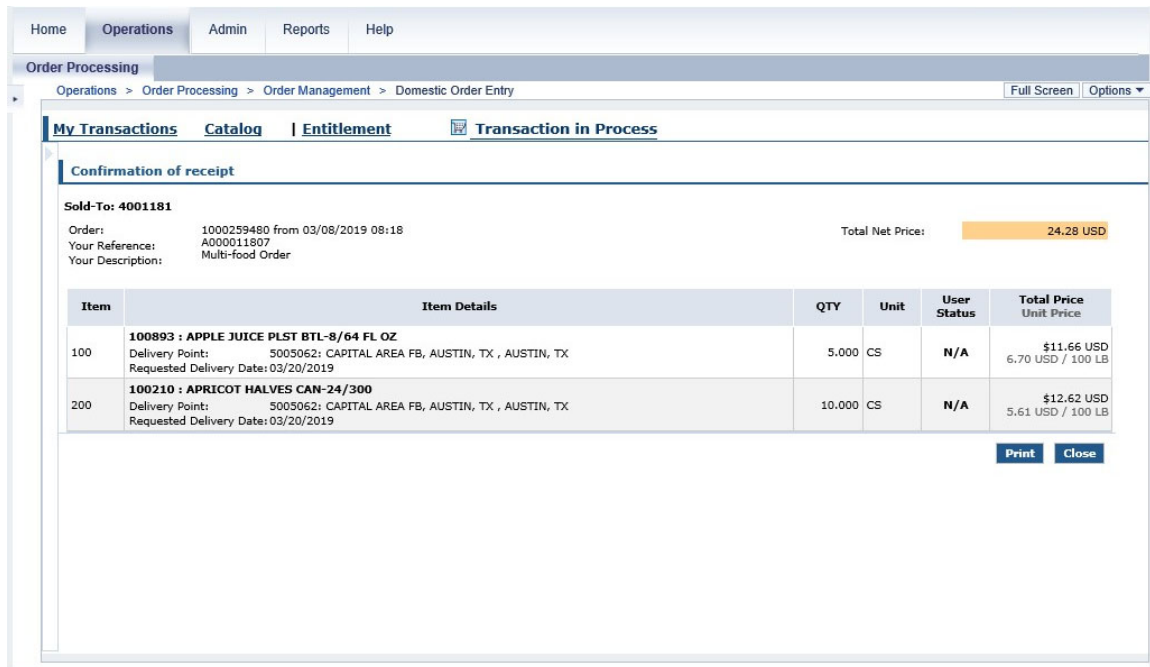
30. The transaction is complete.

(Note) The order number will be required to display or modify the order in the future. For reference, record the order number displayed on the *Confirmation of receipt* screen.

RESULT

A multi-food order was created, including selecting a Ship-To destination, adding items to the order, and selecting a delivery date. As applicable, quantities and items may have been updated before submitting the order.

Create Multi-Food Order SDA

PROCESS OVERVIEW

Purpose

The purpose of this document is to create a multi-food order by State Distributing Agencies (SDAs) and Indian Tribal Organizations (ITOs). Multi-food orders are sourced from a warehouse; a multi-food order is not the same as a domestic requisition and is not consolidated. When navigating through the catalog, all available multi-food products are displayed after clicking on the multi-food link. Currently multi-food is available only to programs CSFP and FDPIR. Multi-food delivery calendars are set by the National Warehouse Admin. The available delivery dates and Ship-To locations are displayed when creating a multi-food order.

Process Trigger

Use this transaction when the user needs to create a multi-food order.

Prerequisites

- A catalog view must be assigned to the organization.
- Delivery dates must be assigned to Sold-To and Ship-To locations.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab ➜ **Order Processing** tab ➜ **Order Management** folder to go to the *Domestic Order Entry* link

Tips and Tricks

- The **R/O/C** acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - o **Required (R)** – a mandatory field necessary to complete the transaction
  - o **Optional (O)** – a non-mandatory field not required to complete the transaction
  - o **Conditional (C)** – a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Portal Basic Navigation course for tips on creating favorites, performing searches, etc.

PROCEDURE

1. Start the transaction using the Portal path: **Operations** tab ➜ **Order Processing** tab ➜ **Order Management** folder ➜ **Domestic Order Entry** link.

   Image: Domestic Order Entry Screen

2. Click ◄ (the **Hide Navigator** button) to hide the Portal menu.

3. Perform one of the following:

If	Then
The user is ordering on behalf of an RA	Go to Step 4.
The user is ordering for their own organization	Go to Step 5.

Image: Domestic Order Entry Screen
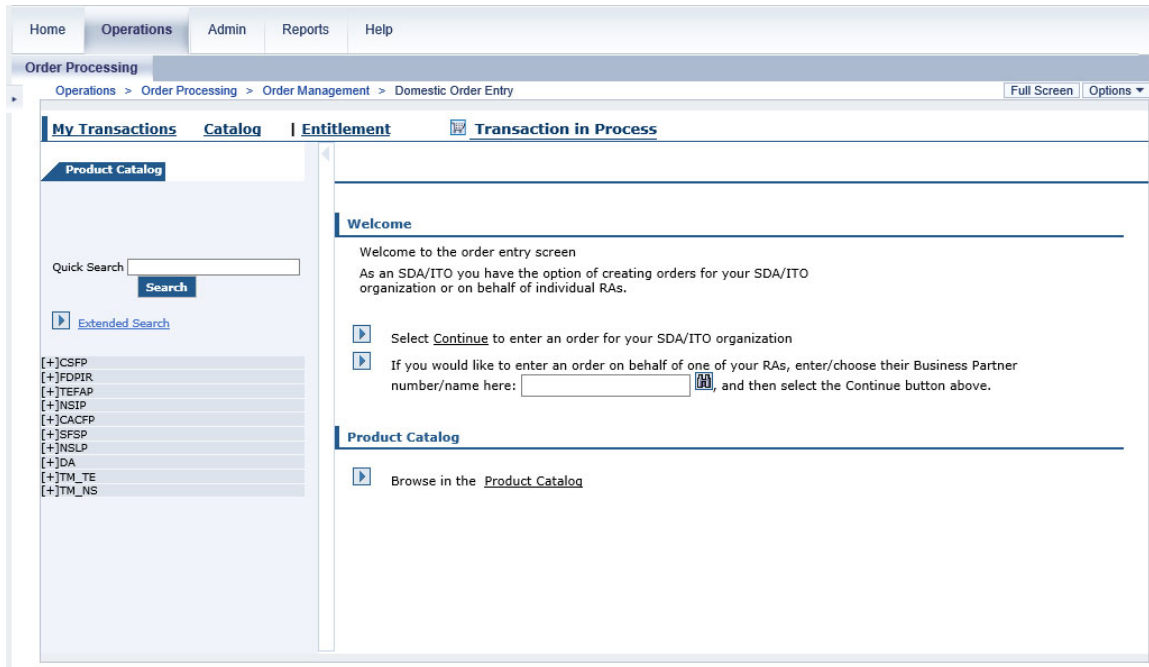
4. Enter the RA's BP number in the text box or click [icon] (the **Binoculars** icon). In this example, **4001181** was entered.

(Note) If the textbox is not displayed, the RA may be selected from a dropdown list instead.

Image: Domestic Order Entry Screen

5. Click Continue (the **Continue** link) under the *Welcome* section, to begin entering the order.

Image: Domestic Order Entry Screen

6.   As required, complete/review the following fields:

Field	R/O/C	Description
Your Reference:	O	A free text field which allows for further clarification of an entry by reference to other sources of information. **Example:** A000011807
Your Description:	O	A free text field describing the order or complaint issue. **Example:** Multi-food Order (Note) This field can be used to enter a description of the order or an External sales order number.

(Note) The order pre-populates with the **Sold-To Party Number** (customer number). The **Your Reference** and **Your Description** fields are an optional way for an SDA/ITO to recognize orders in WBSCM later.

Image: Domestic Order Entry Screen
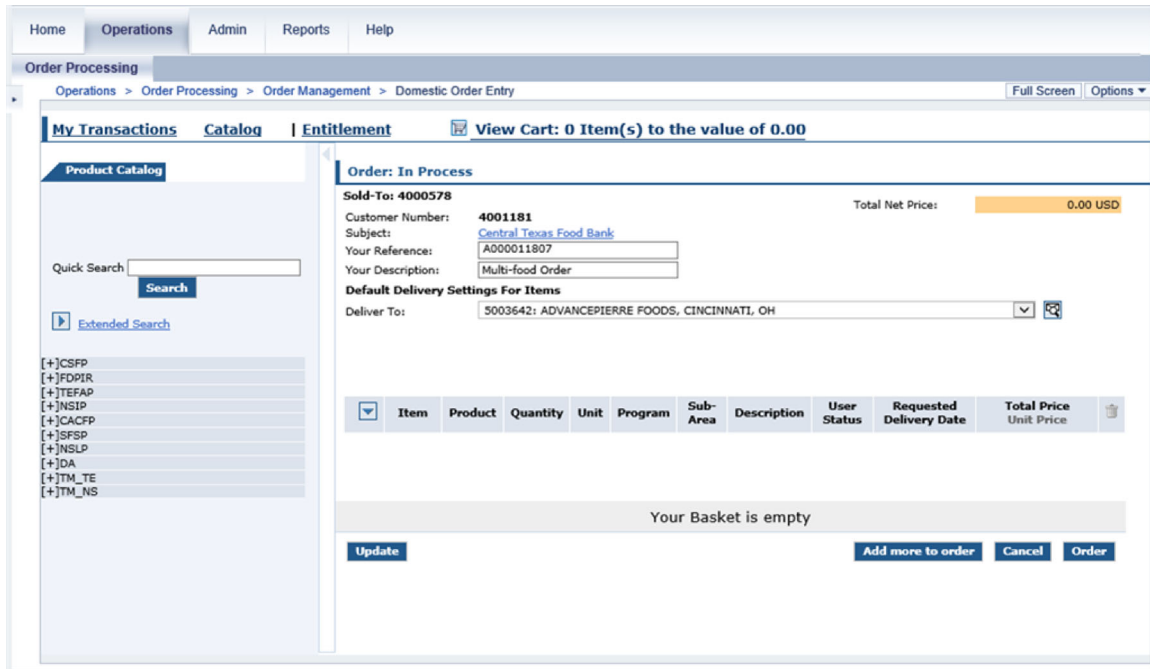
7.   Click [▼] (the **Dropdown** button) in the **Deliver To:** field to select the desired Ship-To destination.

Image: Domestic Order Entry Screen
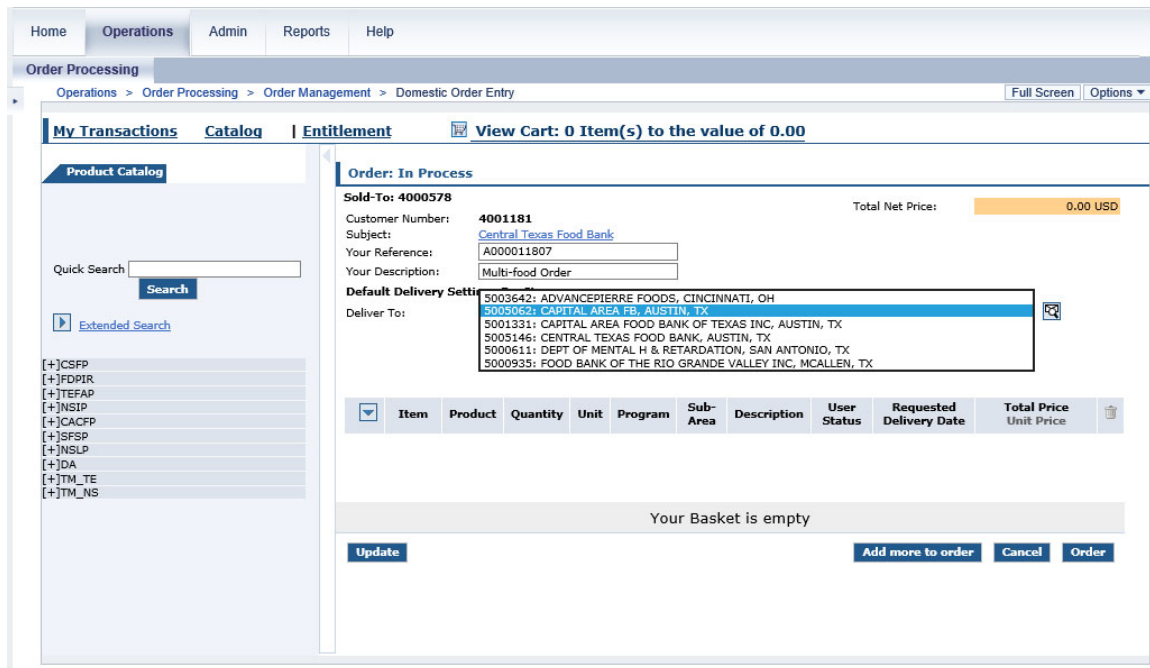
8.   Select the desired Ship-To destination from the **Deliver To:** dropdown list. In this example, 5005062: CAPITAL AREA FB, AUSTIN, TX (the **5005062: CAPITAL AREA FB, AUSTIN, TX** option) was selected.

Image: Domestic Order Entry Screen
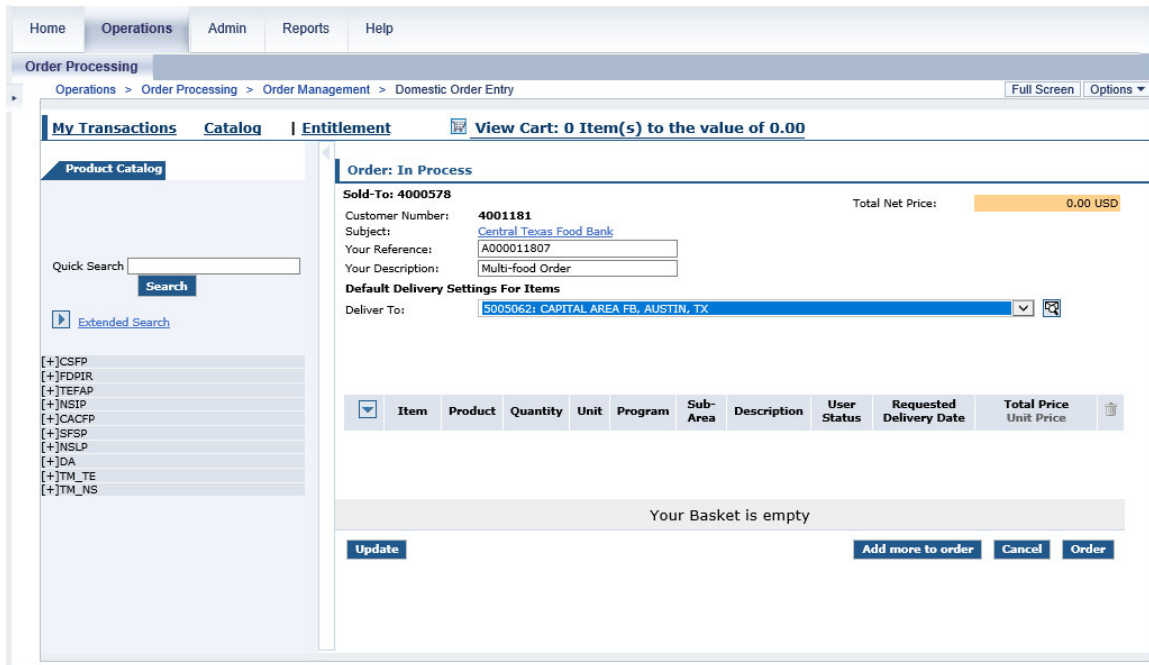
9. Click ![Update] (the **Update** button) to save the **Deliver To:** destination and any optional text entered in the header.

Image: Domestic Order Entry Screen

10. In the Product Catalog, click [+] (the **Plus** icon) next to the appropriate program. In this example, [+]CSFP (the **CSFP** option) was selected.

(Note) To review the list of materials available for ordering, the user will drill down through the product catalog beginning with the program. The user will see only programs with which their SDA, ITO, or RA is affiliated. Multi-food orders are available only to CSFP and FDPIR.

Image: Domestic Order Entry Screen

11. Click Multi-Food (the **Multi-Food** link) after selecting the desired program. In this example, Multi-Food (the **Multi-Food** option) under **CSFP** was selected.

(Note) After selecting the **Multi-Food** link, all the available products will display on the right-hand side of the screen.

Image: Domestic Order Entry Screen

12.   Click ☐ (the **Check Box** icon) next to the line item for the required product to add it to the cart. In this example, the line item for product number **100893** was selected.

Image: Domestic Order Entry Screen
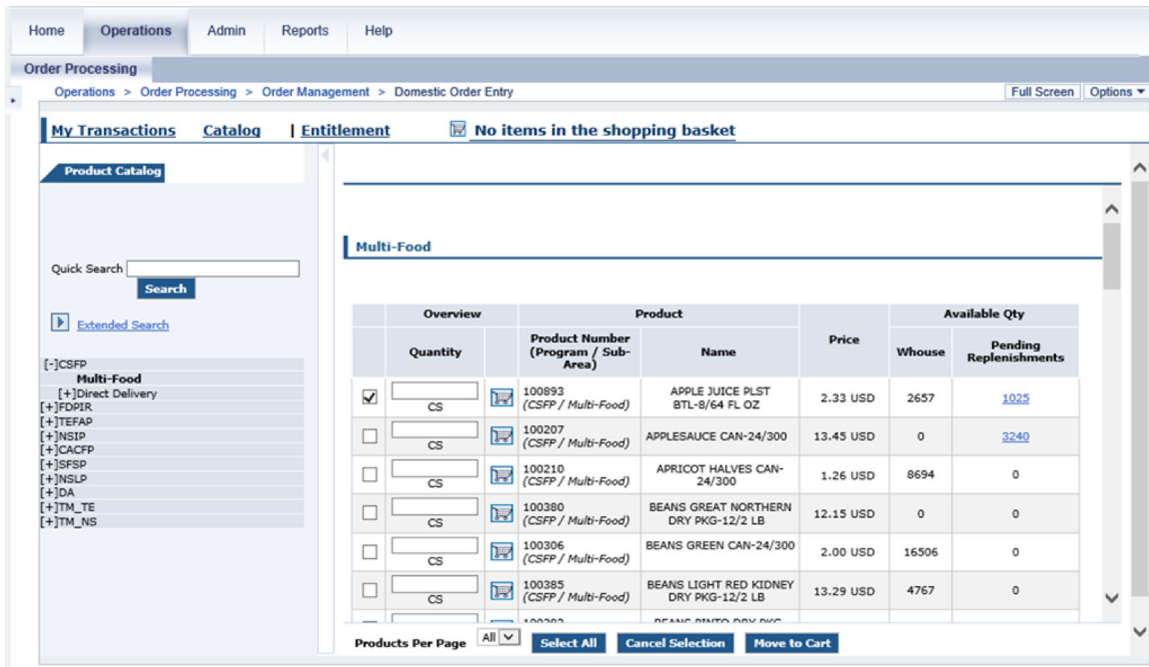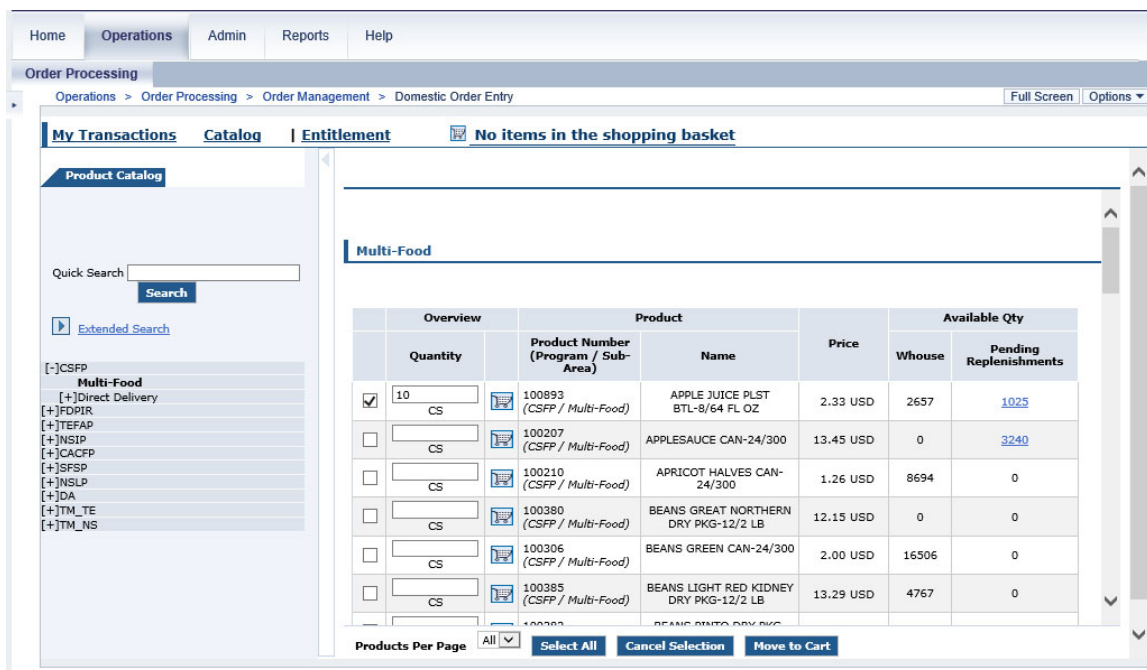
13.   As required, complete/review the following fields:

Field	R/O/C	Description
Quantity	R	Number of items. **Example:** 10

(Note) The **Available Qty** columns reflect the quantity currently on hand at the national warehouses and quantities on order for replenishment. Order that exceed available quantities may not be processed or are subject to being cancelled or delayed.

Image: Domestic Order Entry Screen

14.   Click ⛟ (the **Shopping Cart** button) to add the product to the cart.

Image: Domestic Order Entry Screen

15. Click on ![View Cart:] (the **View Cart:** link) to view the items added to the cart. In this example, ![View Cart: 1 Item(s) to the value of 23.32 USD] (the **View Cart: 1 Item(s) to the value of 23.32 USD** link) was selected.

Image: Domestic Order Entry Screen
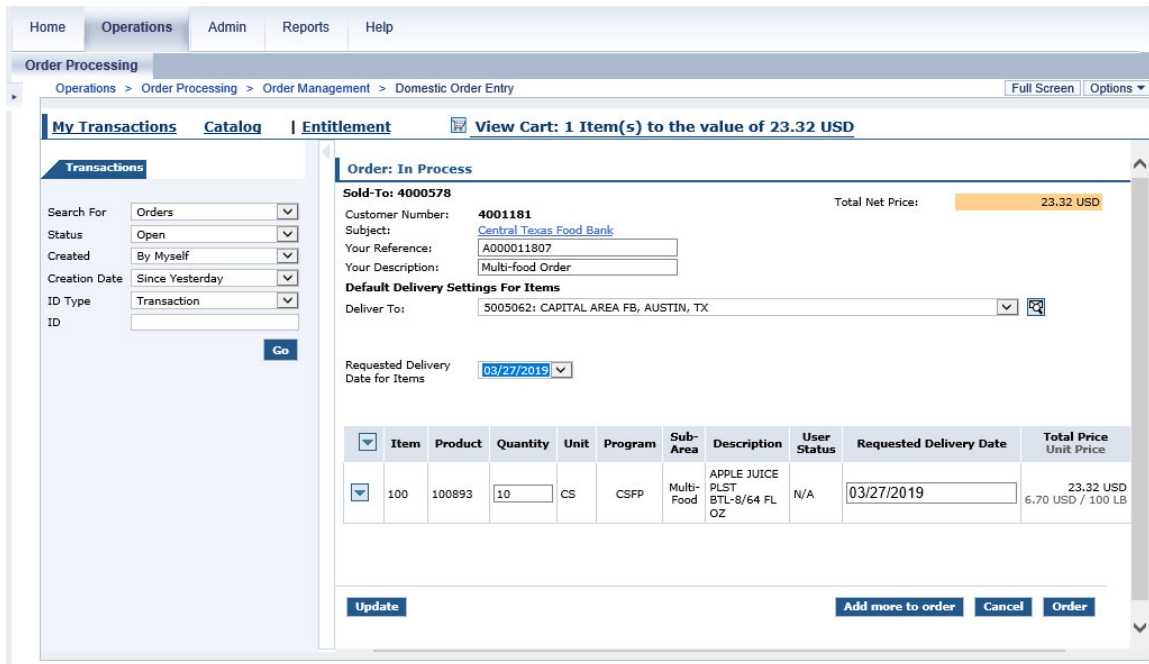
16. Click on ![v] (the **Dropdown** button) in the **Requested Delivery Date** to select a delivery date. In this example, ![03/27/2019 v] (the **04/03/2019** date) was selected.

(Note) Click ◀ (the **Hide Navigator** button) to hide the *Transaction* Pane to maximize the screen.

(Note) If there are no delivery dates listed, possible reasons include:

- The user has missed the window for the next delivery date.
- The user has selected a delivery location that only has non-delivery dates.

(Note) Once selected, the delivery date for each product will be displayed in the **Requested Delivery Date** column.

17. Perform one of the following:

If	Then
The user needs to add another item to the order	Go to Step 18.
The user needs to update quantity for an item in the cart	Go to Step 23.
The user needs to delete item(s) from the order	Go to Step 27.
The user is ready to submit the order	Go to Step 30.

Image: Domestic Order Entry Screen
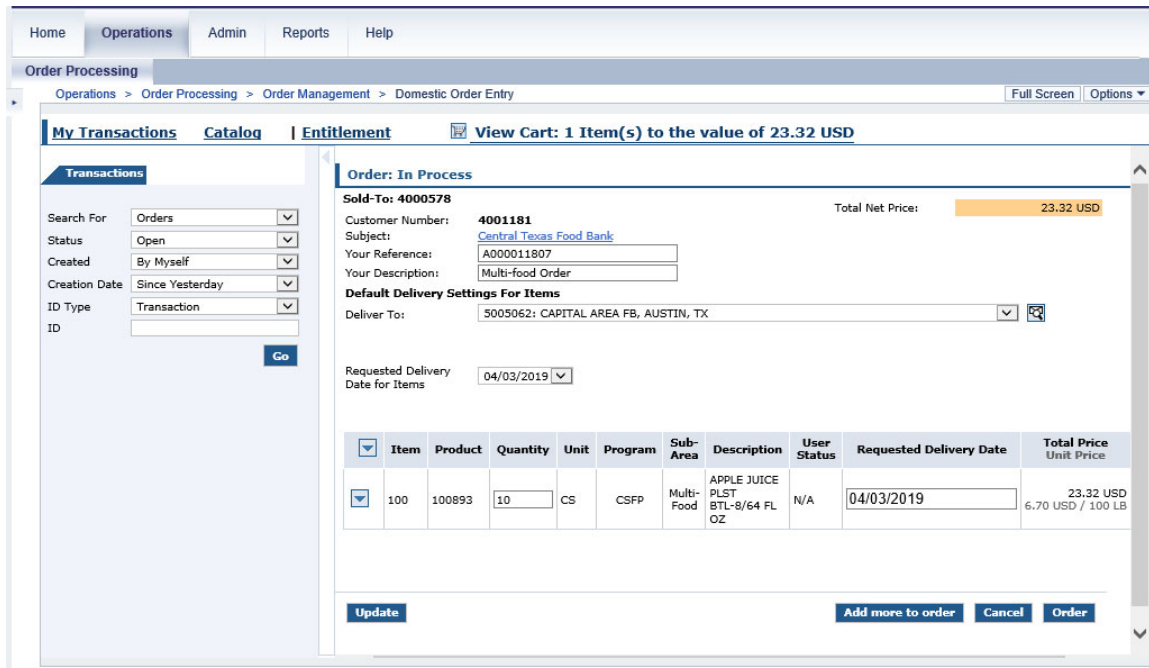
18. Click [Add more to order] (the **Add more to order** button) to add a new product to this order.

Image: Domestic Order Entry Screen
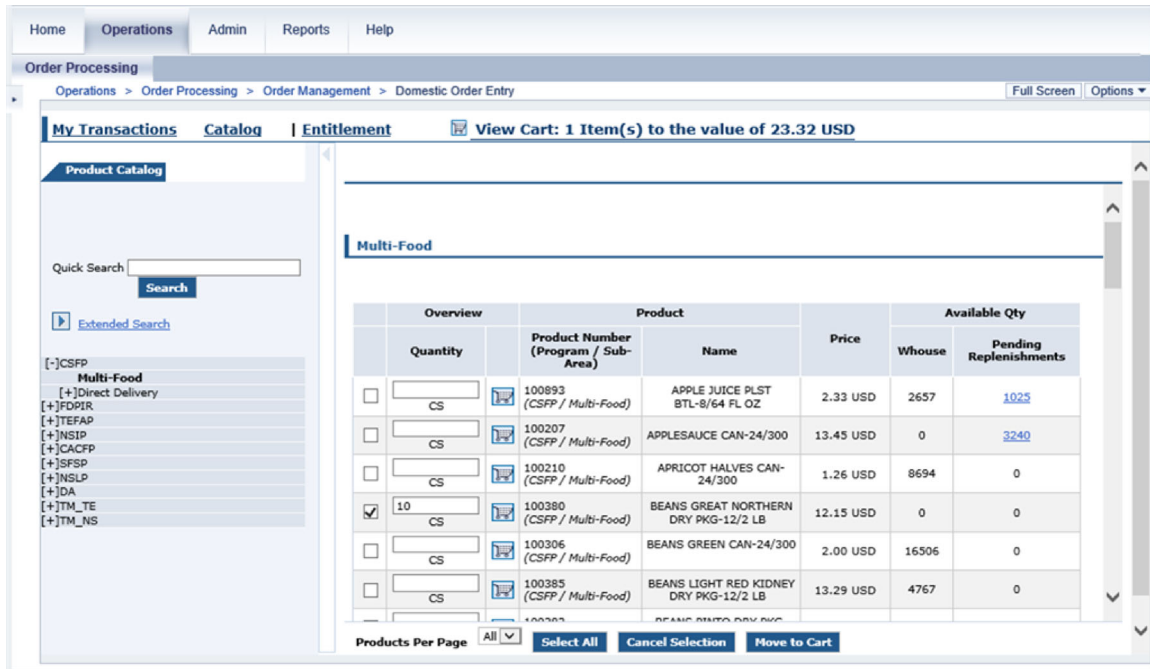
19.   Click ☐ (the **Check Box**) next to the line item for the required product. In this example, the line item for product **100385** was selected.

(Note) All checked products can be added to the cart at the same time.

Image: Domestic Order Entry Screen
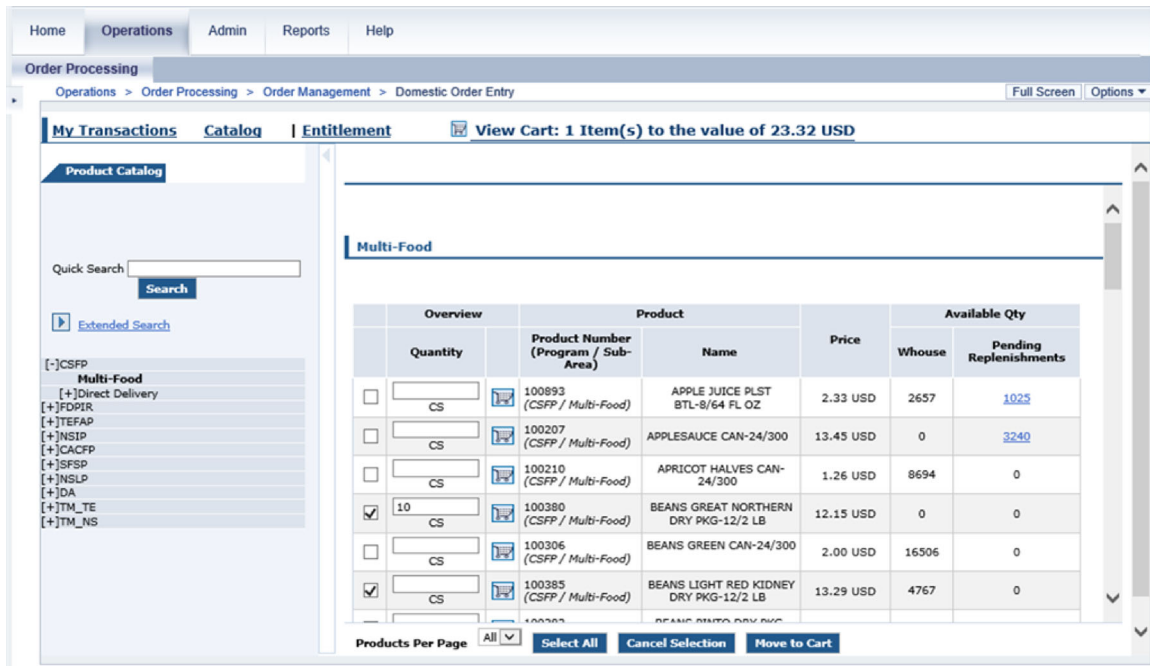
20. In the **Quantity** field enter the desired quantity. In this example, 5 was entered in the **Quantity** field for product **100385**.

Image: Domestic Order Entry Screen

21. Click (the **Move to Cart** button) on the bottom of the screen.

Image: Domestic Order Entry Screen
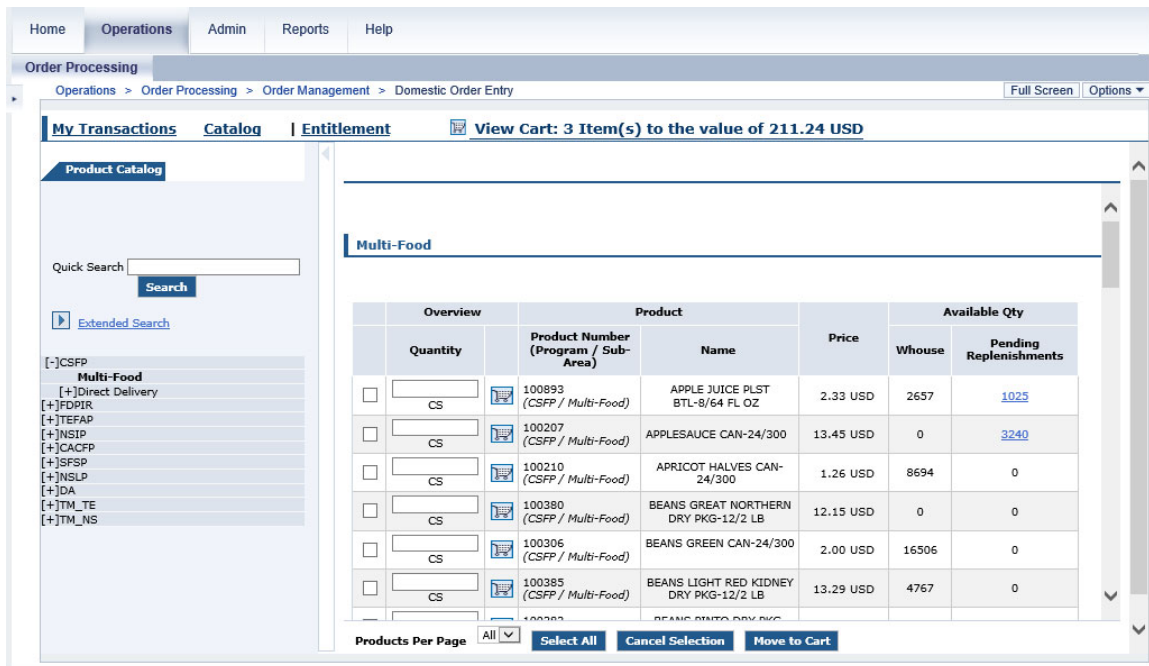
22. Click (the **View Cart:** link) to view items added to the cart. In this example,

(the **View Cart: 3 Item(s) to the value of 211.24 USD** link) was selected.

Image: Domestic Order Entry Screen

23. Click ◄ (the **Hide Navigator** button) to hide the *Transaction* Pane

Image: Domestic Order Entry Screen

24. Update the **Quantity** field, as appropriate, for the required line item.

Image: Domestic Order Entry Screen

25. Click **Update** (the **Update** button) to apply changes.

26. Return to Step 17.

Image: Domestic Order Entry Screen

27. Click ☐ (the **Check Box**) underneath the **Trashcan** column to select a line to be deleted. In this example, the second line item was selected.

Image: Domestic Order Entry Screen

28. Click [Update] (the **Update** button) to delete the selected line(s).

29. Return to Step 17.

Image: Domestic Order Entry Screen

30. Click [Order] (the **Order** button) to submit this order.

Image: Domestic Order Entry Screen

31. Click [OK] (the **OK** button) on the pop-up screen to confirm order submission.

Image: Domestic Order Entry Screen
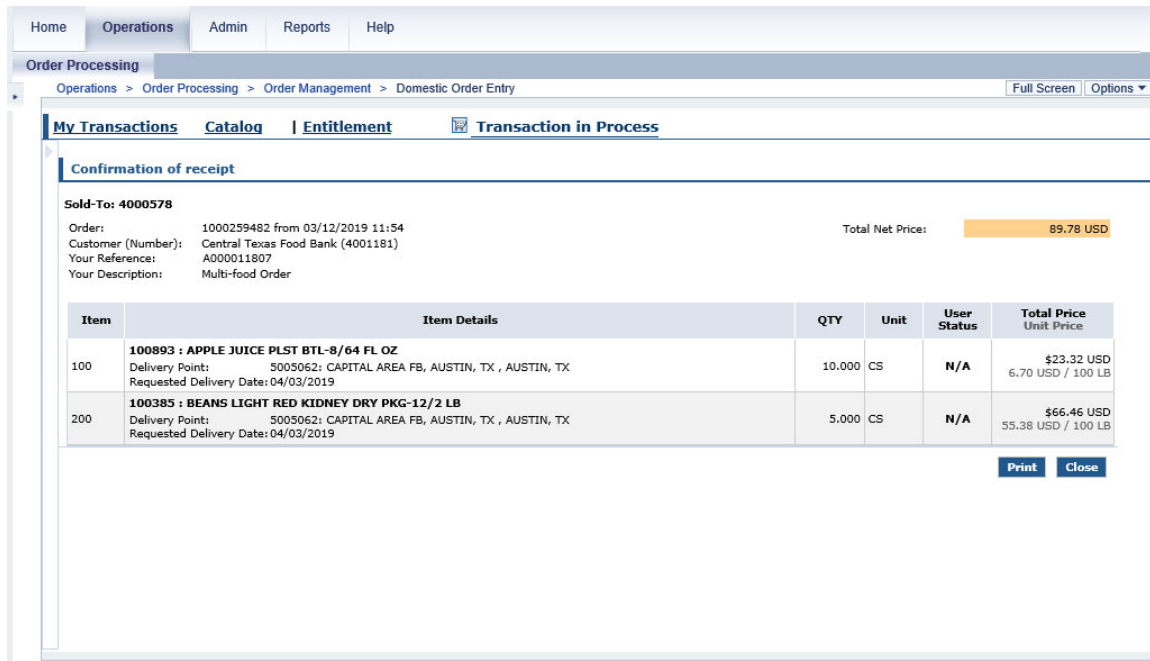
32. The transaction is complete.

(Note) The order number will be required to display or modify the order in the future. For reference, record the order number displayed on the *Confirmation for Receipt* screen.

RESULT

A multi-food order was created, including, selecting a Ship-To destination, adding items to the order, and selecting a delivery date. As applicable, quantities and items may have been updated before submitting the order.

Report Title	Multi-Food Requisition Report
Purpose	This report provides detail on the multi-food requisitions that match the selection criteria.
Portal Navigation Path	**Reports** tab ➔ **Order Processing** tab ➔ **Multi-Food Requisition Report** link
Target Audience	FNS, SDA/ITO, and RA Order Managers; National Warehouse Inventory Management Specialists; Co-op and National Warehouse View-Only

Report Selection Screen

Reports : Input Criteria

Execute | Print PDF Output

Multi-food Requisition Report

Reset Values

Show Variants

Program:
Req. Delivery Date: To
Material: To
Sold-To Party:
Ship-To Party:
Region Code: To
Plant:
Status:
Order Number: To
Shipment Receipt Date: To

Enter at least one of the following search criteria: **Requested Delivery Date**, **Order Number**, or **Shipment Receipt Date.**

Codes for specific National Warehouse Plants include:

- 2000: Americold Services LLC - Syracuse
- 2100: Americold Services LLC - Carthage
- 2200: Paris Brothers Inc. - Kansas City
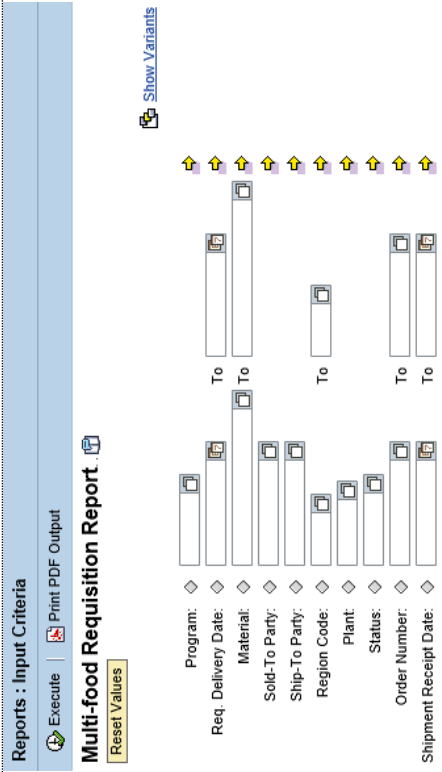- 2300: Americold Services LLC - Nampa
- 2301: Americold Services LLC - Walla Walla
- 2400: Americold Services LLC – Mountville

Note: User should limit date ranges to within one year when performing searches within the **Shipment Receipt Date** field.

The report considers business partner relationships. Unless search criteria identify a Sold-To Party or Ship-To Party, a user from a higher-level organization will see transactions for all associated business partners. For example, FNS users may see results for all organizations; SDA users may see transactions for all their RAs. If a user selects a specific Sold-To Party or Ship-To Party, only the transactions for that business partner are displayed.

Click Execute (the **Execute** button) to generate results.

Report Output

Multi-food Requisition Report

⬅ Go Back | 🔴 Print PDF Output

View: MULTI_FOOD_REQ ▼ | Export ◢

Status Text	Req. Delivery Date	Date Received	Sales Order #	SO Item #	Delivery #	Del. Line Item	Linked Del. Item
Ready for Approval	08/06/2019		1000260081	100	80038464	10	
	08/06/2019		1000260081	200	80038464	20	
	08/06/2019		1000260081	300	80038464	30	
	08/06/2019		1000260082	100	80038463	10	
	08/06/2019		1000260082	200	80038463	20	
	08/06/2019		1000260082	300	80038463	30	

Note: To view additional fields (columns), use the horizontal scrollbar; to view additional records (rows), use the vertical scrollbar.
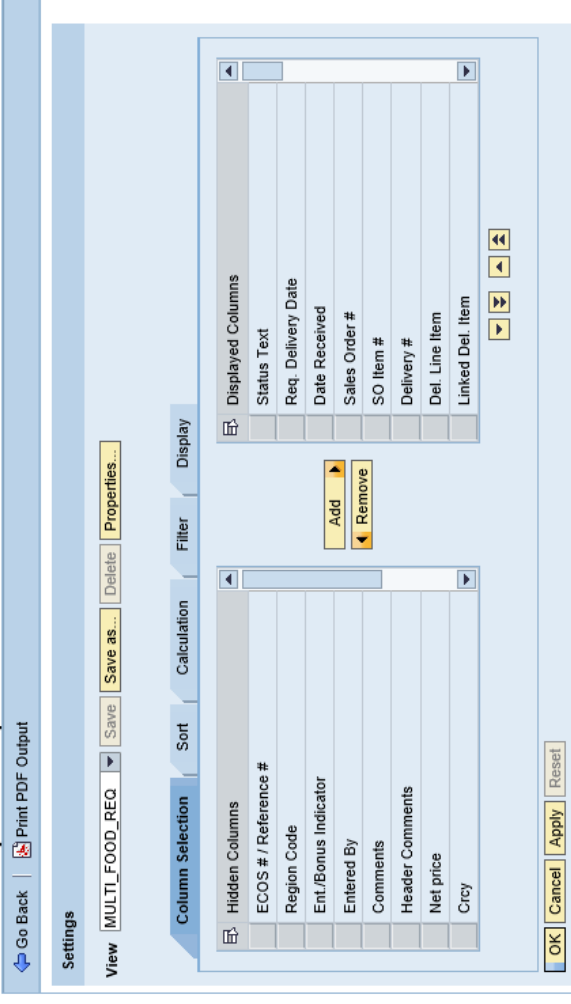
To select a different View and apply the pre-determined display settings to this report, click View MULTI_FOOD_REQ ▼ (the **View:** dropdown arrow).

To modify the report output, use the 🔵 (the **Open Settings Dialog** button). Be sure to save the customized visible fields, sorting, calculations, filters, and other display options as a new View to conveniently apply the same settings to this report in the future.

Click Export ◢ (the **Export** button) to export the report to a Microsoft Excel file.

Note: The 🔴 Print PDF Output (The **Print PDF Output** button) produces a formatted print-ready document. The contents of the PDF (fields, field sequence, sort order, etc.) cannot be changed.

Report Output Settings Screen

- Select [Column Selection] (the **Column Selection** tab) to add/remove columns and change the sequence of the displayed columns as desired by selecting the field name and clicking up and down icons.

- Select [Sort] (the **Sort** tab) to sort the results by specified field and direction.

- Select [Calculation] (the **Calculation** tab) to insert a calculated value based on available report fields.

- Select [Filter] (the **Filter** tab) to apply filter(s) to your report.

- Click [Save as...] (the **Save as…** button) to save the selections as a new View. In the save prompt window, enter a descriptive name.

- Click [OK] (the **OK** button) to go back to the previous screen.

Once the criteria have been selected click [Apply] (the **Apply** button) to generate the results.