



## 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 [Modify Domestic Shipment Receipt](#) work instruction, otherwise the user must open an incident through the WBSCM Helpdesk, email: [WBSCM.ServiceDesk@CACI.com](mailto:WBSCM.ServiceDesk@CACI.com) 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



Work Instruction  
Cancel Shipment Receipt

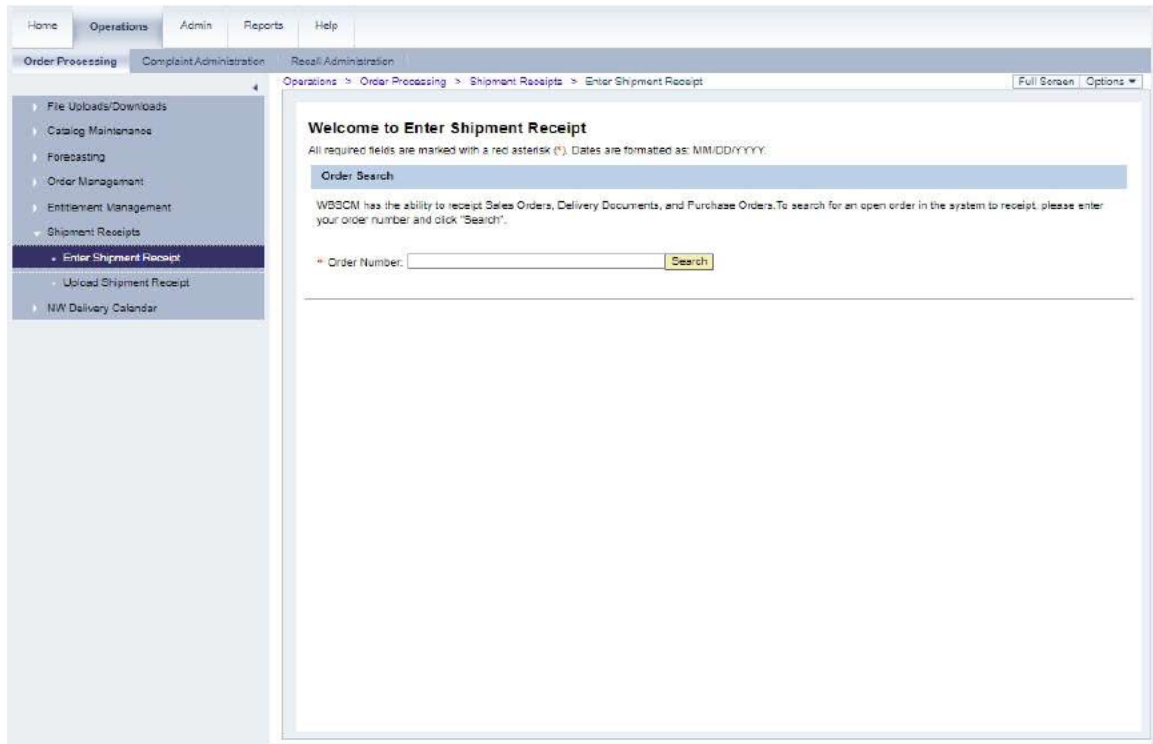
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- **Optional (O)** – a non-mandatory field not required to complete the transaction
- **Conditional (C)** – a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Help site,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

## PROCEDURE

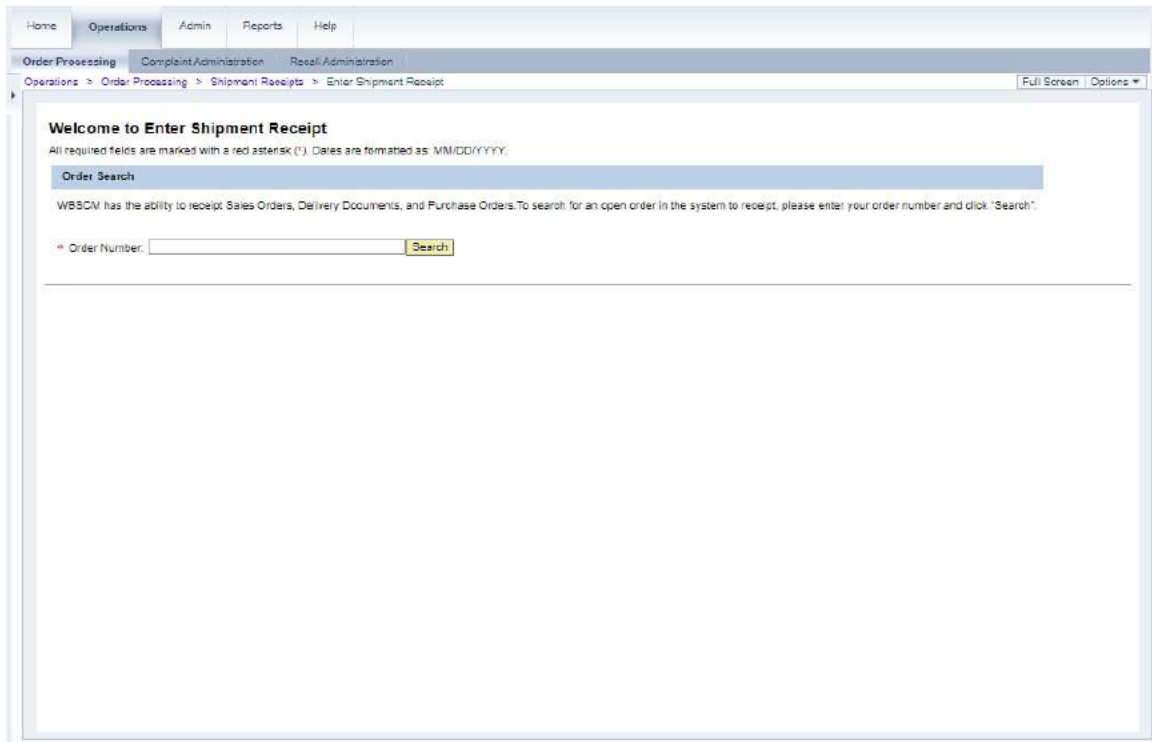
1. Start the transaction using the Portal path: **Operations tab → Order Processing tab → Shipment Receipts folder → Enter Shipment Receipt link.**

### Image: Enter Shipment Receipt Screen




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**



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

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

## Image: Enter Shipment Receipt Screen

- Click **Search** (the Search button) to execute the search.

## Image: Enter Shipment Receipt Details Screen

| Select                   | Further Actions          | Receipt Status   | Sales Doc  | Item | Pur. Doc   | Item # | Material | Material Description                   | ASN Number | Signed by | Date Received | Prev  |
|--------------------------|--------------------------|------------------|------------|------|------------|--------|----------|--|------------|-----------|---------------|-------|
| <input type="checkbox"/> | <input type="checkbox"/> | Pending Review   | 5000414712 | 100  | 4100008382 | 8      | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB | 0100250894 | John Doe  | 10/18/2023    | 700,0 |
| <input type="checkbox"/> | <input type="checkbox"/> | Ready to Receipt | 5000414714 | 100  |            | 8      | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB | 0100282141 |           |               |       |
| <input type="checkbox"/> | <input type="checkbox"/> | Ready to Receipt | 5000414715 | 100  |            | 9      | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input type="checkbox"/> | <input type="checkbox"/> | Missing ASN      | 5000414717 | 100  |            | 10     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input type="checkbox"/> | <input type="checkbox"/> | Missing ASN      | 5000414718 | 100  |            | 11     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input type="checkbox"/> | <input type="checkbox"/> | Missing ASN      | 5000414719 | 100  |            | 12     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input type="checkbox"/> | <input type="checkbox"/> | Missing ASN      | 5000414720 | 100  |            | 13     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input type="checkbox"/> | <input type="checkbox"/> | Missing ASN      | 5000414721 | 100  |            | 14     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input type="checkbox"/> | <input type="checkbox"/> | Missing ASN      | 5000414722 | 100  |            | 15     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input type="checkbox"/> | <input type="checkbox"/> | Missing ASN      | 5000414723 | 100  |            | 16     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |

- 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**

| Select                              | Further-Actions          | Receipt Status    | Sales Doc  | Item | Pur. Doc   | Item # | Material | Material Description                   | ASN Number | Signed by | Date Received | Prev. |
|-------------------------------------|--------------------------|-------------------|------------|------|------------|--------|----------|--|------------|-----------|---------------|-------|
| <input type="checkbox"/>            | <input type="checkbox"/> | Missing ASN       | 5000414734 | 100  | 4100008382 | 27     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input type="checkbox"/>            | <input type="checkbox"/> | Missing ASN       | 5000414735 | 100  |            | 28     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input type="checkbox"/>            | <input type="checkbox"/> | Missing ASN       | 5000414736 | 100  |            | 29     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input type="checkbox"/>            | <input type="checkbox"/> | Missing ASN       | 5000414737 | 100  |            | 30     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input type="checkbox"/>            | <input type="checkbox"/> | Missing ASN       | 5000414700 | 100  |            | 31     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input type="checkbox"/>            | <input type="checkbox"/> | Missing ASN       | 5000414670 | 100  |            | 32     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input type="checkbox"/>            | <input type="checkbox"/> | Missing ASN       | 5000414670 | 100  |            | 33     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input type="checkbox"/>            | <input type="checkbox"/> | Missing ASN       | 5000414677 | 100  |            | 34     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Receipt Processed | 5000414678 | 100  |            | 35     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            | John Doe  | 08/12/2021    | 888.0 |
| <input type="checkbox"/>            | <input type="checkbox"/> | Missing ASN       | 5000414679 | 100  |            | 36     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |

- 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.



(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

**Receipt Header**

Order Number: 4100008382 Entered By: ALLROLES... Railcar/BOL:

Signed By:  Date Received:

Comments:

**Receipt Item Details**

View: eNV VIEW

| Select                              | Further Actions                     | Receipt Status  | Sales Doc  | Item | Pur. Doc   | Item # | Material | Material Description                   | ASN Number | Signed by | Date Received | Prev. |
|-------------------------------------|-------------------------------------|-----------------|------------|------|------------|--------|----------|--|------------|-----------|---------------|-------|
| <input type="checkbox"/>            | <input type="checkbox"/>            | Missing ASN     | 5000414734 | 100  | 4100008382 | 27     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Missing ASN     | 5000414735 | 100  |            | 28     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Missing ASN     | 5000414736 | 100  |            | 29     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Missing ASN     | 5000414737 | 100  |            | 30     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Missing ASN     | 5000414700 | 100  |            | 31     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Missing ASN     | 5000414675 | 100  |            | 32     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Missing ASN     | 5000414670 | 100  |            | 33     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Missing ASN     | 5000414677 | 100  |            | 34     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Recpt Processed | 5000414678 | 100  |            | 35     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            | John Doe  | 08/12/2021    | 888.0 |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Missing ASN     | 5000414679 | 100  |            | 36     | 100428   | PASTA MACARONI PLAIN ELBOW PKG-24/1 LB |            |           |               |       |

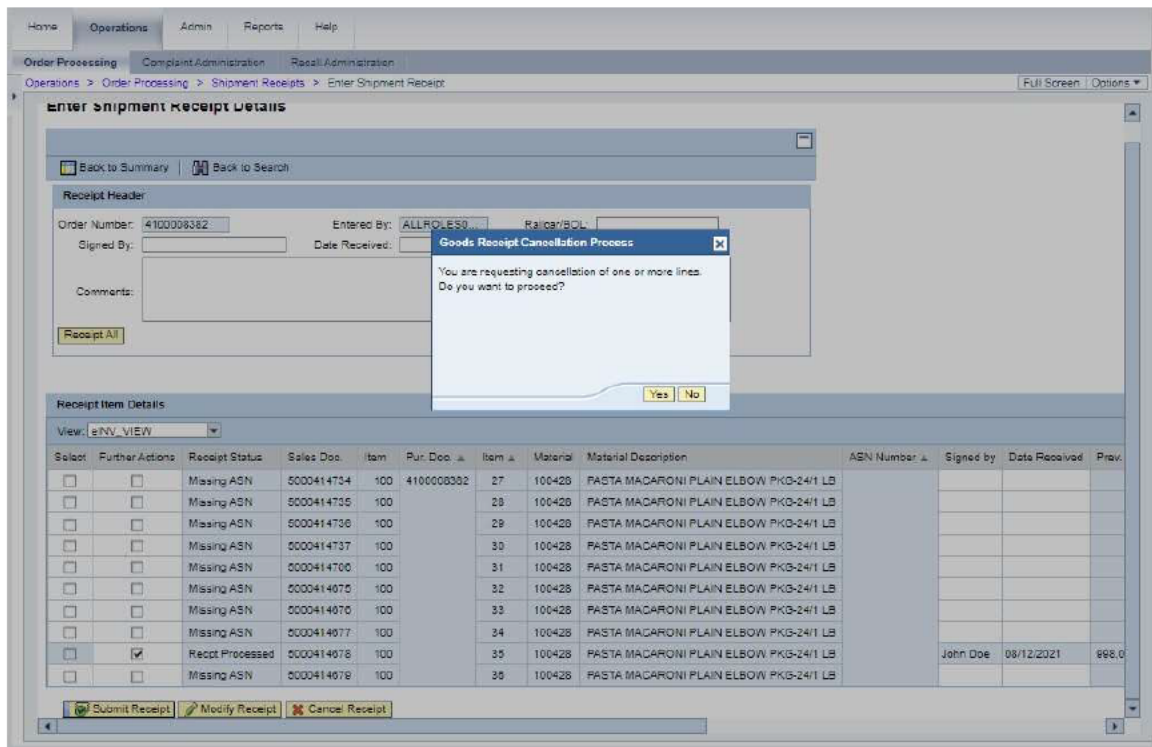
7. Click  (the **Cancel Receipt** button) to cancel the receipt for the line item.



(Note) The user will receive an error when:

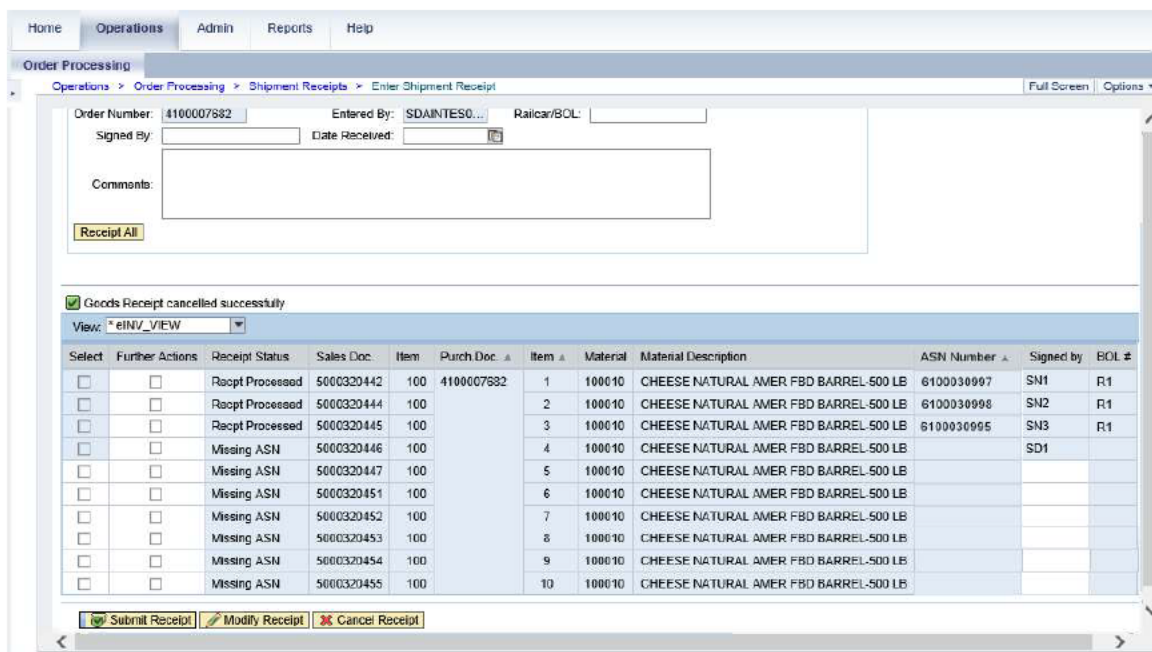
- An ASN exists (**BOL #** field is populated) for the selected line item(s). In this case, the shipment receipt can be modified, but not cancelled. Refer to the [Modify Domestic Shipment Receipt](#) work instruction for more details.
- The user selects multiple lines and at least one has an existing 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



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

## Image: Enter Shipment Receipt Details Screen



- 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.



Work Instruction  
Cancel Shipment Receipt

**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









The screenshot shows the 'Consolidate Requisitions' screen in the WBSCM portal. The top navigation bar includes 'Home', 'Operations', 'Admin', 'Reports', and 'Help'. Below this, the breadcrumb path is 'Operations > Order Processing > Order Management > Consolidate Requisitions'. A left-hand navigation menu is expanded to show 'Consolidate Requisitions' under the 'Order Management' section. The main content area is titled 'Welcome to Consolidate Requisitions' and includes instructions: 'All required fields are marked with a red asterisk (\*). Dates are formatted as MM/DD/YYYY.' Below this is a section for 'Selections for Consolidation' with the following text: 'Select the product/material ordered, to review and consolidate associated requisitions. Use additional fields to limit line items to specific requisitions. The criteria are retained when switching between materials to consolidate; navigate back to this selection screen to modify or remove any criteria. Submitting the material on this screen locks the records so other users cannot consolidate the same requisitions.' The form contains several fields: '\* Ordered Product' (required), 'Program', 'Sold-To Party', 'Ship-To Party', and 'Ship-To Delivery Date'. Each of these fields has a dropdown arrow and a magnifying glass icon. To the right of these fields are three 'To' fields, each with a dropdown arrow and a magnifying glass icon. At the bottom of the form are 'Submit' and 'Clear' buttons.

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

### Image: Consolidate Requisitions Screen

This screenshot shows the same 'Consolidate Requisitions' screen as the previous one, but with the left-hand navigation menu minimized. The breadcrumb path and main content area are identical. The 'Hide Navigator' arrow icon is visible in the top left corner of the main content area, indicating the menu is minimized.

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.<br><br><b>Example:</b><br>100207   |
| Program:               | O     | Acronym used to identify a USDA food distribution program.<br><br><b>Example:</b><br>NSLP<br><br> (Note) Click  (the <b>Advanced Options</b> button) to enter or exclude multiple selections.  |
| Sold-To Party:         | O     | Unique identifying number associated with a particular customer in WBSCM.<br><br> (Note) Users can enter a Sold-To Party or a range of Sold-To Parties. Click  (the <b>Advanced Options</b> button) to enter or exclude multiple selections.   |
| Ship-To Party:         | O     | Unique identifying number associated with a person or company that receives the materials or commodities.<br><br><b>Example:</b><br>5001600<br><br> (Note) Users can enter a Ship-To Party or a range of Ship-To Parties. Click  (the <b>Advanced Options</b> button) to enter or exclude multiple selections. |
| Ship-To Delivery Date: | O     | The date upon which the delivery is expected to be completed.<br><br> (Note) Users can enter a Ship-To Delivery Date or a range of Ship-To Delivery Dates. Click  (the <b>Advanced Options</b> button) to enter or exclude multiple selections.  |



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

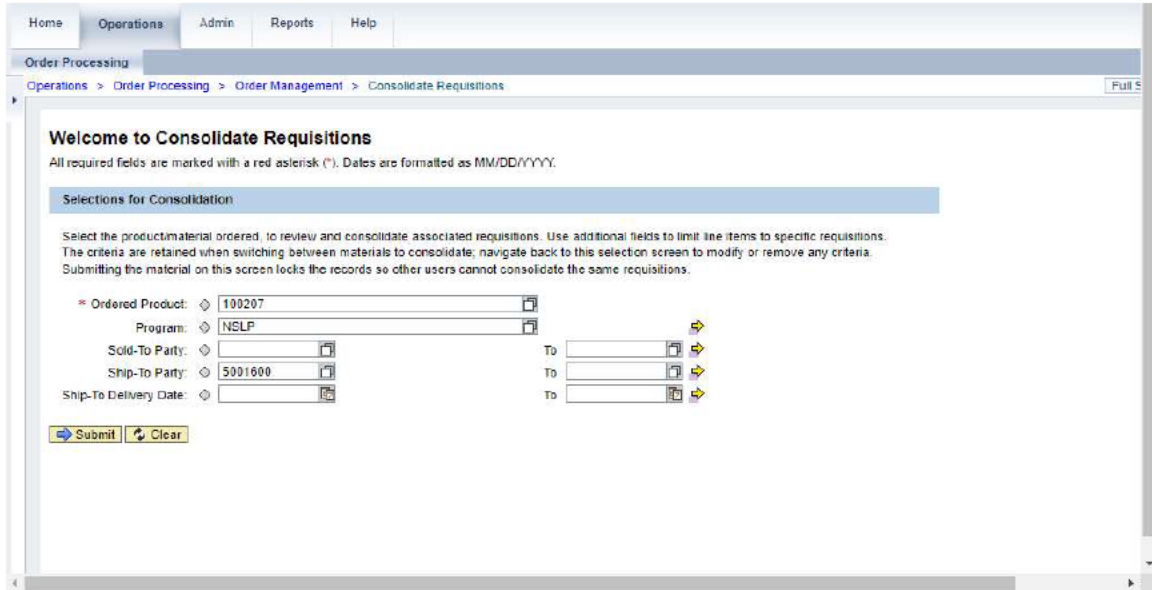


(Note) The user can search by a range of data for the **Sold-To Party**, **Ship-To Party**, and **Ship-To Delivery Date** fields by entering values in these fields and the corresponding **To** fields for each one. For example, entering **11/01/2023** in the **Ship-To Delivery Date** field and **11/30/2023** 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.



(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



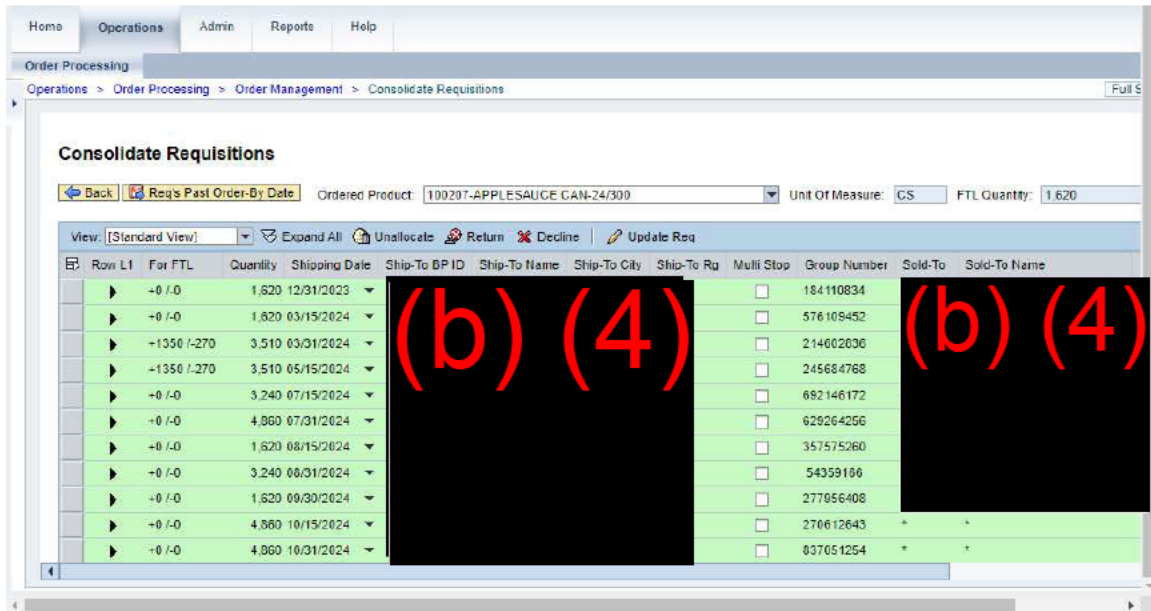
4. Click  (the **Submit** button) to submit the selection.



(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.

**Image: Consolidate Requisitions Screen**



5. If necessary, click (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.



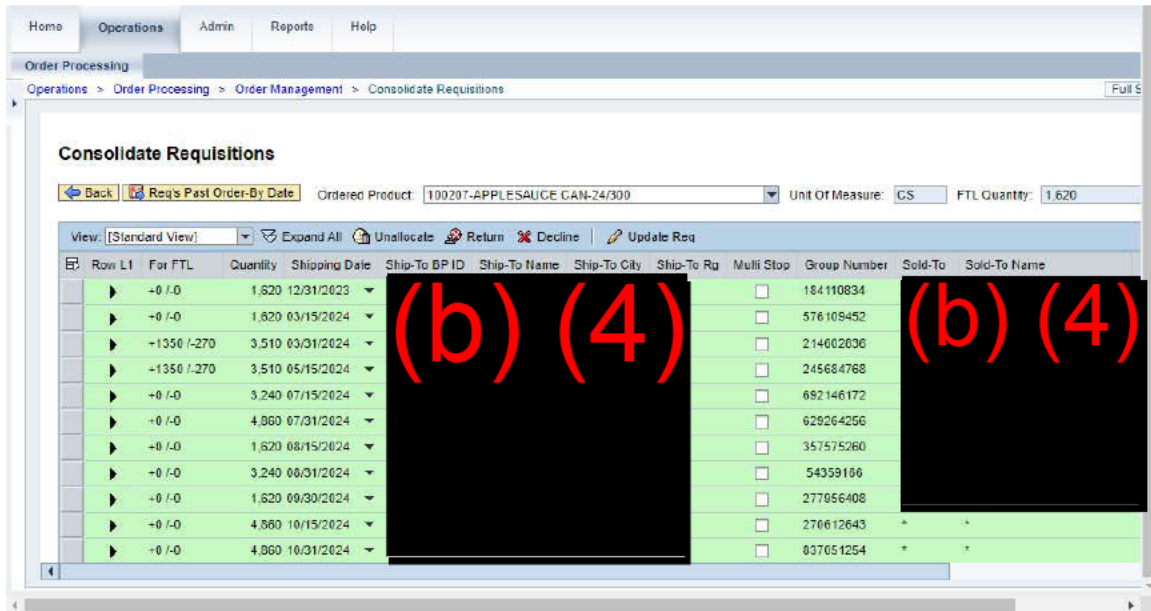
## Work Instruction Consolidate Requisitions to Create Standard Domestic Sales Order


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- **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.



Image: Consolidate Requisitions Screen



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.

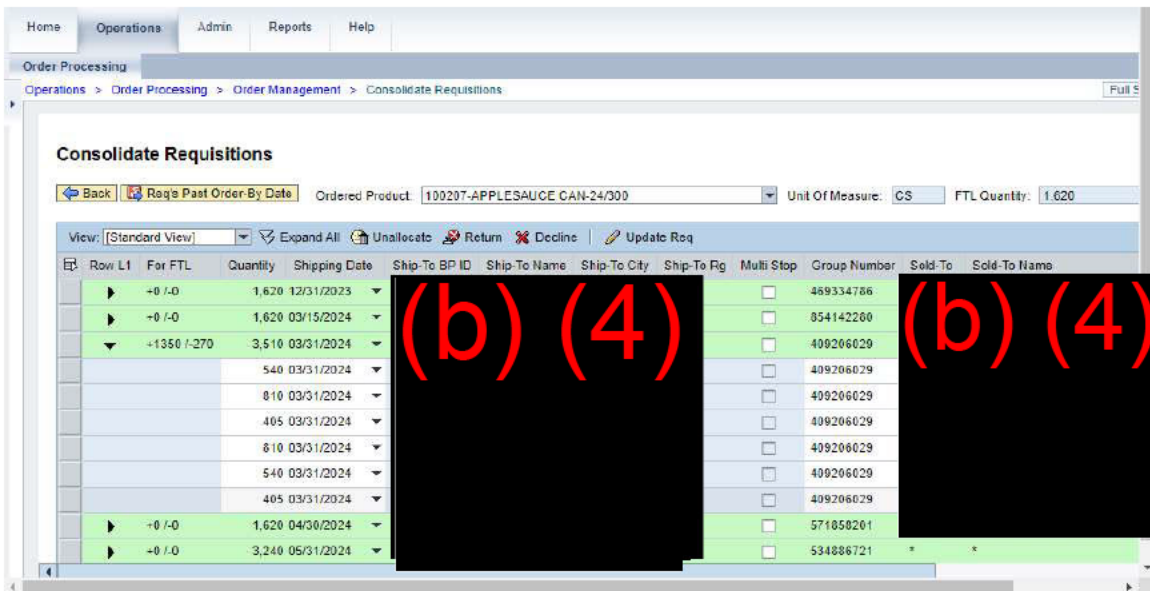
There are several buttons on the screen that can benefit the user in the order consolidation process. These buttons are as follows:

- **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**



| 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 |
|---------------|---------|----------|---------------|---------------|--------------|--------------|------------|--------------------------|--------------|---------|--------------|
| ▶ +0 /-0      |         | 1,620    | 12/31/2023    |               | (b) (4)      |              |            | <input type="checkbox"/> | 469334786    | (b) (4) |              |
| ▶ +0 /-0      |         | 1,620    | 03/15/2024    |               | (b) (4)      |              |            | <input type="checkbox"/> | 854142260    | (b) (4) |              |
| ▼ +1350 /-270 |         | 3,510    | 03/31/2024    |               | (b) (4)      |              |            | <input type="checkbox"/> | 409206029    | (b) (4) |              |
|               |         | 540      | 03/31/2024    |               | (b) (4)      |              |            | <input type="checkbox"/> | 409206029    | (b) (4) |              |
|               |         | 810      | 03/31/2024    |               | (b) (4)      |              |            | <input type="checkbox"/> | 409206029    | (b) (4) |              |
|               |         | 405      | 03/31/2024    |               | (b) (4)      |              |            | <input type="checkbox"/> | 409206029    | (b) (4) |              |
|               |         | 810      | 03/31/2024    |               | (b) (4)      |              |            | <input type="checkbox"/> | 409206029    | (b) (4) |              |
|               |         | 540      | 03/31/2024    |               | (b) (4)      |              |            | <input type="checkbox"/> | 409206029    | (b) (4) |              |
|               |         | 405      | 03/31/2024    |               | (b) (4)      |              |            | <input type="checkbox"/> | 409206029    | (b) (4) |              |
| ▶ +0 /-0      |         | 1,620    | 04/30/2024    |               | (b) (4)      |              |            | <input type="checkbox"/> | 571850201    | (b) (4) |              |
| ▶ +0 /-0      |         | 3,240    | 05/31/2024    |               | (b) (4)      |              |            | <input type="checkbox"/> | 534886721    | (b) (4) |              |

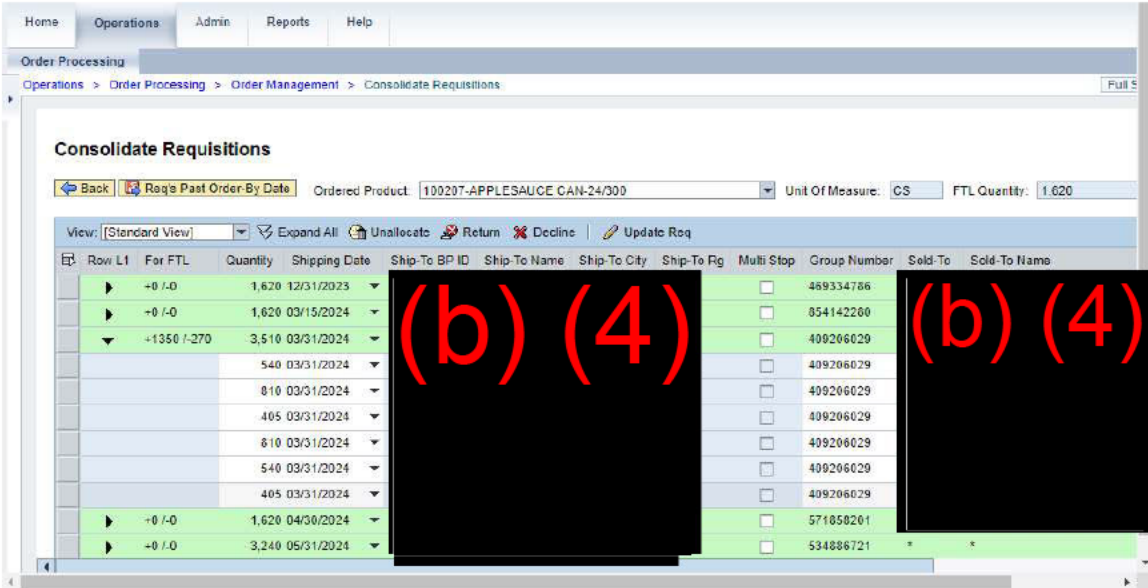
**7.** Perform one of the following:


| If  | 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>                                    | Go to Step 42 |

**If** queue to the Consolidation Workbench for further processing.

**Then**

### Image: Consolidate Requisitions Screen

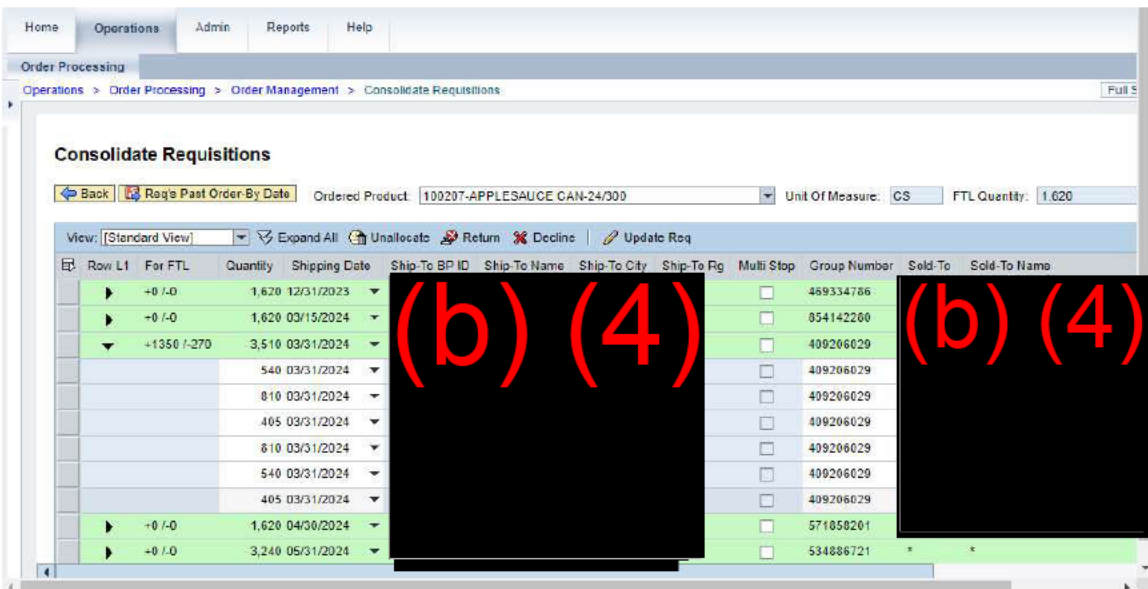


- Click  (the **Select** button) beside the line item of the aggregated grouping to be processed.



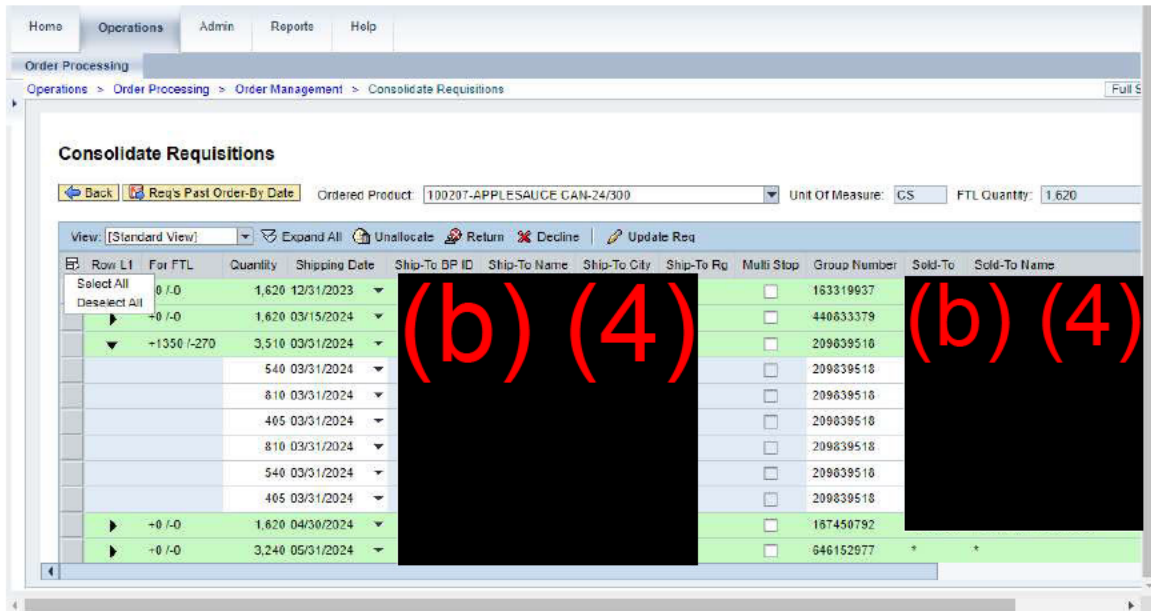
(Note) By selecting a proposed order (an aggregated grouping of requisitions), all the requisitions within the grouping will automatically be selected as well.

### Image: Consolidate Requisitions Screen



- Click  (the **Table Selection Menu** button).

Image: Consolidate Requisitions Screen



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




(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  (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.

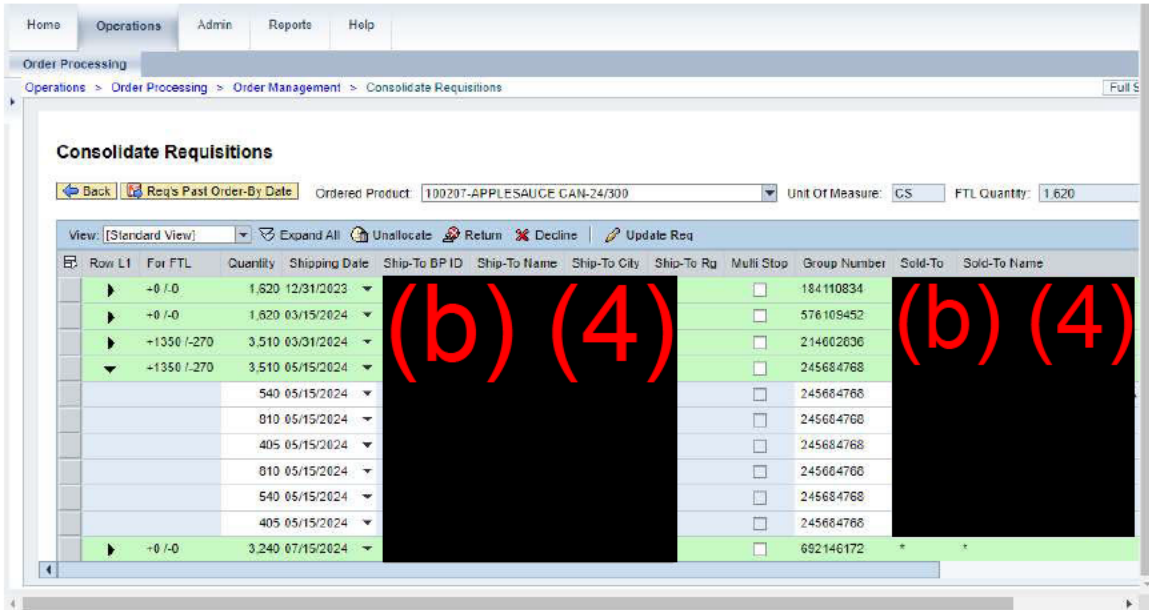
b. If the aggregate lines are on collapsed mode:


- 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.

11. Return to Step 7.

Image: Consolidate Requisitions Screen



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.



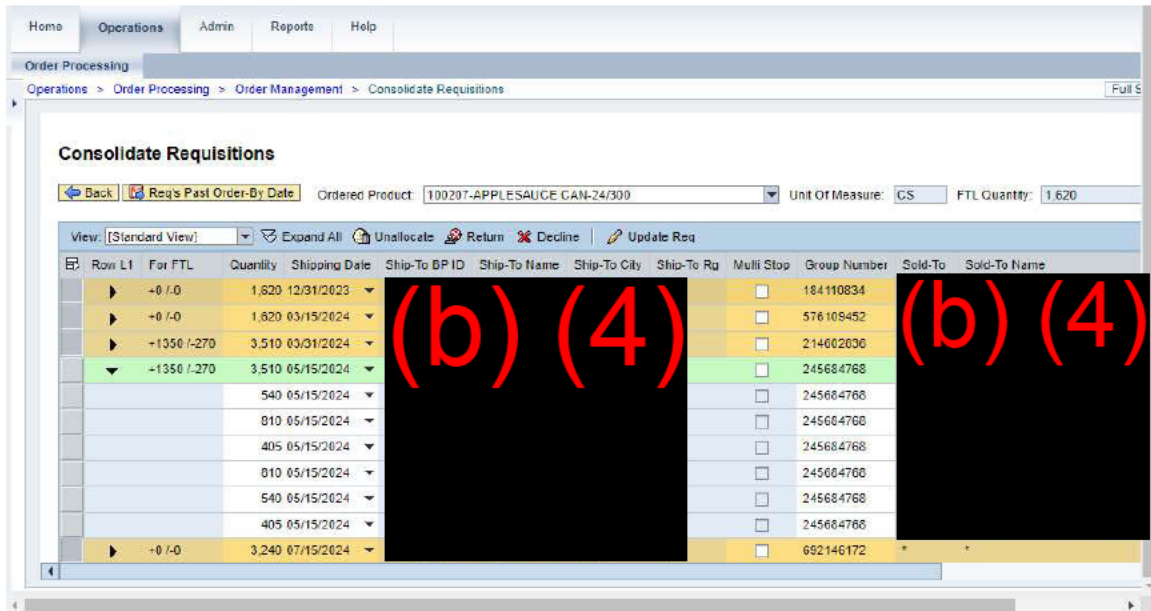
(Note) Unallocating provides a way to reduce the number of line items the user is working with on the screen at one time.



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

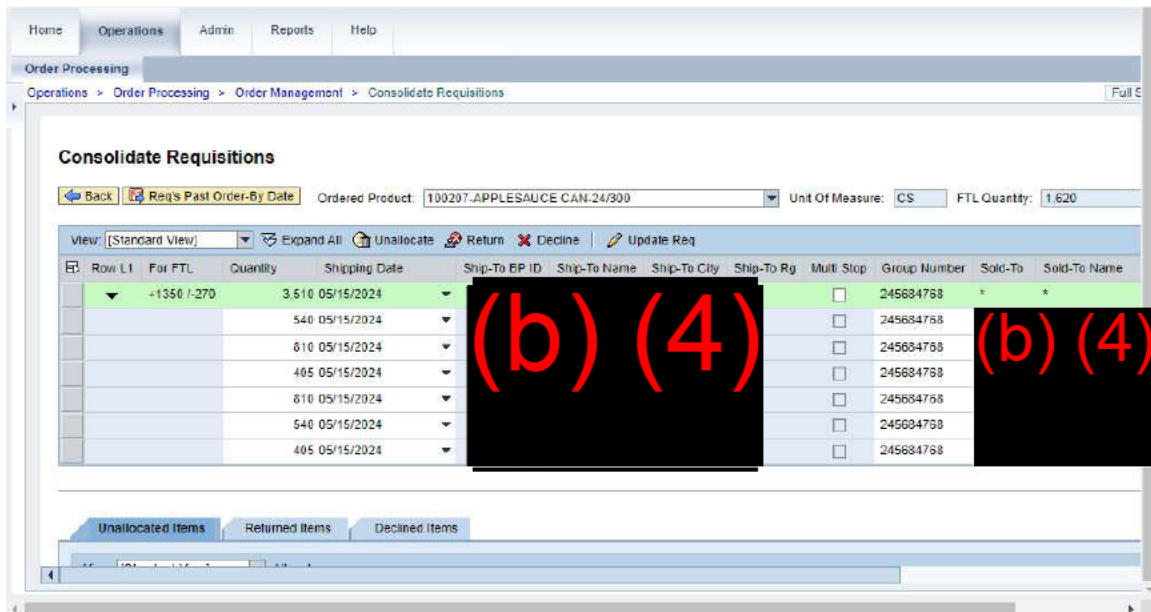
To select multiple consecutive rows, press and hold the *Shift* key and click the beginning and end row **Select** buttons.

**Image: Consolidate Requisitions Screen**



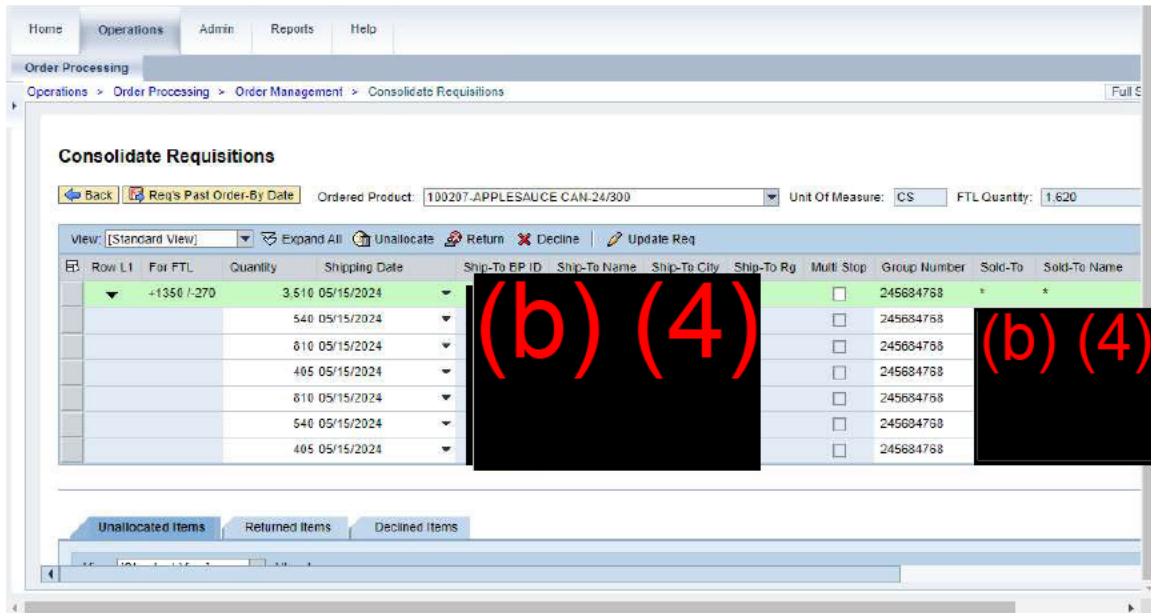
- Click **Unallocate** (the **Unallocate** button) to move all selected lines to the *Unallocated Items* queue at the bottom of the screen.

**Image: Consolidate Requisitions Screen**



- Return to Step 7.

**Image: Consolidate Requisitions Screen**



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

| Field    | R/O/C | Description                                    |
|----------|-------|--|
| Quantity | 0     | Number of items.<br><br><b>Example:</b><br>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.

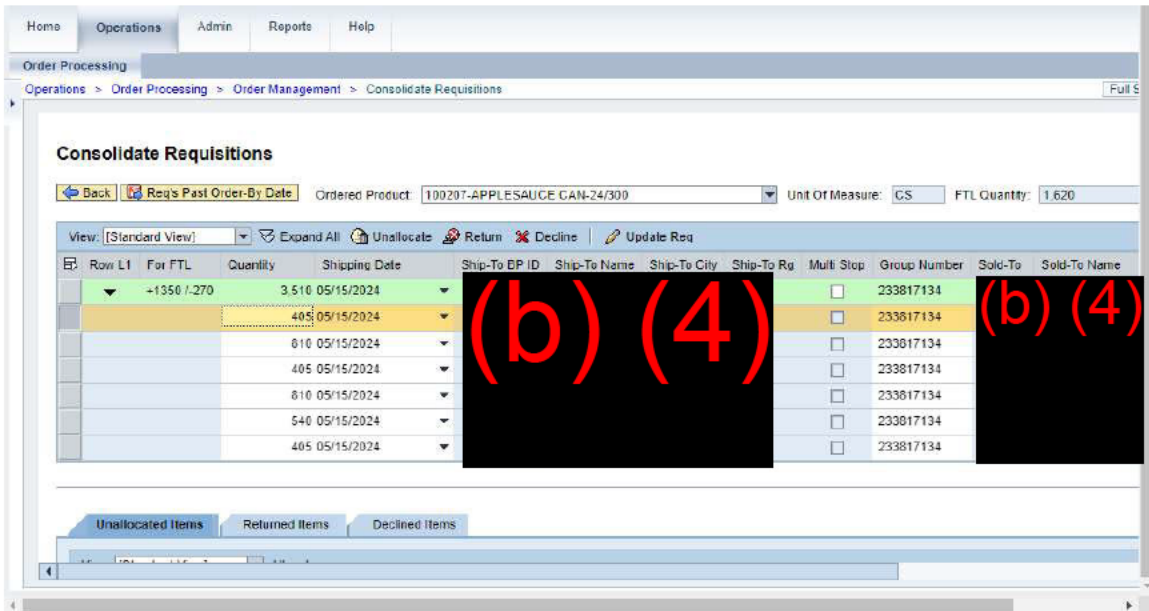
The user may need to add or remove items in order to get to the correct amount, as indicated in the **For FTL** (For Full Truckload) column. When the user reaches "+0/-0", the order is ready to be submitted.

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.

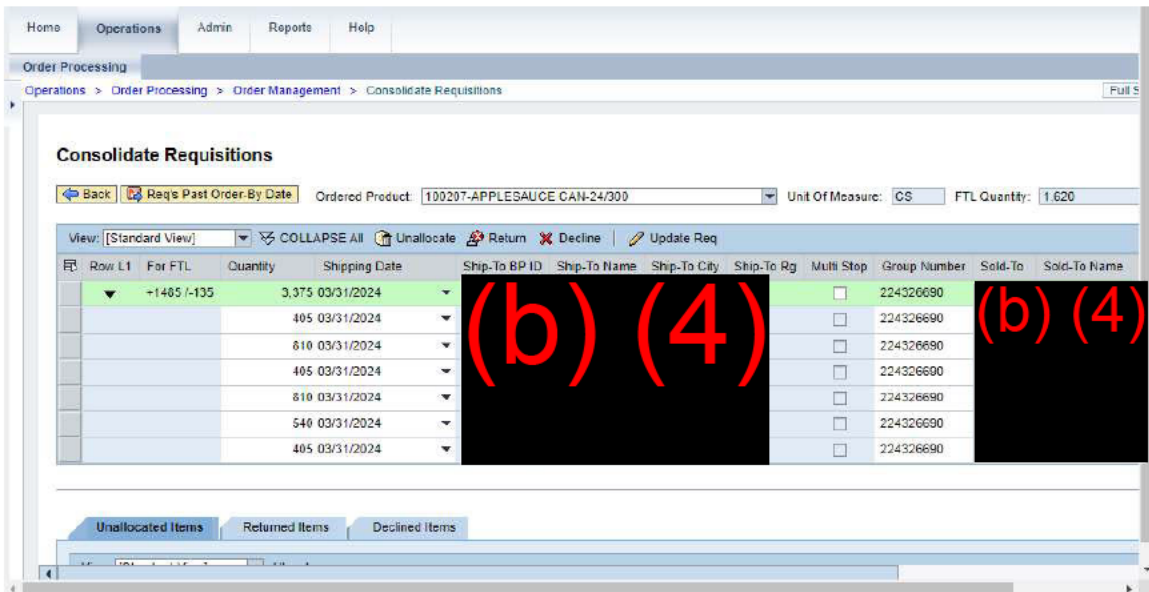
Also note that an asterisk displays on the proposed order (green row) if multiple values exist under the same column within a group.

**Image: Consolidate Requisitions Screen**



- Press Enter on the keyboard.

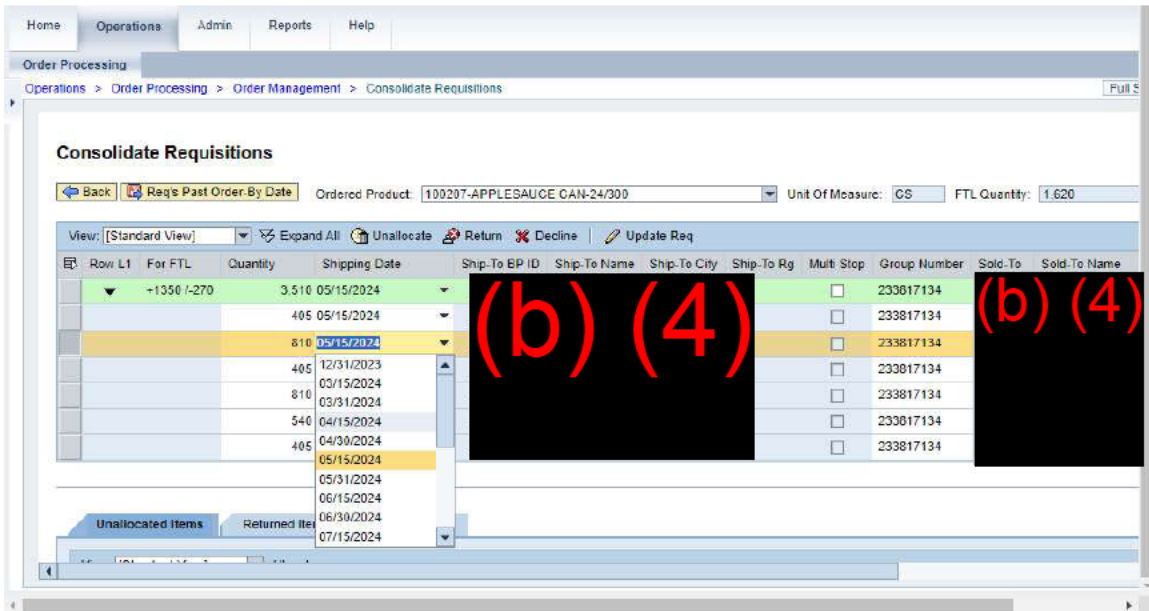
**Image: Consolidate Requisitions Screen**



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



## Image: Consolidate Requisitions Screen

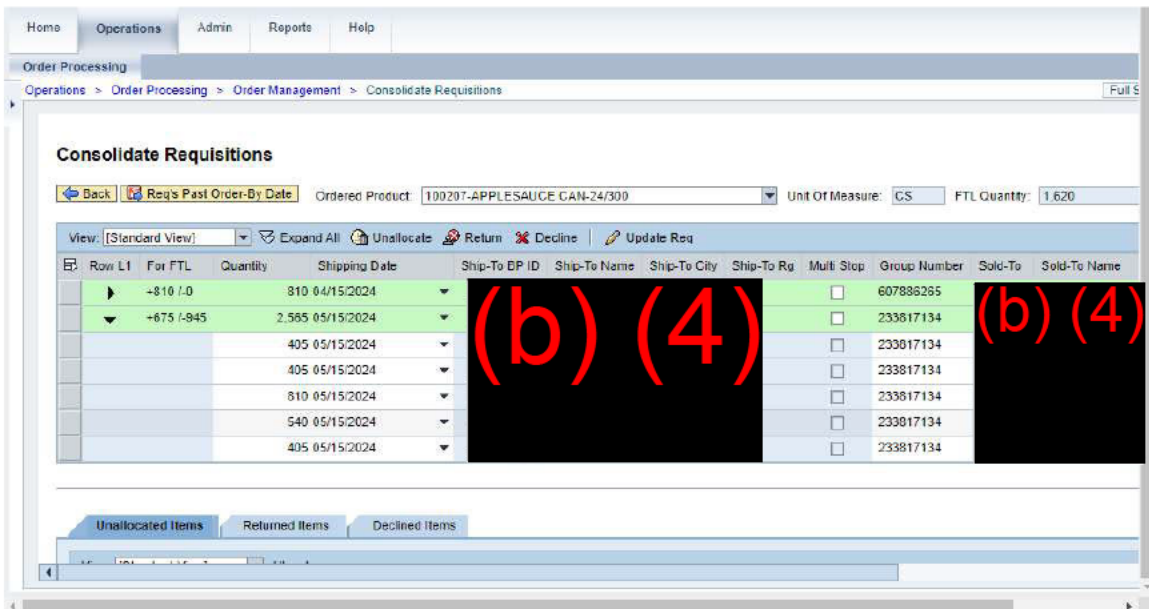


- Click the appropriate date from the **Shipping Date** drop-down. In this example, **04/15/2024** (the **4/15/2024** date) is selected.



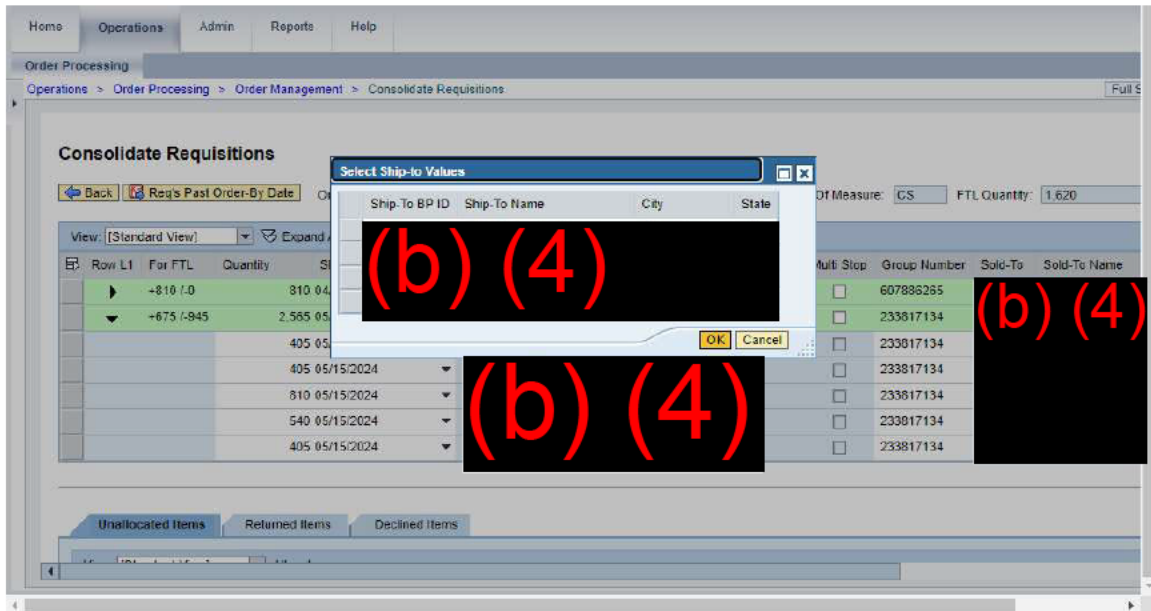
(Note) The requisition is moved out of the current aggregate of grouped requisitions and is listed as a new and separate requisition (green line).

## Image: Consolidate Requisitions Screen



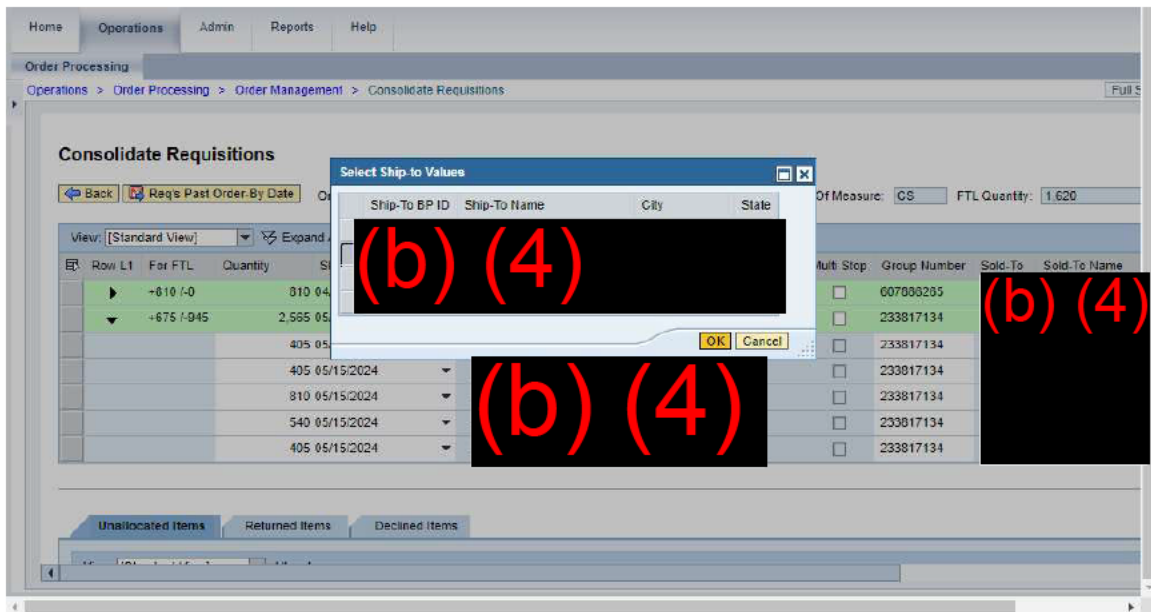
- Click the appropriate **Ship-To BP ID** to change the Ship-To Location on a requisition line item. In this example, **(b) (4)** link is selected for the requisition with **Sold-To (b) (4)**

**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**

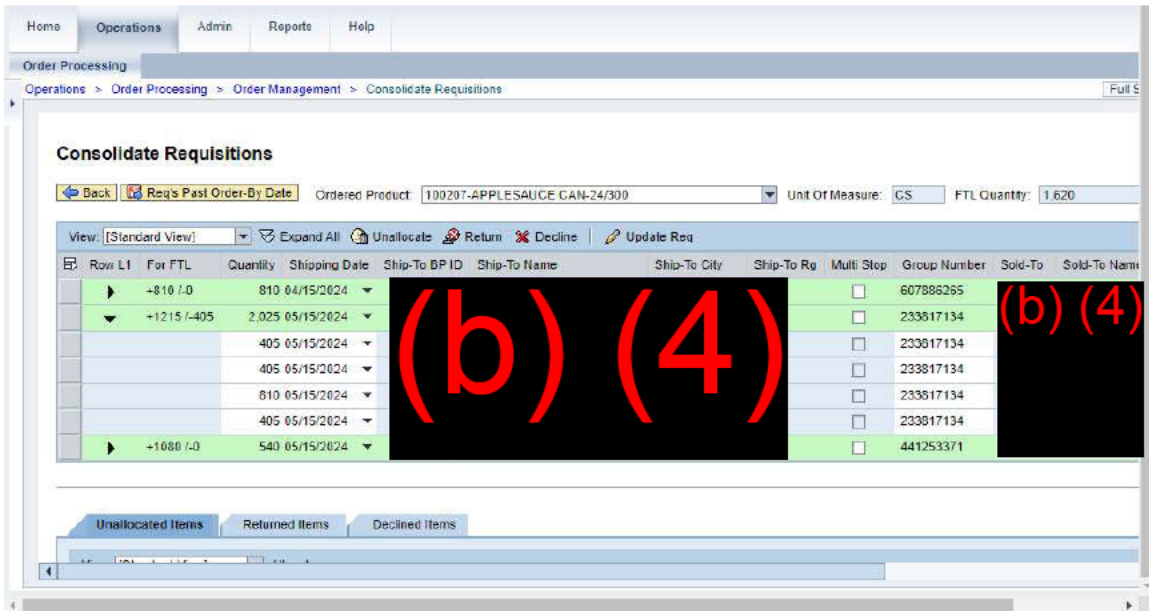


21. Click  (the **OK** button).



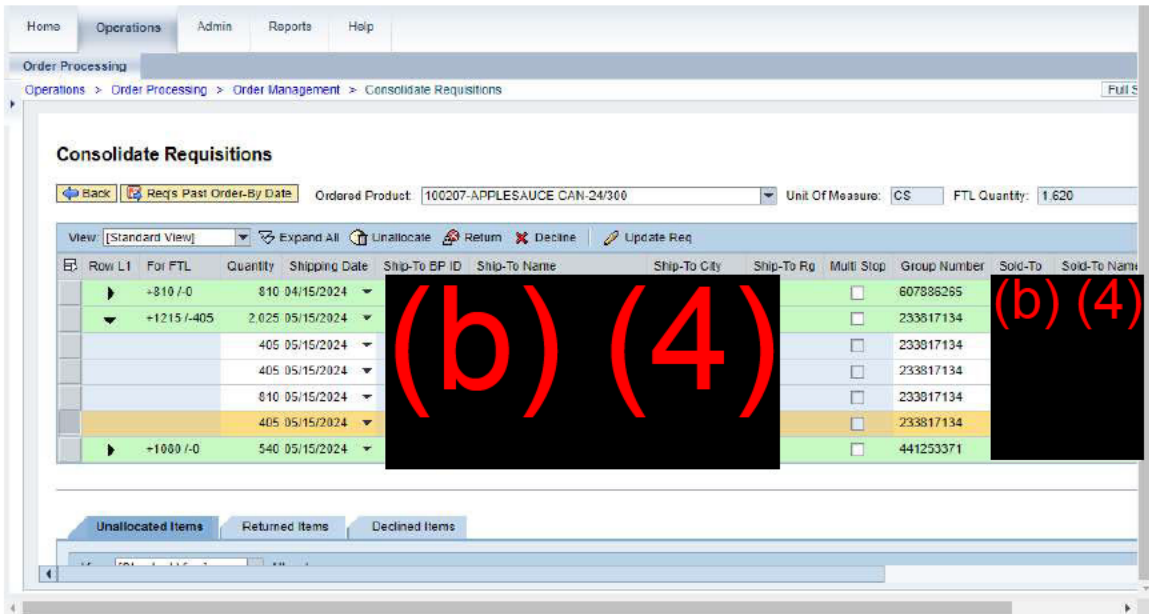
(Note) The requisition is moved out of the current aggregate of grouped requisitions and is listed as a new and separate requisition (green line).


**Image: Consolidate Requisitions Screen**



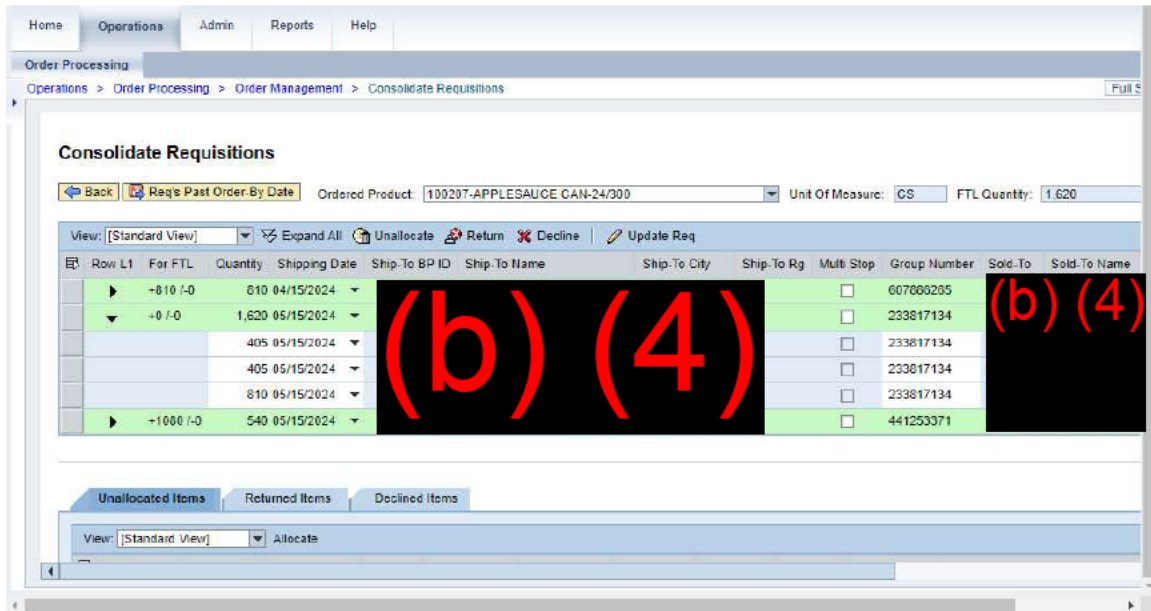
22. Click  (the **Select** button) on a requisition to unallocate it from the aggregated grouping.

**Image: Consolidate Requisitions Screen**



23. Click  **Unallocate** (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.

**Image: Consolidate Requisitions Screen**



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



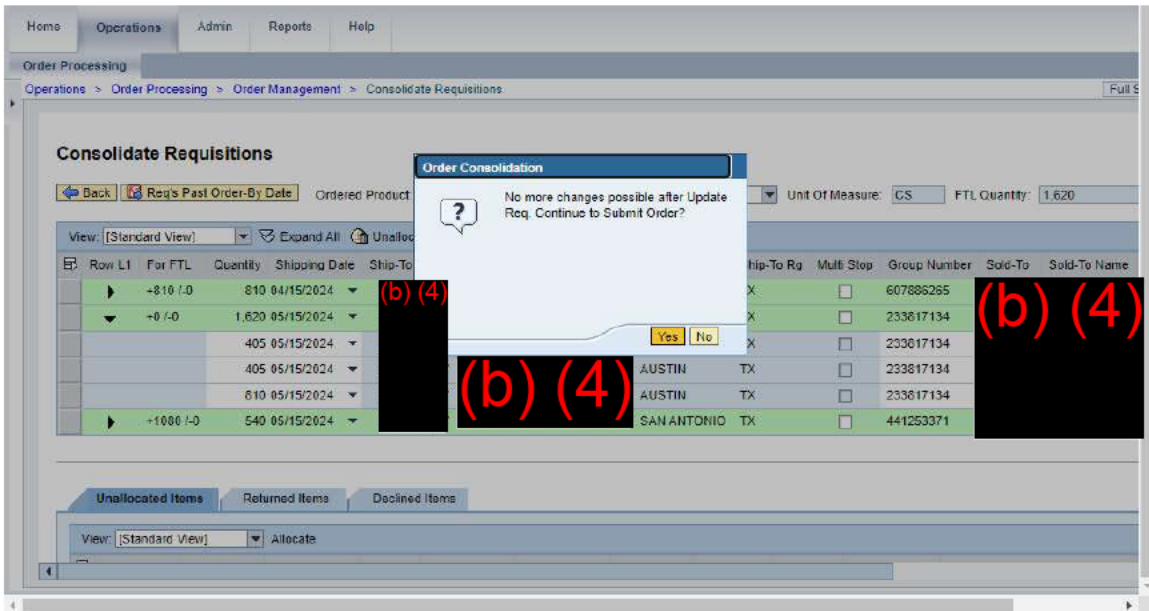
(Note) The user does not need to select records for update before clicking the **Update Req** button. All records with changes made in the workbench will be updated.


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.

**Image: Order Consolidation Pop-up Screen**

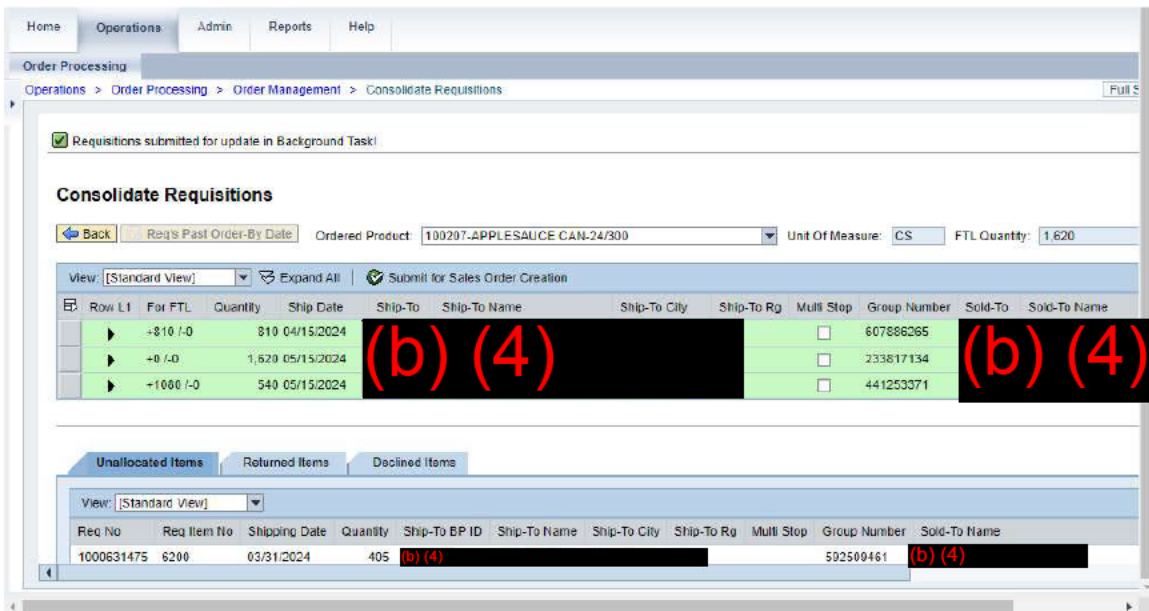



25. Click  (the **Yes** button) to confirm.




(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**



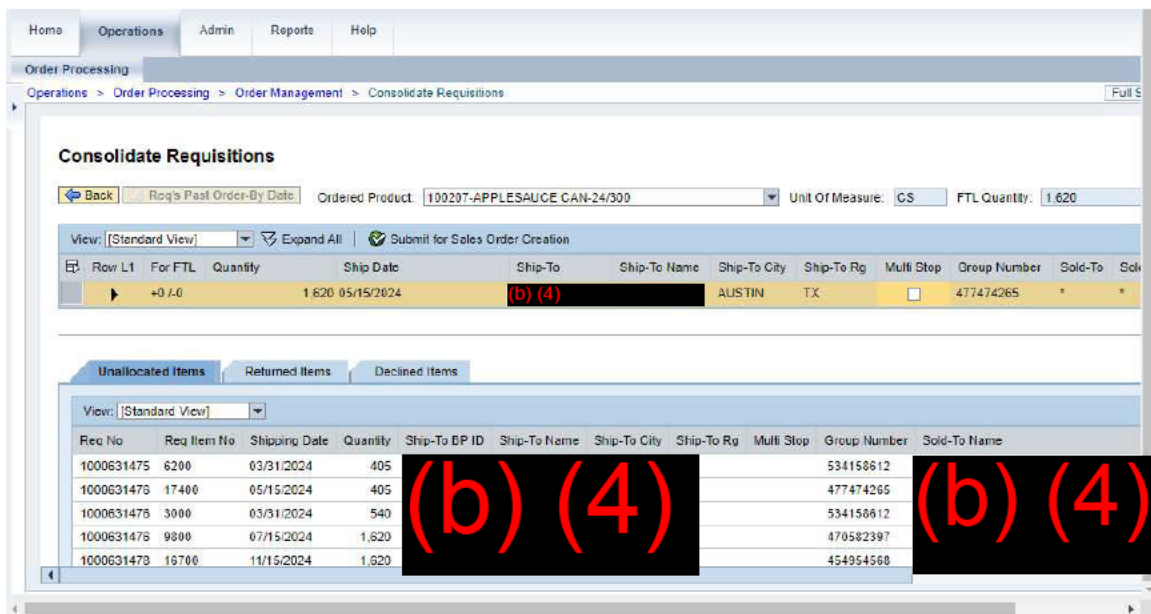
26. Click  (the **Select** button) to select the requisition group to submit for sales order creation.



(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**



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



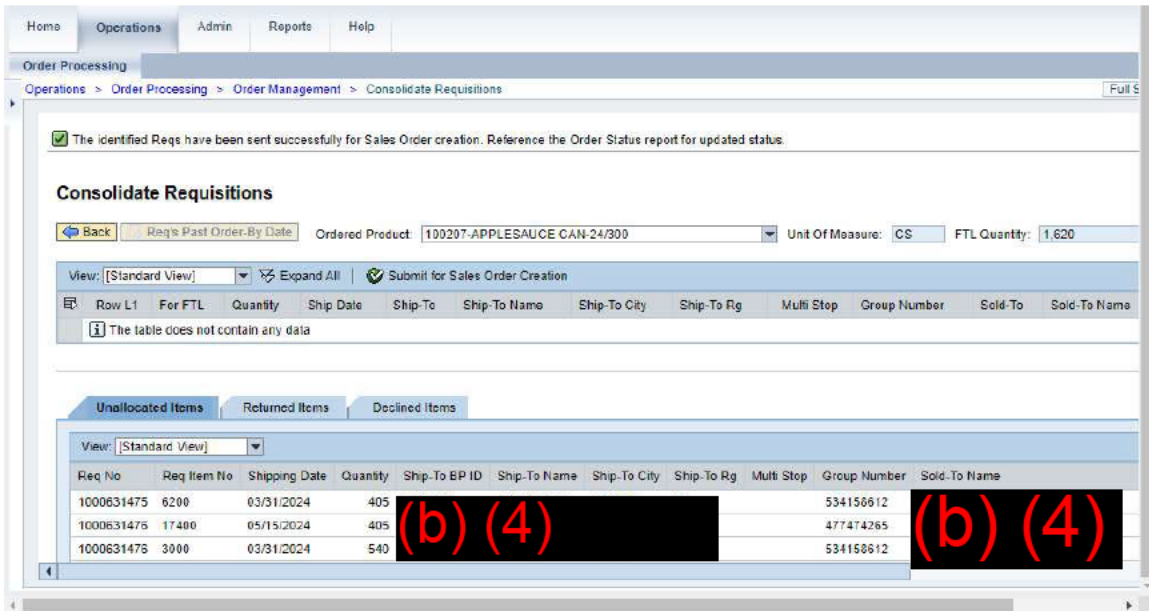
(Note) The **Submit for Sales Order Creation** button only displays after the user has updated the requisition by clicking the **Update Req** button.

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.

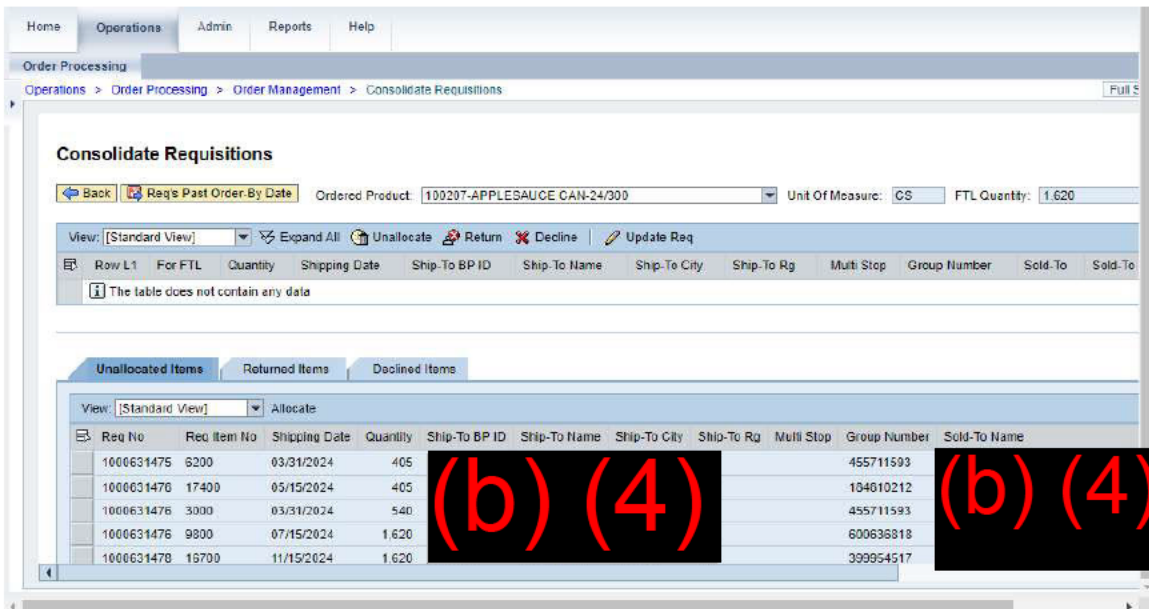
Declining a requisition will remove that line item from the proposed order. It will also cancel the line item for this commodity. Generally, the Decline feature will only be used when a requisition is entered incorrectly, duplicate requisitions were accidentally created, or there is not enough demand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

**Image: Consolidate Requisitions Screen**



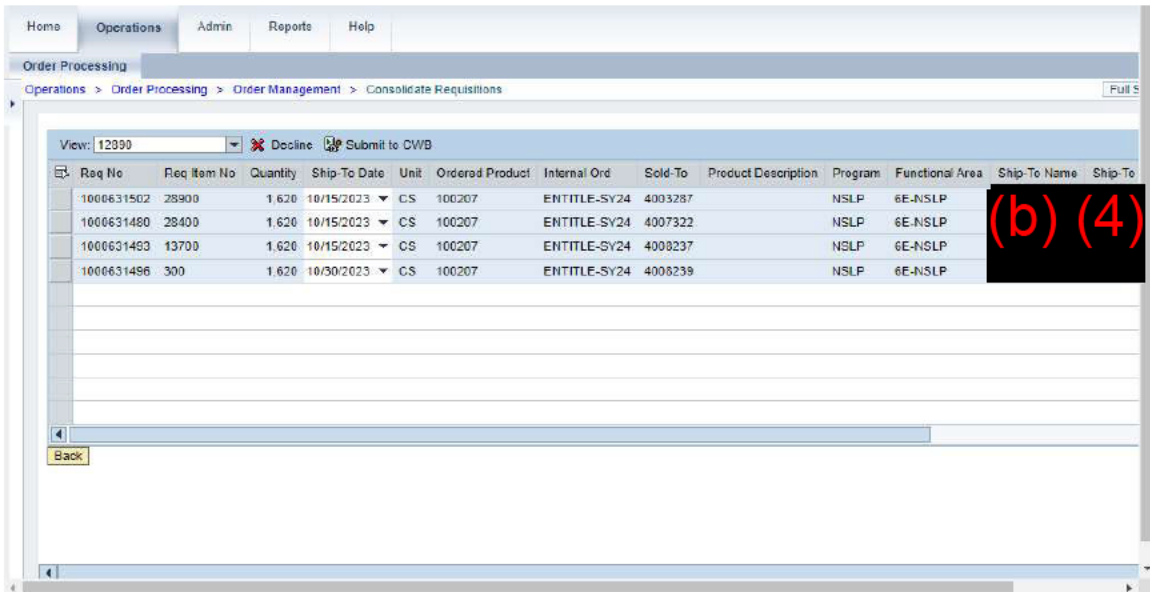
28. Review the confirmation message and ensure no error exists updating the requisition lines.
29. Return to Step 7.

**Image: Consolidate Requisitions Screen**



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.

## Image: Consolidate Requisitions Screen



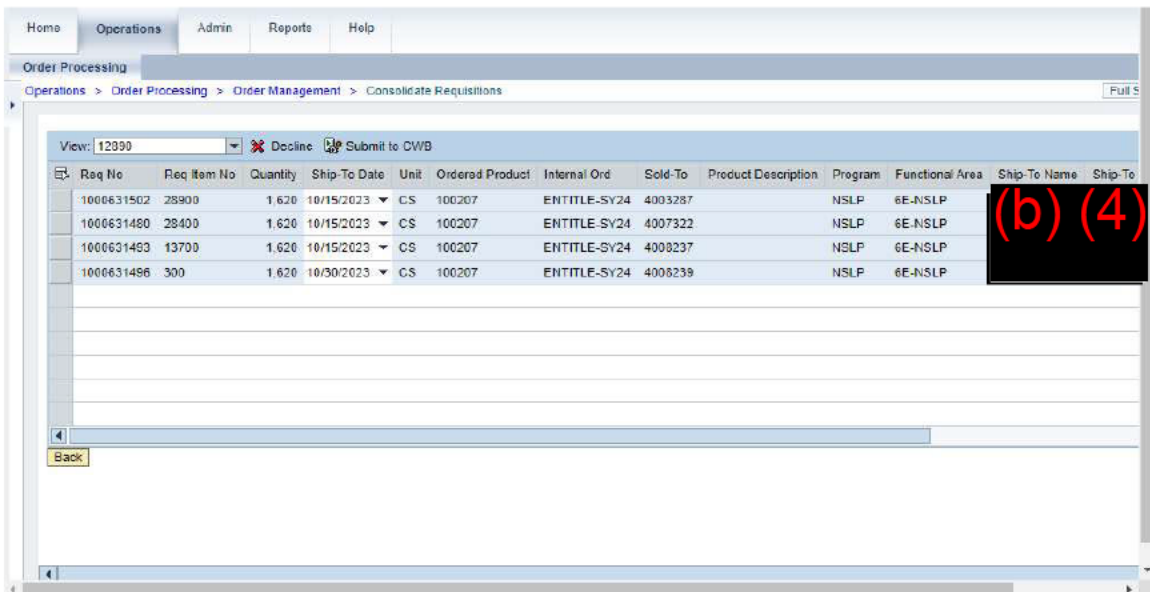
View: 12390 Decline Submit to DWB

| 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 |
|------------|-------------|----------|--------------|------|-----------------|--------------|---------|---------------------|---------|-----------------|--------------|---------|
| 1000631502 | 28900       | 1.620    | 10/15/2023   | CS   | 100207          | ENTITLE-SY24 | 4003287 |                     | NSLP    | 6E-NSLP         |              |         |
| 1000631480 | 28400       | 1.620    | 10/15/2023   | CS   | 100207          | ENTITLE-SY24 | 4007322 |                     | NSLP    | 6E-NSLP         |              | (b) (4) |
| 1000631463 | 13700       | 1.620    | 10/15/2023   | CS   | 100207          | ENTITLE-SY24 | 4008237 |                     | NSLP    | 6E-NSLP         |              |         |
| 1000631486 | 300         | 1.620    | 10/30/2023   | CS   | 100207          | ENTITLE-SY24 | 4008239 |                     | NSLP    | 6E-NSLP         |              |         |

Back

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


## Image: Consolidate Requisitions Screen



View: 12390 Decline Submit to DWB

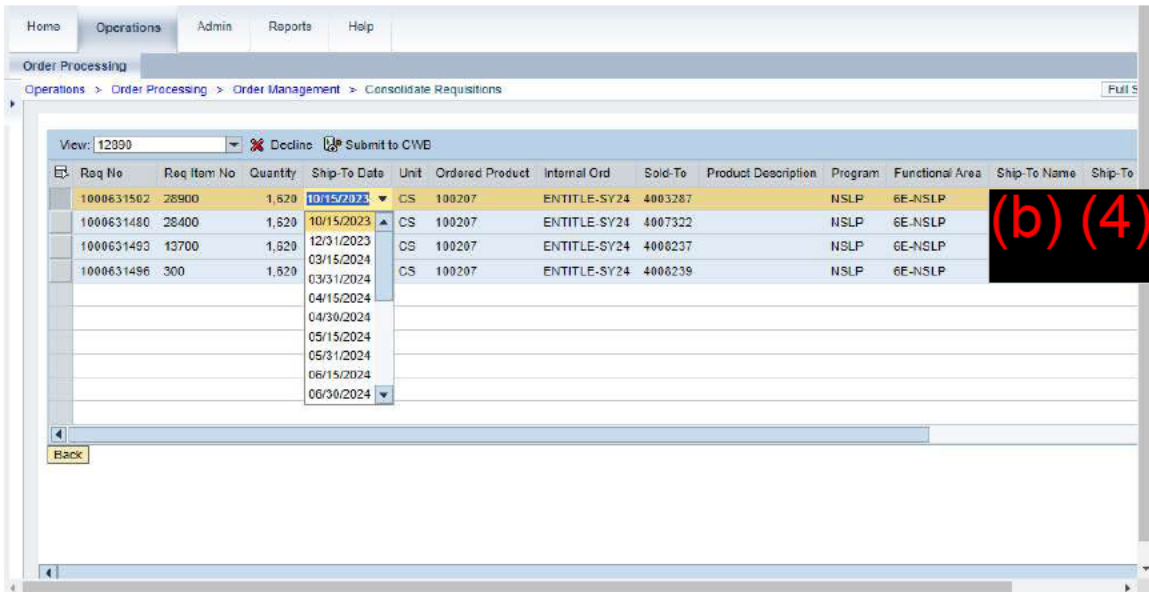
| Req No     | Req Item No | Quantity | Ship-To Date | Unit | Ordered Product | Internal Ord | Sold-To | Product Description | Program | Functional Area | Ship-To Name | Ship-To |
|------------|-------------|----------|--------------|------|-----------------|--------------|---------|---------------------|---------|-----------------|--------------|---------|
| 1000631502 | 28900       | 1.620    | 10/15/2023   | CS   | 100207          | ENTITLE-SY24 | 4003287 |                     | NSLP    | 6E-NSLP         |              |         |
| 1000631480 | 28400       | 1.620    | 10/15/2023   | CS   | 100207          | ENTITLE-SY24 | 4007322 |                     | NSLP    | 6E-NSLP         |              | (b) (4) |
| 1000631463 | 13700       | 1.620    | 10/15/2023   | CS   | 100207          | ENTITLE-SY24 | 4008237 |                     | NSLP    | 6E-NSLP         |              |         |
| 1000631486 | 300         | 1.620    | 10/30/2023   | CS   | 100207          | ENTITLE-SY24 | 4008239 |                     | NSLP    | 6E-NSLP         |              |         |

Back

- 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.



## Image: Consolidate Requisitions Screen

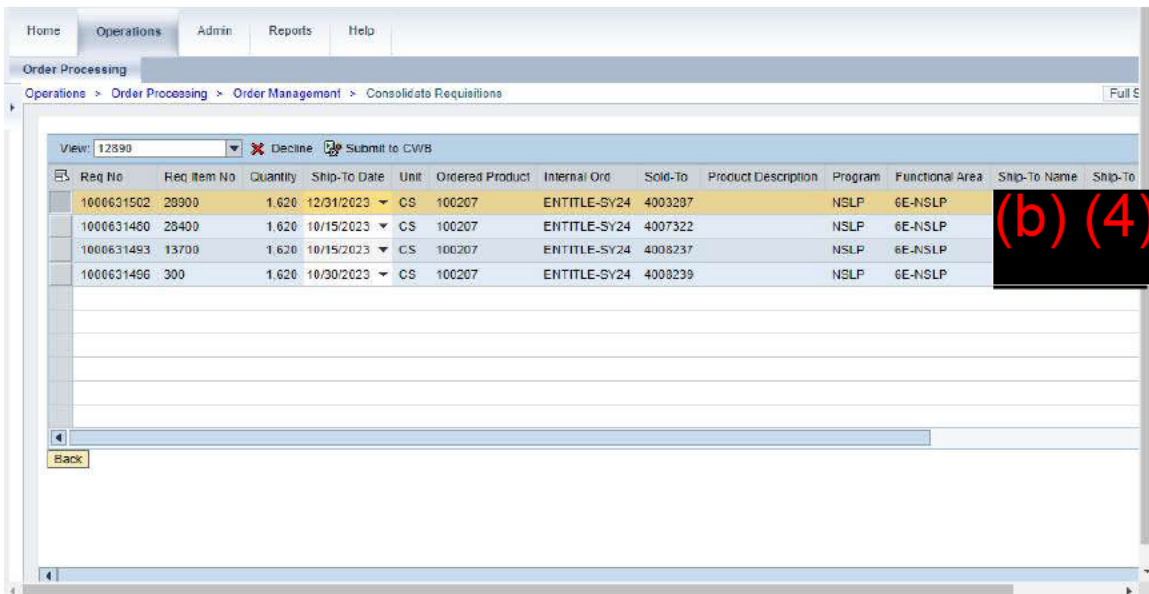



33. Select the appropriate Ship-To Date from the list. In this example, 12/31/2023 (the 12/31/2023 option) is selected.



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

## Image: Consolidate Requisitions Screen



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.

## 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 |
|------------|-------------|----------|--------------|------|-----------------|--------------|---------|---------------------|---------|-----------------|--------------|---------|
| 1000631502 | 28900       | 1.620    | 12/31/2023   | CS   | 100207          | ENTITLE-SY24 | 4003237 |                     | NSLP    | 6E-NSLP         | (b) (4)      |         |
| 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         |              |         |

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



(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

| 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 |
|------------|-------------|----------|--------------|------|-----------------|--------------|---------|---------------------|---------|-----------------|--------------|---------|
| 1000631480 | 28400       | 1.620    | 10/15/2023   | CS   | 100207          | ENTITLE-SY24 | 4007322 |                     | NSLP    | 6E-NSLP         | (b) (4)      |         |
| 1000631483 | 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         |              |         |

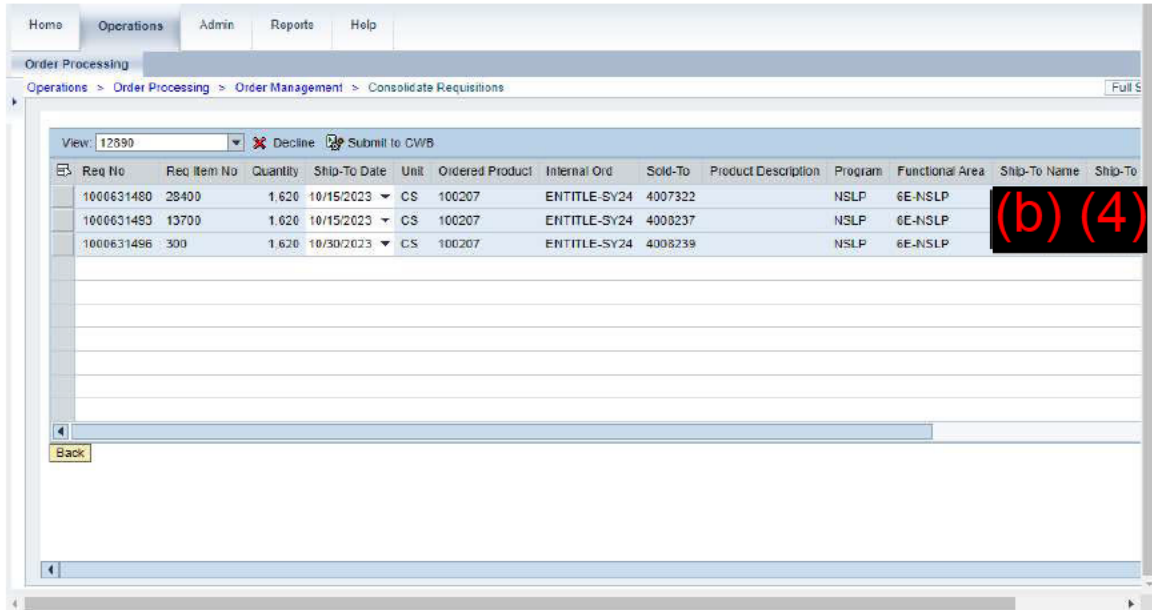
36. Review the *Req's Past Order-By Date* queue.




(Note) The submitted requisition line no longer appears.

37. Return to Step 7.

**Image: Consolidate Requisitions Screen**

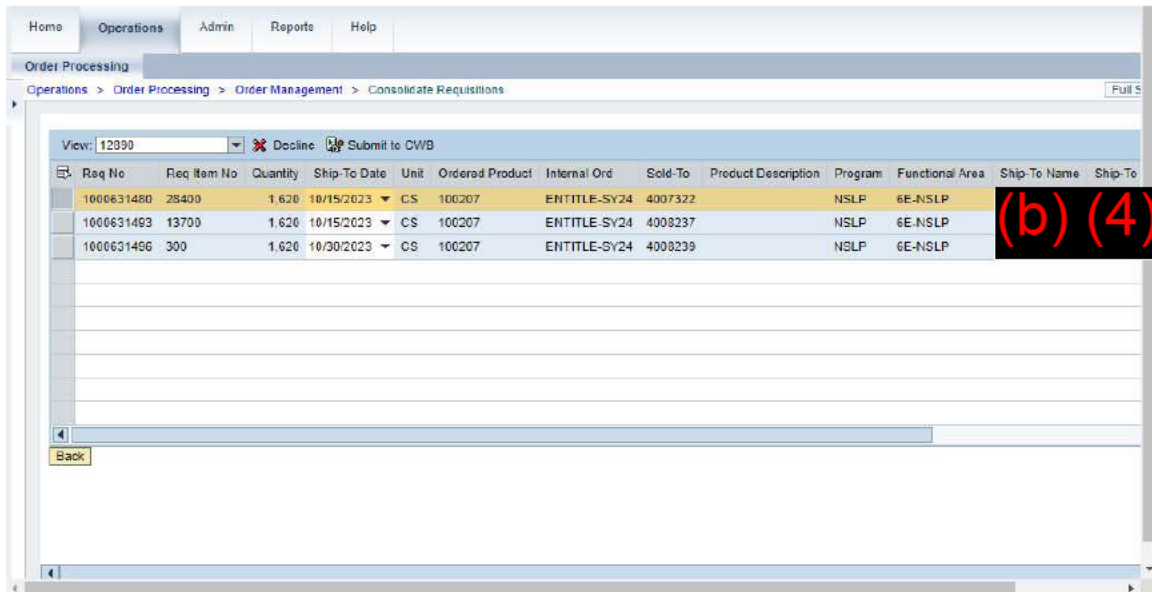



38. Click  (the **Select** button) next to the appropriate Requisition Number. In this example, Requisition Number **1000631480** is selected.



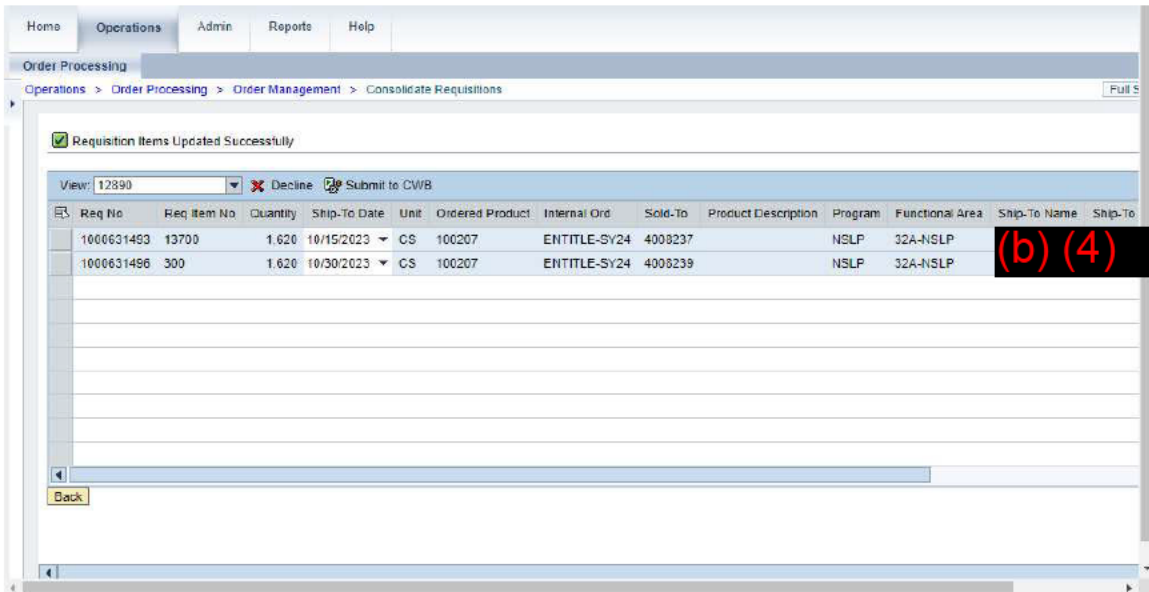
(Note) When a requisition is declined, it will also cancel the line item for this material.

**Image: Consolidate Requisitions Screen**



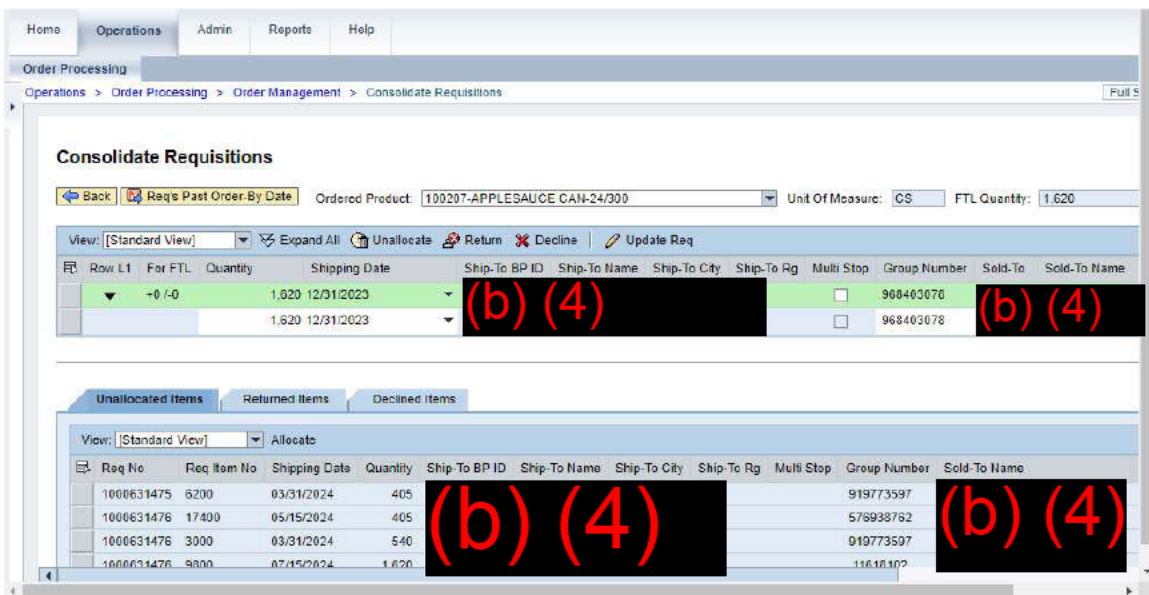
39. Click  (the **Decline** button).

**Image: Consolidate Requisitions Screen**



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

**Image: Consolidate Requisitions Screen**

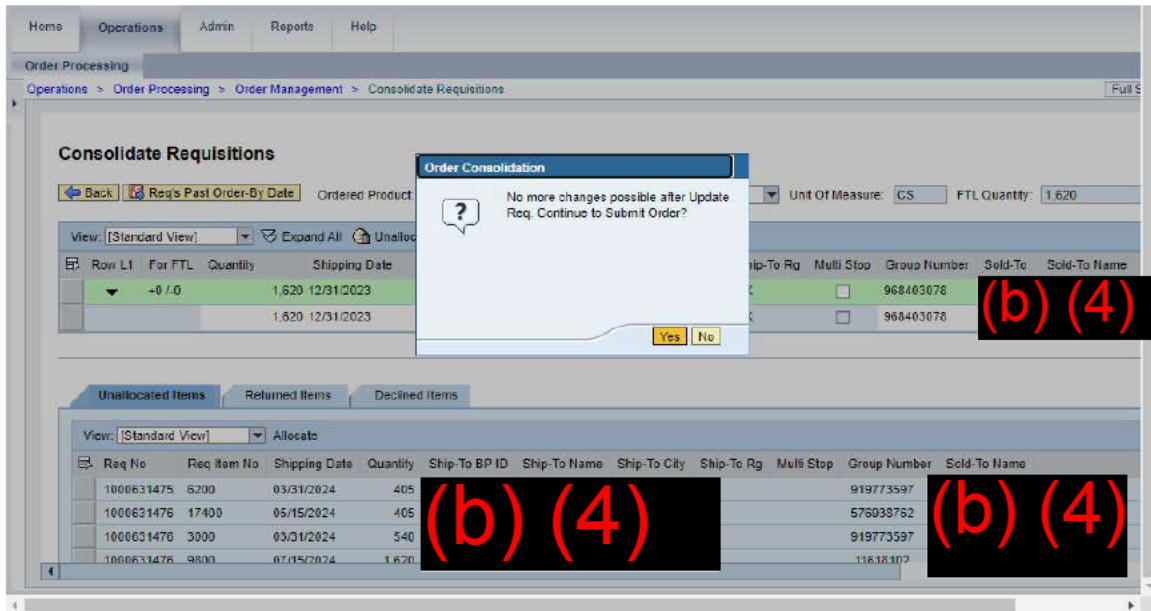


42. Click **Update Req** (the **Update Req** button) to save any changes.



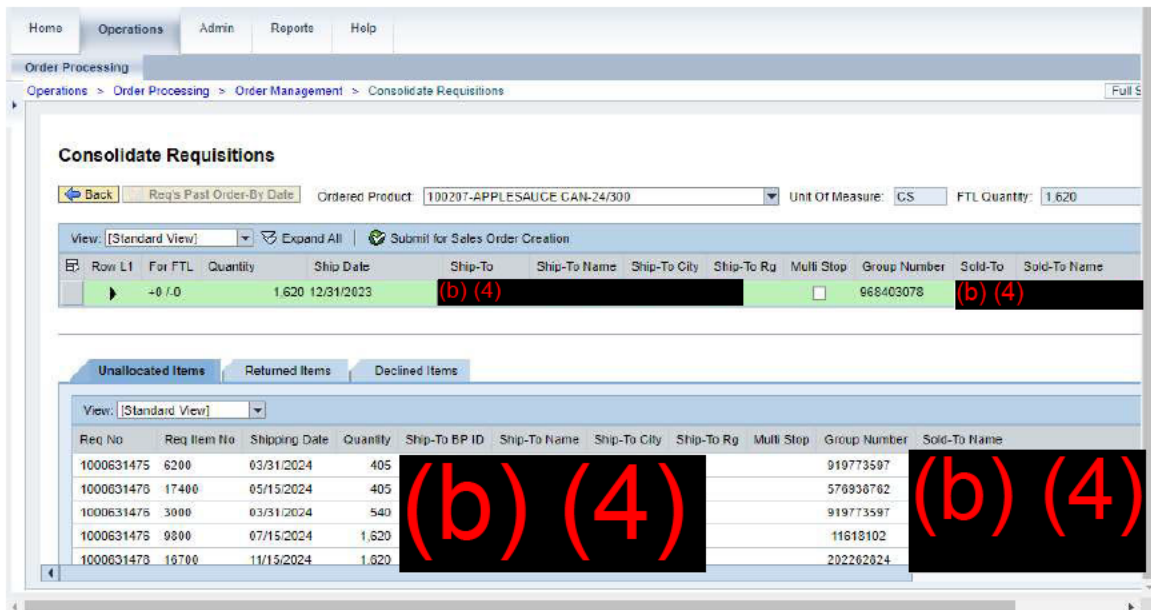
(Note) If the user does not click the **Update Req** button, the requisition that was moved to the Consolidation Workbench will return to the *Req's Past Order-By Date* queue. The user must click the **Update Req** button to save their changes and ensure the requisition stays on the Consolidation Workbench.

**Image: Order Consolidation Pop-Up Screen**



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

**Image: Consolidate Requisitions Screen**



44. View the Consolidation Workbench. Notice that **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:

- Select the **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 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

The screenshot shows the 'Consolidate Requisitions' screen in the WBSM portal. The top navigation bar includes 'Home', 'Operations', 'Admin', 'Reports', and 'Help'. The breadcrumb trail is 'Operations > Order Processing > Order Management > Consolidate Requisitions'. A sidebar on the left lists various menu items, with 'Consolidate Requisitions' highlighted. The main content area is titled 'Welcome to Consolidate Requisitions' and includes instructions: 'All required fields are marked with a red asterisk (\*). Dates are formatted as MM/DD/YYYY.' Below this is a section for 'Selections for Consolidation' with a text box and a 'Submit' button. The form contains several fields: 'Ordered Product' (required), 'Program', 'Sold-To Party', 'Ship-To Party', and 'Ship-To Delivery Date', each with a dropdown menu and a 'To' field for date selection. There are also 'Submit' and 'Clear' buttons at the bottom.









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

### Image: Consolidate Requisitions Screen

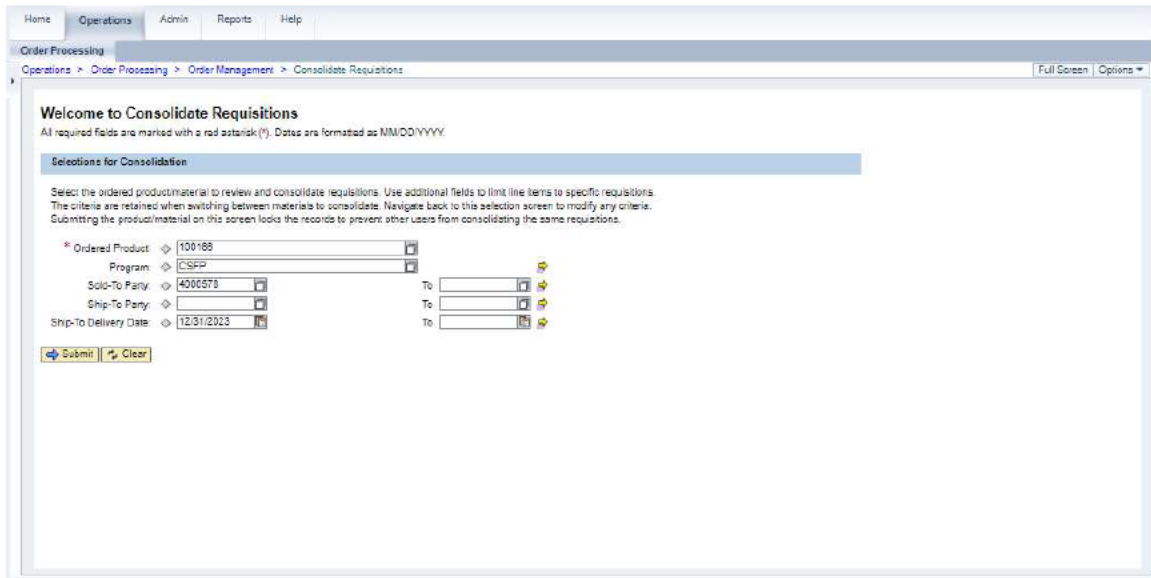
This screenshot is identical to the one above, but the sidebar is minimized, indicated by a small arrow icon on the left edge of the main content area. The rest of the screen, including the navigation bar, breadcrumb trail, and form fields, remains the same.



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

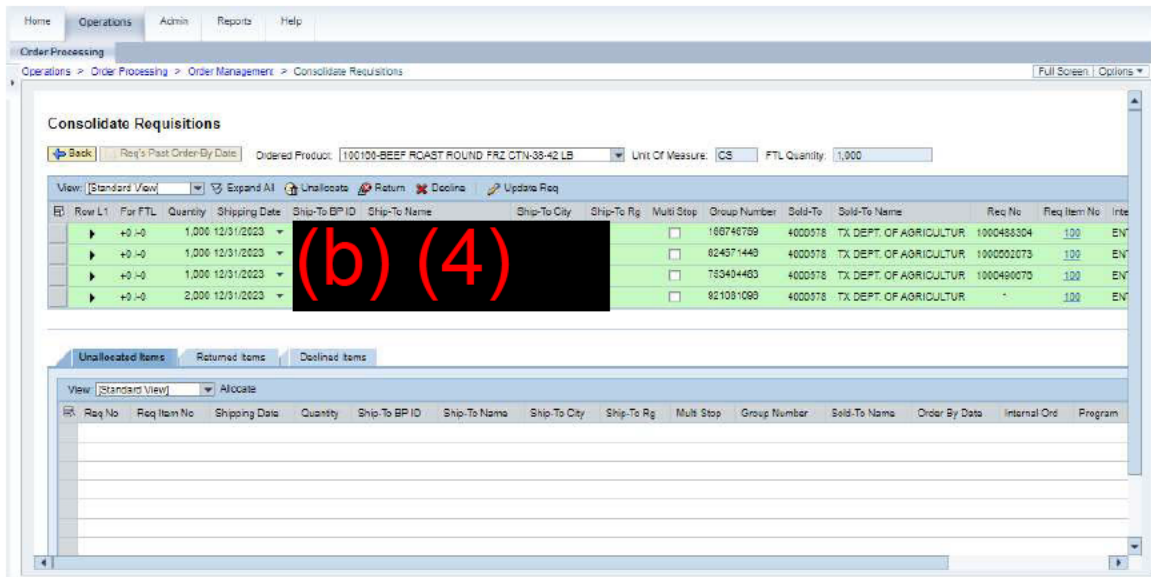
| Field                 | R/O/C | Description  |
|-----------------------|-------|--|
| Ordered Product       | R     | The material number of the product which has been requested to be ordered.<br><br><b>Example:</b><br>100166  |
| Program               | O     | Acronym used to identify a USDA food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

## Image: Consolidate Requisitions Screen



4. Click (the **Submit** button).

## Image: Consolidate Requisitions Screen



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.

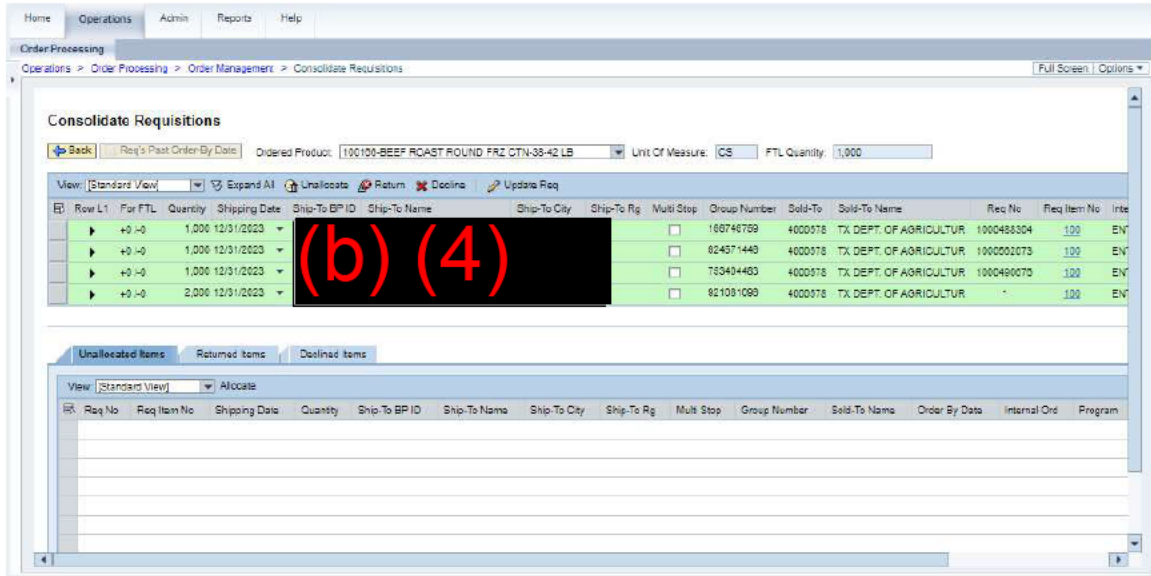
In this example, all proposed orders have the same ship-to date. However, they have different ship-to locations. This is an example of a multi-stop order where multiple requisitions will be

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:

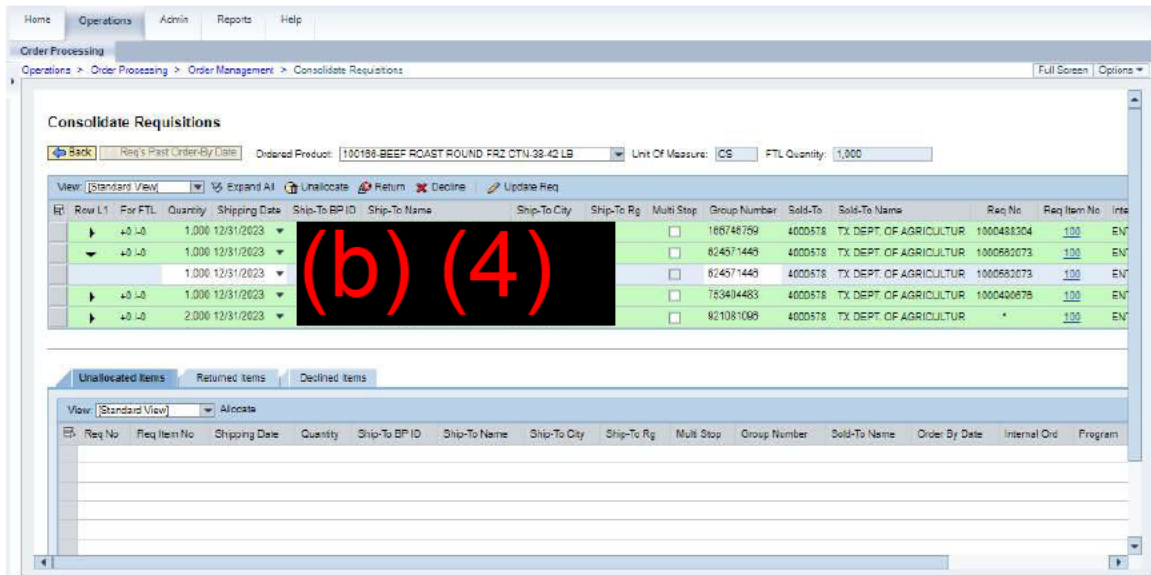
- Log out of WBSCM using **Log off** (the **Log off** button)
- Switch from one material to another
- Click on a different link/iView in WBSCM

### Image: Consolidate Requisitions Screen



6. Click (the **Right arrow**) to expand the line items of the requisition shipment being combined.

### Image: Consolidate Requisitions Screen



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


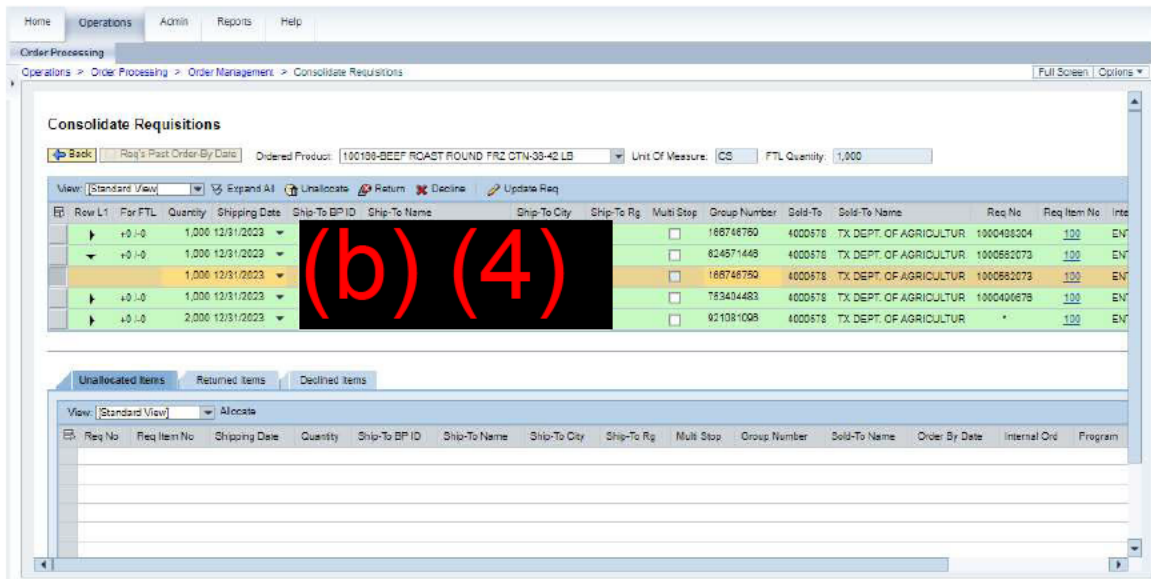
| Field        | R/O/C | Description  |
|--------------|-------|--|
| Group Number | R     | <p>This is the group number, a unique identifying number associated with a proposed order.</p> <p><b>Example:</b><br/>166746759</p> <p> (Note) The Group Number associated with the original order defaults. Change 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 <b>624571446</b> to <b>166746759</b>.</p> |

Image: Consolidate Requisitions Screen

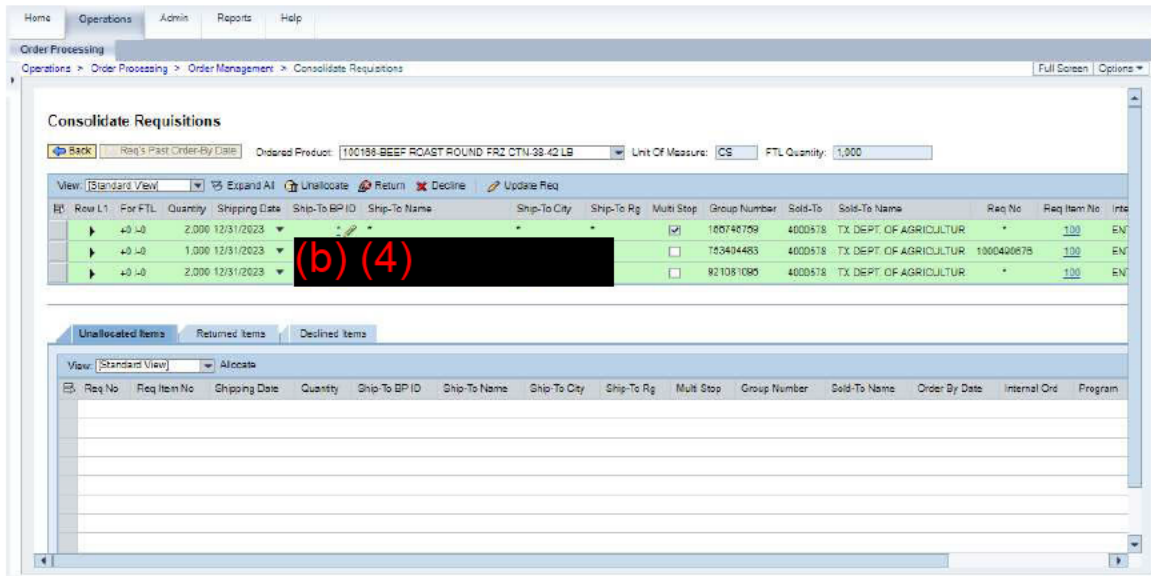


8. Press **Enter** on the keyboard.



(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.

**Image: Consolidate Requisitions Screen**



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.



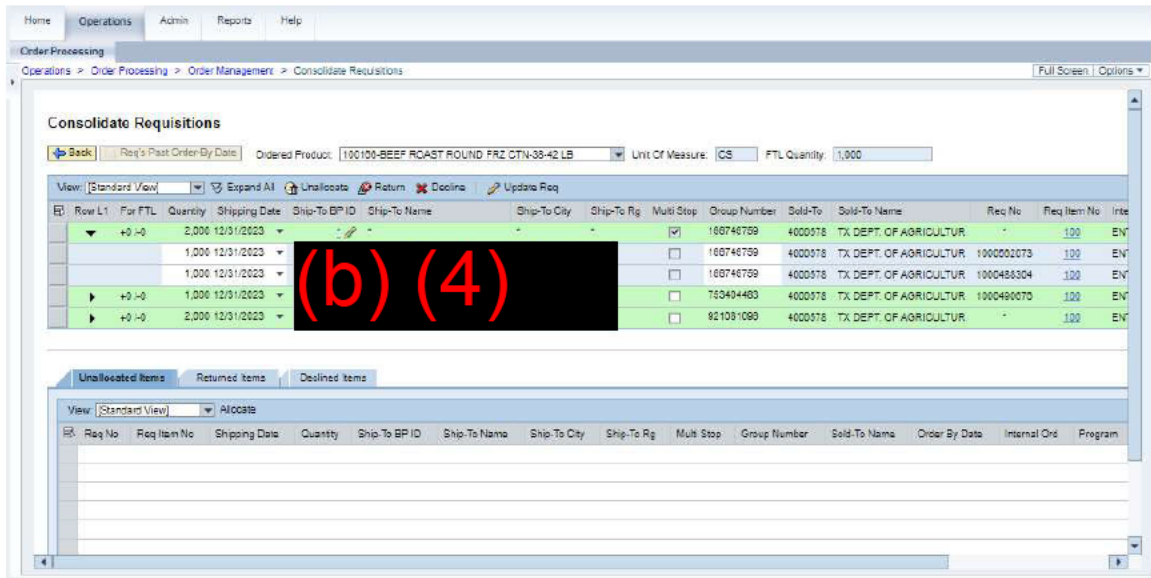
(Note) The **Multi Stop** checkbox is automatically checked when line items are grouped together to create a multi-stop. An asterisk marks fields where the requisitions have different information.

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 [Consolidation for a Multi-Stop Domestic Sales Order between Two States](#) Job Aid for more details on this process.



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

**Image: Consolidate Requisitions Screen**



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



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



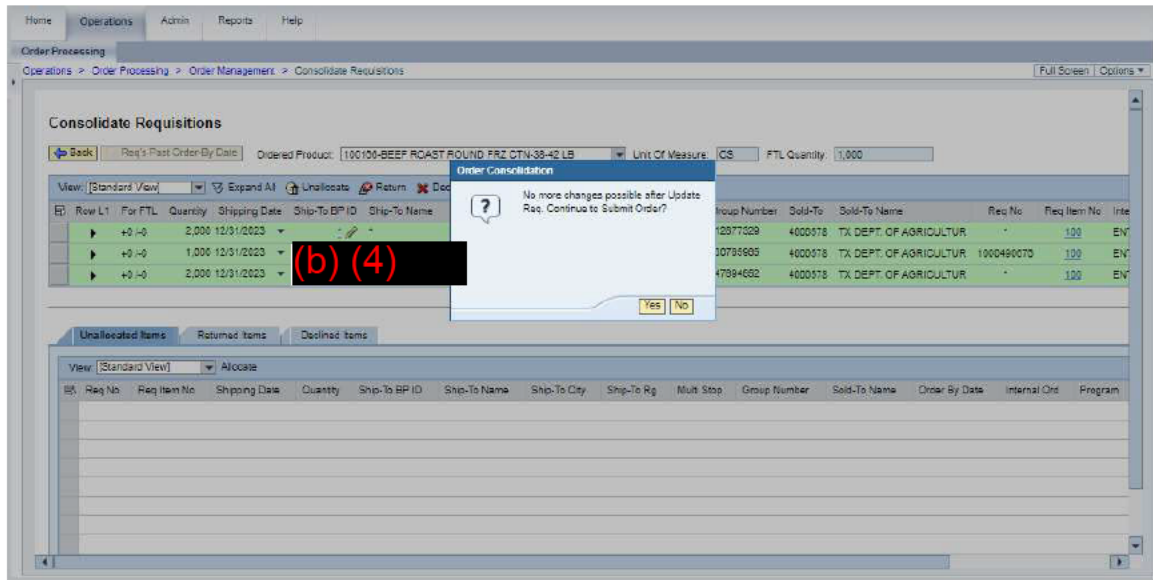
(Note) Clicking the **Update Req** button serves two purposes:

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.

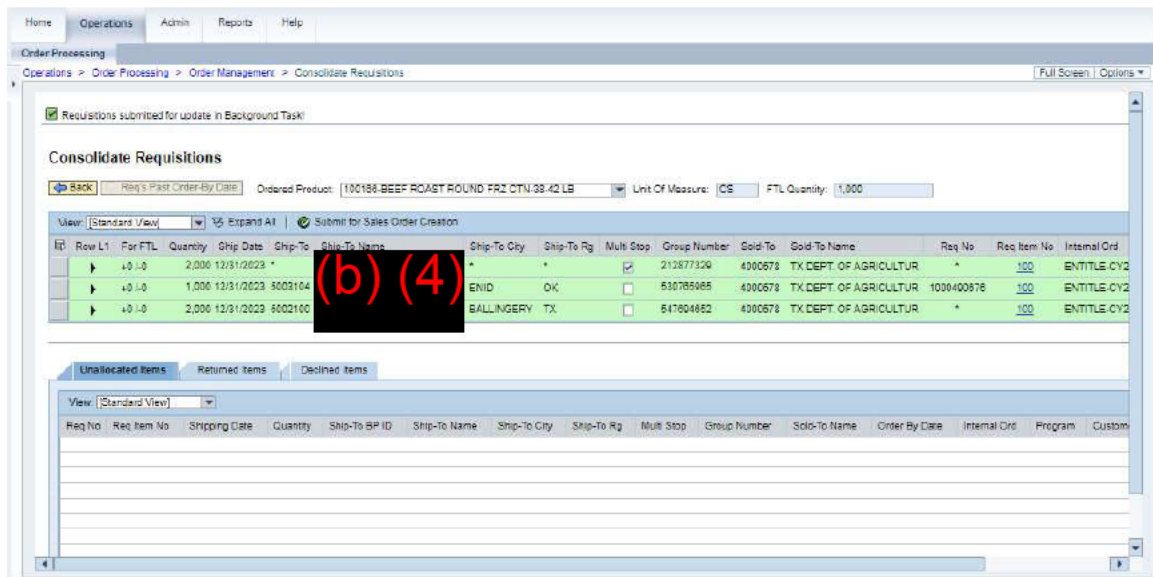
It is not necessary to submit requisitions for order creation at this time, but changes will be retained.

## Image: Order Consolidation Pop-Up



- Click  (the **Yes** button) to submit the changes.

## Image: Consolidate Requisitions Screen



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

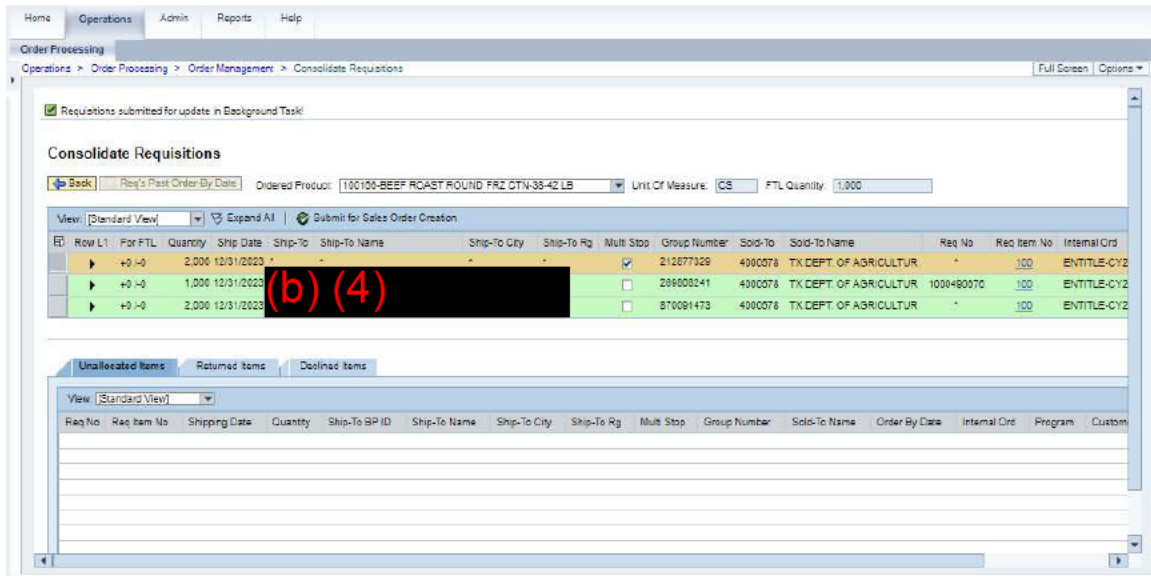


(Note) A system message displays at the top of the screen indicating that the requisitions have been submitted for update in the background task.



(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.

**Image: Consolidate Requisitions Screen**



13. Click (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.

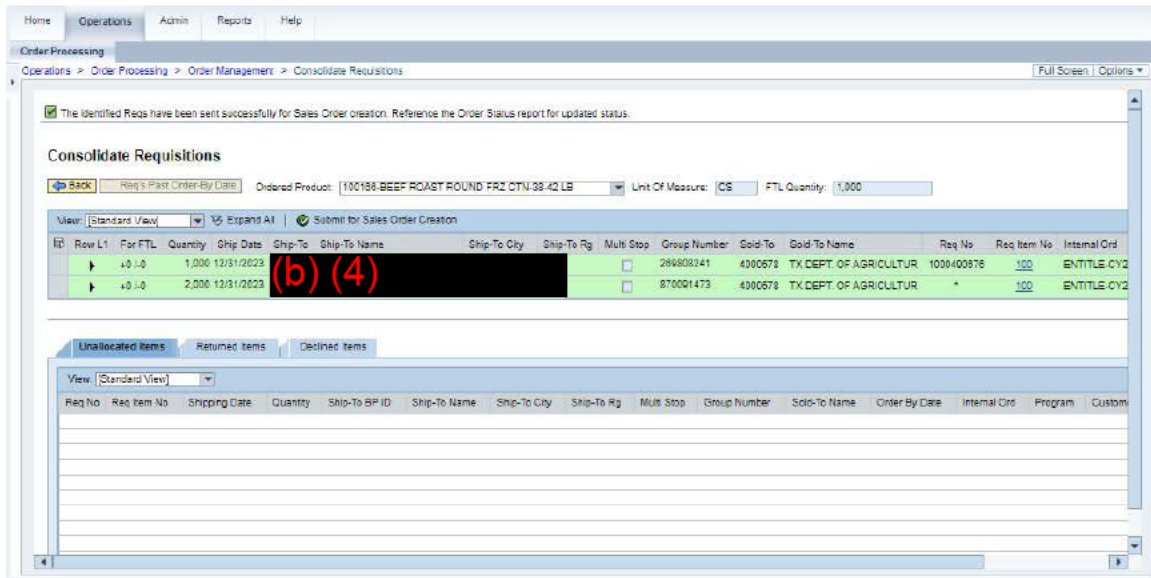
Unallocated requisitions remain unaffected and are still in the queue at the bottom of the screen. The unallocated requisitions will return to the Order Consolidation Workbench upon exiting the transaction; they do not remain in the Unallocated queue.

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.



**Image: Consolidate Requisitions Screen**



**14.** The transaction is complete.



(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.



Work Instruction  
Consolidation for a Multi-Stop Domestic Sales Order

**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.

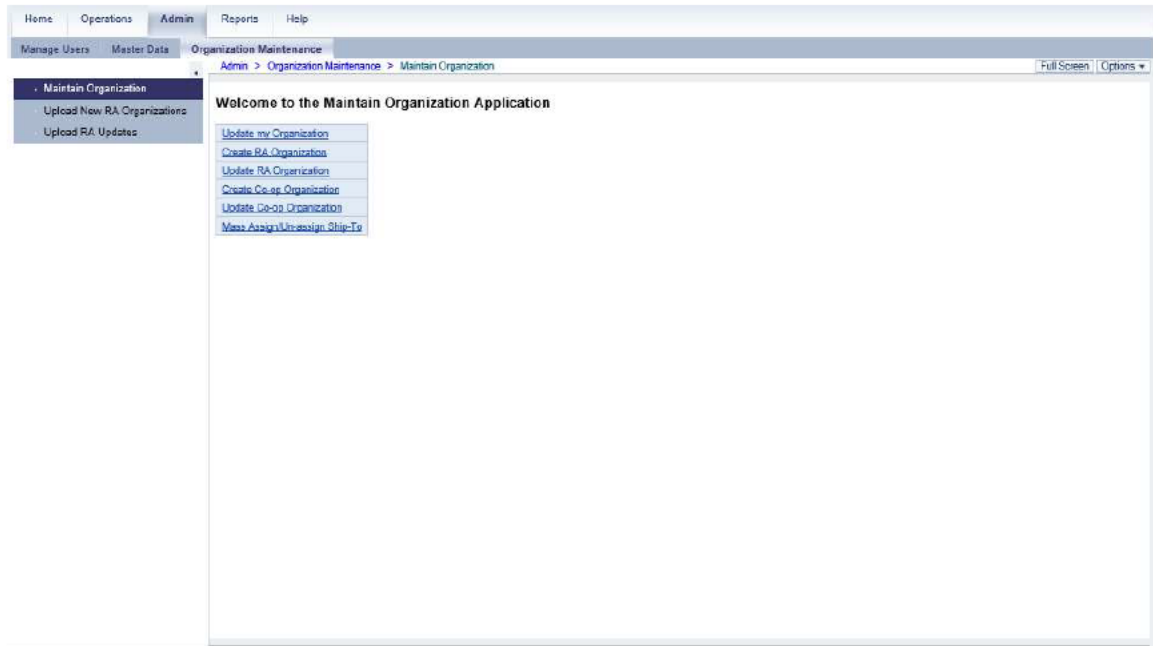
### Tips and Tricks


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

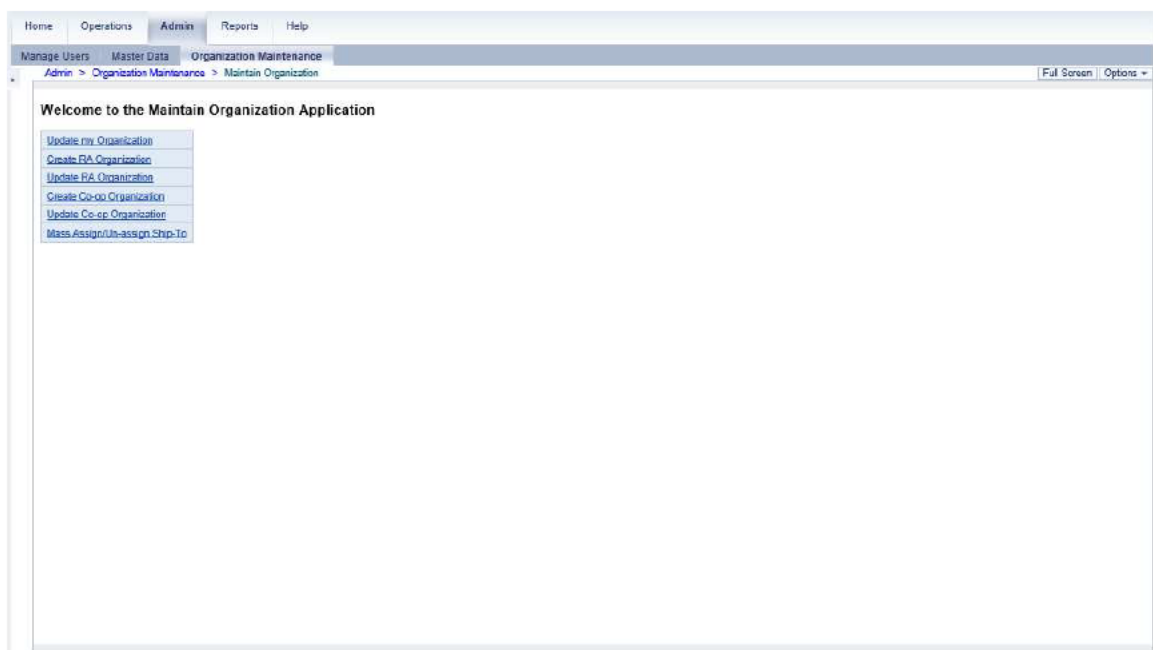
1. Start the transaction using the Portal path: **Admin tab → Organization Maintenance tab → Maintain Organization link.**

### Image: Maintain Organization Screen



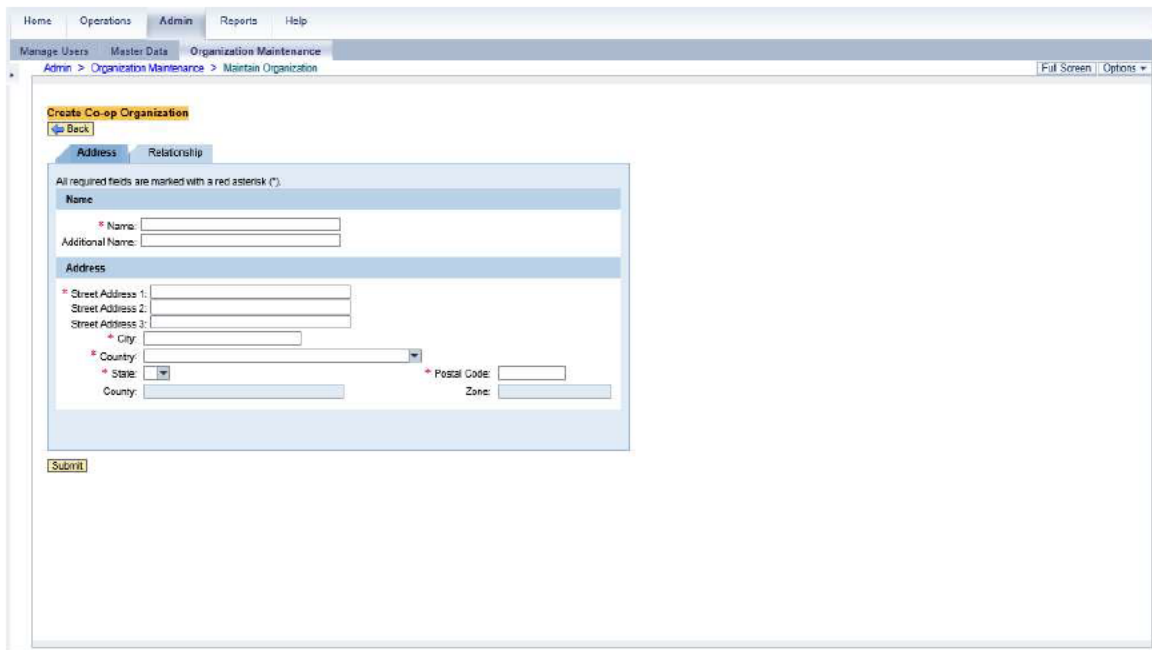
2. Click  (the **Hide Navigator** arrow) to minimize the Portal Menu. Note that this can be done with any transaction in WBSCM.

### Image: Maintain Organization Screen






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

**Image: Create Co-op Organization (Address) Screen**



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

| Field             | R/O/C | Description   |
|-------------------|-------|---|
| Name:             | R     | Person or business partner's name.<br><br><b>Example:</b><br>Pueblo City School District 60                                       |
| Additional Name:  | O     | 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.<br><br><b>Example:</b><br>1902 Montezuma Road |
| Street Address 2: | O     | A free text field in which to enter the street address of the user or organization.   |

| Field             | R/O/C | Description  |
|-------------------|-------|--|
| Street Address 3: | O     | 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.<br><br><b>Example:</b><br>Pueblo  |
| Country:          | R     | Country code that represents country name.<br><br><b>Example:</b><br>USA<br><br> (Note) The Country <input type="text"/> (the <b>Drop-down</b> button) displays a list of countries in alphabetical order. Use the vertical scroll bar to locate the <b>USA</b> option.                               |
| State:            | R     | The abbreviation or name of United States territory, district or state.<br><br><b>Example:</b><br>Colorado<br><br> (Note) The State <input type="text"/> (the <b>Drop-down</b> 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.<br><br><b>Example:</b><br>81003<br><br> (Note) The postal code must be valid and belong to the state selected.  |

## Image: Create Co-op Organization (Address) Screen

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



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

## Image: Create Co-op Organization (Relationship) Screen

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

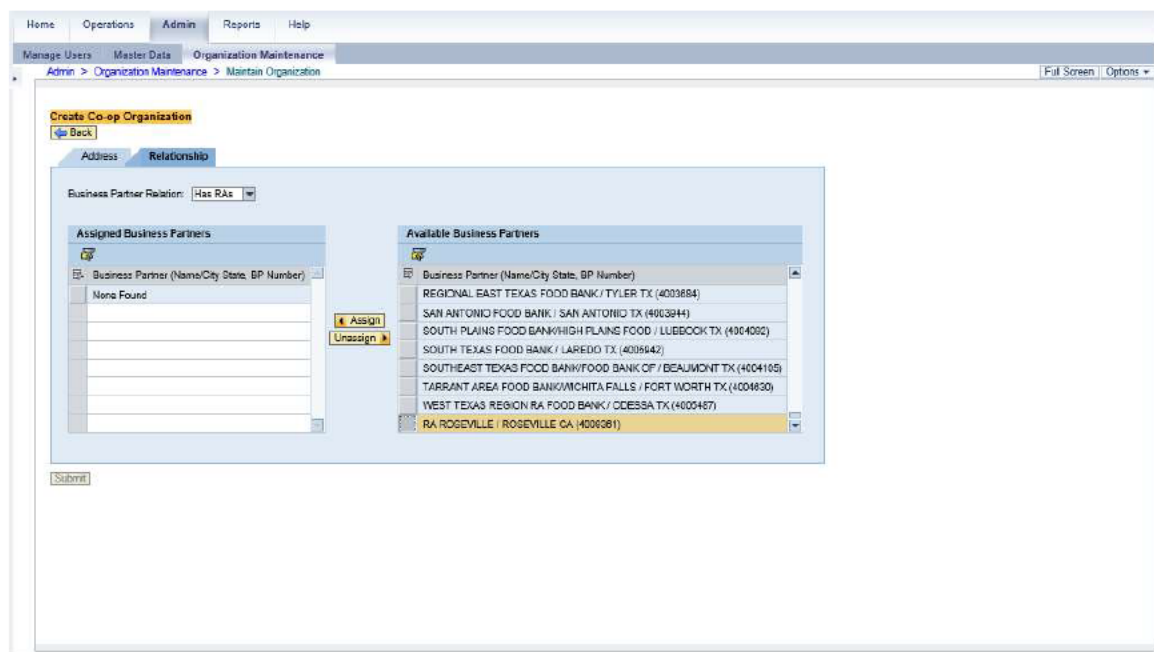


(Note) To filter the list of available Business Partners, click on the column **Business**

**Partner (Name/City State, BP Number)** field. Select (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 **(All)** option.

**Image: Create Co-op Organization (Relationship) Screen**



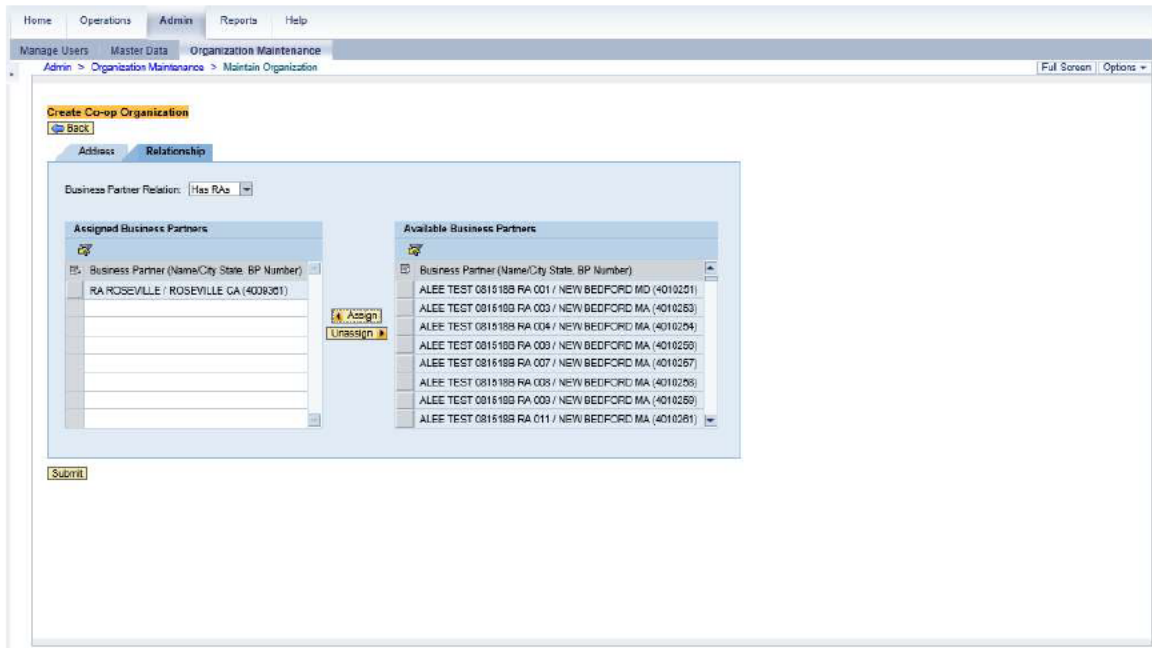
7. Click (the **Assign** button) to assign the selected RA to the new Co-op Organization.



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

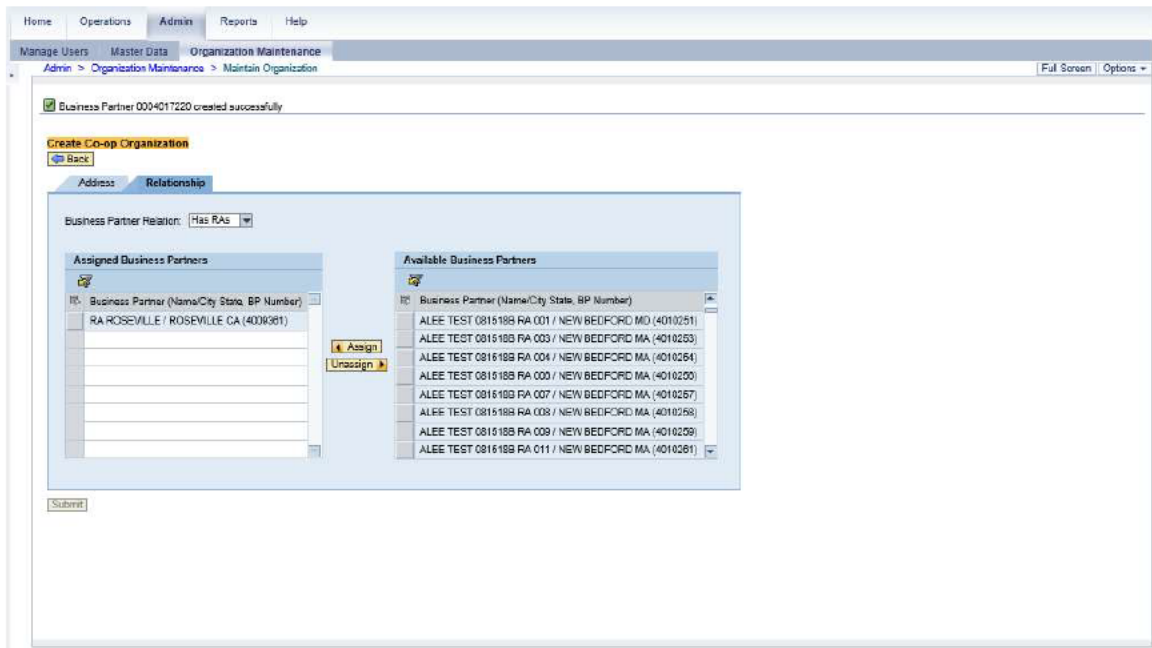


## Image: Create Co-op Organization (Relationship) Screen



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

## Image: Create Co-op Organization (Relationship) Screen



- The transaction is complete.



Work Instruction  
Create Co-op Organization

**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.

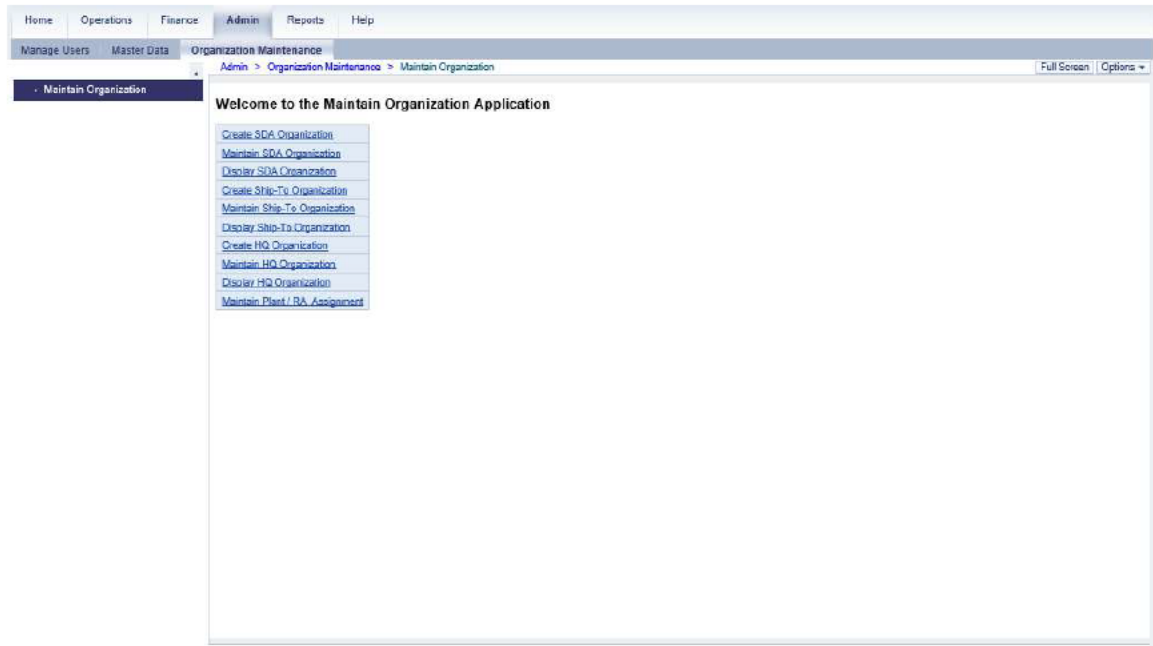
### Tips and Tricks


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

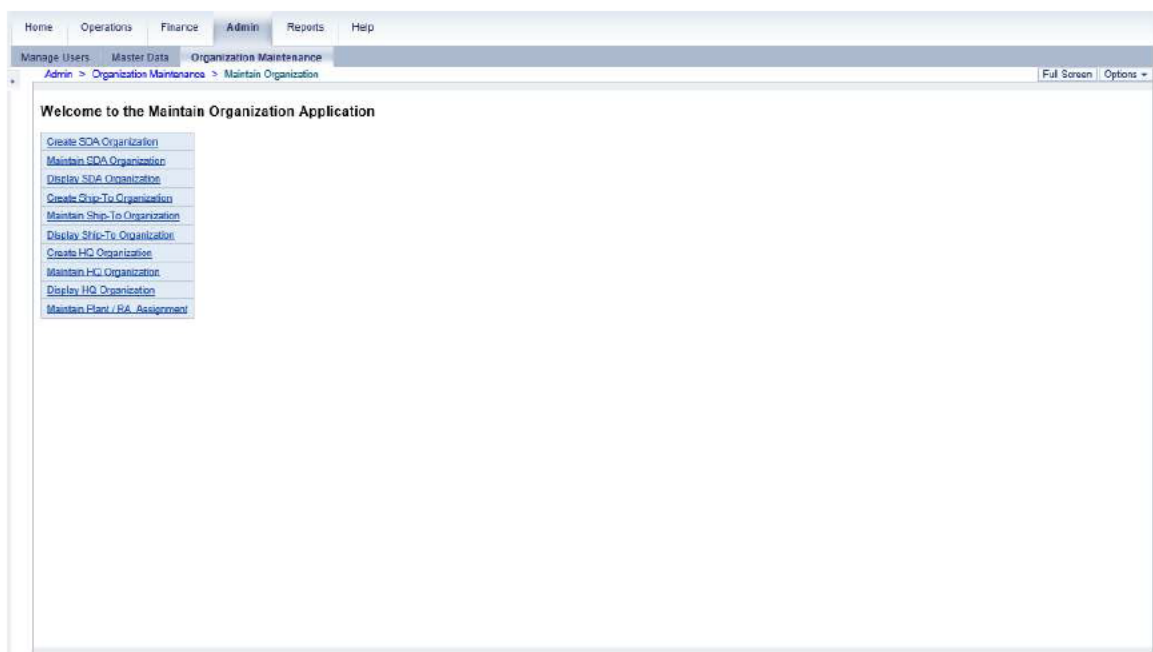
1. Start the transaction using the following Portal path: **Admin tab → Organization Maintenance tab → Maintain Organization link.**

### Image: Maintain Organization Screen



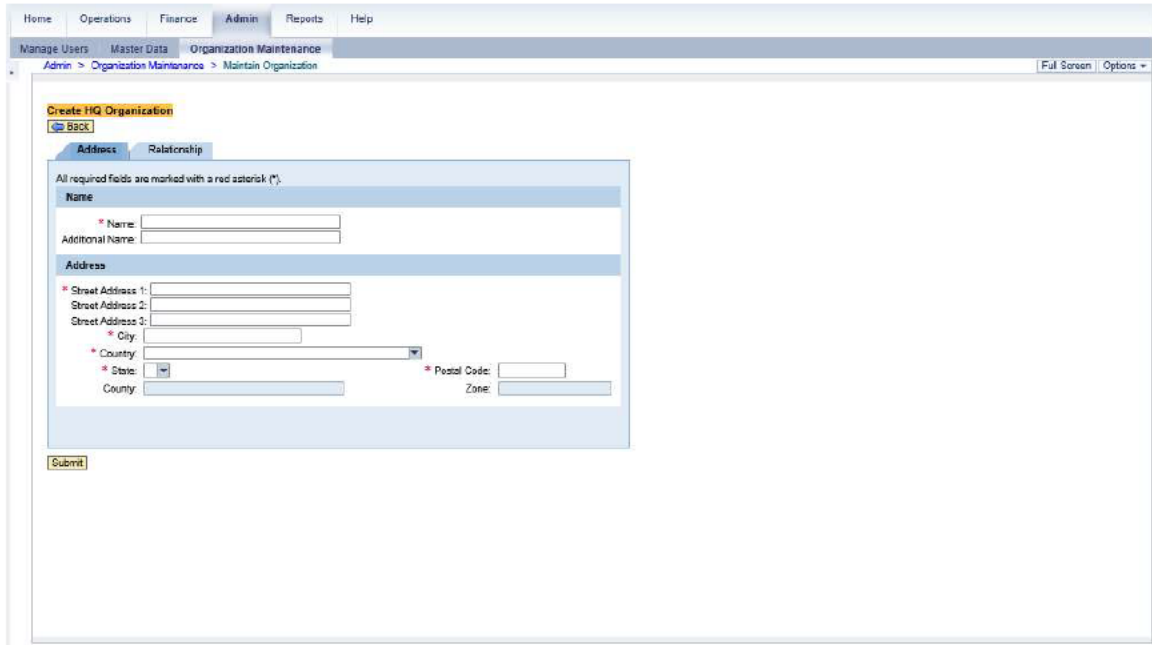
2. Click  (the **Hide Navigator** arrow) to minimize the Portal Menu. Note that this can be done with any transaction in WBSCM.

### Image: Maintain Organization Screen






3. Click [Create HQ Organization](#) (the **Create HQ Organization** link) to create an HQ Organization.

**Image: Create HQ Organization (Address) Screen**



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

| Field             | R/O/C | Description   |
|-------------------|-------|---|
| Name:             | R     | Person or business partner's name.<br><br><b>Example:</b><br>Midwest HQ   |
| Additional Name:  | O     | 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.<br><br><b>Example:</b><br>One Williams Center |
| Street Address 2: | O     | A free text field in which to enter additional street address information.  |

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

**Image: Create HQ Organization (Address) Screen**

The screenshot shows the 'Create HQ Organization' screen with the 'Address' tab selected. The form contains the following fields and values:

- Name:** \* Name: Midwest HQ
- Address:** \* Street Address 1: One Williams Center
- City:** TULSA
- Country:** USA
- State:** Oklahoma
- Postal Code:** \* Postal Code: 74172

- 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**

The screenshot shows the 'Create HQ Organization' screen with the 'Relationship' tab selected. The 'Business Partner Relation' is set to 'Has Reporting Ship-To'. The 'Available Business Partners' list includes:

- 15TH AVENUE FOOD CORP / BROOKLYN NY (5002689)
- 20TH CENTURY / MONTCLAIR CA (5001416)** (Selected)
- 21ST CENTURY FOODS LTD / SAN ANTONIO TX (5002705)
- 21ST CENTURY FOODS LTD / SAN ANTONIO TX (5002908)
- 21ST CENTURY FOODS LTD / WAELDER TX (5002957)
- 32 GOLD / LOS ANGELES CA (5004020)
- 4U2L / MINNETONKA MN (5003951)
- 4U2L - INACTIVE / GREENDALE IN (5003652)

- Click **Select** (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:

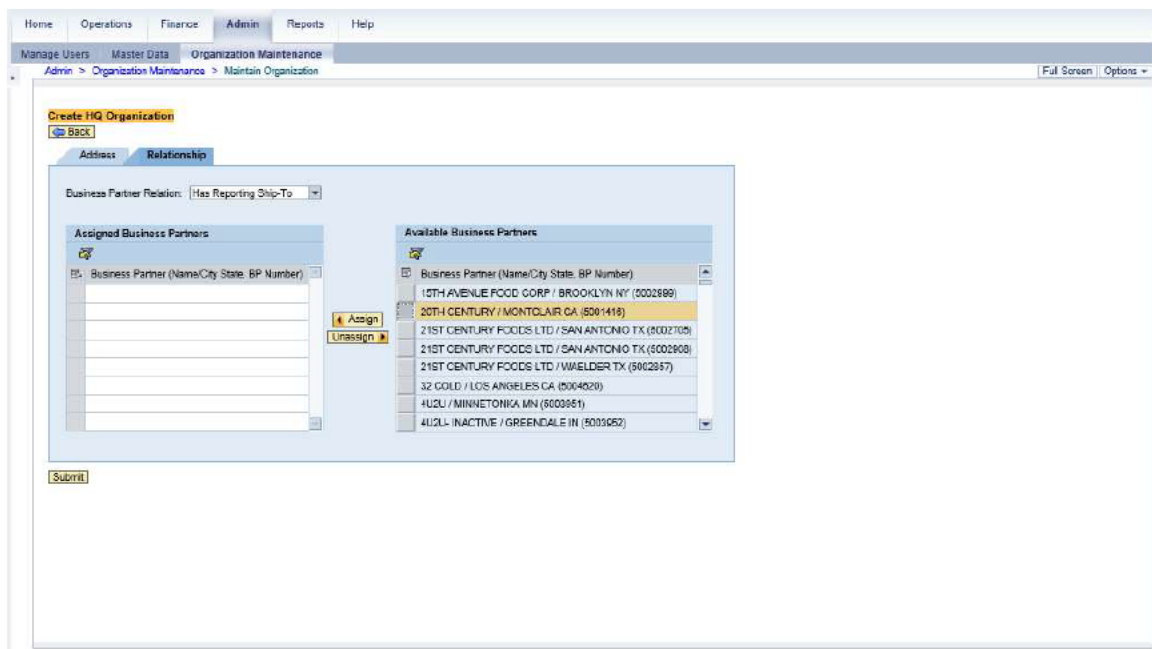
- If the business partners are listed in consecutive rows, hold down the **Shift** key and click the first and last select buttons.
- To select business partners from non-consecutive rows, hold down the **Ctrl** key while clicking each select button.



(Note) To filter the list of available Business Partners click on the column **Business Partner (Name/City State, BP Number)** field. Select  (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 **(All)** option.

### Image: Create HQ Organization (Relationship) Screen



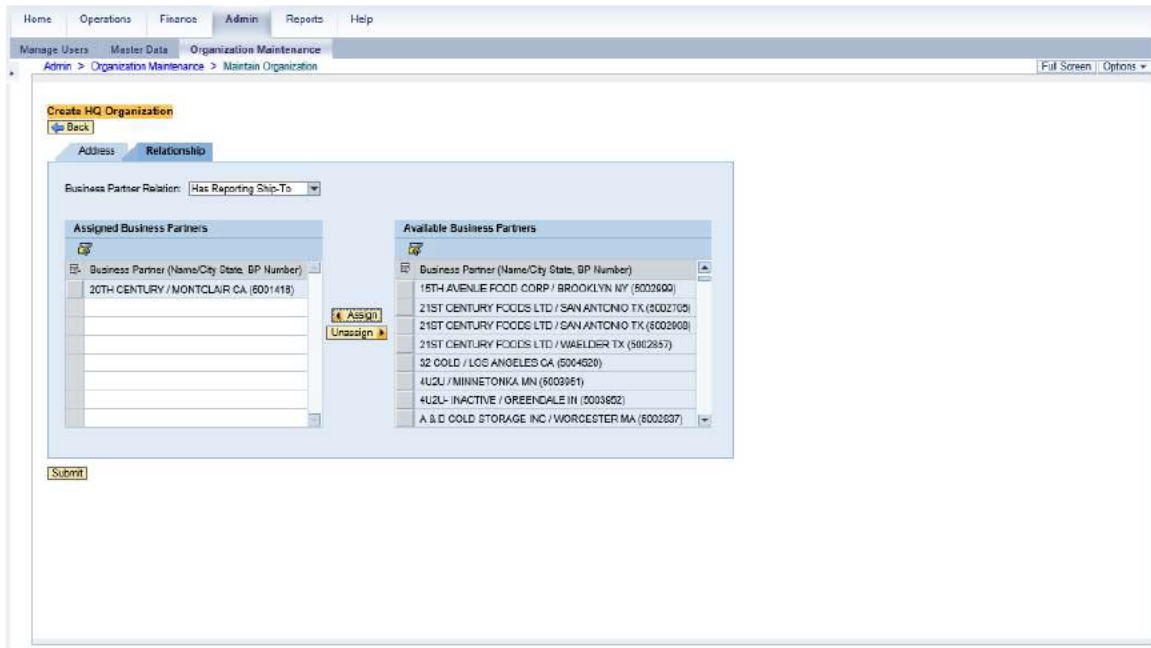
7. Click  (the **Assign** button) to assign a Ship-To location to the HQ.



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

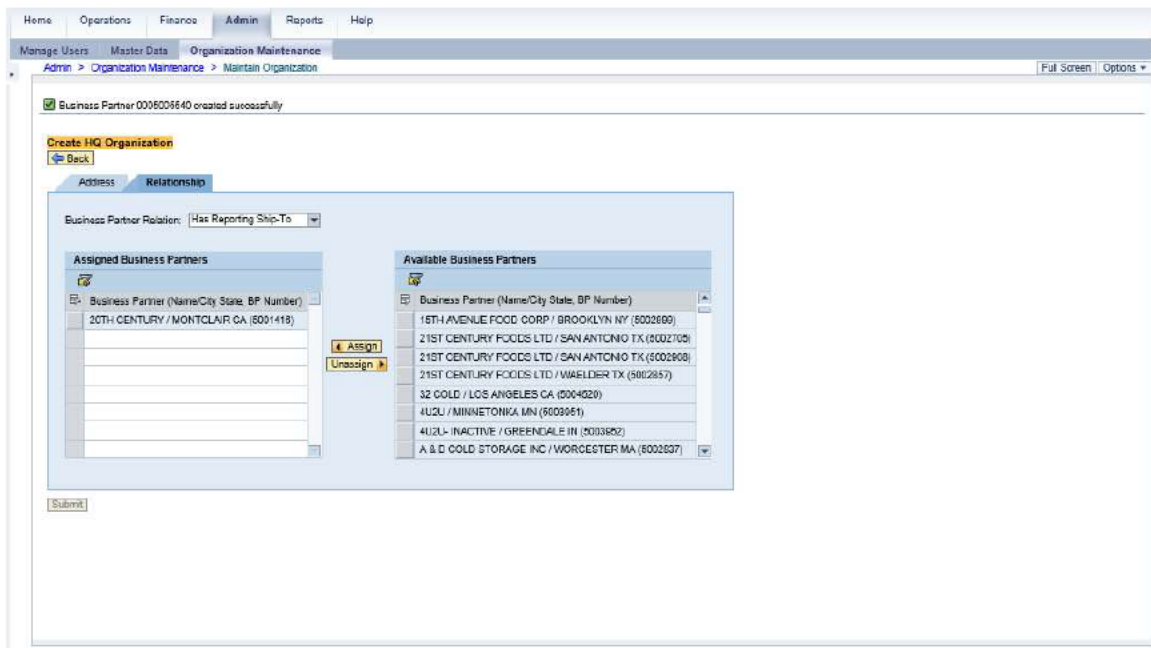


**Image: Create HQ Organization (Relationship) Screen**



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

**Image: Create HQ Organization (Relationship) Screen**



- The transaction is complete.



Work Instruction  
Create Domestic HQ

**RESULT**

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