

PROCESS OVERVIEW

Purpose

The purpose of this transaction is for domestic recipient organizations (or USDA on behalf of a recipient) to cancel a shipment receipt for a purchase order (PO) or sales order (SO). The shipment receipt, also known as the goods receipt (GR), is the method by which the recipient confirms the materials/commodities requested in WBSCM have been delivered.

Shipment receipts **can** only be cancelled before an ASN has been entered. The user must cancel the shipment receipt in the following circumstances, and reenter the receipt:

- The receipt has been entered on an incorrect line item.
- The receipt needs to be modified.

Shipment receipts **cannot** be cancelled if an ASN exists. The user is able to modify the shipment receipt. If modification are done in the first 7 days, refer to the <u>Modify Domestic Shipment Receipt</u> work instruction, otherwise the user must open an incident through the WBSCM Helpdesk, email: <u>WBSCM.ServiceDesk@CACI.com</u> or phone: (877) WBSCM-4U or (877) 927-2648 - from 8AM to 6PM EST MON-FRI, Excluding Holidays.

This process is available for the following scenarios:

- The receipt has been entered against a PO line item with an ASN.
- An ASN has been created after the receipt was entered.

Shipment receipts **can** be cancelled for Domestic Direct Ship (3rd party) and National Warehouse orders, but not for offshore shipments.

The user cannot cancel the shipment receipt if:

- Shipment receipt was entered against a PO line item with an ASN.
- ASN was created after the shipment receipt was entered.
- Shipment receipt is for offshore shipment.

Process Trigger

Perform this procedure to cancel a receipted line item when it has been incorrectly receipted.

Prerequisites

- A PO line item must exist in WBSCM.
- An ASN has not been created for the line item.
- Shipment receipt has been entered in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

• Select Operations tab → Order Processing tab → Shipment Receipts folder → Enter Shipment Receipt link to go to the Enter Shipment Receipt 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 navigational training and tips on creating favorites, performing searches, etc.



PROCEDURE

1. Start the transaction using the Portal path: Operations tab → Order Processing tab → Shipment Receipts folder → Enter Shipment Receipt link.

Image: Enter Shipment Receipt Screen

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



Image: Enter Shipment Receipt Screen

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

Field	R/O/C	Description
Order Number:	R	This can be a sales order number, purchase order number, or delivery document number.
		Example: 4100008382
		(Note) The cancel functionality can be performed only for a sales order number or a purchase order number.



Image: Enter Shipment Receipt Screen

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4. Click Search (the Search button) to execute the search.

Image: Enter Shipment Receipt Details Screen

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5. If necessary, click (the **Down** arrow) on the horizontal scrollbar to locate the line item for the receipt that requires cancellation.

Image: Enter Shipment Receipt Details Screen

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6. Click 🗌 (the Check box) in the Further Actions column next to the line item to be cancelled. In this example, line item 35 is selected.

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(Note) Confirm the **ASN Number** and **BOL #** fields are blank for the line item to be selected. If the fields are not blank, the line item cannot be cancelled. If necessary, use > (the **Right** arrow) on the horizontal scrollbar to view the **BOL #** field.



Image: Enter Shipment Receipt Details Screen

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7. Click Cancel Receipt (the Cancel Receipt button) to cancel the receipt for the line item.



(Note) The user will receive an error when:

- An ASN exists (BOL # field is populated) for the selected line item(s). In this case, the shipment receipt can be modified, but not cancelled. Refer to the <u>Modify Domestic</u> <u>Shipment Receipt</u> work instruction for more details.
- The user selects multiple lines and at least one has an existing ASN. The user must deselect each line item with an ASN in order to cancel the remaining lines.
- No line items are selected.



Image: Goods Receipt Cancellation Process Pop-Up Screen

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8. Click Yes (the Yes button) to confirm the receipt will be cancelled for the selected line item.

Image: Enter Shipment Receipt Details Screen

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9. The system generates the cancellation successful message and the status for the line item(s) is updated from **Recpt Processed** to **Missing ASN**.





(Note) The Receipts Status displayed depends on the user's role.

10. The transaction is complete.



RESULT

A shipment receipt has been cancelled for a line item without an ASN for which shipment receipt was entered incorrectly. Once the shipment receipt is cancelled the line item is available to enter the correct shipment receipt.



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 the user's 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.

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.



PROCEDURE

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

Image: Consolidate Requisitions Screen

Operations > Order Processi	ing > Order Management > Consolida	te Requisitions	
Operations > Order Process Welcome to Cons All required fields are mail Selections for Consoli Select the product/male The criteria are relained Submitting the material * Ordered Product Program: Sold To Party: Ship-To Party: Ship-To Delivery Date	Ing > Order Management > Consolidate Solidate Requisitions Ked with a red asterisk (*). Dates are form idation final ordered, to review and consolidate as when switching between materials to co on this screen locks the records so other o	netted as MM/DD/YYYY. ssociated requisitions. Use addition nsolicate, navigate back to this se users cannot consolidate the sam To	nal fields to imit line items to specific lection screen to motify or remove an requisitions.

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

Image: Consolidate Requisitions Screen

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

Field	R/O/C	Description
Ordered Product:	R	The material number of the product that has been requested to be ordered.
		Example: 100207
Program:	0	Acronym used to identify a USDA food distribution program.
		Example: NSLP
		(Note) Click (the Advanced Options button) to enter or exclude multiple selections.
Sold-To Party:	0	Unique identifying number associated with a particular customer in WBSCM.
		(Note) Users can enter a Sold-To Party or a range of Sold-To Parties. Click (the Advanced Options button) to enter or exclude multiple selections.
Ship-To Party:	0	Unique identifying number associated with a person or company that receives the materials or commodities.
		Example: 5001600
		(Note) Users can enter a Ship-To Party or a range of Ship-To Parties. Click (the Advanced Options button) to enter or exclude multiple selections.
Ship-To Delivery Date:	0	The date upon which the delivery is expected to be completed.
		(Note) Users can enter a Ship-To Delivery Date or a range of Ship-To Delivery Dates. Click ^I → (the Advanced Options button) to enter or exclude multiple selections.

(Note) The user can use \Box (the **Matchcode** icon) in each field to select the appropriate values.

(Note) The user can search by a range of data for the **Sold-To Party**, **Ship-To Party**, and **Ship-To Delivery Date** fields by entering values in these fields and the corresponding **To** fields for each one. For example, entering **11/01/2023** in the **Ship-To Delivery Date** field and **11/30/2023** in the corresponding **To** field will return all results that meet all the other filtering requirements and fall into the specified **Ship-To Delivery Date** range.



4.

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(Note) The user can enter a list of data to search by for the **Program**, **Sold-To Party**, **Ship-To Party**, and **Ship-To Delivery Date** fields by clicking the yellow arrow to the right of each field and entering their list of data in the table that appears in the pop-up screen.

Image: Consolidate Requisitions Screen

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Il required fields are mari	ked with a red aslensk (*). Dates are t	ormatted as MM/DD/YYYY.		
Selections for Consoli	dation			
Select the product/mater The criteria are retained	rial ordered, to review and consolidate when switching between materials to	consolidate: navigate back to this se	hal fields to limit line items to specific requisitions. lection screen to modify or remove any criteria.	
Submitting the material	on this screen locks the records so at	her users cannot consolidate the sam	e requisitions.	
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Click Submit (the Submit button) to submit the selection.

(Note) When the user submits the selected Product/Material, WBSCM automatically locks the associated records. This prevents multiple users from consolidating the shipments at the same time until the Product/Material is unlocked. To unlock the Product/Material, perform one of the following:

- Log out of WBSCM using the Log off button
- Switch from one material to another
- Click on a different link/iView in WBSCM.



Work Instruction Consolidate Requisitions to Create Standard Domestic Sales Order

Image: Consolidate Requisitions Screen



5. If necessary, click **F** (the Arrow button) in the horizontal and vertical scrollbars to view more data in the Consolidation Workbench table.

(Note) When RAs, Co-ops, SDAs, or ITOs submit requisitions, WBSCM automatically consolidates all requisitions by Ordered Product (Material), Shipping Date, and Ship-To location. For example, all requisitions for the same ship-to location that are scheduled to ship on 12/31/2023 will be displayed beneath an aggregated line (a proposed order is indicated by a green line item).



(Note) If expected items do not display on the Consolidation Workbench, adjust the optional selection criteria on the material selection screen and resubmit the request.



(Note) The user is able to view the following information about each line item on each requisition:

- **Row L1** contains an arrow that corresponds to each proposed order (each green row). Clicking the arrow lets the user minimize or maximize the line item detail on the proposed order.
- For FTL 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 the user may either add 200 units of the item to the order, or remove 600 units from the order if they wish to consolidate to a full truckload. The user may have multiple Full Truckloads (FTLs) on a consolidated sales order.
- Quantity displays the quantity of items being ordered.
- Shipping Date displays the requested delivery date. 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 BP ID displays 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 that consists of requisitions that are being shipped to multiple different Sold-To Parties.



- Ship-To Name displays the name of the Ship-To location for each of the line items.
- Ship-To City displays the city where the Ship-To is located.
- Ship-To Rg displays the state where the Ship-To is located.
- **Multi-Stop** contains a checkbox that corresponds to each proposed order (each green row). When a multi-stop is created between two orders, the system automatically checks this box. When a multi-stop is created between states, the user must manually check this box. This box indicates that the order has multiple ship-to destinations.
- **Group Number** displays the group number, a unique identifying number associated with a proposed order.
- **Sold-To** displays the Sold-To Party Number, a unique identifying number associated with the Sold-To Party for each line item.
- Sold-To Name displays the name of the Sold-To Party for the requisition.
- **Req No** displays a unique identifying number that was assigned to the requisition when it was placed by an RA, SDA, or ITO before consolidation. Each white line item beneath an aggregate line represents a requisition line item.
- Req Item No 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 the user to see the details of the particular line item.
- Internal Ord 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 refers to the USDA food distribution program through which the commodity was ordered.
- **Order By Date** displays the 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. The user will be able to revisit these requisitions by clicking the **Req's Past Order-By Date** button.





6. Click (the Arrow button) in the Row L1 column to expand the proposed order to be worked on.



(Note) All requisitions that are a part of the proposed order display.

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

There are several buttons on the screen that can benefit the user in the order consolidation process. These buttons are as follows:

- Expand All Expands all the proposed orders so the user can view all the white line items (the requisitions) beneath each proposed order (green aggregated line item) without having to expand each individually. The button will not display when all proposed orders are already expanded.
- **Collapse All** When all proposed orders are expanded, the button appears, allowing the user to collapse (minimize) all line items.
- Unallocate Removes a specified line item(s) from the proposed order and moves it to the queue at the bottom. The user may then reallocate the line item back into the workbench, if desired.
- Return Allows the user to return a requisition to the Sold-To Party that submitted it. Generally, the user would return a requisition if there was a change to be done by the Sold-To Party. The Sold-To Party can make the corrections and then resubmit the requisition for processing.
- Decline Allows the user to decline a line item from a proposed order. Generally, the Decline feature will only be used when a requisition is 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 Allows the user to update the requisitions with any changes and reallocations that have been made (including requisitions that have been returned



or declined). Note that after the user clicks the **Update Req** button, no changes on the *Order Consolidation* screen for the commodity can be performed unless the user exits out of the workbench and comes back into the workbench. If the commodity is still being processed for requisition updates, an error message will display.

- Submit for Sales Order Creation Allows the user to submit the order for confirmation and processing. The user must select the proposed orders (aggregate green lines) to submit for sales order creation.
- **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 the user is viewing in the workbench. Click the **Req's Past Order-By Date** button to access the screen.

Image: Consolidate Requisitions Screen

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1	+0 /-0	1	1,620 12/3	1/2023							469334786			
1	+0 /-0	3	1,620 03/1	5/2024	*						854142260			
	+1350	1-270	3,510 03/3	1/2024							409206029			
			540 03/3	1/2024				-			409206029			
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			810 03/3	1/2024	*						409206029	_		
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1 and 1			405 03/3	1/2024	*						409206029			
	+0/-0		1,620 04/3	0/2024	+						571858201			

7. Perform one of the following:

lf	Then
The user wants to select requisitions for processing.	Go to Step 8
The user wants to unallocate requisitions and move them to the <i>Unallocated Items</i> queue temporarily.	Go to Step 12
The user wants to update requisitions and submit them for Sales Order creation.	Go to Step 15
The user wants to move a requisition that is waiting in the <i>Req's Past Order-By Date</i> queue to the Consolidation Workbench.	Go to Step 30
The user wants to decline a requisition that is waiting in the <i>Req's Past Order-By Date</i> queue.	Go to Step 38
The user wants to update a requisition that was moved from the <i>Req's Past Order-By Date</i>	Got to Step 42



Work Instruction Consolidate Requisitions to Create Standard Domestic Sales Order

lf

Then

queue to the Consolidation Workbench for further processing.

Image: Consolidate Requisitions Screen

	coasing	1		11										-
ation	s > Orde	er Processing	 Order Managemei 	11 > Co	isolidate F	Requisitions								
Co	hiloan	ate Requir	itions											
cu	nsonu	ate Kequi	SILIOITS											
\$	Back E	Reg's Past O	rder-By Date On	dered Pro	duct 10	0207-APPLE	SAUCE CA	N-24/300		👻 Un	it Of Measure:	CS	FTL Quantity.	1.620
Vi	ew: [Stan	dard View]	- S Expand A	a 🔂 U	allocate	🔊 Return	💥 Decline	e 🥜 Upda	ate Req					
昆	Row L1	For FTL	Quantity Shippir	ng Date	Ship-To	BPID Ship	To Name	Ship-To City	Ship-To Rg	Multi Stop	Group Numbe	or Sold-To	Sold-To N	ame
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			405 03/31/2	324							409206029			
	10000	+0.4-0	1 620 04/30/2	174 -							5/1858201			

8.

Click (the Select button) beside the line item of the aggregated grouping to be processed.

(Note) By selecting a proposed order (an aggregated grouping of requisitions), all the requisitions within the grouping will automatically be selected as well.

Image: Consolidate Requisitions Screen

er Pro	cessing											
ration	s > Drde	Processing	> Order Managem	ent > C	onsolida	te Requisitions						
Co	nsolid	ate Requis	sitions									
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	Devid	E. ET		ine Cuil	out	T- DD ID ON T- 1			Correct Name	0.14 Te	Cold To No.	
Щ>	ROW L1	FOFFIL	Quantity Shipp	ing Date	Ship	-TO BPID Ship-To P	ame ship-to city ship-t	To Hg Multi Stop	Group Numbe	or Sold-To	S010-10 Na	me
		+0 7-0	1,620 12/31/	20/23					409554/60			
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1.1	200	+0 /-0	1.620 04/30/	2024 -	-				571858201			
								100 March 100 Ma	10000000000	_		

9. Click 📧 (the Table Selection Menu button).





10. Click Select All (the Select All option) to select all requisitions for processing.

Ð

(Note) The user can deselect all line items by clicking the Deselect All option.

If an update that applies to all the requisitions within the aggregated group is needed, the user makes the update to the aggregated line (e.g., Quantity change, Ship-To change, Shipping Date change), which will update all associated requisitions within the aggregated group.

To deselect requisition line items for unallocation, return, or decline, the user must either:

a. If the aggregate lines are on expanded mode:

- Click I (the Table Selection Menu button) to select all the aggregate and requisition line items in the workbench.
- While pressing the Ctrl key on the 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 requisitions down to the queue at the bottom of the screen.

b. 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 the keyboard, deselect only the aggregate line(s). The user doesn'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.



Work Instruction Consolidate Requisitions to Create Standard Domestic Sales Order

11. Return to Step 7.

Image: Consolidate Requisitions Screen

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ation	s > Orde	r Processing >	Order Ma	anagement	> Co	nsolidate Re	equisitions							
Co	nsolid	ate Requis	itions											
4	Back	Pan's Past O	rder By Da	te Order	ad Dea	duct 100		ICE CAN 3/2	20		Unit Of Management	65	ETI Curatter	1.670
-	DOUN	neys rasi v	UCI-D) Da	Order	ed Pro	auct 1100	201-APPLESAL	JUE GAN-24/3	00	M	Unit Of Measure:	65	FIL Quantity:	1.620
Vi	ew: [Stan	dard View]	- 31	Expand All	(h) U	nallocate ¿	Return 💥	Decline 0	⁹ Update Req					
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	+	+0 /-0	1,620	12/31/2023	+						184110834			
	•	+0 /-0	1,620	03/15/2024	•						576109452			
	•	+1350 /-270	3,510	03/31/2024	•						214602636			
1	-	+1350 /-270	3,510	05/15/2024	*						245684768			
			540	05/15/2024							245684768			
			810	05/15/2024							245684768			
			405	05/15/2024	•						245684768			
			810	05/15/2024	•						245684768			
			540	05/15/2024	•						245684768			
			405	05/15/2024	*						245684768			
-	0.000	-010	3 240	07/15/2024						_	662146172	*	*	

12. Click (the **Select** button) next to each of the aggregated lines that are not currently being worked, so they can be marked for unallocation.



(Note) Unallocating provides a way to reduce the number of line items the user is working with on the screen at one time.



(Note) To select multiple non-consecutive rows, press and hold the *Ctrl* key and click the **Select** button for each row to be selected.

To select multiple consecutive rows, press and hold the *Shift* key and click the beginning and end row **Select** buttons.



Work Instruction Consolidate Requisitions to Create Standard Domestic Sales Order

Image: Consolidate Requisitions Screen



13. Click ⁽¹⁾ Unallocate</sup> (the Unallocate button) to move all selected lines to the Unallocated Items queue at the bottom of the screen.

Image: Consolidate Requisitions Screen

Back Regs Past Order-By Date Ordered Product: 100207-APPLESAUCE CAN-24/300 Unit Of Measure: CS FTL Quantity: 1.620 View: [Standard View]	Co	nsolida	ate Requis	itions										
View: Status Expand All Unallocate Return 2 Decline O Update Req B Row L1 For FTL Quantity Shipping Date Ship-To Br ID Ship-To Rame Ship-To Rame </th <th>4</th> <th>Back</th> <th>Reg's Past O</th> <th>rder-By Date</th> <th>Ordered Product</th> <th>10020</th> <th>07-APPLESAU</th> <th>CE CAN-24/300</th> <th></th> <th>v U</th> <th>nit Of Measure</th> <th>E CS F</th> <th>TL Quantity:</th> <th>1,620</th>	4	Back	Reg's Past O	rder-By Date	Ordered Product	10020	07-APPLESAU	CE CAN-24/300		v U	nit Of Measure	E CS F	TL Quantity:	1,620
H3 ROVELT For FLC Cluanny Shiphi Date	VI	ew: [Stan	dard View]	Exp	and All 🕜 Unalloc	ate 🗳	Return 🗶 D	ecline 🖉 U	pdate Req					
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				40	5 05/15/2024							245684768		
		-			2017-000	0.0244.024								

14. Return to Step 7.





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

Field	R/O/C	Description
Quantity	0	Number of items.
		Example: 405

(Note) The **For FTL** field provides the user 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.

The user may need to add or remove items in order to get to the correct amount, as indicated in the **For FTL** (For Full Truckload) column. When the user reaches "+0/-0", the order is ready to be submitted.

There are two ways to modify the quantity:

- 1. The FTL quantity can be set on the green line (aggregate group level) by entering a FTL amount in the Quantity field and pressing the **Enter** key. An algorithm on the back end will redistribute the items between the existing requisitions to ensure each recipient gets the appropriate quantity, based on the quantity originally ordered.
- 2. The FTL quantity can be manually changed for each recipient's quantity by altering the value in the **Quantity** field for each of the line items (the white rows) as needed. Then press the **Enter** key to save the changes.

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





16. Press Enter on the keyboard.

Image: Consolidate Requisitions Screen

Conso	lidate Requi	sitions							
Back	Reg's Past (Order-By Date Ordered Produc	t 100207-APPLESAUC	CE CAN-24/300		Unit Of Measur	e: CS F	TL Quantity:	1.620
View:	Standard View]	COLLAPSE All (1) U Quantity Shipping Date	nallocate 🔗 Return 💲	K Decline 🖉 U	Jpdate Req Ship-To City Ship	-To Ra Multi Stop	Group Numbe	t Sold-To	Sold-To Na
	+1485 /-135	3,375 03/31/2024	- //				224326690		
		405 03/31/2024	~				224326690) (4
		810 03/31/2024	× .				224326690		
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		810 03/31/2024					224326690		
		540 03/31/2024	1070				224326690		
		405 03/31/2024	•				224326690		

17. Click ¹³ (the Shipping Date drop-down) to select a new Shipping Date for a requisition.





18. Click the appropriate date from the Shipping Date drop-down. In this example, 04/15/2024 (the 4/15/2024 date) is selected.

(Note) The requisition is moved out of the current aggregate of grouped requisitions and is listed as a new and separate requisition (green line).

Image: Consolidate Requisitions Screen

ration	s ≻ Orde	er Processing	> Order Manag	ement > Consoli	date Req	uisitions							[
Co	Back	Regis Past (sitions Order-By Date	Ordered Product	10020	07-APPLESA	JCE CAN-24/300	0	▼ U	nit Of Measu	e: CS F	TL Quantity	1.620
Vi	ew: [Stan	dard View]	V S Exp	and All () Unallo	cate 🔏	Return 💥	Decline 0	Update Reg	Shin To Da	Multi Ston	Group Humber	Sald To	Sold To Ma
-	NOW ET	+810 / 0	Subdruity 81(04/15/2024		Ship-To DP 1	D Ship-to Nati	6 Ship-to City	Ship-to Ky		607886265	3010-10	Sold-TO TVB
	-	+675 /-945	2,565	5 05/15/2024							233817134) (2
	10.0		403	5 05/15/2024	•						233817134		
			408	05/15/2024	•						233817134		
			810	0.05/15/2024	•						233817134		
			540	05/15/2024	-						233817134		
			405	05/15/2024	•						233817134		
	Unallo	cated Items	Returned I	ems Declin	ed Hems	¢.							

19. Click the appropriate Ship-To BP ID to change the Ship-To Location on a requisition line item. In this example, (b) (4)
 (b) (4)



Work Instruction Consolidate Requisitions to Create Standard Domestic Sales Order

Image: Select Ship-to Values Pop-Up Screen



20. Click (the Select button) next to the appropriate Ship-To BP ID. In this example, (b) (4) is selected.

Image: Select Ship-to Values Pop-Up Screen

Co	nsolida	te Requ	isitions	lect Ship to Value	29			1		
(Back 🔯	Reg's Past	Order-By Date Or	Ship-To BP ID	Ship-To Name	City	State	Of Measur	e: CS FT	L Quantity: 1,620
Vi	ew: [Standa	ard View]	▼ ⅔ Expand							
同	Row L1	For FTL	Quantity SI		(4)			Aulti Stop	Group Number	Sold-To Sold-To M
	•	+810 /-0	810 04						607886265	(h) (
	•	+675 /-945	2,565 05.						233817134	
			405 05				OK Cancel		233817134	
			405 05/150	2024 💌					233817134	
			810 05/15/2	2024 -					233817134	
			540 05/15/2	2024 💌					233817134	
			405 05/15/2	2024 -					233817134	

21. Click OK (the OK button).

(Note) The requisition is moved out of the current aggregate of grouped requisitions and is listed as a new and separate requisition (green line).





22. Click (the Select button) on a requisition to unallocate it from the aggregated grouping. Image: Consolidate Requisitions Screen

Cor	solid	te Requis	sitions									
¢ E	Back	Regs Past O	rder-By Dat	te Order	ad Pro	duct 100207-APPLESAUCE CAI	1-24/300	👻 Unit C	f Measure:	CS F	TL Quantity:	1,620
Vie	w [Stan	dard View]	· 31	Expand All	đu	nallocate 🔗 Return 🗶 Decline	🖉 Update Reg					
屘	Row L1	For FTL	Quantity	Shipping D	ate	Ship-To BP ID Ship-To Name	Ship-To City	Ship-To Rg	Multi Stop	Group Nu	mber Sold-To	Sold-To
	•	+810/-0	810	04/15/2024						60788626) (2
	-	+1215/-405	2,025	05/15/2024	*					23381713	4	
			405	05/15/2024						23381713	4	
			405	05/15/2024	•					23381713	4	
			810	05/15/2024	ंच					23381713	4	
			405	05/15/2024	•					23381713	4	
		+1080 /-0	540	05/15/2024	*					44125337	1	

23. Click ^{Onallocate} (the Unallocate button) to remove the requisition from the aggregated grouping of requisitions being worked and move it to the *Unallocated Items* queue at the bottom of the screen.





24. Click Update Req (the Update Req button) to update the requisitions with any changes.

(Note) The user does not need to select records for update before clicking the **Update Req** button. All records with changes made in the workbench will be updated.

Clicking the Update Req button serves two purposes:

- Updates the requisition with changes made to the quantity, ship date, and ship-to location.
- Confirms that the user is done with the entries and is ready to submit them for order creation. After clicking the Update Req button, the user will no longer be able to make changes to the proposed orders unless they exit and reenter the workbench without submitting the entries for order creation.

The user is not required to submit requisitions for order creation at this time, but the changes will be retained.



Work Instruction Consolidate Requisitions to Create Standard Domestic Sales Order

Image: Order Consolidation Pop-up Screen



25. Click Yes (the Yes button) to confirm.

Ð

(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



26.

Click (the **Select** button) to select the requisition group to submit for sales order creation.

(Note) The user can click 🗟 (the **Table Selection Menu** button) and choose the **Select All** or **Deselect All** option when a long list of requisitions or proposed line items to update or submit for



sales order creation displays.

Image: Consolidate Requisitions Screen

tions > Order P	Processing > 0	Order Managemen	nt > Consol	lidate Requisitio	ns							18
Consolidate	e Requisiti	ions										
An Death I	Devis Devis Orde	. D. Data					85		2771 2242	I CLEMENTER OF		
- back	sega nast orde	1-by Date Oto	lered Produc	CL 100207-AP	PLESAUCE CAN	-24/300	Y	Unit Of Measur	e: CS	FTL Quantity:	1.620	
View: [Standar	rd View]	Expand A	li 🕴 🎯 Su	ibmit for Sales (Order Creation							
E Roy L1	For ETL Quar	atity	Ship Date		Ship-To	Ship-To Name	Ship-To City	Ship-To Rg	Multi Stop	Group Number	Sold-To	;
	+0 /-0	1,620	05/15/2024		(b) (4)		AUSTIN	тх		477474265		
	+0 /-0	1 620	05/15/2024		(b) (4)		AUSTIN	ТХ		477474265	•	
	+0 /-0	1.620	05/15/2024		(b) (4)		AUSTIN	TX		477474265	•	
	+0 /-0	1,620	05/15/2024	n of Henry	<u>(b) (4)</u>		AUSTIN	ΤX		477474265	•	
Unaliocat	+0 /-0	1,620 Returned Items	05/15/2024	ned items	(b) (4)		AUSTIN	ΤX		477474265	•	
Unailocat View: [Stand	+0 /-0 ted Items	1 620 Returned Items	05/15/2024	ned Items	(b) (4)		AUSTIN	TX		477474265	•	
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Unailocat View: [Stand Reg No 1000631475	ted items dard View] Reg Item No 6200	1,620 Returned Items	05/15/2024 Declin Quantity 405	ned Items Ship-To BP ID	(b) (4) Ship-To Name	Ship-To City Ship-	AUSTIN To Rg Multi S	TX Nop Group Ni 5341586	umber Solo	477474265 d-To Name	•	
Unailocat View: [Stanc Reg No 1000631475 1000631475	ted Items dard View] Reg Item No 6200 17400	1,620 Returned Items * Shipping Date 03/31/2024 05/15/2024	05/15/2024 Declin Quantity 405 405	ned Items Ship-To BP ID	(b) (4) Ship-To Name	Ship-To City Ship-	AUSTIN To Rg Multi S	TX Rop Group Nr 5341586 4774742	umber Solo	477474265	•	
Unallocat View: [Stanc Reg No 1000631475 1000631475	ted Items dard View] Reg Item No 6200 17400 3000	1,620 Returned Itiens Shipping Date 03/31/2024 05/15/2024 03/31/2024	05/15/2024 Declin Quantity 405 405 540	ned Items Ship-To BP ID	(b) (4) Ship-To Name	Ship-To City Ship-	AUSTIN To Rg Multi S	TX top Group Ni 5341586 4774742 5341566	umber Solo	477474265	• {	
Unailocat View: [Stanc Reg No 1000631475 1000631475 1000631476	+0 /-0 ted Items dard View] Reg Item No 6200 17400 3000 9800	1,620 Returned Itiens Shipping Date 03/31/2024 05/15/2024 07/15/2024	05/15/2024 Declin Quantity 405 405 540 1,620	ned Items Ship-To BP ID	(D) (4) Ship-To Name	Ship-To City Ship-	AUSTIN To Rg Multi S	TX Rop Group Nr 5341586 4774742 5341566 4705823	umber Solo 112 112 112 112 112	477474265	•	

27. Click Submit for Sales Order Creation (the Submit for Sales Order Creation button) to submit the proposed order(s).



(Note) The **Submit for Sales Order Creation** button only displays after the user has updated the requisition by clicking the **Update Req** button.

The unallocated requisition remains unaffected and is still in the queue at the bottom of the screen. When the user exits 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 them. Generally, the user would return a requisition if there is a change for the Sold-To Party to make. The requisition will be returned to the Sold-To Party when the user clicks 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 is 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 the user clicks the **Update Req** button.





- 28. Review the confirmation message and ensure no error exists updating the requisition lines.
- 29. Return to Step 7.

Image: Consolidate Requisitions Screen

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tions	> Order Proce	ssing > Orde	r Management 🤉	 Consolida 	te Requisitions								F
Con	isolidate R	equisition	IS										
de a			5.1										
C B	lack 🛛 😭 Regis	Past Order-By	Date Ordere	d Product	100207-APPLE	ESAUCE CAN-24	/300		 Unit Of M 	leasure: CS	FTL Qua	ntity: 1.620	0
		100		~									
View	w: [Standard Vi	ew/]	→ Expand All	1 Unalloca	te 🛃 Return	💥 Decline	🦉 Update Req	t .					
民	Row L1 For	FTL Quan	tity Shipping	Date S	hip-To BP ID	Ship To Name	Ship-To C	ity Ship-1	o Rg Iv	tulti Stop G	Group Number	Sold-To	Sold
	i The table do	es not contain	any data										
, i	1 The table do	es not contain	any data										
	i The table do	es not contain	any data										
	i The table do	es not contain	any data										
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30. Click Req's Past Order-By Date (the Req's Past Order-By Date button) to view requisitions that have passed the order-by date.





31. Review the displayed requisitions that have an order-by date in the past.

Image: Consolidate Requisitions Screen

8	Reg No	Reg Item No	Quantity	Ship-To Date	Unit	Orderad Product	Internal Ord	Sold-To	Product Description	Program	Functional Area	Ship-To Name	
	1000631502	28900	1 620	10/15/2023 -	CS	100207	ENTITLE-SY24	4003287	1000 C	NSLP	6E-NSLP	(b)	7
	1000631480	28400	1.620	10/15/2023 -	CS	100207	ENTITLE-SY24	4007322		NSLP	6E-NSLP	(\mathbf{D})	
	1000631493	13700	1,620	10/15/2023 -	CS	100207	ENTITLE-SY24	4008237		NSLP	6E-NSLP		
	1000631496	300	1,620	10/30/2023 💌	CS	100207	ENTITLE-SY24	4008239		NSLP	6E-NSLP		

32. Click (the **Ship-To Date** drop-down) on the requisition line that needs to be updated to display available Ship-To Dates and change it to a future date.





33. Select the appropriate Ship-To Date from the list. In this example, ^{12/31/2023} (the **12/31/2023** option) is selected.

(Note) If no ship-to dates are available, the order may need to be declined.

Image: Consolidate Requisitions Screen

ration	s ≻ Order P	rocessing > 0	rder Manag	gement ≻ Con	solidate	s Requisitions							F
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	1000631502	28900	1.626	12/31/2023 -	CS	100207	ENTITI E-SY24	4003287	Product Description	NSLP	6E-NSLP	Ship-To Name	Sing
	1000631480	28400	1.620	10/15/2023 -	CS	100207	ENTITLE-SY24	4007322		NSLP	6E-NSLP		(4
	1000631493	13700	1.620	10/15/2023 -	cs	100207	ENTITLE-SY24	4008237		NSLP	6E-NSLP		
	1000631496	300	1,620	10/30/2023 -	CS	100207	ENTITLE-SY24	4008239		NSLP	6E-NSLP		
4	_												
Back	ĸ												

34. Click (the **Select** button) for the requisition line that is being submitted to the Consolidation Workbench.

(Note) After selecting a new Ship-To Date, the updated requisition line is automatically selected.





35. Click Submit to CWB (the Submit to CWB button).

Ð

(Note) When the user successfully submits 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

12030	•	💥 Declir	ne 🕼 Submit I	o CWE	3							
eq No	Req Item No	Quantity	Ship-To Date	Unit	Ordered Product	Internal Ord	Sold-To	Product Description	Program	Functional Area	Ship-To Name	SI
00631480	28400	1,620	10/15/2023 -	CS	100207	ENTITLE-SY24	4007322		NSLP	6E-NSLP	(h)	
00631493	13700	1.620	10/15/2023 -	CS	100207	ENTITLE-SY24	4008237		NSLP	6E-NSLP		
00631496	300	1,620	10/30/2023 -	CS	100207	ENTITLE-SY24	4008239		NSLP	6E-NSLP	· /	<u>-</u>
												-
	q No 006631480 006631493 00631496	a No Reg Nem No 00631480 28400 00631483 13700 00631496 300	Q No Rec Item No Quantity 00631480 28400 1,620 00631493 13700 1,620 00631496 300 1,620	q No Reg Item No Quantity Ship-To Date 00631480 28400 1,620 10/15/2023 ▼ 00631493 13700 1.620 10/15/2023 ▼ 00631496 300 1,620 10/13/2023 ▼	No Reg Item No Quantity Ship-To Date Unit 00651480 28400 1,620 10/15/2023 • CS 00651483 13700 1,620 10/15/2023 • CS 00651498 300 1,620 10/15/2023 • CS 00651498 300 1,620 10/15/2023 • CS	a No Reg Item No Cuantity Ship-To Date Unit Ordered Product 00631480 28400 1.620 10/15/2023 ▼ CS 100207 00631493 13700 1.620 10/15/2023 ▼ CS 100207 00631498 300 1.620 10/15/2023 ▼ CS 100207	Q No Reg Item No Guantiliy Ship-To Date Unit Ordered Product Internal Ord 00631480 28400 1,620 10/15/2023 ~ CS 100207 ENTITLE-SY24 00631493 13700 1.620 10/15/2023 ~ CS 100207 ENTITLE-SY24 00631496 300 1.620 10/30/2023 ~ CS 100207 ENTITLE-SY24	Q No Reg Item No Guantity Ship-To Date Unit Ordered Product Internal Ord Sold-To 00651480 28400 1.620 10/15/2023 ▼ CS 100207 ENTITLE-Sy24 4007322 00631483 13700 1.620 10/15/2023 ▼ CS 100207 ENTITLE-Sy24 4008237 00631498 300 1.620 10/30/2023 ▼ CS 100207 ENTITLE-Sy24 4008239	A No Reg Item No Cuantility Ship-To Date Unit Ordered Product Internal Ord Sold-To Product Description 00631480 28400 1,620 10/15/2023 • CS 100207 ENTITLE-SY24 4007322 00631483 13700 1.620 10/15/2023 • CS 100207 ENTITLE-SY24 4008237 00631489 300 1.620 10/30/2023 • CS 100207 ENTITLE-SY24 4008239	Q No. Reg Rem No. Guantity Shib-To Date Unit Ordered Product Internal Ord Sold-To Product Description Program 00631480 28400 1,620 10/15/2023 ~ CS 100207 ENTITLE-SY24 400323 NSLP 00631483 13700 1,620 10/15/2023 ~ CS 100207 ENTITLE-SY24 4008237 NSLP 00631493 300 1,620 10/30/2023 ~ CS 100207 ENTITLE-SY24 4008237 NSLP 00631496 300 1,620 10/30/2023 ~ CS 100207 ENTITLE-SY24 4008239 NSLP	A No Reg Item No Cuantility Ship-To Date Unit Ordered Product Internal Ord Sold-To Product Description Program Functional Area 00651460 28400 1,620 10/15/2023 • CS 100207 ENTITLE-SY24 4007322 NSLP 6E-NSLP 00651468 300 1,620 10/15/2023 • CS 100207 ENTITLE-SY24 4008237 NSLP 6E-NSLP 00651498 300 1,620 10/30/2023 • CS 100207 ENTITLE-SY24 4008239 NSLP 6E-NSLP	No Reg Item No Quantity Ship-To Date Unit Ordered Product Internal Ord Sold-To Product Description Program Functional Area Ship-To Name 00651460 28400 1.620 10/15/2023 • CS 100207 ENTITLE-SY24 4007322 NSLP 6E-NSLP 6E-NSLP 00651493 13700 1.620 10/15/2023 • CS 100207 ENTITLE-SY24 4006237 NSLP 6E-NSLP (b) (b) (c) (c)

36. Review the Req's Past Order-By Date queue.

(Note) The submitted requisition line no longer appears.



37. Return to Step 7.

Image: Consolidate Requisitions Screen

BI	Req No	Req Item No	Quantity	Ship-To Date	Unit	Oldered Product	Internal Ord	Sold-To	Product Description	Program	Functional Area	Ship-To Name	Ship-
1	1000631480	28400	1,620	10/15/2023 👻	CS	100207	ENTITLE-SY24	4007322		NSLP	6E-NSLP	(h)	(/
Î	1000631493	13700	1.620	10/15/2023 -	CS	100207	ENTITLE-SY24	4008237		NSLP	6E-NSLP		
1	1000631496	300	1,620	10/30/2023 -	CS	100207	ENTITLE-SY24	4008239		NSLP	6E-NSLP	· /	
4													

38. Click (the **Select** button) next to the appropriate Requisition Number. In this example, Requisition Number **1000631480** is selected.

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

Image: Consolidate Requisitions Screen

B	Req No	Req Item No	Quantity	Ship-To Date	Unit	Ordered Product	Internal Ord	Sold-To	Product Description	Program	Functional Area	Ship-To Name
	1000631480	28400	1,620	10/15/2023 -	CS	100207	ENTITLE-SY24	4007322		NSLP	6E-NSLP	
	1000631493	13700	1,620	10/15/2023 👻	CS	100207	ENTITLE-SY24	4008237		NSLP	6E-NSLP	
	1000631496	300	1,620	10/30/2023 -	CS	100207	ENTITLE-SY24	4008239		NSLP	6E-NSLP	
4												
Rad												

39. Click **Click** (the **Decline** button).



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閐	Reg No	Reg Item No	Quantity	Ship-To Date	Unit	Ordered Product	Internal Ord	Sold-To	Product Description	Program	Functional Area	Ship-To Name	SI
	1000631493	13700	1,620	10/15/2023 -	CS	100207	ENTITLE-SY24	4008237		NSLP	32A-NSLP	(b) (a)	1
-	1000631496	300	1.620	10/30/2023 -	CS	100207	ENTITLE-SY24	4008239		NSLP	32A-NSLP		

- 40. Click Back (the Back button) to return to the Consolidate Requisitions Screen.
- 41. Return to Step 7.

Image: Consolidate Requisitions Screen

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ations	> Order Proce	essing > Order	Management	> Consolida	te Requisitions							
Co	nsolidate R	equisition	S									
P	Back 🕼 Regis	Past Order-By	Date Order	ed Preduct	100207-APPLE	ESAUCE CAN-24/	300	-	Unit Of Measure	CS	FTL Quantity:	1.620
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	Unailocated I View: [Standard 3 Reg No 1000631475	tems Ret View] ▼ Req Itsm No 6200	Allocate Shipping Date 03/31/2024	Declined Quantity 405	Ship-To BP ID	Ship-To Name	Ship-To City	Ship-To Rg M	ulti Stop Group 9197	Number 5	Sold-To Name	
	Unallocated In View: Standard Reg No 1000631475 1000631476	Rec Items Ret View] 👻 Rec Item No 6200 17400	Allocate Shipping Data 03/31/2024 05/15/2024	Declined Quantity 405 405	Ship-To BP ID	Ship-To Name	Ship-To City	Ship-To Rg M	ulti Stop Group 9197 5769	Number \$ 73597 38762	Sold-To Name	(4
	Unailocated It View: [Standard 2 Reg No 1000631475 1000631476 1000631476	tems Ret View] Req Item No 6200 17400 3000	Allocate Shipping Data 03/31/2024 05/15/2024 03/31/2024	Declined Quantity 405 405 540	Ship-To BP ID	Ship-To Name	Ship-To City	Ship-To Rg M	ulli Stop Group 9197 5769 9197	Number 5 73597 38762 73597	Sold-To Name	(4

42.

Click *Update Req* (the **Update Req** button) to save any changes.

(Note) If the user does not click the **Update Req** button, the requisition that was moved to the Consolidation Workbench will return to the *Req's Past Order-By Date* queue. The user must click the **Update Req** button to save their changes and ensure the requisition stays on the Consolidation Workbench.



Work Instruction Consolidate Requisitions to Create Standard Domestic Sales Order

Image: Order Consolidation Pop-Up Screen



43. Click Yes (the Yes button) to confirm.

Image: Consolidate Requisitions Screen

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	+0 /-0	1,620 12/3	1/2023	(b) (4)				96	8403078	(b) (4	.)
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44. View the Consolidation Workbench. Notice that Sales Order Creation (the Submit for Sales Order Creation (the Submit for Sales Order Creation button) is now enabled.

(Note) The user can select and submit the proposed order.

45. The transaction is complete.



Work Instruction Consolidate Requisitions to Create Standard Domestic Sales Order

RESULT

Requisitions have been consolidated and submitted for standard sales order creation.



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 delivered to multiple locations. Order Managers from State Distributing Agencies (SDAs), Indian Tribal Organizations (ITOs) and COOPs 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 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** status must exist in WBSCM.
- Requisitions must be from an RA/Co-op or SDA/ITO as part of the user's SDA/ITO organization.

Portal Path

Follow the Portal path below to complete this transaction:

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 navigational training and 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 **→ Consolidate Requisitions** link.

Image: Consolidate Requisitions Screen

order Processing		and the second	1111 - 11
	Operations > Order Processing > Order Nanagement > Cons	olidate Requisitions	Full Screen Options
File Uploads/Downloads			
Catalog Maintenance	Welcome to Consolidate Requisitions		
Forecasting	Al required fields are marked with a red asterisk (*). Dates are	formatied as MM/DD/YYYY.	
- Order Management	Selections for Consolidation		
Consolidate Requisitions	Called the automation to the trade of the sector of the sector	te annihilare. Une additional fields to link has been to constitute white e	
Domestic Order Entry	The criteria are retained when switching between materials	to consolidate. Navigate back to this selection screen to modify any criteria.	
Full Truck Load and Transfer Requests	Submitting the product/material on this screen locks the rect	ords to prevent other users from consolidating the same requisitions.	
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Returned FNS Orders	Frogram: 🚸	5	
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Shipment Receipts	Ship-To Party: O	To D	
N/V Delivery Calendar	Ship-To Delivery Date: 🚸 🔤	To KE S	
	Submit Clear		

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

Image: Consolidate Requisitions Screen

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Icome to Consolidate Requisitions	
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rp-To Delivery Date: 🚸 🔟 To	
Submit 1 Glear	



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

Field	R/O/C	Description
Ordered Product	R	The material number of the product which has been requested to be ordered.
		Example: 100166
Program	0	Acronym used to identify a USDA food distribution program.
		Example: CSFP
		(Note) Click (the Advanced Options button) to enter or exclude multiple selections.
Sold-To Party	0	Unique identifying number associated with a particular customer in WBSCM.
		Example: 4000578
		(Note) Users can enter a Sold-To Party or a range of Sold-To Parties. Click [♣] (the Advanced Options button) to enter or exclude multiple selections.
Ship-To Party	0	Unique identifying number associated with a person or company that receives the materials or commodities.
		(Note) Users can enter a Ship-To Party or a range of Ship-To Parties, Click (the Advanced Options button) to enter or exclude multiple selections.
Ship-To Delivery Date	0	The date upon which the delivery is expected to be completed.
		Example: 12/31/2023
		(Note) Users can enter a Ship-To Delivery Date or a range of Ship-To Delivery Dates. Click (the Advanced Options button) to enter or exclude multiple selections.



	olidate Requisitions	Full Screen Opti
Jalcome to Consolidate Requisitions		
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4. Click Submit (the Submit button).

Image: Consolidate Requisitions Screen

on	nsolid	ate Ree	uisitio	ns															
6 8	lack	Reg's P	ast Order-B	y Date Di	dered	Product 100	100-BEEF ROA	AST ROUN	D FRZ CTN-	38-42 LB	🗣 Un	Cf Measure	CS FT	L Quantity:	1,900				
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1	+	+0.1-0	1,00	0 12/31/2023									166746759	4000578	TX DEPT. OF A	BRICULTUR	1000488304	100	
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	•	+0.1-0	1,00	0 12/31/2023	*								753404483	4000578	TX DEPT, OF A	BRICULTUR	1000490070	100	
	+	+9.1-0	2,00	0.12/31/2023	*								921081098	4000578	TX DEPT. OF A	BRICULTUR	1983	100	
V	Unallo	eated Iten	w R	sturned items	M	Declined ter	ns												
8	Raqh	Vo Req	Item No	Shipping Da	ate:	Quantity	Ship-To BP ID	Ship-To	Nama (Ship To City	Ship-To P	ig Mult S	itop Group f	lomber	Sold-To Name	Order By D	ato Interna	Ord Prog	gra
																			-

5. If needed, click 💌 (the Scroll Right button) to display additional columns.

(Note) After RAs, Co-ops, SDAs, or ITOs submit their requisitions, WBSCM automatically groups requisitions by Material, Shipping Date, and Ship-To location. For example, all requisitions for the same ship-to location that are scheduled to ship on 12/31/2023 are displayed beneath one Group Number.

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.

When an SDA user selects a Product/Material to consolidate, WBSCM automatically locks the associated records. This prevents multiple users from consolidating the shipments at the same time until the Product/Material is unlocked. To unlock the Product/Material, perform one of the following:

- Log out of WBSCM using (the Log off button) Switch from one material to another
- Click on a different link/iView in WBSCM

Image: Consolidate Requisitions Screen

	Back	Reg's Pa	sst Order-By D	ote Ordere	d Product: 1	00100-BEEF ROA	ST ROUND FRZ C	TN-38-42 LB	Vin	t Of Measure	E CS FT	L Quantity:	1,000				
Vie	aw: [[Stand	lard View]	• 3	Expand Al	🔒 Unallocata	🖉 Raturn 💥	Decline 🔰 🥜 Uş	odare Req									
昆	Row L1	For FTL	Quantity S	hipping Date	Ship-To BP I	D Ship-To Name		Ship-To City	Ship-To Rg	Multi Stop	Group Number	Sold-To	Sold-To Name		Reg No	Reg item No	ŧ.
	•	+0.1-0	1,000.13	1/31/2023 -							100740759	4000578	TX DEPT; OF A	BRICULTUR	1000488304	100	
	•	+0.1-0	1,000 12	1/31/2023 ·			4				824571448	4000378	TX DEPT. OF A	GRICULTUR	1000002073	100	
_	•	+0.1-0	1,000 13	/31/2023 -							753404483	4000578	TX DEPT, OF A	BRICULTUR	1000490070	122	
	Unailee View [Sta	ated Item	w]	ned Items Alcoate	Declined to	ams											
76	Raq No	o Req	Item No S	hipping Date	Quantity	Ship-To BP 10	Ship-To Name	Ship-To Cit	y Ship-To I	lg Multi	Stop Group N	omber	Sold-To Name	Order By D	ato interna	Ord Prog	gra

Click (the **Right** arrow) to expand the line items of the requisition shipment being combined. 6. Image: Consolidate Requisitions Screen

4	Back	Reg's Pa	st Order-By Eate Do	ered Product []	00188-BEEF ROAST R	OUND FRZ CTN-38-42 LB	Unit Of	Maasure:	CS FT	L Quantity:	1,000		
W	ew: [Stan	dard View(💌 🧐 Expand A	I Grunalocata	🖗 Return 🕱 Deck	ne 🛛 🥜 Update Req	2.0.3			-			
尼	Row L1	For FTL	Quantity Shipping D	ate Ship-To BP	ID Ship-To Name	Ship-To City	Ship-To Rg Mu	iti Stop	Group Number	Sold-To	Sold-To Name	Reg No	Reg Item No
	+	40.1.04	1,000 12/31/2023	•					166746759	4000578	TX DEPT, OF AGRICULT	UR 1000488304	100
	-	40.10	1.000 12/31/2023	*					824571448	4000578	TX DEPT. OF AGRICULT	UR 1000582073	100
			1,000 12/31/2023	*					624571448	4000578	TX DEPT: OF AGRICULT	UR 1000582073	100
	+	40 1.0	1.000 12/31/2023	*					753404483	4000578	TX DEPT. OF AGRICULT	UR 1000400678	100
	+	40.10	2:000 12/31/2023	*					921081098	4000578	TX DEPT, OF AGRICULT	ur ·	100
-	Unation	cated item	Returned tems	Declined a	iems								
	And the list	andalo vie	M POLICIA										



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

Field	R/O/C	Description
Group Number	R	This is the group number, a unique identifying number associated with a proposed order.
		Example: 166746759
		(Note) The Group Number associated with the original order defaults. Change the defaulted Group Number to the Group Number of the order with which the line item is being consolidated. In this example, the Group Number is changed from 624571446 to 166746759.

Image: Consolidate Requisitions Screen

4 0 Ba	ick																
		Reas Pa	st Order-By	Date Didere	ed Product 1	00188-BEEF ROAS	ST ROUND FRZ C	TN-38-42 LB	👻 Unit	Of Measure	: (CS / FT	L Quantity:	1,000	8			
View	Stand	ard View]		S Expand Al	Challocate	PReturn 🗶	Decline 🥜 Up	date Req									
屁 R	Row L1	For FTL	Quantity	Shipping Date	Ship-To BP I	D Ship-To Name		Ship-To City	Ship-To Rg	Multi Stop	Group Number	Sold-To	Sold-To Name		Reg No	Reg Item No	ĝ li
	+	+0.1-0	1,000	12/31/2023 -							166746760	4000578	TX DEPT. OF A	GRICULTUR	1000488304	100	E
	*	+0 /-0	1,000	12/31/2023 -					1		824571448	4000578	TX DEPT. OF A	GRICULTUR	1000582073	100	E
			1,000	12/31/2023 •							168746759	400057.8	TX DEPT, OF A	GRICULTUR	1000582073	100	E
	+	10.10	1,000	12/31/2023 -							753404483	4000578	TX DEPT. OF A	GRICULTUR	1000406678	100	E
	*	+0.1.0	2,000	12/31/2023 -							921081098	4000578	TX DEPT. OF A	GRICULTUR		100	E
Vie B	Unalloc aw (Sta Reg No	ated Kerr ndard Viev Reg I	v] • tem No	Alocate Shipping Date	Declined it	ems Ship-To BP ID	Ship-To Name	Ship-To City	Ship-To R	g Multi S	Stop Group N	lumber	Sold-To Name	Order By Di	ste interna	I Ord Prop	;ra

8. Press Enter on the keyboard.

(Note) After entering a new value in the **Group No** field, the user must press **Enter** to process the entries. If **Enter** is not pressed, the changes may not be saved and the user will need to re-enter them.



ons	solida	te Requ	uisition	5												
> 8a	ck	Reg's Pas	t Order-By	Date Orders	ad Product: 10	0188-BEEF ROA	ST ROUND FRZ	CTN-38-42 LB	Uni Uni	Of Measure	CS FTU	Quantity:	1,900			
View B R	Estand	For FTL	Quantity	3 Expand Al Shipping Date	Ch Unallocate Ship-To BP II	 Beturn X Ship-To Name 	Decline 🥜 U	Ipdate Req Ship-To City	Ship-To Rg	Multi Stop	Group Number	Sold-To	Sold-To Name	Reg No	Reg Item No	6 1
	+	10-1-0+	2.000	12/31/2023 •	1					1.21	100740759	4000578	TX DEPT OF AGRICULTUR	•	100	E
	+	40.1-0	1,000	12/31/2023 •	(h)	(Λ)					T03404483	4000578	TX DEPT OF AGRICULTUR	1000490878	100	÷
	+	+0.10	2,000	12/31/2023 💌		(-)					921081095	4000578	TX DEPT. OF AGRICULTUR		100	÷
Vie	w [Sta	ndard View] =	Alcosta	CEVINES IS											2/
8	Reg No	Req It	en No	Shipping Date	Quantity	Ship-To BP ID	Ship-To Name	Ship-To City	Ship-To F	g Mult S	itop Group N	umber	Sold-To Name Order By D	ate Interna	Ord Prog	ran
	_															

9. Click (the **Right** arrow) of the appropriate line item to expand the proposed order and display all of the requisitions that are included in the proposed order.

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(Note) The **Multi Stop** checkbox is automatically checked when line items are grouped together to create a multi-stop. An asterisk marks fields where the requisitions have different information.

If it is a multi-stop between different states, the user must select the **Multi Stop** checkbox manually. This step is in addition to having to share the group number with the other state user. The users for both states need to communicate with each other to ensure that the same group number is used on both orders. Refer to the <u>Consolidation for a Multi-Stop</u> <u>Domestic Sales Order between Two States</u> Job Aid for more details on this process.

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(Note) To exit the consolidation workbench without updating the requisitions, click **Back** (the **Back** button).



101														
.01	nsonoa	ate Req	uisitions	-			100							
~	baux.) may sin a	ac onter by bate Diden	ed Product: [196	100-BEEF RUAST HOUS	ND FRZ CTN-38-42 LB	Lu Cu	t of weasure		Quantity:	1,900			
Vie	aw: [Stan	dard View]	💌 🌝 Expand Al	G Unaliceate	Peturn 💥 Decline	🥜 Update Req								
E.	Row L1	For FTL	Quantity Shipping Date	Ship-To BP ID	Ship-To Name	Ship-To City	Ship-To Rg	Multi Stop	Group Number	Sold-To	Sold-To Name	Reg No	Reg item No	É I
	•	+0.2-0	2,000 12/31/2023 -	:1	*	50	*.	9	166746759	4000578	TX DEPT. OF AGRICULT	UR 👘	100	E
			1,000 12/31/2023 -						188748759	4000378	TX DEPT. OF AGRICULT	UR 1000002073	100	
			1,000 12/31/2023 -						188746759	4000578	TX DEPT, OF AGRICULT	UR 1000486304	100	
		+0.+0	1,000 12/31/2023 -						753404483	4000578	TX DEPT. OF AGRICULT	UR 1000490070	100	5
		+0.1-0.	2,000 12/31/2023 -	· · · · ·					921081093	4000578	TX DEPT. OF AGRICULT	UR -	100	E
	Unailor View [St	sated Item	s Returned kems	Declined ten										
	A Req N	io Regi	ten No Shipping Date	Quantty	Ship-To BP ID Ship-T	io Name Ship-To Ca	ty Ship-To P	ig Multi	Stop Group N	imber	Sold-To Name Order B	y Data interni	I Ord Prog	rait

10. Click Update Req (the Update Req button).



(Note) All records with changes made in the Consolidation Workbench will be updated.

(Note) Clicking the Update Req button serves two purposes:

- 1. It commits the updates to the requisitions made to the quantity, shipping date, ship-to location, and returned or declined line items.
- 2. It confirms that changes to the requisitions are complete and saves the changes made using the consolidation workbench.

After clicking the **Update Req** button, users can no longer make changes to the proposed order.

It is not necessary to submit requisitions for order creation at this time, but changes will be retained.



Image: Order Consolidation Pop-Up

onsolid	ate Roqu	> Order Manag	ement > Consc	Note Requisitons							Full Screen 1	Opti
Back	Req's Past	Orden-By Date	Didered Produ	ICT. 100100-BEEF RCA	ST ROUND FRZ	OTN-38-42 LB 💽 Unit Of Meas	ure CS FT	L Quantity	1,000			
view: [Star	ndard Viewj	Exp:	and All Grunal	locato @ Return 💥	Dec 2	No more changes possible after Upda Real Costinue to Submit Order?	ite					
D Rew L1	ForFTL G	2 000 12/31/0	ng Date Ship-1	o BP ID Ship-To Name		Req. Continue to Scome Order?	10877500	Sold-Te	TV DEPT OF AGRICULTUR	Heg No	Heq Item No	
	+00	1.000 12/31/2	023 - //-				10785985	4000578	TX DEPT OF AGRICULTUR	1000490075	100	-
	+0.1-0	2,000 12/31/2	023 -)(4)			47894652	4000578	TX DEPT OF AGRICULTUR	100	100	
Unalle	icated Items	Returned it	oms Decl	inad tems	1	Tes NO	J					
View [3]	tandard View] No Req Iter	Alcca	te Ig Date - Oua	ntty Ship-To BP ID	Ship-To Name	Ship-To City Ship-To Rg Mu	it Stop Group f	lumber	Sold-To Name Order By D	ate Interna	I Ord Prog	ram

11. Click Yes (the Yes button) to submit the changes.

Image: Consolidate Requisitions Screen

	ider Miobessing	 Order Manageme 	ent > Cons	olidate Requisitions	5								Full	Screen. Opt
Requisit	ons submitted f	lor update in Backgrou	und Taski											
onsoli	idate Requ	lisitions												
Back	Reg's Pas	Corder-By Date D	idered Fred	uot: [100188-BEE	F ROAST ROUND F	RZ CTN-33-42 LB	Unit	Of Measure: CS	FTL	Quantity: 1,000)		
View: [St	andard View]	💌 🧭 Expand	AI 🗭 :	Submit for Sales Or	rder Creaton									
B Rowl	L1 For FTL	Quantity Ship Date	Ship-To	Ship-To Name	Ship	To City Ship-To	Rg Multi Stop	Group Number	Soid-To	Sold-To Name		Reg No	Req Item No	Internal Ori
•	40.10	2,000 12/31/2023		(h)			B	212877329	4000578	TX DEPT. OF AGRIC	ULTUR	*	100	ENTITLE C
+	+0.10	1,000 12/31/2023	5003104		ENID	OK		530785985	4000578	TX DEPT. OF AGRIC	ULTUR	1000400676	100	ENTITLE-C
•	+0.1-0	2,000 12/31/2023	6002100		BALL	INGERY TX		547604652	4000678	TX DEPT. OF AGRIC	SULTUR		100	ENTITLE-C
Una View (liocated items	Returned items	Dec	lined tems										
Heg No	Reg hem No	Shipping Date	Quantity	Ship-To BP ID	Ship-To Name	Ship-To City 3	Ship-To Rg Mu	In Stop Group	Number	Solo-To Name C	order By Da	ke intern	al Ord Prog	ram Cusi

12. Click (the Select button) beside the proposed order(s) being submitted for sales order creation.



(Note) A system message displays at the top of the screen indicating that the requisitions have been submitted for update in the background task.

(Note) Users can click (the **Table Selection Menu** button) and choose the **Select All** or **Deselect All** option to update and/or submit multiple requisitions for sales order creation.





13. Click Submit for Sales Order Creation (the Submit for Sales Order Creation button) to submit the proposed order(s).



(Note) The **Submit for Sales Order Creation** button only displays after the requisitions are updated by clicking the **Update Req** button.

Unallocated requisitions remain unaffected and are still in the queue at the bottom of the screen. The unallocated requisitions will return to the Order Consolidation Workbench upon exiting the transaction; they do not remain in the Unallocated queue.

Returned requisitions go back to the Sold-To Party that submitted them. Requisitions are returned when there are changes to be made by the Sold-To Party. The requisition will be returned to the Sold-To Party after clicking 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 the commodity. The Decline feature is only 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 clicking the **Update Req** button.





14. The transaction is complete.

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(Note) After an SDA user consolidates a requisition, background processes generate the Sales Order numbers. Users should wait ~15 minutes to review the newly consolidated order(s) using the Order Status Report.

During peak ordering periods, it will take longer. As long as the requisitions are submitted for order consolidation before the USDA order-by deadline (CST), WBSCM will accept and provide Sales Order numbers.



RESULT

A multi-stop domestic sales order has been consolidated from requisitions with differing ship-to locations within the state.



PROCESS OVERVIEW

Purpose

A Co-op Organization is an organization that places orders in WBSCM on behalf of member Recipient Agencies (RAs). The purpose of a Co-op is to leverage buying power by consolidating orders based on the needs of their RAs and submitting their combined order requests to the SDA for update or approval. Use this transaction to create a new Co-op Organization in WBSCM.

Process Trigger

Use this process when a new Co-op Organization needs to be created in WBSCM.

Prerequisites

- RA(s) that should belong to a Co-op must exist in WBSCM.
- Available business partners must exist in WBSCM
- SDA Org Admin Role

Portal Path

Follow the Portal path below to complete this transaction:

• Select Admin tab → Organization Maintenance tab → Maintain Organization link to go to the Maintain Organization 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
 - 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: Admin tab → Organization Maintenance tab → Maintain Organization link.

Image: Maintain Organization Screen

Home Operations Admin	Reports Help	
Manage Users Master Data Or	ganization Maintenance	
	Admin > Organization Maintenance > Maintain Organization	Full Screen Options +
Maintain Organization		
Upload New RA Organizations	Welcome to the Maintain Organization Application	
Upload RA Updates	Update my Organization	
	Create RA.Organization	
	Update RA Organization	
	Create Co. op Organization	
	Update Co-op Organization	
	Mass Assign Unidesign Ship-To	

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

Image: Maintain Organization Screen





3. Click Create Co-op Organization (Create Co-op Organization link) to create a new Co-op Organization.



reate Co-op Organization		
Back		
Address Relationship		
All required fields are marked with a red asterisk (*).		
Name		
8 Name		
Additional Name	<u> </u>	
Address		
Provide Case		
* Street Address 1: Street Address 2:		
Street Address 3:		
* City:		
* Country		
State	Thosa Cooe	
County.	2002	
Submit		

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

Field	R/O/C	Description
Name:	R	Person or business partner's name. Example: Pueblo City School District 60
Additiona l Name:	0	A free text field to enter an additional name or name of recipient.
Street Address 1:	R	A free text field in which to enter the street address of the user or organization. Example: 1902 Montezuma Road
Street Address 2:	0	A free text field in which to enter the street address of the user or organization.



Field	R/O/C	Description
Street Address 3:	0	A free text field in which to enter the street address of the user or organization.
City:	R	City where the user or company is located. Example: Pueblo
Country:	R	Country code that represents country name. Example: USA (Note) The Country ^I (the Drop-down button) displays a list of countries in alphabetical order. Use the vertical scroll bar to locate the USA option.
State:	R	The abbreviation or name of United States territory, district or state. Example: Colorado (Note) The State ^I (the Drop-down button) displays a list of US states in alphabetical order. Use the vertical scroll bar to locate the desired state.
Postal Code	R	A zip code. Example: 81003 (Note) The postal code must be valid and belong to the state selected.



Image: Create Co-op Organization (Address) Screen

Tusers Master Data Organization Maintenance	The second se
mn > Organization Mamenance > Maintain Organization	Ful Screen Opt
reate Co-op Organization	
Back	
Address Relationship	
All required fields are marked with a red asterisk (*).	
Name	
* Name: Pueblo City School District 60	
Additional Name:	
Andrees	
* Street Address 1: 1002 Montazuma Road	
Street Address 2.	
* City: PUEBLO	
* Country USA	
* State: Colorado * Postal Code: 81003	
County: Zone:	
CARGANYA REALESS	
submit	

5. Click Relationship (the **Relationship** tab) to assign Business Partner relationships to the new Coop Organization.



(Note) The user may toggle between the *Address* and *Relationship* tabs without losing unsaved changes.

Image: Create Co-op Organization (Relationship) Screen

Ass	sioned Business Parine's		Available Business Partners	_	
C.	7		7		
E.	Business Partner (Name/City State, BP Number)	1	Business Partner (Name/City State, BP Number)		
	None Found		REGIONAL EAST TEXAS FOOD BANK / TYLER TX (4003884)		
-		The American	SAN ANTONIO FOOD BANK / SAN ANTONIO TX (4003944)	-	
		Assign	SOUTH PLAINS FOOD BANK/HIGH PLAINS FOOD / LUBBOCK TX (4004082)	-	
		Unassign 🕨	SOUTH TEXAS FOOD BANK / LAREDO TX (4005942)		
			SOUTHEAST TEXAS FOOD BANK/FOOD BANK OF / BEAUMONT TX (4004105)		
			TARRANT AREA FOOD BANK/MICHITA FALLS / FORT WORTH TX (4004830)		
			WEST TEXAS REGION RA FOOD BANK / CDESSA TX (4005467)		
			RA ROGEVILLE (ROSEVILLE CA (4006381)		
smt]					



6. Click (the Select button) to the left of an RA for the new Co-op Organization in the Available Business Partners section. In this example, the RA Roseville / Roseville CA (4009361) option is selected.

(Note) The available Business Partners are listed in alphabetical order on the right-hand panel. Use the vertical scroll bar to find the appropriate business partner. To select multiple business partners:

 If the business partners are listed in consecutive rows, hold down the Shift key and click the first and last select buttons.

(All)

• To select business partners from non-consecutive rows, hold down the **Ctrl** key while clicking each select button.



(Note) To filter the list of available Business Partners, click on the column Business

Partner (Name/City State, BP Number) field. Select (User-Defined Filter...) (the (User-Defined Filter...) option) and enter search criteria. Use "*" (the Asterisk symbol) at the beginning and at the end of a search term (e.g., *20th* or *5001416*) to search for a business partner that contains the term. The asterisk searches part of a word as well (e.g., *Califor*). See also the Wildcard and Matchcode Searches job aid for additional information.

To remove filter, select (AII) option.

Image: Create Co-op Organization (Relationship) Screen



7. Click Assign (the Assign button) to assign the selected RA to the new Co-op Organization.

(Note) If the relationship is created in error, select the business partner from the Assigned Business Partner panel and click Unassign (the Unassign button) to remove the assigned business partner.



Image: Create Co-op Organization (Relationship) Screen



8. Click Submit (the Submit button) to create the new Co-op Organization.



Address Relationship Business Partner Helation: Has RAs				
Assigned Business Partners		Available Business Partners		
8		4		
15. Business Partner (Name/City State BP Number)		12 Business Partner (Name/City State, BP Number)	The second se	
RA ROSEVILLE / ROSEVILLE CA (4008381)		ALEE TEST 0815188 RA 001 / NEW BEDFORD MD (40	102511	
		ALEE TEST 0815188 FA 003 / NEW BEDFORD MA (40)	10253)	
	Assign]	ALEE TEST 0816188 RA 004 / NEW BEDFORD MA (40	10254)	
	Unassign 🕨	ALEE TEST 0815188 RA 000 / NEW BEDFORD MA (40	10250)	
		ALEE TEST 081618B FA 007 / NEW BEDFORD MA (40	10257)	
		ALEE TEST 081518B RA 008 / NEW BEDFORD MA (40	10258)	
		ALEE TEST 0815188 RA 009 / NEW BEDFORD MA (40	10259)	
		ALEE TEST 0816188 RA 011 / NEW BEDFORD MA (40	10261) 🖛	
britt.				

9. The transaction is complete.



RESULT

The new Co-op Organization with the specified business partner relationship has been created in WBSCM.



PROCESS OVERVIEW

Purpose

The purpose of this transaction is for an FNS Org Admin to create a new Domestic Headquarters (HQ) organization in WBSCM. This includes naming the HQ, entering address information for the organization and linking any Ship-To locations to the Domestic HQ. This includes:

- Name and address
- Assign or unassign Business Partner relationships and Partners

Process Trigger

Use this transaction when new Domestic HQ Organization needs to be created in WBSCM.

Prerequisites

FNS Org Admin Role

Portal Path

Follow the Portal path below to complete this transaction:

• Select Admin tab → Organization Maintenance tab → Maintain Organization link to go to the Maintain Organization 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
 - **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.



PROCEDURE

1. Start the transaction using the following Portal path: Admin tab → Organization Maintenance tab → Maintain Organization link.

Image: Maintain Organization Screen

Home Operations Finance	Admin Reports Help	
Manage Users Master Data On	ganization Maintenance	
	Admin > Organization Maintenance > Maintain Organization	Full Screen Options +
Maintain Organization	Welcome to the Maintain Organization Application	
	Create SDA Organization	
	Maintain SDA Organization	
	Display SDA Organization	
	Create Ship-To Organization	
	Maintain Ship-Te Organization	
	Display Ship-To Organization	
	Vester H0 Organization	
	Disniar HD Ornanization	
	Maintain Plant / BA Assignment	

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

Image: Maintain Organization Screen





3. Click Create HQ Organization (the Create HQ Organization link) to create an HQ Organization.





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

Field	R/O/C	Description
Name:	R	Person or business partner's name. Example: Midwest HQ
Additional Name:	0	A free text field to enter an additional name or name of recipient.
Street Address 1:	R	A free text field in which to enter the street address of the user or organization. Example: One Williams Center
Street Address 2:	0	A free text field in which to enter additional street address information.

Field	R/O/C	Description
Street Address 3:	ο	A free text field in which to enter additional street address information.
City:	R	City where the user or organization is located. Example: Tulsa
Country:	R	Country code that represents country name. Example: USA (Note) The Country ^I (the Drop-down button) displays a list of countries in alphabetical order. Use the vertical scroll bar to locate the USA option. Domestic HQs should always use USA.
State:	R	 The abbreviation or name of United States territory, district, or state. Example: Oklahoma (Note) The State ^I (the Drop-down button) displays a list of US states in alphabetical order. Use the vertical scroll bar to locate the desired state.
Postal Code:	R	A ZIP code. Example: 74172 (Note) The postal code must be valid and belong to the state selected.

Image: Create HQ Organization (Address) Screen

lome Operations	Finance Admin	Reports Help			
anage Users Maste Admin > Organizatio	r Data Organization Mai n Maintenance > Maintain Or	panization			Ful Screen Option
Create HQ Organ	Relationship Relationship Introduced with a red asterisk (Victorest HQ 1; [One Villians Center 2; [2			
Street Addiess City Country State Country	TULSA USA Oliahoma		* Postal Code: [74172 Zone:	L	
[Submit]					

5. Click Relationship (the Relationship tab) to assign a Ship-To location to the Domestic HQ.

(Note) The user may toggle between the Address and Relationship tabs without losing unsaved changes.

Image: Create HQ Organization (Relationship) Screen

Address Relationship	ä			
Assigned Business Partners		Available Business Partners		
4				
Es Business Partner (Name/City State, BP Number)	1	Business Partner (Name/City State, BP Number)		
		15TH AVENUE FOOD CORP / BROOKLYN NY (5002999)	-	
	Frank and	20TH CENTURY / MONTOLAIR CA. (5001416)		
	Assign	21ST CENTURY FOODS LTD / SAN ANTONIO TX (8002705)		
	Chassion M	21ST CENTURY FOODS LTD / SAN ANTONIO TX (5002908)		
		21ST CENTURY FOODS LTD / WAELDER TX (5002857)		
		32 COLD / LOS ANGELES CA (5004520)		
		4U2U / MINNETONICA MN (5003951)		
	3	4U2LL INACTIVE / GREENDALE IN (5003952)		
Submit]				

6. Click (the Select button) next to the appropriate Ship-To from the Available Business Partners panel. In this example, the 20th Century / Montclair CA (5001416) option is selected.

(Note) The available Business Partners are listed in alphabetical order on the right-hand panel. Use the vertical scroll bar to find the appropriate business partner. To select multiple business partners:

- If the business partners are listed in consecutive rows, hold down the **Shift** key and click the first and last select buttons.
- To select business partners from non-consecutive rows, hold down the Ctrl key while clicking each select button.

(All)

(Note) To filter the list of available Business Partners click on the column Business

Partner (Name/City State, BP Number) field. Select (User-Defined Filter...) (the (User-Defined Filter...) option) and enter search criteria. Use "*" (the Asterisk symbol) at the beginning and at the end of a search term (e.g., *20th* or *5001416*) to search for a business partner that contains the term. The asterisk searches part of a word as well (e.g., *Califor*). See also the Wildcard and Matchcode Searches job aid for additional information.

To remove the filter, select the (AII) option.

Image: Create HQ Organization (Relationship) Screen

Business Partner Relation: Has Reporting Ship-To				
Assigned Business Partners		Available Business Partners		
a,				
Es Business Partner (Name/City State: BP Number)	1	E Business Partner (Name/City State, BP Number)		
		15TH AVENUE FOOD CORP / BROOKLYN NY (5002999)		
	La Arrian	20TH CENTURY / MONTOLAIR CA (5001418)		
	Linassion	21ST CENTURY FOODS LTD / SAN ANTONIO TX (8002705)		
	Consection (m)	21ST CENTURY FOODS LTD / SAN ANTONIO TX (5002908)		
		21ST CENTURY FOODS LTD / WAELDER TX (5002857)		
		32 COLD / LOS ANGELES CA (5004520)		
		4U2U / MINNETONKA MN (5003951)		
	8	4U2L- INACTIVE / GREENDALE IN (5003952)	±	
Lorit)				

7. Click Assign (the Assign button) to assign a Ship-To location to the HQ.

(Note) If the relationship is created in error, select the business partner from the Assigned Business Partner panel and click Unassign (the Unassign button) to remove the assigned business partner.

Image: Create HQ Organization (Relationship) Screen

8. Click Submit (the Submit button) to create the new Domestic HQ.

Home Operations Finance Admin Reports Help Manage Users Master Data Organization Maintenance Admin > Organization Maintenance > Maintain Organiza Full Screen Options * Eusiness Partner 0005006640 created succ spfully Create HQ Organization Address Relationship Business Partner Relation: Has Reporting Ship-To Assigned Business Partners Available Business Partners 1 100 E- Busine Business Partner (Name/City State, BP Number) 1. ess Partner (Name/City State, BP Number) 📃 15TH AVENUE FOOD CORP / BROOKLYN NY (5002899) 20TH CENTURY / MONTCLAIR CA (5001418) Assign 21ST CENTURY FOODS LTD / SAN ANTONO TX (8002705) 21ST CENTURY FOODS LTD / SAN ANTONIO TK (5002808) Unassign 🕨 21ST CENTURY FOODS LTD / WAELDER TX (5002857) 32 COLD / LOS ANGELES CA (5004520) 4U2U / MINNETONKA MN (6003961) 4U2U- INACTIVE / GREENDALE IN (5003952) A & D COLD STORAGE INC / WORCESTER MA (5002637) Submit

Image: Create HQ Organization (Relationship) Screen

9. The transaction is complete.

RESULT

The new Domestic HQ with the specified business partner relationship has been created in WBSCM.