PROCESS OVERVIEW

Purpose

The purpose of this procedure is for a user logged in as a State Distributing Agency/Indian Tribal Organization (SDA/ITO) to view and export a domestic catalog view maintained for their Recipient Agencies (RAs). SDA/ITOs can ensure that the catalog has been set up accurately by viewing it as it would appear to an RA; they also have the ability to download a catalog to either communicate the products/delivery dates to the RAs or for preserving the information for review. This document includes process steps to review a catalog prepared for an RA as well as export the catalog.

SDA/ITOs create catalogs for RAs for the following programs:

- **TEFAP -** The Emergency Food Assistance Program
- **NSIP -** Nutrition Services Incentive Program
- **NSLP** – National School Lunch Program
- **SFSP -** Summer Food Service Program
- **CACFP -** Child and Adult Care Food Program
- **CSFP -** Commodity Supplemental Food Program
- **FDPIR -** Food Distribution Program on Indian Reservations
- **DA -** Disaster Assistance

Process Trigger

Perform this transaction after creating or updating an RA catalog view.

Prerequisites

- The RA Catalog view must exist in WBSCM

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab ➔ **Catalog Maintenance** folder ➔ **Display RA Catalog** link to go to the *Display RA Catalog* screen.
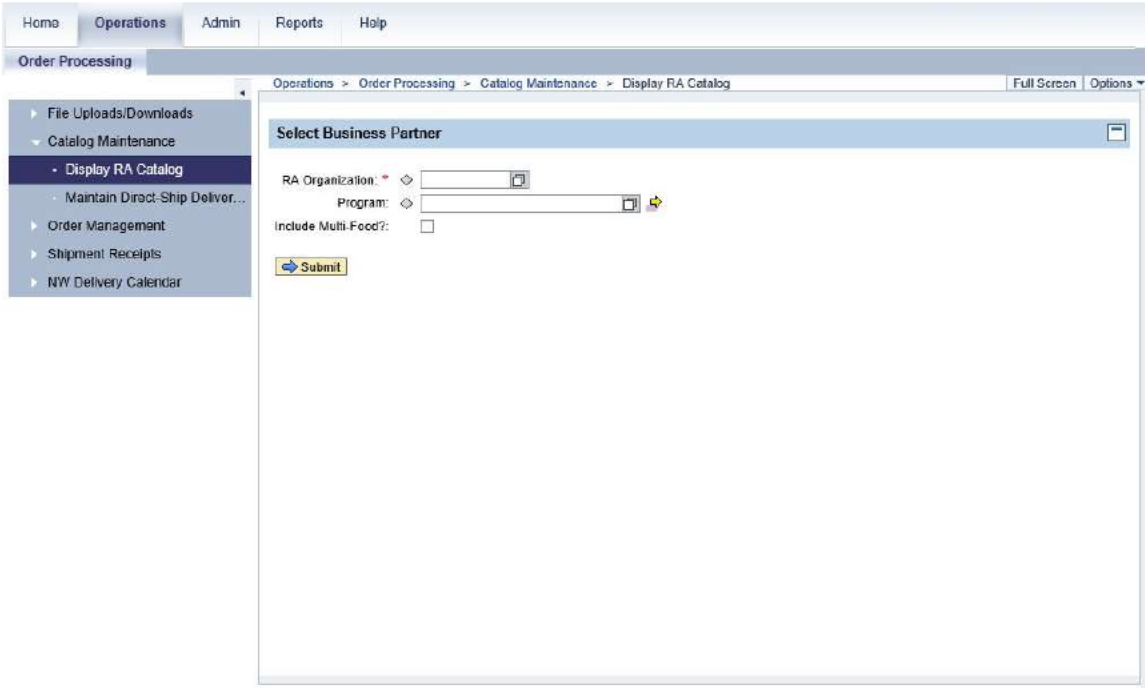
Tips and Tricks

- 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 following Portal path: **Operations** tab ➔ **Catalog Maintenance** folder ➔ **Display RA Catalog** link to go to the *Display RA Catalog* screen.

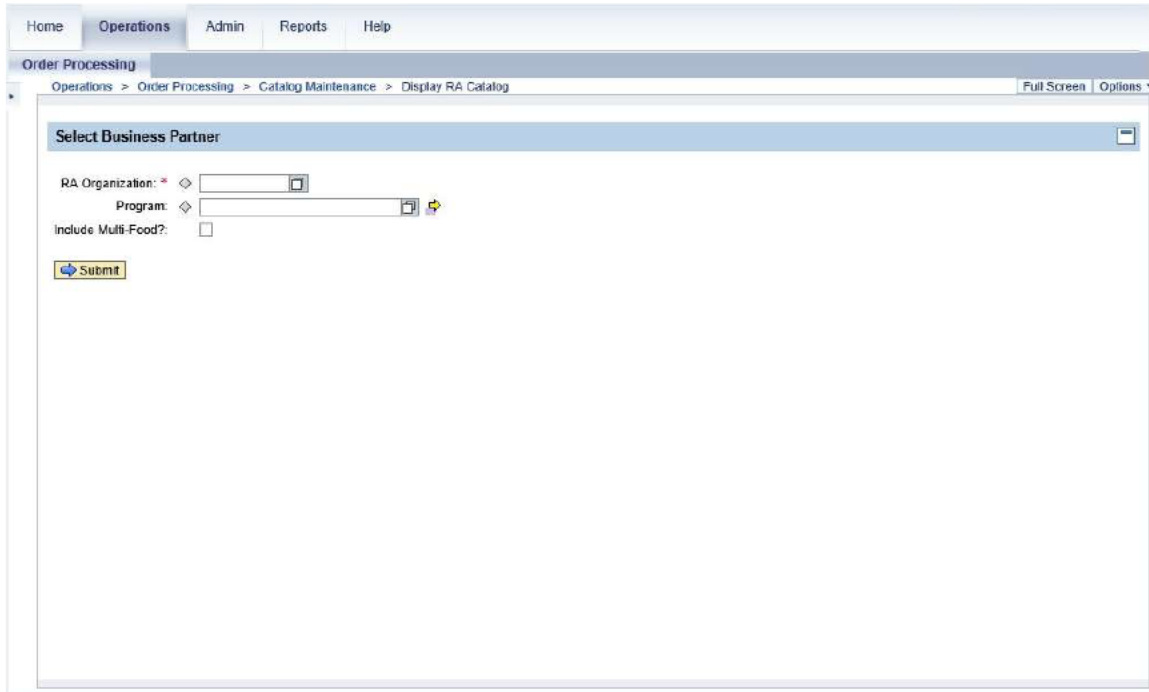**Image: Display RA Catalog Screen**

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

Image: Display RA Catalog Screen

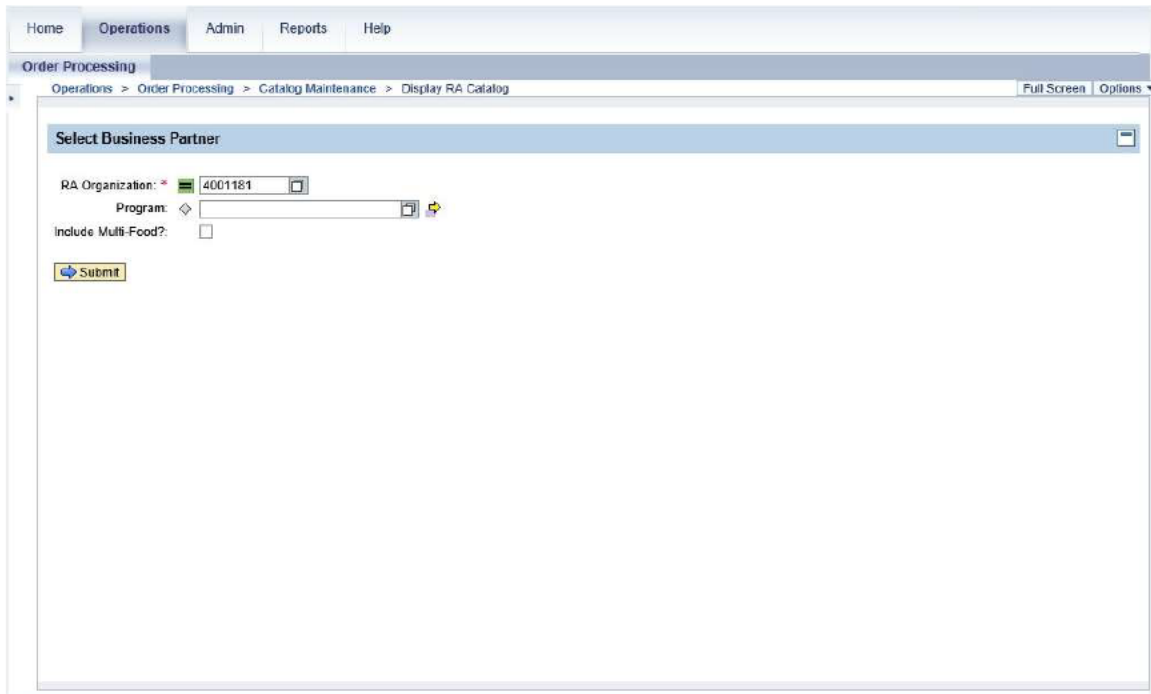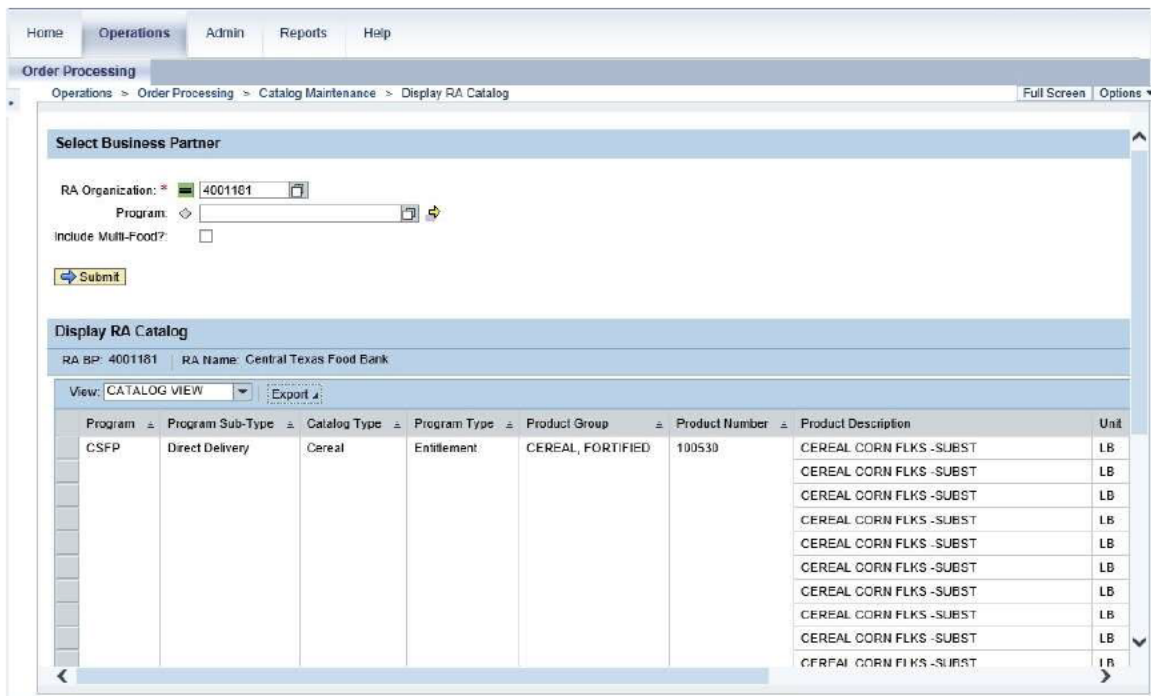3.   As required, complete/review the following fields:

Field	R/O/C	Description
RA Organization: *	R	The Recipient Agency. **Example:** 4001181 (Note) Only one RA Organization can be selected at a time.1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC
Program:	O	Acronym to identify a USDA food distribution program.
Include Multi-Food?:	O	When checked, multi-food commodities are included. (Note) The 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC**Include Multi-Food?:** field defaults to unchecked.1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC

Image: Display RA Catalog Screen

4. Click [Submit] (the **Submit** button) to display the catalog for the selected RA Organization.

Image: Display RA Catalog Screen

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

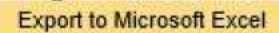| Field	R/O/C	Description
Program	O	Acronym to identify a USDA food distribution program.
Program Sub-Type	O	Within a USDA program, distinguishes the sub-program used to process and deliver products. (Note) 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC**Program Sub-Types** include the following: • Direct Delivery • Processing Diversion • Multi-Food1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC
Catalog Type	O	The type of product included in a catalog. (Note) All catalog types do not apply to all programs. Each program has a unique set of catalog types associated with it.1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC (Note) For multi-food entries and the DA Program, this field will be blank.1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC
Program Type	O	The manner in which a program is funded. (Note) 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC**Program Types** include: • Entitlement • Bonus1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC (Note) For Multi-Food entries and the DA Program, this field will be blank.1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC
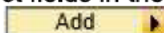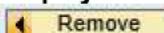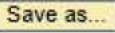
Field	R/O/C	Description
Product Group	O	Group to which the product or material belongs.
Product Number	O	Unique identifier assigned to a product.
Product Description	O	Information used to characterize a material.
Unit	O	Unit of measurement (such as cases or pounds) for ordering products.
RA Order By Date	O	The date by which the RA must place the order. **Example:** (Note) The 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC**RA Order By Date** is calculated by subtracting the **SDA Lead Time** from the **FNS Order By Date.**1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC (Note) For Multi-Food entries, this field will be "Not Applicable".1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC
SDA Lead Time	O	The number of days prior to the FNS Order By Date that the RA has to submit their requisitions to the SDA for review and consolidation. (Note) For Multi-Food entries, this field will be zero.1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC

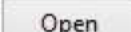| Field	R/O/C	Description
FNS Order By Date	O	The date by which FNS requires the consolidated order to be submitted. (Note) For Multi-Food entries, this field will be blank.1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC
Deliver By Date	O	The date by which the products should be delivered. (Note) The 'NO Delivery Date Set" value will appear under the 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC**RA Order By Date** column field when SDAs do not assign to their RA View.1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC (Note) For Multi-Food entries, this field will be blank.1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC

6. Perform any of the following:

If	Then
The user needs to download RA catalog view	1. Click Export ◢ (the **Export** button) to export the catalog view data. 2. Click Export to Microsoft Excel (the **Export to Microsoft Excel** button). 3. Click Open (the **Open** button). 4. Review and save the spreadsheet as appropriate. 5. Click ✕ (the **Close** button) to close the spreadsheet and return to the transaction.
The user needs to customize the appearance of the RA catalog	1. Click ▸ 🔧 (the **Open Settings** button) located on the right side of the screen. 2. As appropriate, select fields in the **Hidden Columns** and click Add ▸ (the **Add** button) to add columns to the displayed view. 3. As appropriate, select fields in the **Displayed Columns** and click ◂ Remove (the **Remove** button) to

If	Then
	remove columns from the displayed view.
	4. As appropriate, select fields in the **Displayed Columns** and click ▾ ⬇ ▴ ⬆ (the **Up/Down** arrows) to change the column order.
	5. Click Save as... (the **Save as...**button) to save the new view.
	6. Name the new view in the **Description** field.
	7. Click OK (the **OK** button).
	(Note) The new view can be selected from the **Views** field the next time the transaction is required.
	(Note) The RA catalog view can be downloaded after making changes to the columns.
The user needs to limit the amount of information displayed	1. Click ▸ 👤 (the **Open Settings** button) located on the right side of the screen.
	2. Click Filter (the **Filter** tab).
	3. Click ▾ (the **Drop-down** button) in the first field to select the column to be filtered from the drop-down list.
	4. Click ☐ (the **Matchcode** button) in the third field to select a value for which filtering is required.
	5. Review the filtered display as appropriate.
	(Note) Only records that match the applied filter(s) will be displayed.
	(Note) The RA catalog view can be downloaded after applying a filter.

(Note) Export file download prompt may appear different based on the user's browser.

7. The transaction is complete.

RESULT

The SDA/ITO has reviewed the RA catalog details, using the available tools to customize the appearance of or apply filters to the catalog, as applicable. If appropriate, the SDA/ITO may also have exported the view as a spreadsheet for further review, record-keeping, or sharing outside of WBSCM.

Purpose

The purpose of this document is to display a recall thread on the WBSCM Discussion Forums. Discussion Forums are located on the WBSCM homepage, so users will be able to see them immediately upon logging in to WBSCM. There is a specific forum just for addressing recall cases.

Process Trigger

Perform this transaction when you would like to display a recall thread in the Discussion Forum.

Prerequisites

- Recall message must be posted by USDA to the Discussion Forum.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Home** tab ➜ **News and Alerts** tab ➜ **News and Alerts** link to go to the *WBSCM Homepage* screen.

Tips and Tricks

- This transaction will not allow you to modify any fields.

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

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

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

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

Reminders

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

PROCEDURE

1. Start the transaction using the following Portal path: **Home** tab ➜ **News and Alerts** tab ➜ **News and Alerts** link

WBSCM Homepage Screen

2. Click **USDA Holds and Recalls** (the **USDA Holds and Recalls** link) to enter this forum.

 (Note) The red circle next to a forum/category indicates that new content has been added since the last visit. Other columns in the table provide additional detail, as follows:

Views - number of combined times all WBSCM users have viewed this particular forum.

Topics / Messages - number of topics and number of messages (respectively) in the forum.

Last Post - date and time when last post was added and user who last posted to the forum.

Forums: USDA Holds and Recalls Screen

Forums » USDA Holds and Recalls   ☑ My Control Panel

Forum: USDA Holds and Recalls

			Search Forum	
	👁 Watch Forum 🔍 Search Forum		[ ]	Go

Thread	Author	Views	Replies	Last Post
❋ **FNS Case #514: Ham Recall** Posted By: FNS-01, FNS-01 -- Aug 14, 2009 1:20 PM				

🔴 New content since your last visit

3.   A list of all threads in the forum will display. Click **FNS Case #514: Ham Recall** (the **FNS Case #514: Ham Recall** link) to view this thread.

ℹ️   (Note) The user can choose to watch this forum by clicking the **Watch Forum** link. By choosing this option, the user will be updated via email whenever a new post is added. Another option is to search the forum for specific keywords. Use the **Search Forum** free text field to enter in keywords. Click the **Go** button to display your search results.

Forums : FNS Case #514: Ham Recall Screen

4. You are now displaying the discussion forum post. Click Back To Forum (the **Back to Forum** link) to go to the previous screen.

    (Note) As you are an external user with view-only access to the forum, you will not be able to respond to or modify the contents of this forum.

News and Alerts Screen

| | USDA | United States Department of Agriculture | Welcome SDA-01 SDA-01 | Log Off | WBSCM |

Home Operations Admin Help

News and Alerts | Inbox

News and Alerts | Back Forward

Detailed Navigation	
News and Alerts	
Portal Favorites	

Forums » USDA Holds and Recalls

Forum: USDA Holds and Recalls

My Control Panel

Watch Forum   Search Forum

Search Forum
[_____] Go

Thread	Author	Views	Replies	Last Post
FNS Case #514: Ham Recall Posted By: FNS-01, FNS-01 -- Aug 14, 2009 1:20 PM				

● New content since your last visit

5. You have completed this transaction.

RESULT

The transaction has been successfully completed.

PROCESS OVERVIEW

Purpose

The purpose of this transaction is for Recall Specialists to display a recall for review purposes. Through this transaction, you can perform a search for a recall, and then display general data as it relates to the specific recall. You will be able to see any case notes on the recall, and information on the partners, activities, documents, products, and transactions linked to the recall.

Process Trigger

Perform this transaction when you need to review a recall that has been created.

Prerequisites

- Recall case must exist in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab ➜ **Recall Administration** tab ➜ **Create/Display Recall** link to go to the *Search Cases* screen.

Tips and Tricks

- This transaction will not allow you to modify any fields.

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

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

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

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

Reminders

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

PROCEDURE

1. Start the transaction using the Portal path: **Operations** tab ➔ **Recall Administration** tab ➔ **Create/Display Recall**

Search: Cases Screen

2. Click the **Case ID** field.

Search: Cases Screen

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

Field	R/O/C	Description
Case ID	O	A unique identifying number associated with the recall case. **Example:** 552

Search: Cases Screen
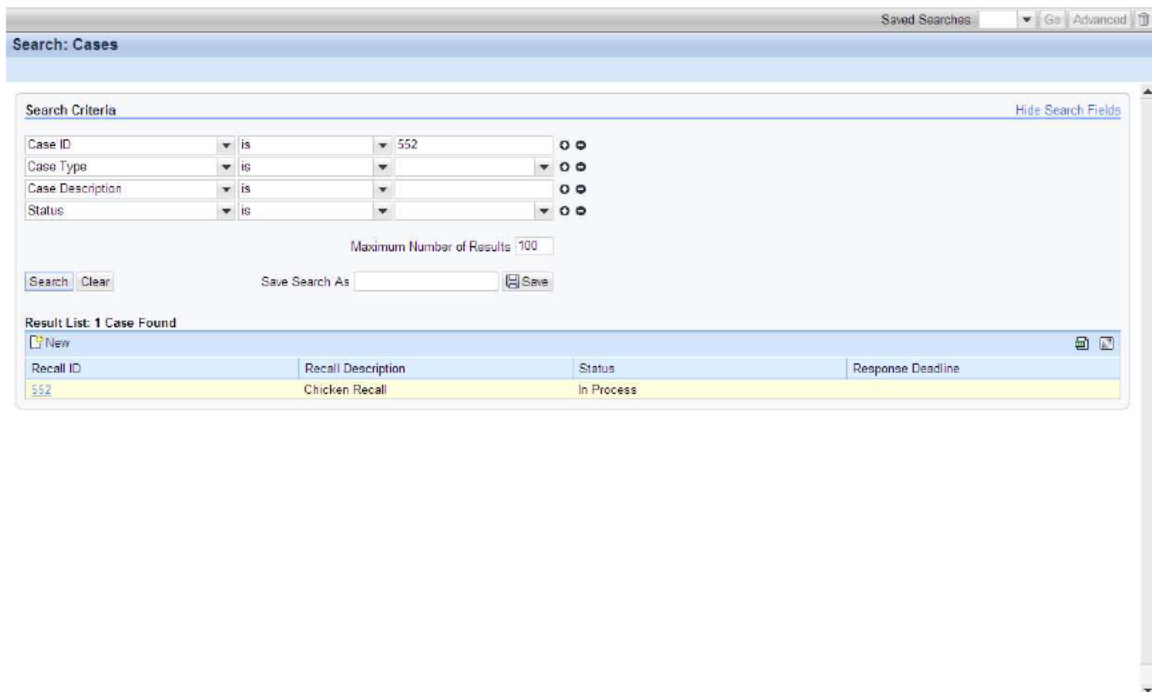
4. Click Search (the **Search** button) to process your entry.

> ![info icon] (Note) To narrow your search results, enter appropriate criteria. You can search by Case ID, Case Type, Case Description, or Status.
>
> When searching for a recall, you can also use the following search method located in the second drop down box: *is, is not, contains,* and *starts with*. The search criteria has to match exactly when using *is*. When you are looking for a recall that does not have a certain search criteria, then you would use *is not*. When using *contains*, the output that will be listed will include the word entered in the search criteria. Whatever was entered in the search criteria when using *starts with*, will have the search output beginning with what was entered.

Search: Cases Screen

5. Click ![552] (the **552** link) to display the recall information. This number represents the Recall Case ID.

> ![info icon] (Note) This screen displays a list of recalls (or in this example, one recall). Since we entered the exact Case ID number, we only received one search result.
>
> The results table contains information such as the Recall ID, Recall Description, Status, and Response Deadline.

FNS Recalls: 552, Chicken Recall Screen

6.   The recall case displays. Scroll down to display more.

(Note) This screen shows the case details for the recall. The upper left side of the screen shows General Data such as type of recall, recall ID, description, who the recall was created by, and who the recall was last changed by. On the upper right side of the screen is the processing data such as the status, earliest notification date, response deadline date, recall creation date, and the date the recall was last changed on.

Below the case details is a list of Parties Involved. *Parties Involved* are the sold-to parties, their names, ID's and contact information.

FNS Recalls: 552, Chicken Recall Screen

7. You have completed this transaction.

> (Note) Displayed below the case details are the parties involved, notes, transactions, reference objects, and attachments related to the recall.
>
> The *Notes* section contains notes on the investigation, complaints filed, and reasons for the recall investigation. *Transactions* are the complaints, sales orders, and entitlement increments and decrements related to the recall. *Reference Objects* show the products affected by the recall. *Attachments* is documentation related to the recall.

RESULT

You have successfully viewed a recall.

PROCESS OVERVIEW

Purpose

This transaction enables a State Distributing Agency (SDA) or Indian Tribal Organization (ITO) to export a catalog from WBSCM to their computer. The catalog can be filtered by program, delivery dates, and NLT dates. Results are generated in XML or CSV format and may be displayed, printed, or saved.

Process Trigger

Use this procedure to download the catalog in XML or CSV format.

Prerequisites

- Catalog view must be assigned to SDA/ITO.
- Materials must exist in WBSCM.
- Delivery periods and NLT dates must be set up for the materials.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab → **Order Processing** tab → **File Uploads/Downloads** folder → **Download Catalog** link to go to the *Download Catalog* screen.

Tips and Tricks

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

PROCEDURE

1. Start the transaction using the Portal path: **Operations** tab → **Order Processing** tab → **File Uploads/Downloads** folder → **Download Catalog** link.

Image: Download Catalog Screen

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

Image: Download Catalog Screen

3. Select the appropriate option from the **Program** drop-down list.

> (Note) Hold the **Ctrl** key to select more than one program. All USDA program catalogs are available for selection.

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

Field	R/O/C	Description
From Date:	R	Beginning value to be entered when specifying a date range. **Example:** 06/02/2019 (Note) Use the **To Date:** field to enter the end value for the date range.
NLT Date (Order by Date):	R	No Later Than Date. The date by which an order needs to be placed in order to receive a specified shipping date. **Example:** 05/01/2019 (Note) Use the **To Date:** field to enter the end value for the date range.

(Note) Enter dates in MM/DD/YYYY format, or click the calendar icon adjacent to the field to select from the calendar.

Image: Download Catalog Screen
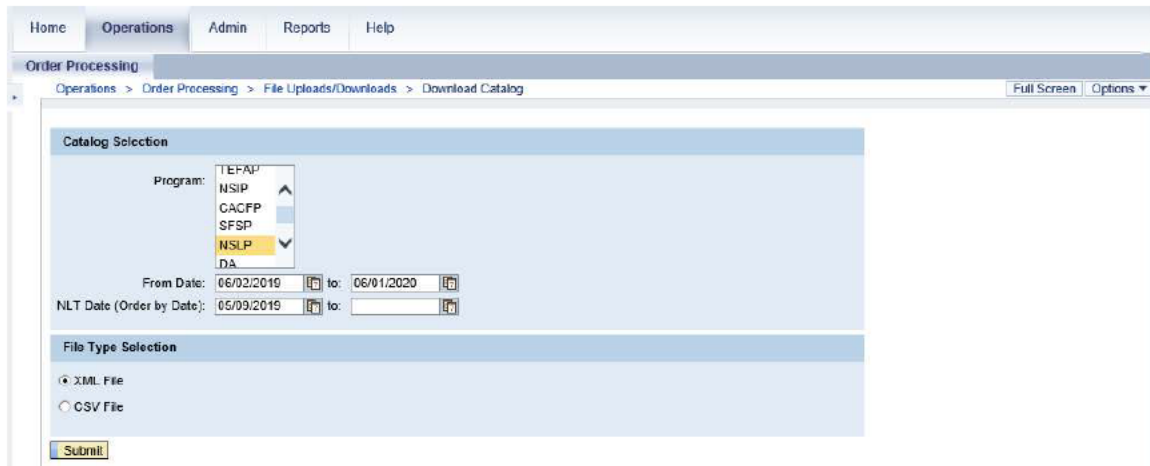
5. Under *File Type Selection*, select ⊙ (the **Radio** button) beside the desired download format for the file. In this example, **CSV File** is selected.

(Note) **XML** is usually used to upload the file into another system. **CSV** displays data in a spreadsheet format.

Image: Download Catalog Screen
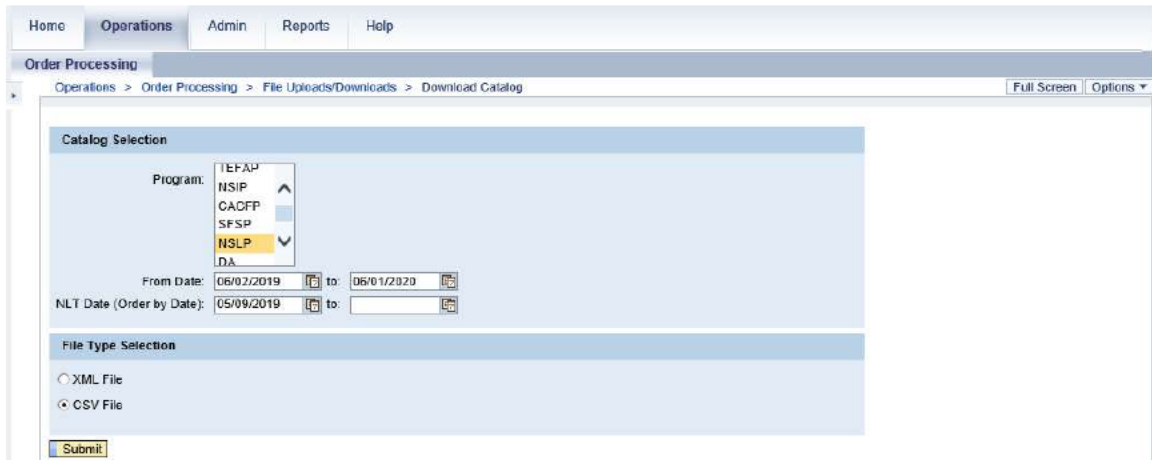
6. Click [Submit] (the **Submit** button) to apply the selected options and initiate the download.

    Image: Download Catalog Screen
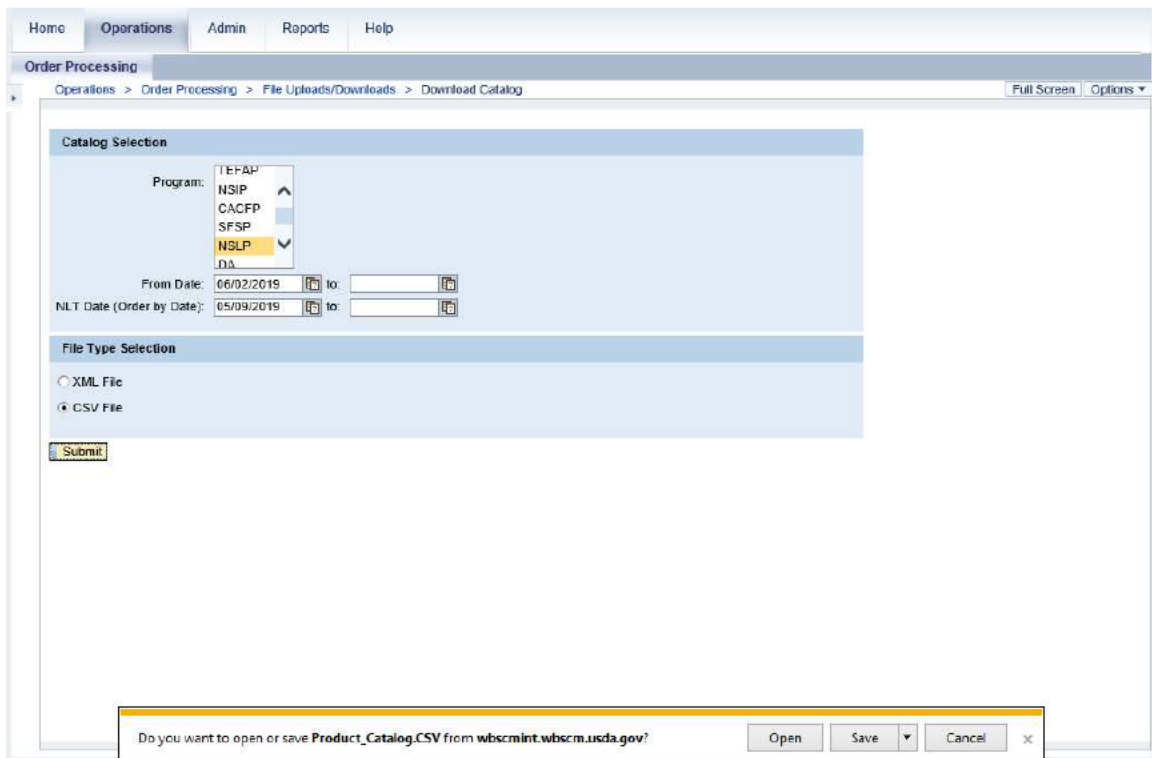
7. An option displays to select a download action. In this example, [Open] (the **Open** button) is selected.
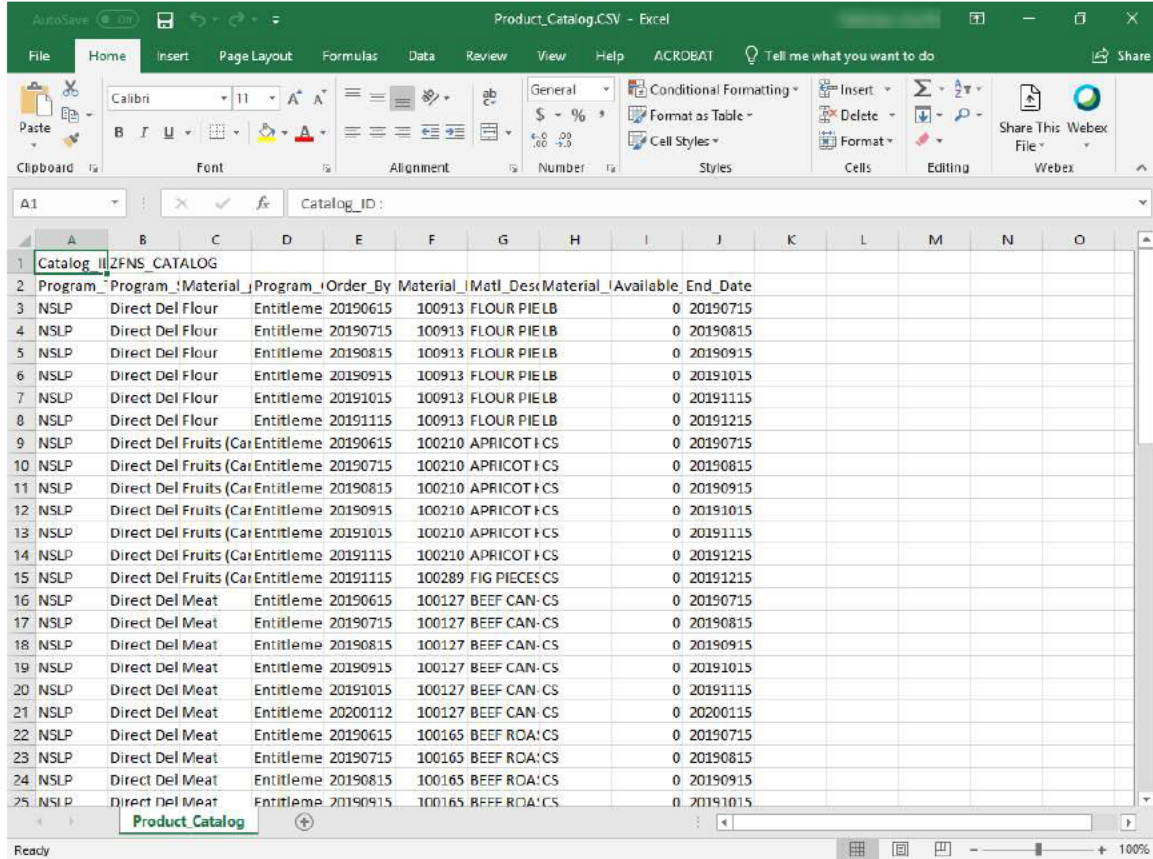
    (Note) Download file prompt may appear different based on the user's browser. To download in Chrome, refer to the Download/Export Document section in the WBSCM Portal Navigation job aid.

(Note) Options include:

- **Open** displays the downloaded data in the appropriate application. For **CSV** files, this is the user's default spreadsheet software (for example, Excel). The file is not automatically saved.
- **Save** prompts the user to select a location to save the file. The file is not automatically opened for viewing.
- **Cancel** exits the process without downloading the catalog.

Image: Microsoft Excel Spreadsheet

8. Review the downloaded data. For additional information on fields included in the download file, refer to **FNS resources for WBSCM data files**.

9. The transaction is complete.

RESULT

The user has downloaded a copy of the catalog based on the program and date selections. Depending on the file format and downloaded action selected, the catalog may be viewed, printed, or saved as a spreadsheet (CSV) or saved for uploading to another system (XML).

PROCESS OVERVIEW

Purpose

The purpose of this transaction is to download Purchase Order Data from WBSCM. This can be used for reporting purposes.

Process Trigger

Perform this transaction when you need to download data from a specific purchase order.

Prerequisites

- Purchase order data must exist in WBSCM.
- ASN information must exist in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

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

Tips and Tricks

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

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

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

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

Reminders

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

PROCEDURE

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

Download Purchase Orders Screen

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

Field	R/O/C	Description
SDA Partner ID	R	Unique number automatically assigned to each SDA. **Example:** 4000112
Delivery Date	R	Use the Delivery Date field to enter the desired delivery date for the order. **Example:** 01/01/09
To	C	Upper limit of the range to be selected from a list. **Example:** 08/01/09

Download Purchase Orders Screen

3. Click [Submit] (the **Submit** button) to view the purchase order data for the desired PO. This will look for any purchase order information from 01/01/09 up to 08/01/09.

Download Purchase Orders Screen

4. Click [Download XML] (the **Download XML** button) to download in XML format.

File Download Screen
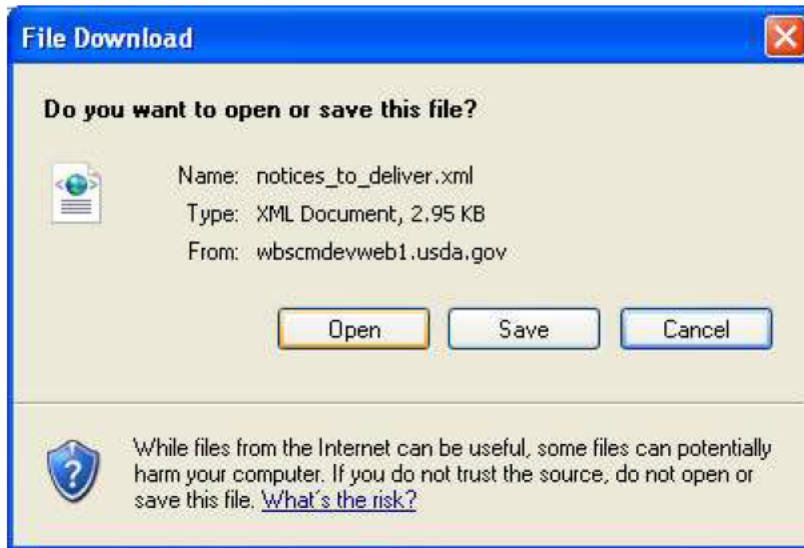
5. You can either click [Open] (the **Open** button) or [Save] (the **Save** button) to view the information. Saving and opening the file will show the structure of the purchase order data. The following are steps for both options.

C:\Documents and Settings\Administrator\Local Settings\Temporary Internet Files\Content.IE5\ELQ Screen
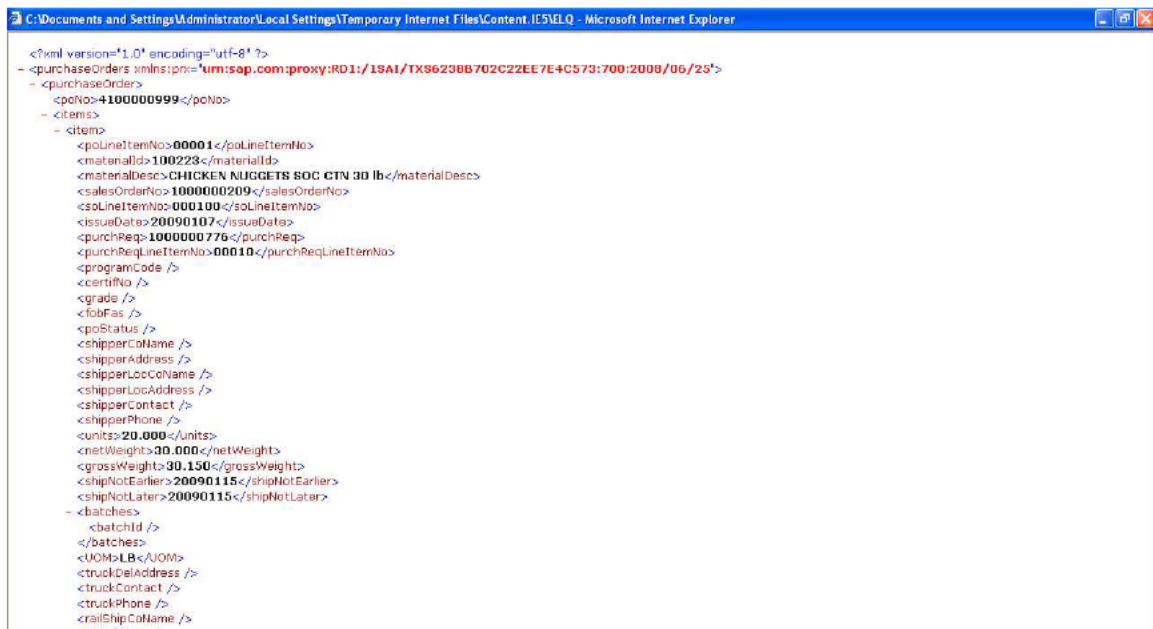
6. Click [X] (the **Close** button) to close the structure data.

Download Purchase Orders Screen

7. Click [Download CSV] (the **Download CSV** button) to download in CSV format.

File Download Pop-up

8. Click [Save] (the **Save** button) to save the PO Data.

Save As Pop-up
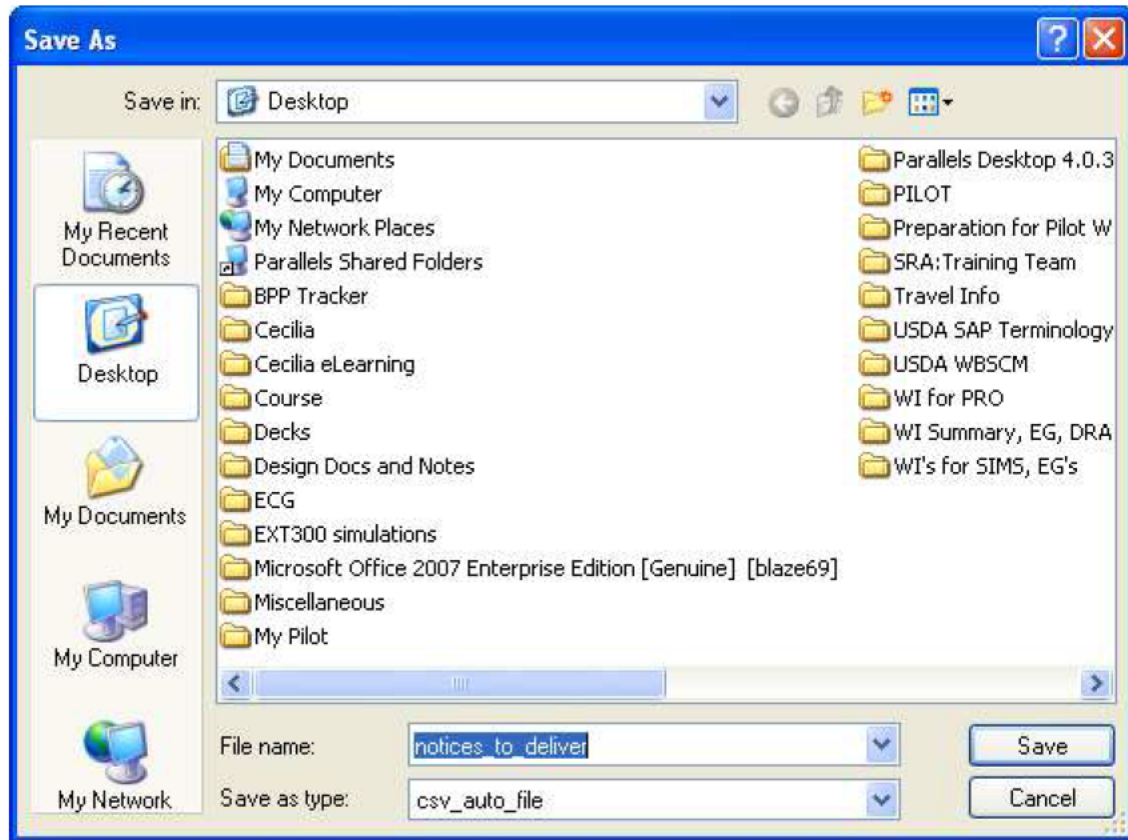
9. As required, complete/review the following fields:

Field	R/O/C	Description
File name:	R	The name that the file is to be saved as. **Example:** notices_to_deliver

Save As Pop-up
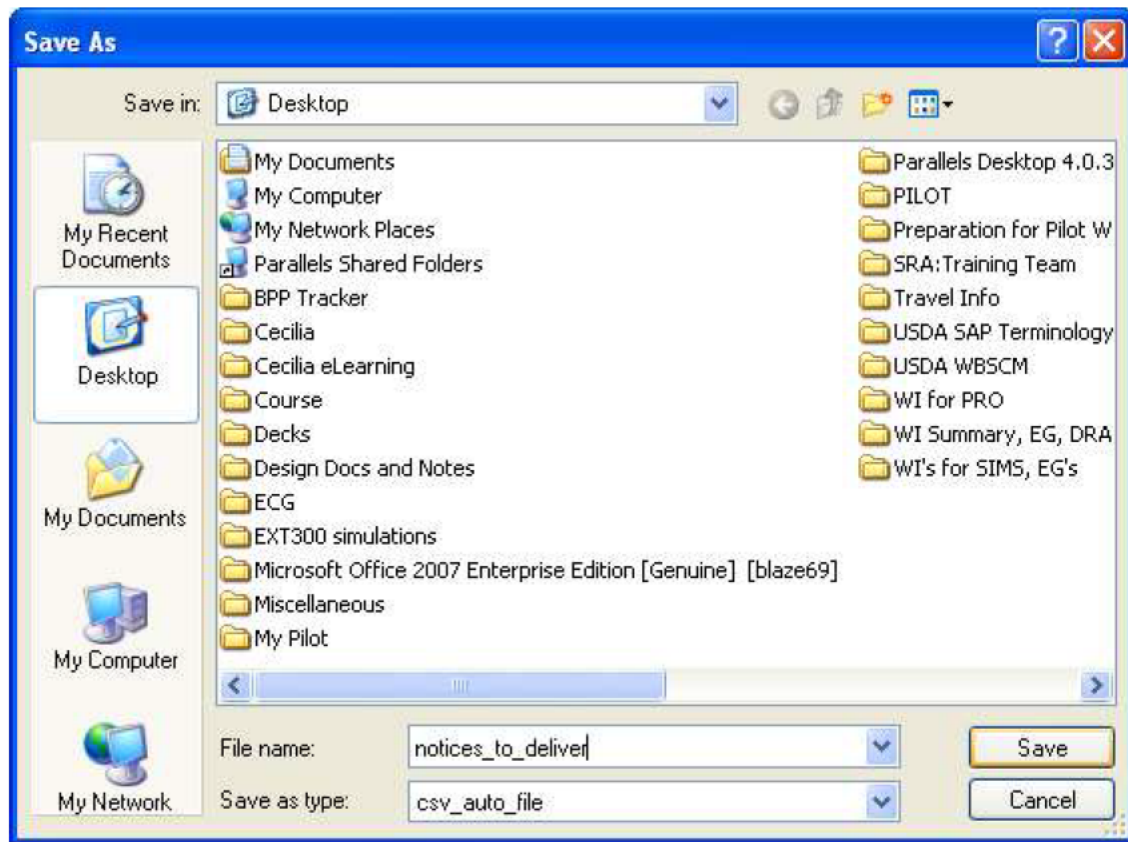
10. Click [Save] (the **Save** button) to save the CSV file to your local drive.

Download complete Pop-up
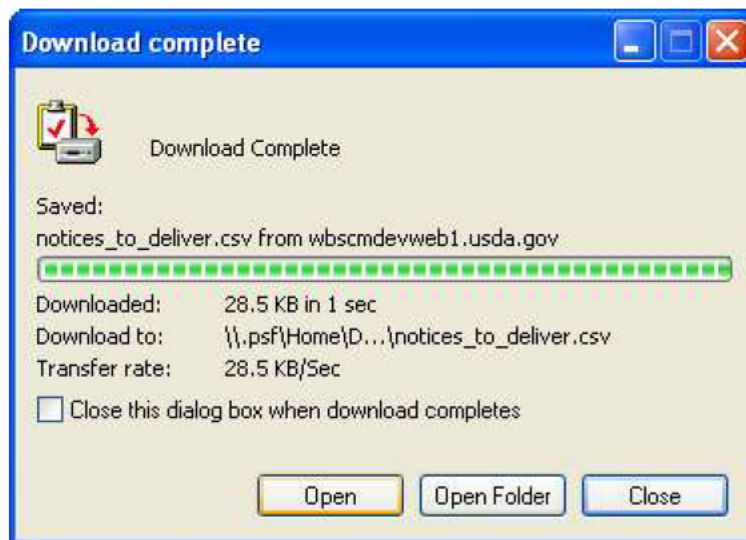
11. Click [Open] (the **Open** button) to open the document.

Notices_to_Deliver - Notepad Screen

```
eliver - Notepad                                                                    _ □ X
View  Help
em,Material,Material Description,Document,Item,Doc. Date,Purch.Req.,Item,Char,QM Certificate Reference,I ▲
)001,100223,CHICKEN NUGGETS SOC CTN 30 lb,1000000209,000100,01/07/2009,1000000776,00010,,,,,,,,,,,20.00
)001,100223,CHICKEN NUGGETS SOC CTN 30 lb,1000000208,000100,01/08/2009,1000000775,00010,,,,,,,,,,,,10.00
)001,100686,BEANS GREEN KIDNEY CAN 6/10,1010,000100,01/14/2009,1000001393,00010,,,,,X,,,,,,10.000,1640.
)001,100686,BEANS GREEN KIDNEY CAN 6/10,5000001443,000100,01/14/2009,1000001402,00010,,,,,X,,,,,,10.000
)001,100223,CHICKEN NUGGETS SOC CTN 30 lb,478,000100,01/21/2009,1000000715,00010,,,,,,,,,,4.000,30.000
)001,100264,PEAR D'ANJOU FRESH CTN 45 LB,5000001532,000100,01/26/2009,1000001455,00010,,,,,,,,,,,20.000
)001,100224,CHICKEN THIGHS CHILLED PACK BULK LB,5000001542,000100,01/28/2009,1000001471,00010,,,,,,,,,,,
)001,100224,CHICKEN THIGHS CHILLED PACK BULK LB,5000001545,000100,01/28/2009,1000001474,00010,,,,,,,,,,,
)001,100206,"CEREAL RICE CRISP, 1008- 16/12 OZ",5000001708,000100,02/24/2009,1000001834,00010,NSLP,,,,,,
)001,100263,PEAR CAN 24/300,5000001717,000100,02/24/2009,1000001843,00010,,,,,,,,,,13.000,22.500,27.00
)001,100206,"CEREAL RICE CRISP, 1008- 16/12 OZ",5000001721,000100,02/24/2009,1000001836,00010,,,,,X,,,,,
)001,100206,"CEREAL RICE CRISP, 1008- 16/12 OZ",5000001762,000100,02/24/2009,1000001858,00010,NSLP,,,,X,
)001,100206,"CEREAL RICE CRISP, 1008- 16/12 OZ",5000001763,000100,02/24/2009,1000001859,00010,,,,,X,,,,
)001,100263,PEAR CAN 24/300,5000001764,000100,02/24/2009,1000001861,00010,NSLP,,,X,,,,,,,21.000,22.500,
)001,100263,PEAR CAN 24/300,5000001765,000100,02/24/2009,1000001862,00010,,,,,X,,,,,,23.000,22.500,27.0
)001,100199,"CEREAL, BABY INSTANT RICE CTN 12/8 OZ",5000001831,000100,02/26/2009,1000001890,00010,NSLP,,
)002,100204,"CEREAL, FORTIFIED RTE RICE 14/13.5 OZ",5000001831,000200,02/26/2009,1000001890,00020,NSLP,,
)001,100203,"CEREAL RICE CRISP, 1440- 16/12 OZ",5000001927,000100,03/04/2009,1000001906,00010,,,,,,,,,,,
)001,100206,"CEREAL RICE CRISP, 1008- 16/12 OZ",5000001961,000100,03/05/2009,1000001909,00010,,,,,,,,,,,
)002,100206,"CEREAL RICE CRISP, 1008- 16/12 OZ",5000001961,000200,03/05/2009,1000001909,00020,,,,,,,,,,,
)001,100233,MILK DRY INSTANT NFAT PKG 6/4 LB,1347,000100,03/05/2009,1000001871,00010,,,,,,,,,,,10.000,2-
)001,100206,"CEREAL RICE CRISP, 1008- 16/12 OZ",5000002141,000300,03/19/2009,1000001988,00030,,,,,,,,,,,
)001,100206,"CEREAL RICE CRISP, 1008- 16/12 OZ",5000002141,000200,03/20/2009,1000001988,00020,,,,,,,,,,,
)001,100206,"CEREAL RICE CRISP, 1008- 16/12 OZ",5000002147,000100,03/20/2009,1000002001,00010,,,,,,,,,,,
)001,F-NONREFRIG,RE-NON FRIDGERATED DOMESTIC-F,5000002147,000110,03/20/2009,1000002001,00020,,,,,,,,,;
)001,100206,"CEREAL RICE CRISP, 1008- 16/12 OZ",5000002141,000400,03/24/2009,1000001988,00050,,,,,,,,,,,
)001,100206,"CEREAL RICE CRISP, 1008- 16/12 OZ",5000002141,000500,03/24/2009,1000001988,00070,,,,,,,,,,,
)001,100206,"CEREAL RICE CRISP, 1008- 16/12 OZ",5000002235,000100,03/24/2009,1000002054,00010,,,,,,,,,,,
)001,F-NONREFRIG,RE-NON FRIDGERATED DOMESTIC-F,5000002235,000200,03/25/2009,1000002054,00020,,,,,X,,,,,
)001,100206,"CEREAL RICE CRISP, 1008- 16/12 OZ",5000002257,000100,04/02/2009,1000002055,00010,,,,,,,,,,,
)001,100206,"CEREAL RICE CRISP, 1008- 16/12 OZ",5000002511,000100,04/02/2009,1000002186,00010,,,,,,,,,, ▼
```

12. You have completed this transaction.

RESULT

You viewed and downloaded PO data from WBSCM.

PROCESS OVERVIEW

Purpose

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

Process Trigger

Use this procedure to download sales orders from WBSCM.

Prerequisites

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

Portal Path

Follow the Portal path below to complete this transaction:

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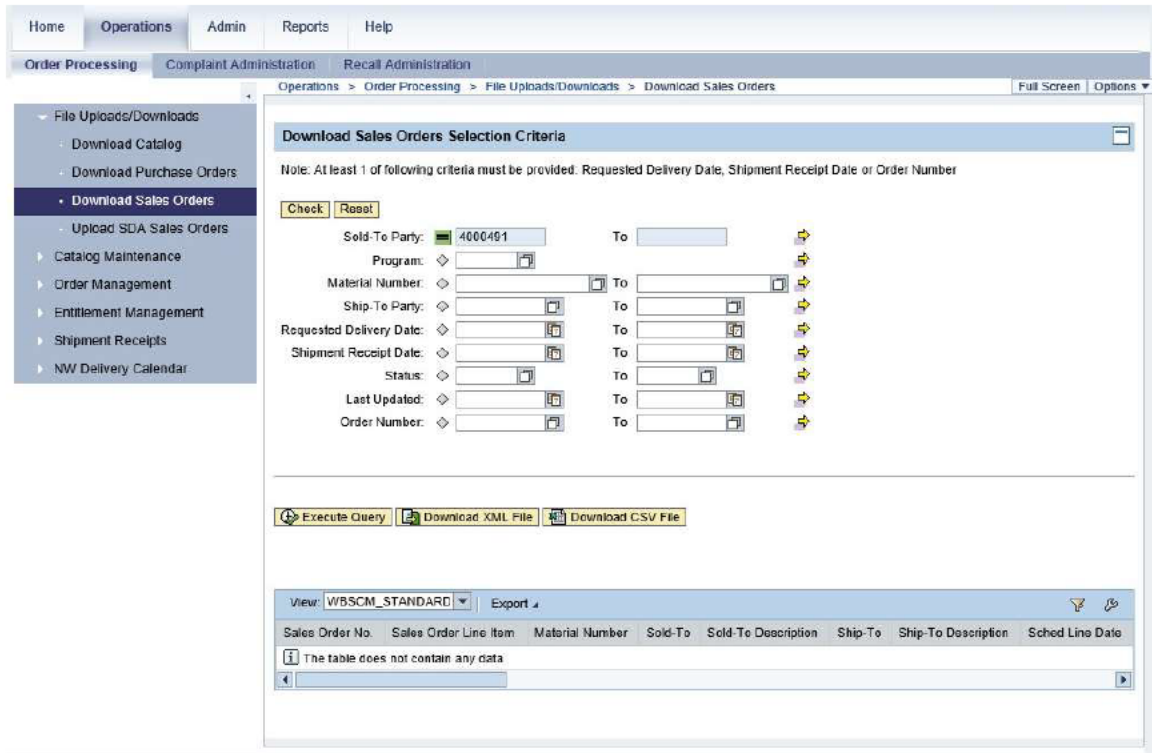
Tips and Tricks

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

PROCEDURE

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

Image: Download Sales Orders Screen

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

Image: Download Sales Orders Screen

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

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

Field	R/O/C	Description
Order Number:	C	This can be a sales order number, purchase order number, or delivery document number. When entering this number, the customer ensures that they are receipting against the correct order. In the case of inbound to warehouse receipts, only enter a purchase order number in this field. (Note) The order number here represents the sales order number.
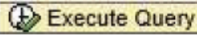
(Note) Users are required to enter either **Requested Delivery Date**, **Shipment Receipt Date**, or **Order Number** and other criteria as appropriate.

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

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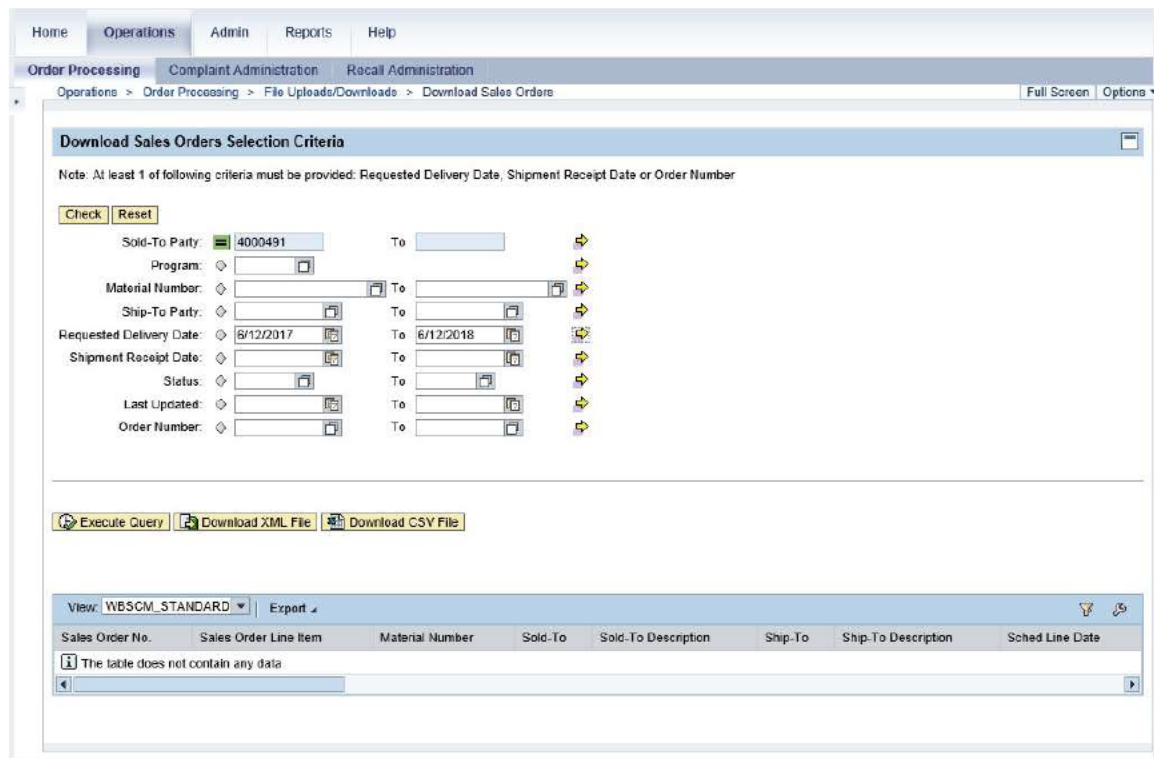
4. Click [Execute Query] (the **Execute Query** button) to generate a list of sales orders.

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

Image: Download Sales Orders Screen

5. Perform one of the following:

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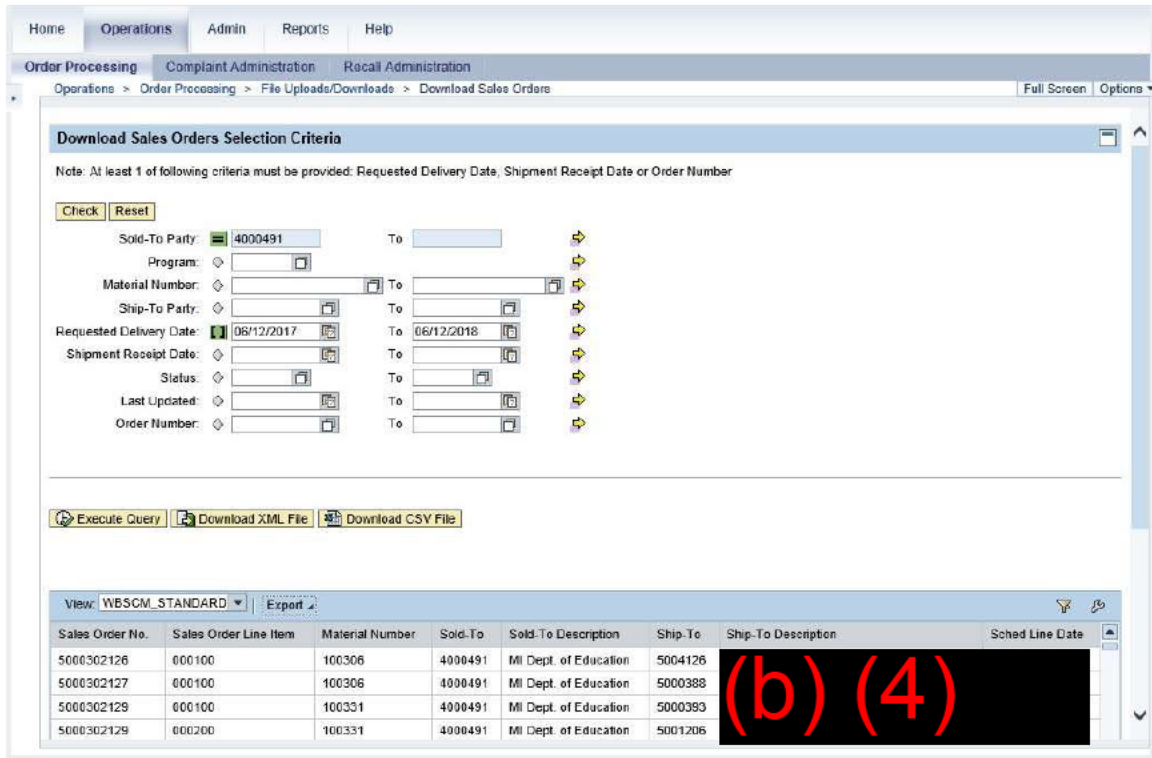
6. Click ![Save] (the **Save** button) to open the *Download Options* window and save the file.

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

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

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

Image: Download Sales Orders Screen

Home	Operations	Admin	Reports	Help		
Order Processing	Complaint Administration	Recall Administration				

Operations > Order Processing > File Uploads/Downloads > Download Sales Orders   Full Screen | Options ▼

Download Sales Orders Selection Criteria

Note: At least 1 of following criteria must be provided: Requested Delivery Date, Shipment Receipt Date or Order Number

Check | Reset

Field		Value	To	
Sold-To Party:	=	4000491		➡
Program:	◇			➡
Material Number:	◇		To	➡
Ship-To Party:	◇		To	➡
Requested Delivery Date:	📅	06/12/2017	To 06/12/2018	➡
Shipment Receipt Date:	◇		To	➡
Status:	◇		To	➡
Last Updated:	◇		To	➡
Order Number:	◇		To	➡

🔄 Execute Query   📄 Download XML File   📄 Download CSV File

View: WBSCM_STANDARD ▼ | Export ▲

Sales Order No.	Sales Order Line Item	Material Number	Sold-To	Sold-To Description	Ship-To	Ship-To Description	Sched Line Date
5000302126	000100	100306	4000491	MI Dept. of Education	5004126	(b) (4)	
5000302127	000100	100306	4000491	MI Dept. of Education	5000388		
5000302129	000100	100331	4000491	MI Dept. of Education	5000393		
5000302129	000200	100331	4000491	MI Dept. of Education	5001206		

7.   This transaction is complete.

RESULT

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

PROCESS OVERVIEW

Purpose

Domestic recipient organizations (or USDA on behalf of a recipient) use this procedure to manually enter a shipment receipt for a purchase order, sales order, or delivery document. The shipment receipt, also known as the Goods Receipt (GR), is the method by which the recipient confirms that materials requested in WBSCM have been delivered. The shipment receipt provides details such as when the shipment was received, who signed for it, and if the shipment was damaged and/or rejected. The recipient also uses this procedure to document quantities of materials received, reporting both good quantities and Over, Short, Damaged (O/S/D) or late quantities.

Timely entry of a shipment receipt is a critical step in WBSCM. Current FNS policy requires <u>entry of shipment receipts within two calendar days of receiving a delivery</u>.

The receipting procedure described in this document applies to orders that contain one or more line items supplied by a vendor with electronic invoicing (eINV) capabilities in WBSCM. The shipment receipt is matched against the Advanced Shipment Notification (ASN) submitted by the vendor and other information associated with the purchase order (PO) to generate a payment invoice for the vendor. Late entry of the shipment receipt will cause delays and inaccuracies in the downstream process. Users will receive an email notification if the recipient hasn't entered a goods receipt.

eINV functionality does not apply to services, third party barter shipments, or multi-food outbound shipments from a national warehouse.

Users can enter a shipment receipt in WBSCM two ways:

1. Use the *Enter Shipment Receipt* transaction to create a shipment receipt manually. This work instruction reviews the steps to perform the *Enter Shipment Receipt* transaction.
2. Use the *Upload Shipment Receipt* transaction to upload a shipment receipt from a comma-separated values (CSV) or extensible markup language (XML) file.

The following work instructions provide guidance for working with domestic shipment receipts in specific circumstances:

- Modify Domestic Shipment Receipt - used when the user needs to modify a recently entered shipment receipt.
- Cancel Shipment Receipt- used when an ASN does not exist (BOL # field is not populated) for a line item.
- Enter Multi-Food Shipment Receipt - used for multi-food shipments, when the user needs to enter shipment receipts manually.
- Upload Domestic Shipment Receipt - used to upload shipment receipts for any PO using a CSV or XML file. This functionality cannot be used for multiple ASNs for the same PO line items.

Process Trigger

Perform this procedure when a recipient needs enter a goods receipt for a domestic shipment.

Prerequisites

- The PO or sales order must exist in WBSCM.
- eINV must be enabled for one or more line item(s) on the PO.

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 this 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 that 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	This can be a sales order number, purchase order number, or delivery document number. **Example:** 5000370678 (Note) To enter a domestic shipment receipt, only sales order and purchase order numbers are applicable.

Image: Enter Shipment Receipt Screen

4.   Click [Search] (the **Search** button) to execute the search.

Image: Associated Order Summary Screen

5.   Click the appropriate document link in the **Associated Document** column for the line item being receipted. In this example, 4100012785 (the **4100012785** link) is selected.

(Note) Recipients are only able to view their own purchase order line items. USDA users can view all purchase order line items.

Image: Enter Shipment Receipt Screen

6.   Perform one of the following:

If	Then
The displayed view is DOMESTIC_VIEW	Review the Enter Multi-Food Shipment Receipt work instruction.
The user is entering a new receipt with the same **Signed By** and/or **Received Date** applied to multiple line items using fields in the *Receipt Header*	Go to Step 7. ![info icon] (Note) This option is useful when receipting multiple PO line items with the same receipt date. When the PO has multiple lines with different information, the best practice is to receipt one line at a time to avoid inadvertently entering incorrect information.
The user is entering shipment receipt information for individual line item(s) only	Go to Step 10.
The user is ready to submit the receipt	Go to Step 20.

Image: Enter Shipment Receipt Screen

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

Field	R/O/C	Description
Railcar/BOL:	O	Rail car number or Bill of Lading number from the shipping document.
Signed By:	R	The name of the individual that signed for the receipt. **Example:** John Doe (Note) The **Signed By** field is optional when using the header information to Receipt All; this information can be entered manually for each line item prior to submitting the receipt.
Date Received:	R	The date the materials were received. **Example:** 02/25/2019 (Note) The **Date Received:** field cannot be a date in the future. This date can be today's date or an earlier date. (Note) The **Date Received:** field is optional when using the header information to Receipt All; this information can be entered manually for

Field	R/O/C	Description
		each line item prior to submitting the receipt.
Comments:	O	Free text field to describe details related to the shipment, if necessary. **Example:** Goods received

8. Click **Receipt All** (the **Receipt All** button) to copy all header data into all line items associated with the order. In this example, the header and **Receipt All** button are not used; the shipment is receipted as an individual line item.

9. Return to Step 6.

Image: Enter Shipment Receipt Screen

10. Click ☐ (the **Checkbox**) in the **Select** column to select the desired line item(s) to enter a shipment receipt.

(Note) To deselect lines that should not be receipted at this time, click ☑ (the **Checkbox**).

Image: Enter Shipment Receipt Screen
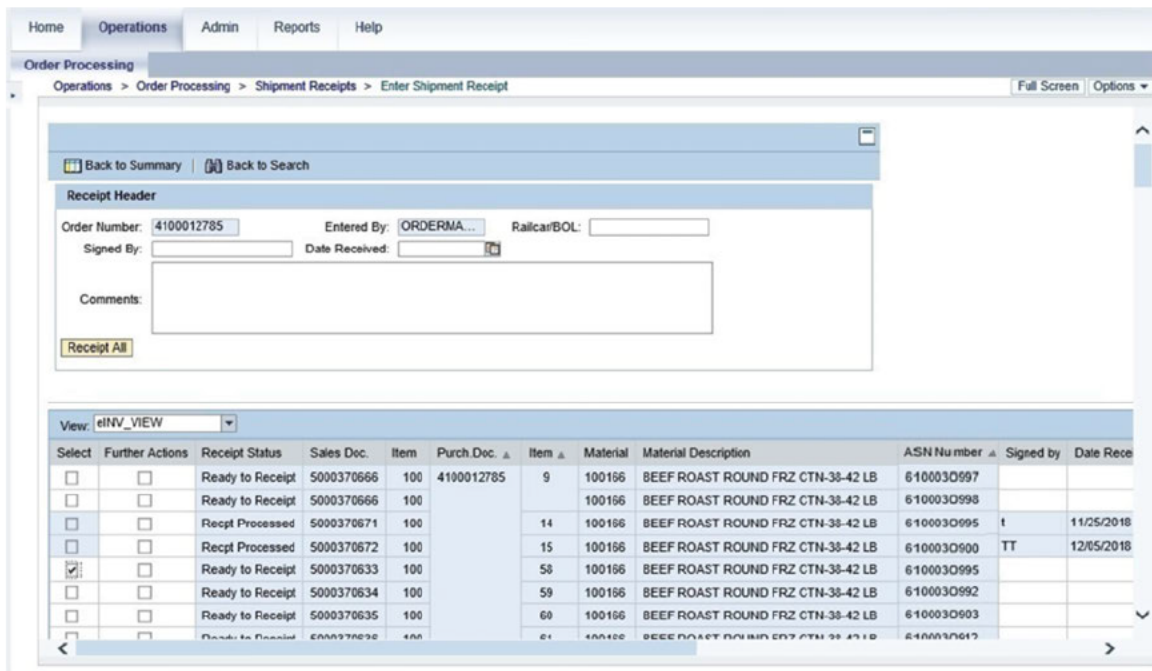
11. Perform one of the following:

If	Then
The user needs to review and/or enter information for a single PO line item(s)	Go to Step 12.
The user needs to review and/or enter information for single PO line item with multiple BOL numbers	Go to Step 14.
The user needs to report damage	Go to Step 16.
The user is ready to submit the receipt	Go to Step 20.

(Note) The *Enter Shipment Receipt* screen is sorted by the defaulted order: **Purch. Doc** number, then **Item** number, and finally **ASN**.

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

Field	R/O/C	Description
Signed By	R	The name of the individual that signed for the receipt. **Example:** John Doe (Note) Enter **Signed By** for the line item if it has not already been populated by an entry in the *Receipt Header* section.

Field	R/O/C	Description
Date Received	R	The date the materials were received. **Example:** 02/25/2019 (Note) Enter **Date Received:** for the line item if it has not already been populated by an entry in the *Receipt Header* section.
Good Qty.	C	The amount of materials received in good condition, equal to or less than the ordered amount, in pounds (LB). (Note) This field is used for receipting materials reported in pounds. When receipting variable weight items, this value is automatically calculated once the **Good Qty (in CS)** is applied. (Note) The unit of measure (UoM) is applied based on the Sales Order.
Good Qty (in CS)	C	The amount of materials received in good condition, in cases (CS). The **Good Qty (in CS)** is not required when receipting in pounds. (Note) This field is auto populated based on the corresponding ASN quantity and can be updated. However, for orders with a missing ASN, the field will be blank. (Note) The unit of measure (UoM) is applied based on the PO.
Over Qty	O	The amount of materials receipted for a PO line as **Good Qty** or **Good Qty (in CS)** that exceeds the ASN amount. (Note) This field is auto-populated based on the **Good Qty** or **Good Qty (in CS)** fields and the corresponding ASN Quantity. • Items that are receipted <u>over</u> the ASN quantity display in red. • Quantities that are receipted <u>under</u> the ASN quantity are included in the **Open Qty** total for that line.
Previous Qty	O	The amount of materials that were previously receipted on the line item.

Field	R/O/C	Description
Open Qty	O	The amount of materials that have not yet been receipted for the line item. (Note) This field is auto-populated based on the **Good Qty** or **Good Qty (in CS)** fields and the corresponding ASN quantity. For orders with a missing ASN, the field will populate with the PO quantity.
Reject Qty.	O	The amount of materials that are not usable and thus rejected.

(Note) Before entering values in the **Good Qty** field, check the values in the **Previous Qty** and **Open Qty** fields.

If the ASN has not yet been entered, the **Good Qty (in CS)** will display as zero, and the user will need to enter a valid quantity.

Domestic Direct Ship Orders are receipted by domestic customers (or AMS due to prompt pay time constraints) using any of the above methods.

13.   Return to Step 11.

Image: Enter Shipment Receipt Screen

in	ASN Number	Signed by	Date Received	Prev. Qty.	Open Qty.	Good Qty.	UoM Entry	Good Qty (in CS)	Damage Qty.	Reject Qty.	Over Qty.	Qty. UoM	BOL #
42 LB	6100030997	Jane Doe	12/25/2019	0.000	1,000.000	39,985.000	LB	1,000.000	9	0.000	0.000	CS	BOL 003
42 LB	6100030998	Jane Doe	12/25/2019	0.000	100.000	4,000.000	LB	100.000	9	0.000	0.000	CS	BOL987600
42 LB	6100030995	t	11/25/2018	1,000.000	0.000	0.000	LB	1,000.000	14	0.000	0.000	CS	BOL 103
42 LB	6100030900	TT	12/05/2018	1,000.000	0.000	0.000	LB	1,000.000	15	0.000	0.000	CS	BOL987654
42 LB	6100030995			1,000.000	0.000	40,000.000	LB	1,000.000	58	0.000	0.000	CS	BOL354540
42 LB	6100030992			0.000	1,000.000	40,000.000	LB	1,000.000	59	0.000	0.000	CS	BOL104
42 LB	6100030903			0.000	1,000.000	40,000.000	LB	1,000.000	60	0.000	0.000	CS	BOL987650
42 LB	6100030912			0.000	1,000.000	40,000.000	LB	1,000.000	61	0.000	0.000	CS	BOL987654

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

Field	R/O/C	Description
Signed by	R	The name of the individual that signed for the receipt. **Example:** Jane Doe (Note) Enter **Signed By** for the line item if it has not already been populated by an entry in the *Receipt Header* section.
Date Received	R	The date the materials were received. **Example:** 12/25/2019 (Note) Enter **Date Received:** for the line item if it has not already been populated by an entry in the *Receipt Header* section.
Good Qty.	C	The amount of materials received in good condition, equal to or less than the ordered amount, in pounds (LB). (Note) This field is used for receipting materials reported in pounds. When receipting variable weight items, this value is automatically calculated once the **Good Qty (in CS)** is applied. (Note) The Unit of measure (UoM) is applied based on the Sales Order.
Good Qty (in CS)	C	The amount of materials received in good condition, in cases (CS). The **Good Qty (in CS)** is not required when receipting in pounds. (Note) This field is auto populated based on the corresponding ASN quantity and can be updated. However, for orders with a missing ASN, the field will be blank. (Note) The Unit of Measure (UoM) is applied based on the PO.
Over Qty	O	The amount of materials receipted for a PO line as **Good Qty** or **Good Qty (in CS)** that exceeds the ordered amount. (Note) This field is auto-populated based on the **Good Qty** or **Good Qty (in CS)** fields and the corresponding ASN Quantity.

Field	R/O/C	Description
Previous Qty	O	The amount of materials that were previously receipted on the line item.
Open Qty	O	The amount of materials that have not yet been receipted for the line item. (Note) This field is auto populated based on the **Good Qty** or **Good Qty (in CS)** fields and the corresponding ASN Quantity. For orders with a missing ASN, the field will populate with the PO quantity.
Reject Qty	O	The amount of materials that are not usable and thus rejected.

(Note) Purchase Orders with multiple ASNs will have a separate BOL number for each ASN. During the receipting process, select the BOL number documented on the provided paperwork. As applicable, complete receipt details for each line item.

15. Return to Step 11.

Image: Enter Shipment Receipt Screen

16. Click the number icon in the **Damage Qty** column corresponding to the line with damaged or rejected material. In this example, 58 (the **Damage Qty** button for line item #58) is selected.

(Note) The *Enter Damage Details* Pop-up can be used to document details about materials that were reported as **Reject Qty**. The **Damage Quantity** field is left blank.

Image: Enter Damage Details Pop-up
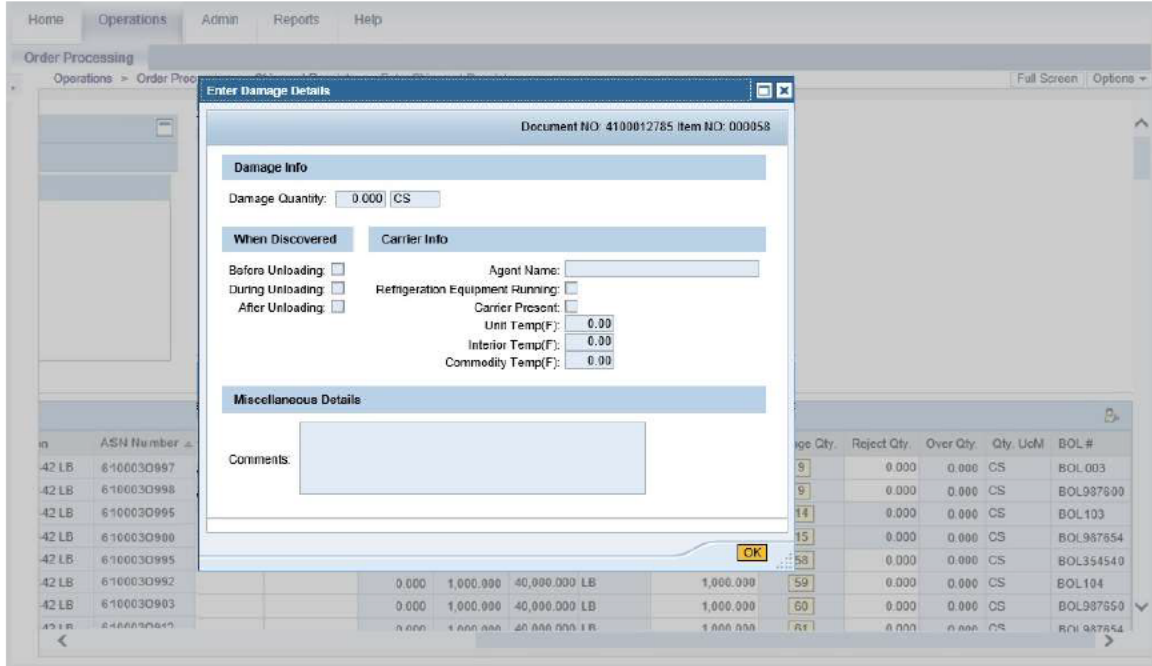
17. As required, complete/review the following fields:

Field	R/O/C	Description
Damage Quantity:	R	Total amount of materials damaged due to transport, unloading, or improper storage. (Note) Do not enter a rejected quantity in this field; if documenting reasons for rejecting materials, leave this field blank.
Before Unloading:	O	A checkbox to indicate that the damaged materials were received "before unloading" from the carrier.
During Unloading:	O	A checkbox to indicate that the damaged materials were received "during unloading" from the carrier.

Field	R/O/C	Description
After Unloading:	O	A checkbox to indicate that the damaged materials were received "after unloading" from the carrier.
Agent Name:	O	An agent who is responsible for delivering the materials to the recipient.
Refrigeration Equipment Running:	O	A checkbox to indicate that the refrigeration equipment was running at the time of receiving the materials.
Carrier Present:	O	A checkbox to indicate that the person who delivered the materials was present at the time of receiving the materials.
Unit Temp(F):	O	The temperature of the unit at the time of receiving.
Interior Temp(F):	O	The temperature of the interior container or truck where the materials were kept.
Commodity Temp(F):	O	The temperature of the materials received.
Comments:	O	Free text field to describe details related to the shipment, if necessary.

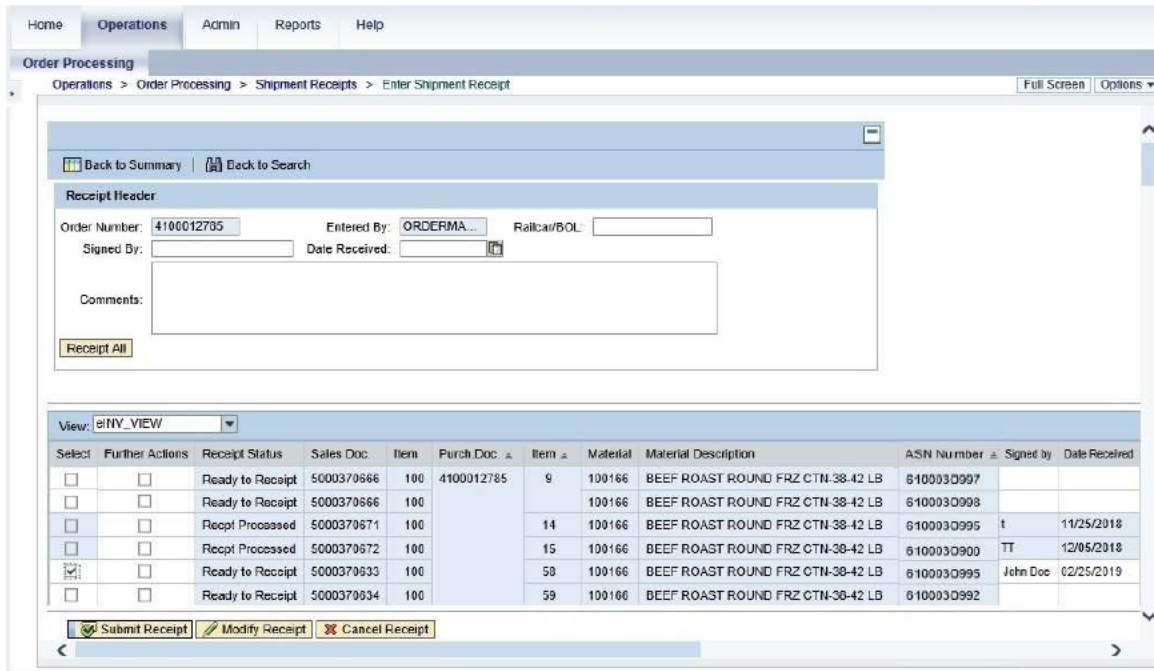18. Click $\boxed{\text{OK}}$ (the **OK** button) to accept the damage details and return to the *Enter Shipment Receipt* screen.
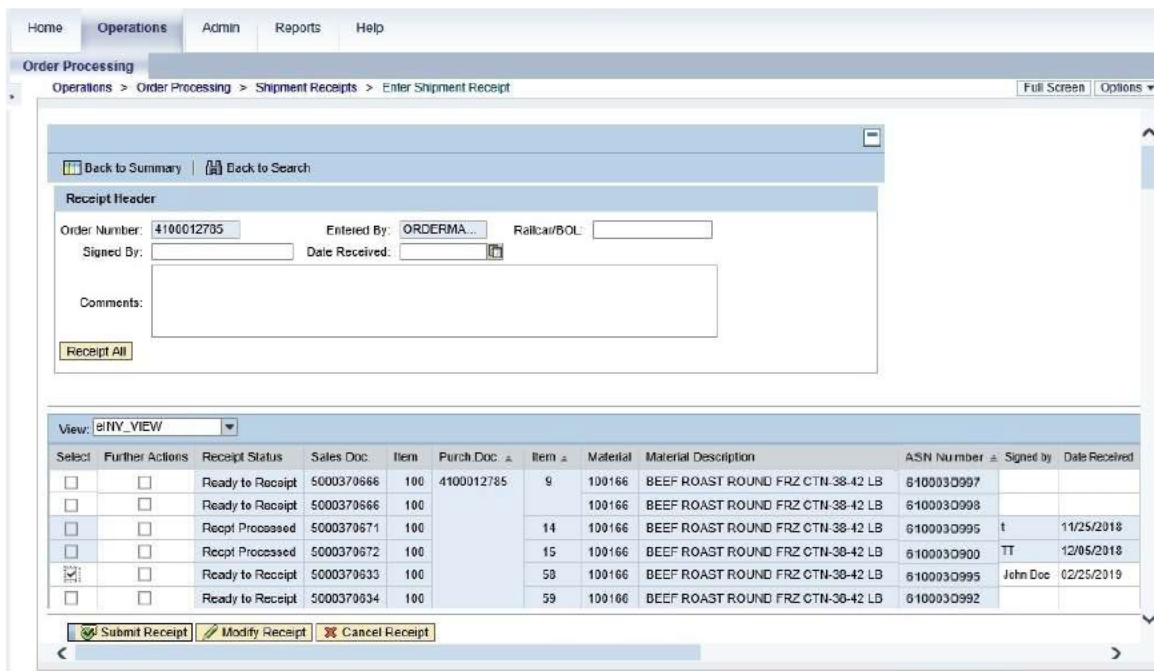
Image: Enter Shipment Receipt Screen

19. Perform one of the following:

If	Then
The user needs to continue working on the current receipt	Go to Step 11.
The user is ready to submit the receipt	Go to Step 20.

Image: Enter Shipment Receipt Screen

20. Click [Submit Receipt] (the **Submit Receipt** button) to submit the receipt to USDA.

(Note) The line item status codes for submitted receipts are:

- **Processing Recpt** - The receipt was submitted and is processing in WBSCM.
- **Pending Review** - The submitted receipt will be reviewed by USDA. This may reflect a difference in quantity between recipient and vendor or a modification after the initial day of entry.
- **Recpt Processed** - The receipt for delivery by vendor to the initial destination has been updated in WBSCM.
    - For deliveries directly to the customer, the destination is the Ship-To.
    - For deliveries with additional transportation services (e.g., Offshore), the initial destination is where the vendor transfers materials to the transportation provider (e.g., port).
- **Rcept2 Processed** - For deliveries that included additional transportation services (e.g., Offshore), the receipt for delivery to final destination has been updated in WBSCM.

(Note) WBSCM sends an email notification to the vendor when a receipt is entered with Over, Short, or Damaged (O/S/D) materials/commodities or if there was no ASN at the time the receipt was submitted.

Image: Enter Shipment Receipt Screen
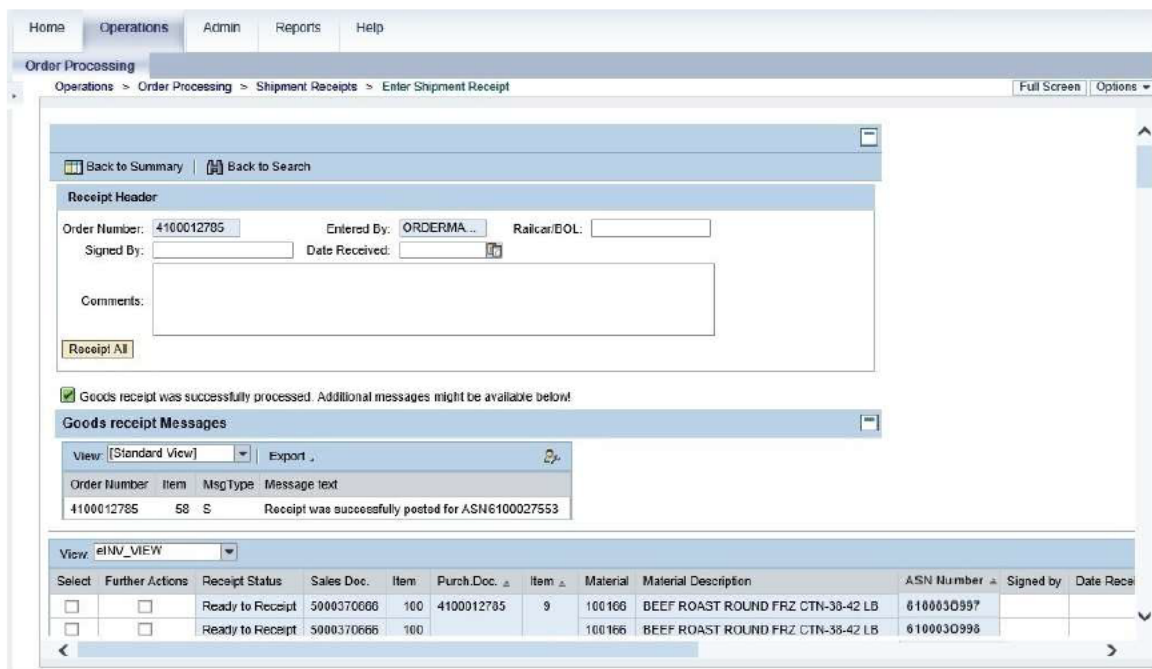
21. Review the system message at the top of the screen.

(Note) In the *Goods receipt Messages* section, the **MsgType** column provides detail for each Order Number and item:

- **S** indicates the receipt was successfully submitted.
- **E** indicates an error. Based on the type of error received, instructions are displayed such

as **Please retry Good Receipt for the line item** or **Please contact the WBSCM Helpdesk to complete Good Receipt for the item**.

22.   The transaction is complete.

RESULT

A shipment receipt for a purchase order line item was created in WBSCM by manual data entry. Optional and required information was entered in a shipment receipt, including:

- Date Received
- Signed By
- Quantities received or rejected
- Damaged Goods information
- Comments

PROCESS OVERVIEW

Purpose

Domestic recipient organizations (or USDA on behalf of a recipient) use this procedure to manually enter a multi-food shipment receipt for a sales order or a delivery order. The shipment receipt, also known as the goods receipt (GR), is the method by which the recipient confirms the materials requested in WBSCM have been delivered. The shipment receipt provides details, such as when the shipment was received, who signed for it, and if any part of it was damaged and rejected. The recipient also uses this procedure to document quantities of materials received, reporting both "good" quantities and Over/Short/Damaged (O/S/D) quantities.

Timely entry of a multi-food shipment receipt is a critical step in WBSCM. Current FNS Policy requires entry of shipment receipts within two calendar days of receiving a delivery.

Users can enter a multi-food shipment receipt in WBSCM two ways:

1. Use the *Enter Shipment Receipt* transaction to create a shipment receipt manually.
2. Use the *Upload Shipment Receipt* transaction to upload a shipment receipt from a comma separated value (CSV) or extensible markup language (XML) file. Refer to the Upload *Domestic Shipment Receipts* work instruction for additional details.

Process Trigger

Perform this procedure when a recipient has received a shipment and needs to create a multi-food shipment receipt for the received materials.

Prerequisites

*   The sales order or delivery document must exist 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.
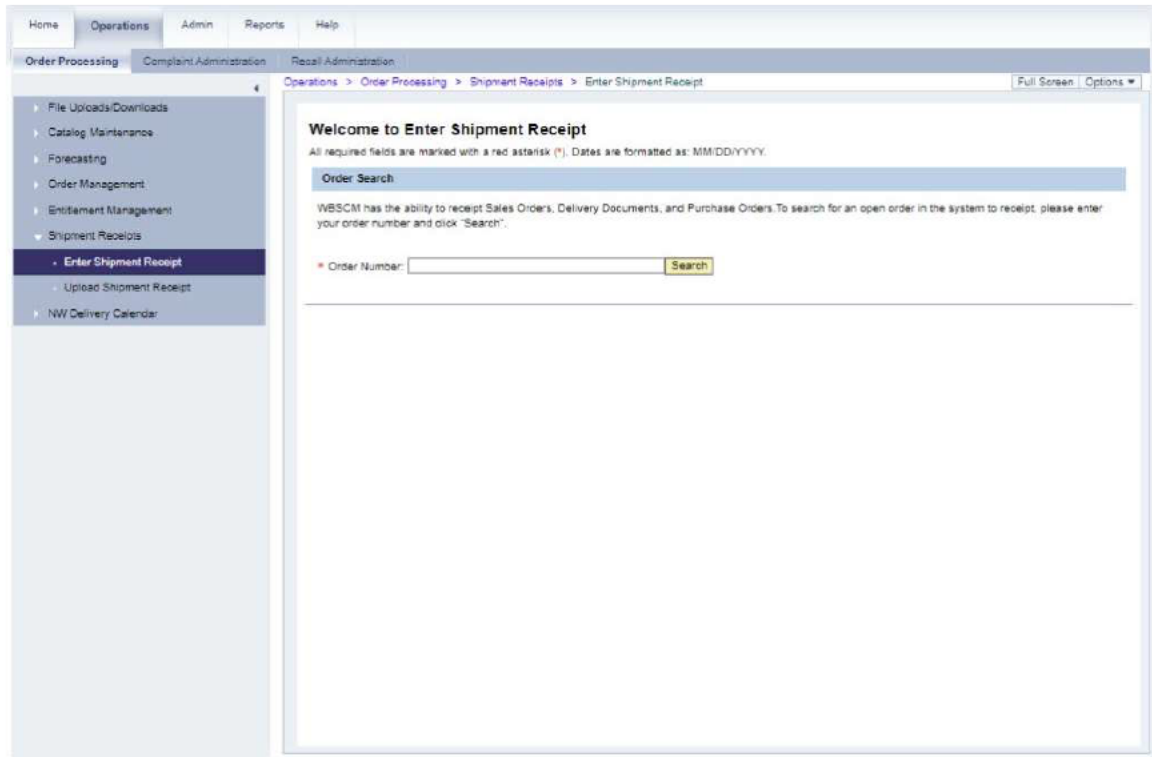
Tips and Tricks

*   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.

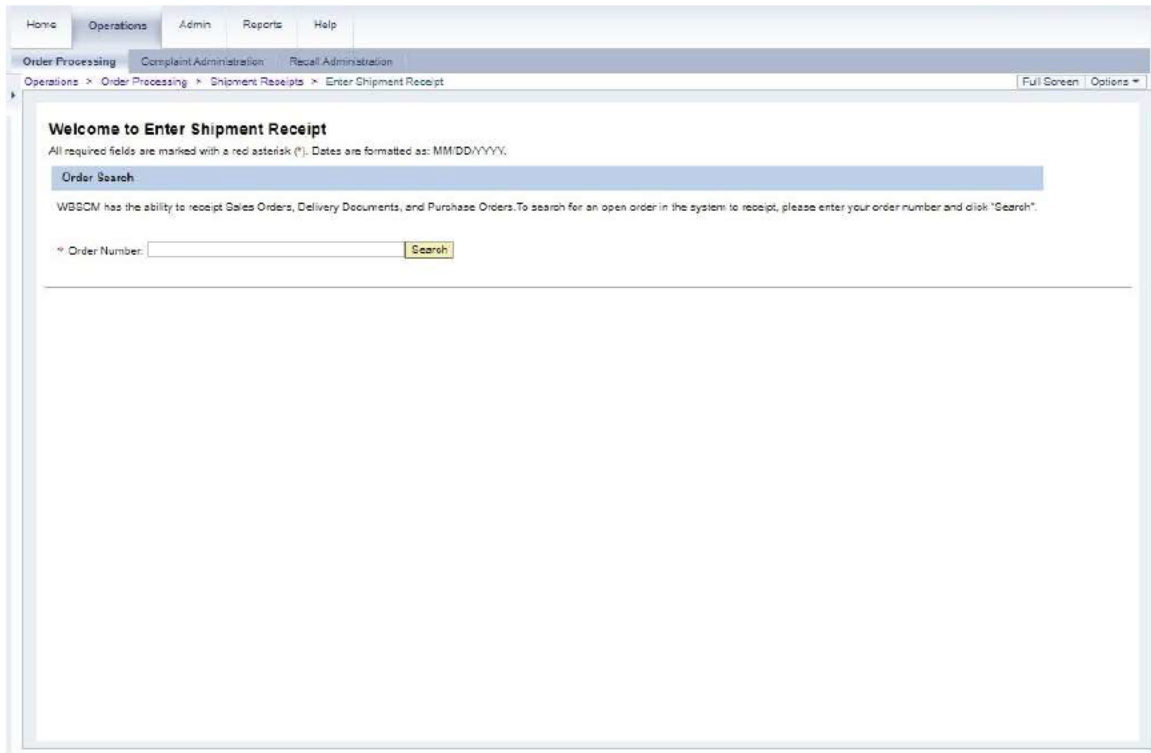   **Image: Enter Shipment Receipt Screen**

2. Click ◄ (the **Hide Navigator** arrow) to minimize the Portal menu. Note that 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	This can be a sales order number, purchase order number, or delivery document number. **Example:** 1000264118 (Note) In the case of multi-food shipment enter a sales order number or a delivery document number.

(Note) In this example, the sales order number is entered. Only line items associated with the sales order are displayed on the *Enter Shipment Receipt* screen.

Image: Associated Order Screen

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

Image: Associated Order Summary Screen

5. Click the appropriate link in the **Associated Document** column to continue. In this example, 0080038473 (the **0080038473** link) is selected.

> (Note) When searching by a sales order number or delivery document number, the *Associated Order Summary* screen displays. Click the document link in the **Associated Document** column to continue to the *Enter Shipment Receipt* screen.

Image: Enter Shipment Receipt Details Screen

6. Perform one of the following:

If	Then
The displayed view is eINV_VIEW	Review the *Enter Domestic Shipment Receipt* work instruction. (Note) For multi-food orders the view is always **DOMESTIC_VIEW**.
The user is entering a new receipt with the same **Signed By** and/or **Received Date** applied to multiple line items using fields in the *Receipt Header*	Go to Step 7. (Note) This option is useful when receipting multiple deliveries or sales order lines. For multiple lines with different information, the best practice is to receipt one line item at a time to avoid inadvertently entering incorrect information.
The user is entering shipment receipt information for individual line item(s) only	Go to step 10.

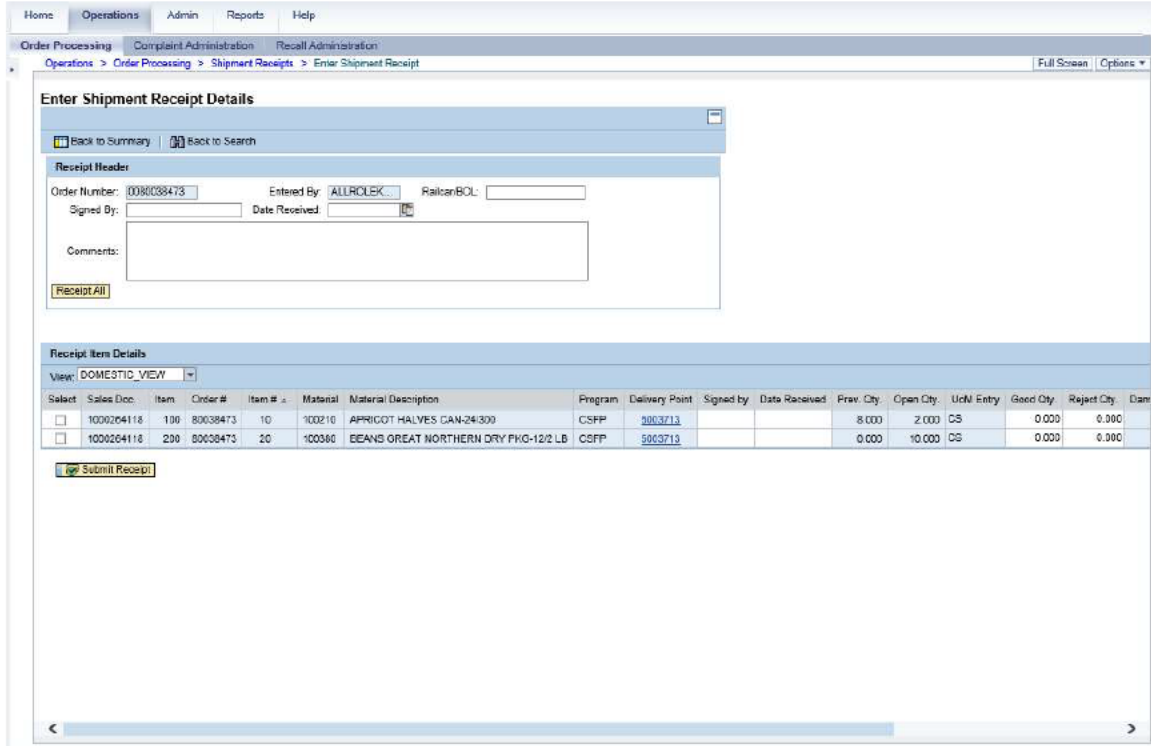| If	Then
The user is ready to submit the receipt	Go to Step 18.

(Note) Users can create their own layout and save it as their Personal View for use in the future using (the **Open Settings** icon). Refer to the *Reporting Navigation* job aid for tools and techniques to adjust the content and order of the output to save a personal view.

Image: Enter Shipment Receipt Details Screen

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

Field	R/O/C	Description
Signed By:	C	The name of the individual that signed for the receipt. **Example:** John Doe (Note) The **Signed By** field is optional when using the header information to Receipt All; this information can be entered manually for each line prior to submitting the receipt.
Date Received:	C	The date the materials were received. **Example:** 08/12/2021 (Note) The **Date Received:** field cannot be a date in the future. This date can be
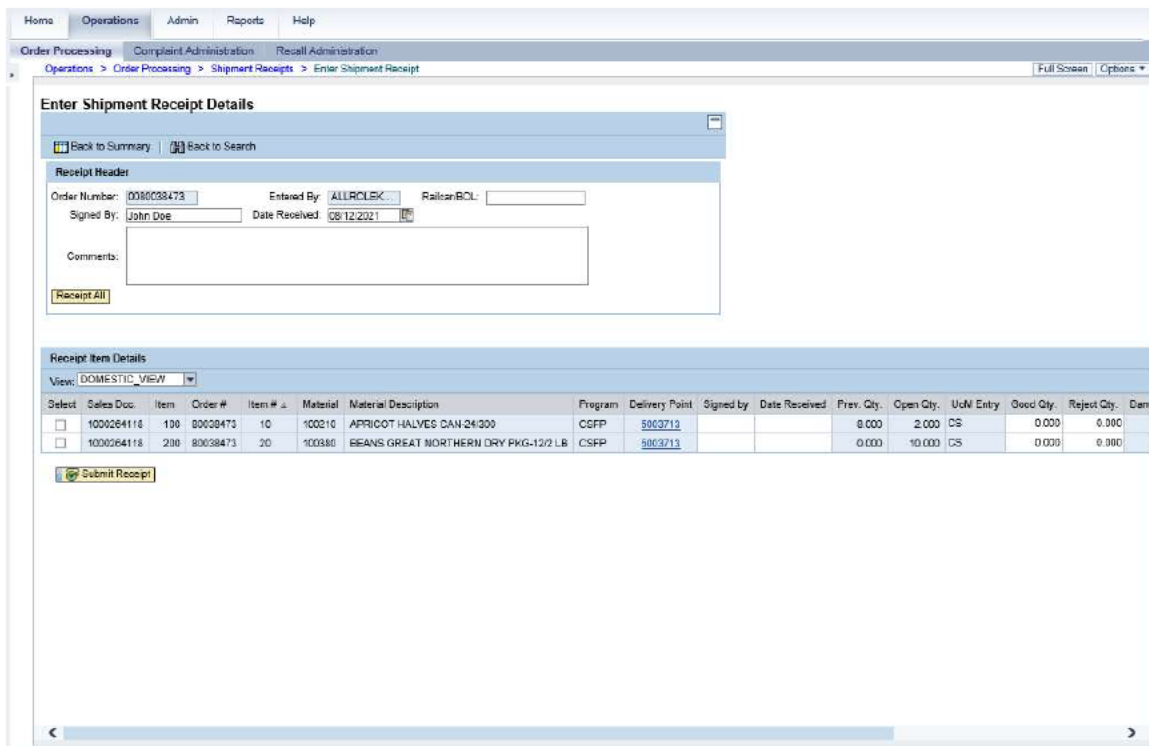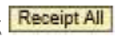
Field	R/O/C	Description
		today's date or an earlier date. (Note) The **Date Received:** field is optional when using the header information to Receipt All; this information can be entered manually for each line item prior to submitting the receipt.
Comments:	O	Free text field to describe details related to the shipment, if necessary.

Image: Enter Shipment Receipt Details Screen

8. Click [Receipt All] (the **Receipt All** button) to copy all header data into the line items associated with the order. In this example, the **Receipt All** button is not used; the shipment is receipted as an individual line item.

(Note) [Receipt All] (the **Receipt All** button) does not submit the receipt to USDA.

9. Return to Step 6.

Image: Enter Shipment Receipt Details Screen
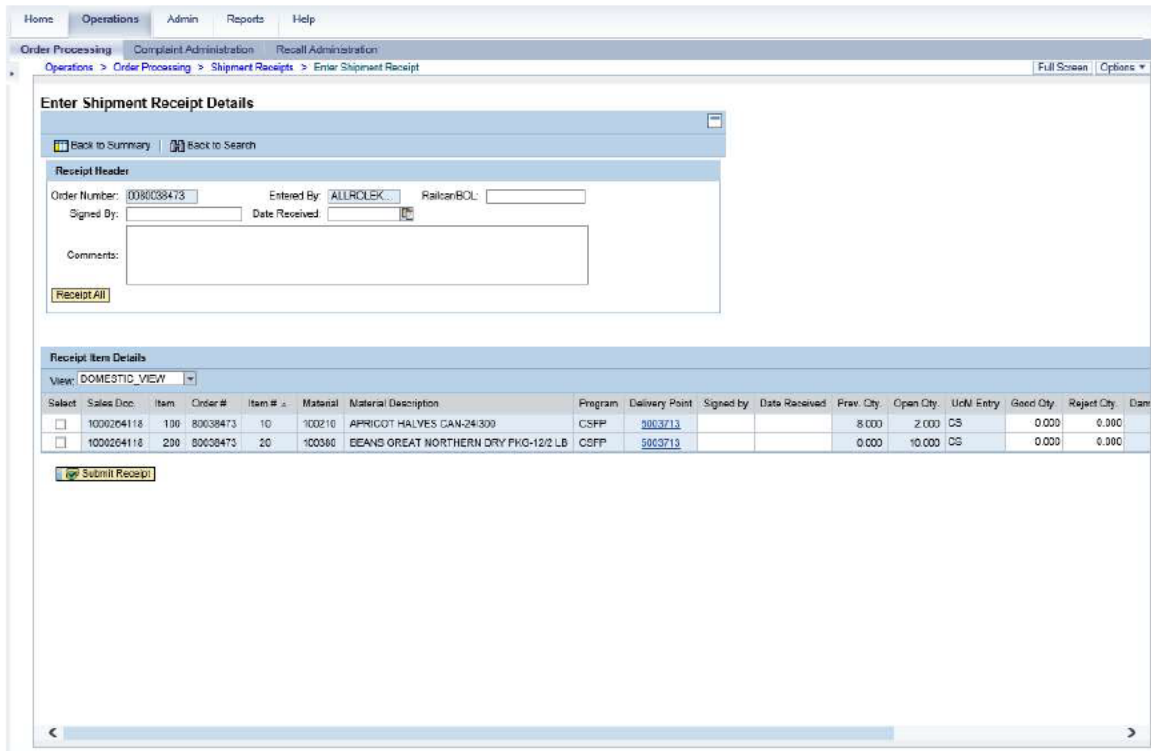
10. Click ☐ (the **Checkbox**) in the **Select** column to choose the desired line item(s) to enter a shipment receipt.

> (Note) Depending on previously completed steps, one or more line items may already be selected.

> (Note) To deselect line items that are not being receipted at this time, click ☑ (the **Checkbox**) in the **Select** column.

11. Perform one of the following:

If	Then
The user needs to review and/or enter information for line item(s)	Go to Step 12.
The user needs to report damage	Go to Step 14.
The user is ready to submit the receipt	Go to Step 18.

Image: Enter Shipment Receipt Details Screen

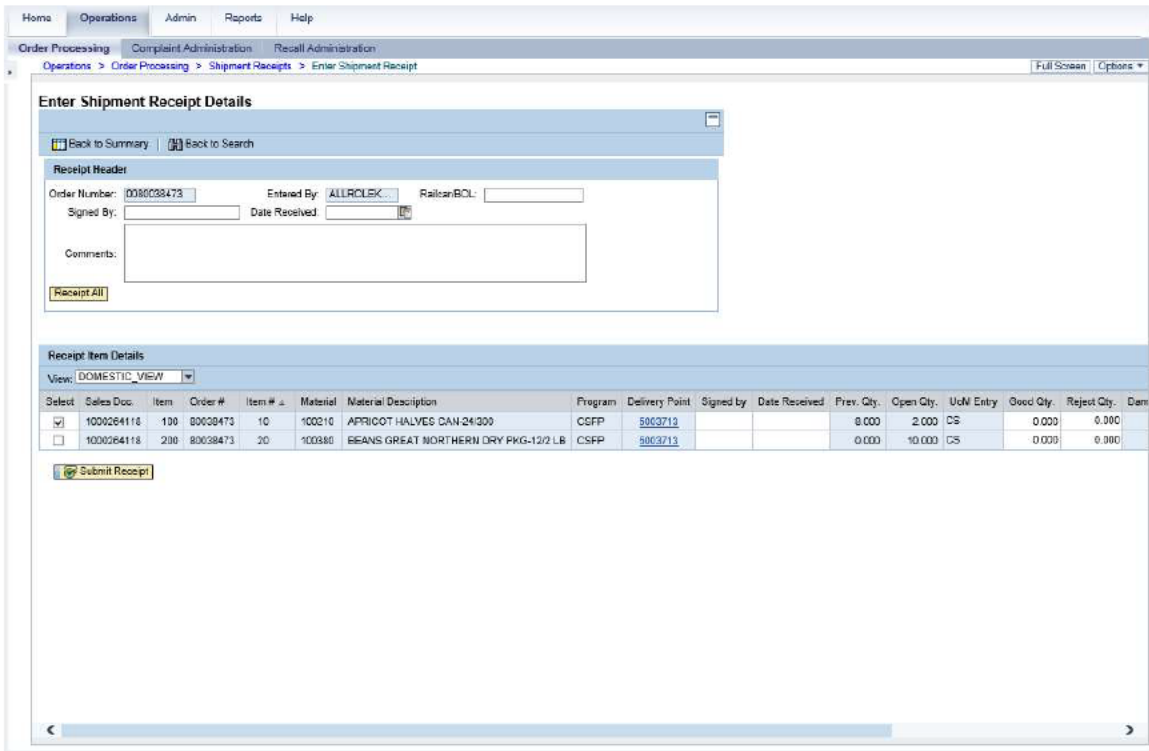12.   As required, complete/review the following fields:

Field	R/O/C	Description
Signed by	R	The name of the individual that signed for the receipt. **Example:** John Doe (Note) Enter **Signed By** for the line item if it has not already been populated by an entry in the *Receipt Header* section.
Date Received	R	The date the materials were received. **Example:** 08/12/2021 (Note) Enter **Date Received** for the line item if it has not already been populated by an entry in the *Receipt Header* section.
Good Qty.	R	The amount of materials received in good condition, equal to or less than the ordered amount, in pounds (LB). (Note) The unit of measure (UoM) is applied based on the Sales Order.

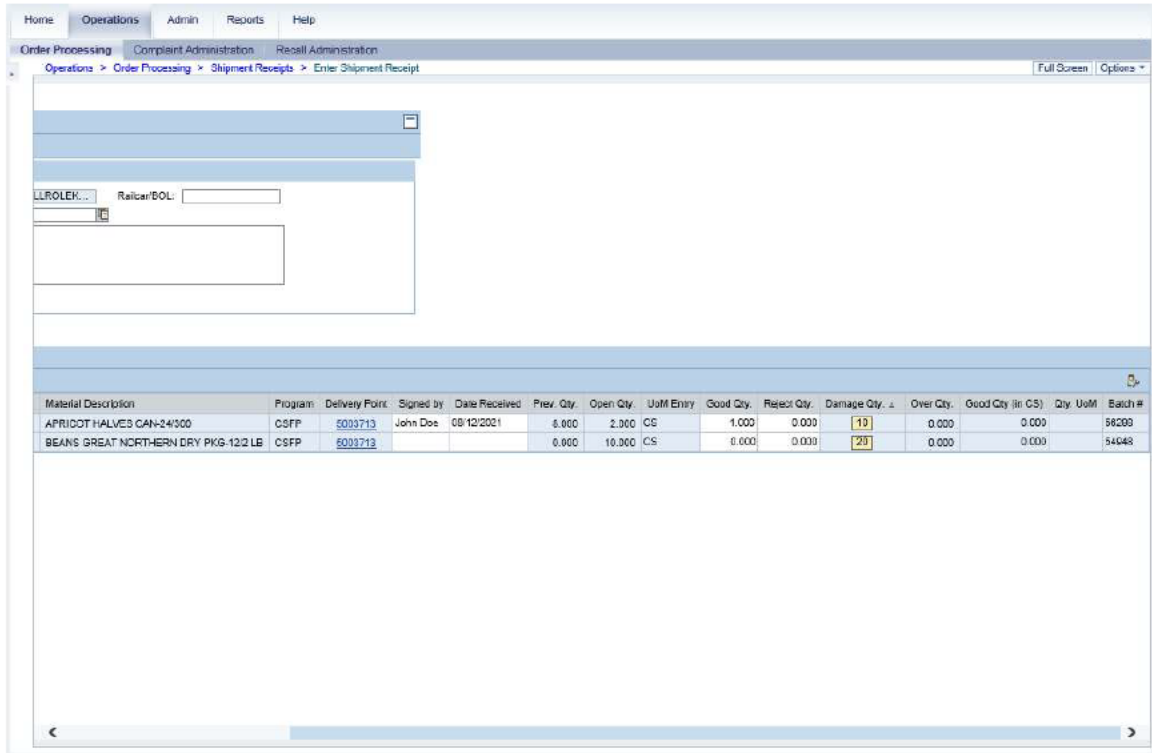| Field	R/O/C	Description
Good Qty (in CS)	C	The amount of materials received in good condition, in cases (CS). The **Good Qty (in CS)** is not required when receipting in pounds. **Example:** 995 (Note) The unit of measure (UoM) is applied based on the Sales Order.
Over Qty.	C	The amount of materials receipted for a PO line as **Good Qty** or **Good Qty (in CS)** that exceeds the ordered amount. (Note) For multi-food, the **Over Qty.** column is auto-populated based on the **Good Qty.** or **Good Qty (in CS)** fields and the corresponding Sales Order quantity.
Prev. Qty.	O	The amount of materials that were previously receipted on the line item.
Open Qty.	C	The amount of materials that have not yet been receipted for the line item. **Example:** 1,000.000 (Note) The **Open Qty.** column is auto-populated based on the **Good Qty.** or **Good Qty (in CS)** fields and the corresponding PO quantity.
Reject Qty.	O	The amount of materials that are not usable and thus rejected.

(Note) Validate the entries in the **Previous Qty.** and **Open Qty.** fields prior to entering values in the **Good Qty.** field.

Multi-Food Outbound Orders are receipted by domestic customers using any of the following entry methods to enter a receipt. The method of entry is based on the unit of measure for the material:

- **When receipting LB materials:** Enter only the **Good Qty.** field (in LB).
- **When receipting CS materials:** Enter only the **Good Qty (in CS)** field. When the receipt is entered, the system converts the number of cases into pounds using the standard conversion ratio for the material.
- **When receipting variable weight materials:** Enter both the **Good Qty.** and **Good Qty (in CS)** fields.

13. Return to Step 11.

Image: Enter Shipment Receipt Details Screen

14. Click the number icon in the **Damage Qty.** column. In this example, [10] (the **Damage Qty.** button) for line item #10 is selected.

> (Note) The *Enter Damage Details* Pop-Up can be used to document details about materials that were reported as **Reject Qty.** The **Damage Quantity** field should remain blank.

Image: Enter Damage Details Pop-Up Screen

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

Field	R/O/C	Description
Damage Quantity:	R	Total amount of materials damaged due to transport, unloading, or improper storage. **Example:** 3 (Note) Do not enter a rejected quantity in this field; if documenting reasons for rejecting materials, leave this field blank.
Before Unloading:	O	A checkbox to indicate that the damaged materials were received "before unloading" from the carrier.
During Unloading:	O	A checkbox to indicate that the damaged materials were received "during unloading" from the carrier.

Field	R/O/C	Description
After Unloading:	O	A checkbox to indicate that the damaged materials were received "after unloading" from the carrier.
Agent Name:	O	An agent who is responsible for delivering the materials to the recipient.
Refrigeration Equipment Running:	O	A checkbox to indicate that the refrigeration equipment was running at the time of receiving the materials.
Carrier Present:	O	A checkbox to indicate that the person who delivered the materials was present at the time of receiving the materials.
Unit Temp(F):	O	The temperature of the unit at the time of receiving.
Interior Temp(F):	O	The temperature of the interior container or truck where the materials were kept.
Commodity Temp(F):	O	The temperature of the materials received.
Comments:	O	Free text field to describe details related to the shipment, if necessary. **Example:** Inventory damaged during storage process in house

Image: Enter Damage Details Pop-Up Screen
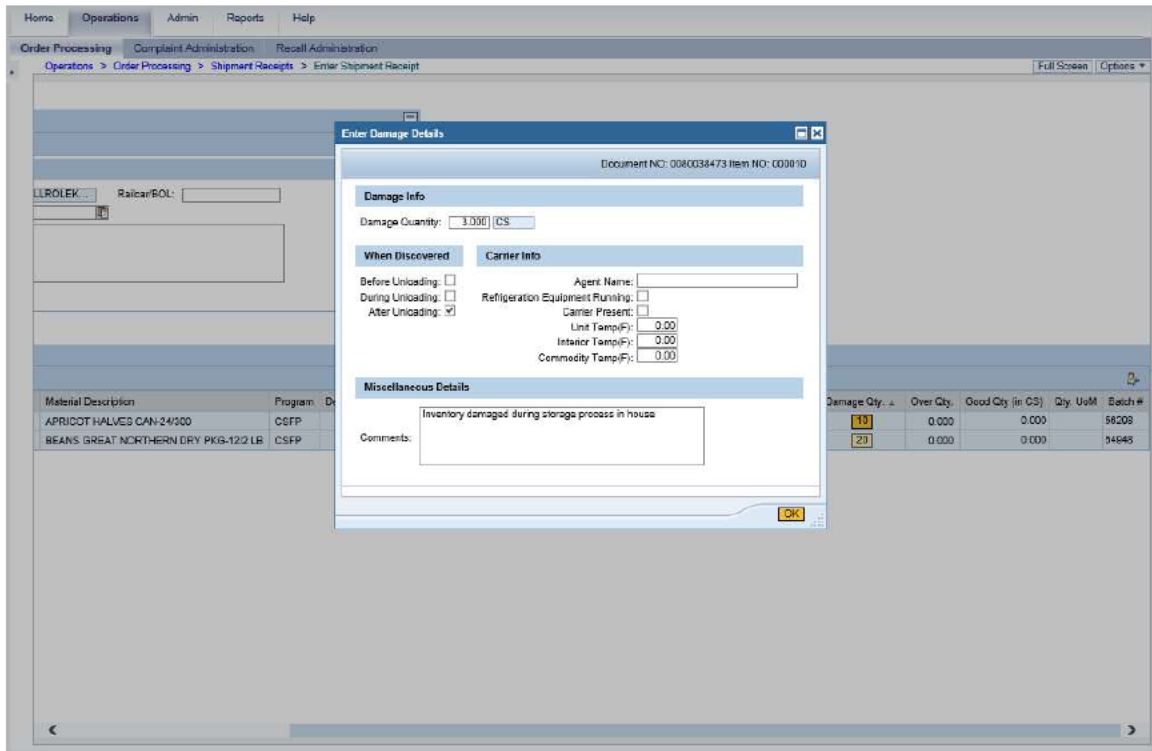
16. Click [OK] (the **OK** button) to accept the damage details and return to the *Enter Shipment Receipt Details* screen.

17. Perform one of the following:

If	Then
The user will continue working on the current receipt	Go to Step 10.
The user is ready to submit the receipt	Go to Step 18.

Image: Enter Shipment Receipt Details Screen

18. Click [Submit Receipt] (the **Submit Receipt** button) to submit the receipt to USDA.

> (Note) Once submitted, the completely receipted line items cannot be displayed through the **Enter Shipment Receipt** transaction and the receipt can no longer be edited. If the line item has an **Open Qty**, the user is able to view the line item and continue entering subsequent receipts. The Multi-Food Received Shipment Report can be used to display receipted line items.
>
> Contact the WBSCM Help Desk for assistance with modifications or to cancel a previously submitted receipt.

Image: Enter Shipment Receipt (Goods receipt Messages) Screen
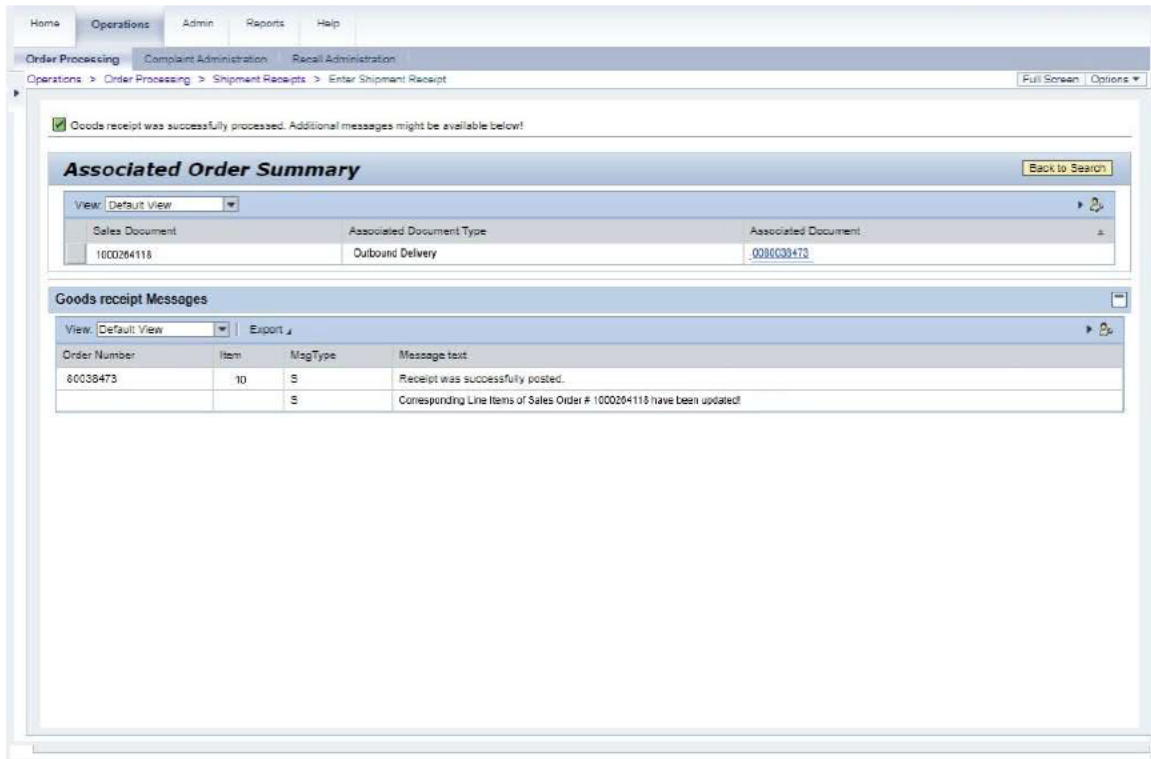
19.   Review the system message at the top of the screen.

> (Note) The **MsgType** column, in the *Goods receipt Messages* section, provides detail for each **Order Number** and **Item**:
>
> - **S** indicates the receipt was successfully submitted.
> - **E** indicates an error. Based on the type of error received, instructions are displayed. Examples are: **Please retry Goods Receipt for the line item** or **Please contact the WBSCM Helpdesk to complete Goods Receipt for the item**.

20.   The transaction is complete.

RESULT

A multi-food shipment receipt for a purchase order line item was created in WBSCM by manual data entry. Optional and required information was entered in a shipment receipt, including:

- Date received
- Name of receiver
- Quantities received or rejected
- Damaged goods information
- Comments