

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

Home Operations Admin	Reports Halp	
Order Processing		
	Operations > Order Processing > Catalog Maintenance > Display RA Catalog	Full Screen Options -
File Uploads/Downloads Catalog Maintenance	Select Business Partner	
Display RA Catalog Maintain Direct-Ship Deliver Order Management Shipment Receipts NW Delivery Calendar	RA Organization.* Program: Include Multi-Food?:	

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

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Operations > Order Processing > Catalog Maintenance > Display RA Catalog	Full Screen Op
Select Business Partner	
RA Organization: * 🔅 🔲 🗍 Program: 🗞	
Include Multi-Food?	
submt	

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.1EA42E9629D548D187FD88222D E5565B61DAE25139534354BB633244 76A7D0BC
Program:	0	Acronym to identify a USDA food distribution program.
Include Multi-Food?:	0	When checked, multi-food commodities are included. (Note) The 1EA42E9629D548D187FD88222DE55 65B61DAE25139534354BB63324476A 7D0BCInclude Multi-Food?: field defaults to unchecked.1EA42E9629D548D187FD8 8222DE5565B61DAE25139534354BB6 3324476A7D0BC



Image: Display RA Catalog Screen

r Processing Operations > Order Processing > Catalog Maintenance > Display RA Catalog	Full Screen 0
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Select Business Partner	
RA Organization: * 🚍 4001181 🔲	
Program: 🗇 🗁	
Include Multi-Food?	
Submit	

4. Click Submit (the Submit button) to display the catalog for the selected RA Organization. Image: Display RA Catalog Screen

Processing								
perations > Or	der Processing > Catalo	og Maintenance 🕞 🛛	Display RA Catalog				Full Screen	Op
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Progra nclude Multi-Fool	am. 🗞 📃 d?: 🗌	ā)) \$					
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RA BP: 400118 View: CATALO	1 RA Name: Central 1	t in	Program Type ≟ Entitlement	Product Group = CEREAL, FORTIFIED	Product Number = 100530	Product Description CEREAL CORN FLKS -SUBST		
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5. As required, complete/review the following fields:

Field	R/O/C	Description
Program	0	Acronym to identify a USDA food distribution program.
Program Sub-Type	0	Within a USDA program, distinguishes the sub- program used to process and deliver products. (Note) 1EA42E9629D548D187FD88222DE55 65B61DAE25139534354BB63324476A 7D0BC Program Sub-Types include the following: • Direct Delivery • Processing Diversion • Multi- Food1EA42E9629D548D187F D88222DE5565B61DAE25139 534354BB63324476A7D0BC
Catalog Type	0	 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.1EA42E9629D548D187FD88222DE5 565B61DAE25139534354BB63324476 A7D0BC (Note) For multi-food entries and the DA Program, this field will be blank.1EA42E9629D548D187FD88222 DE5565B61DAE25139534354BB63324 476A7D0BC
Program Type	ο	The manner in which a program is funded. (Note) 1EA42E9629D548D187FD88222DE55 65B61DAE25139534354BB63324476A 7D0BCProgram Types include: • Entitlement • Bonus1EA42E9629D548D187F D88222DE5565B61DAE25139 534354BB63324476A7D0BC (Note) For Multi-Food entries and the DA Program, this field will be blank.1EA42E9629D548D187FD88222 DE5565B61DAE25139534354BB63324



Field	R/O/C	Description
Product Group	0	Group to which the product or material belongs.
Product Number	0	Unique identifier assigned to a product.
Product Description	0	Information used to characterize a material.
Unit	0	Unit of measurement (such as cases or pounds) for ordering products.
RA Order By Date	0	The date by which the RA must place the order. Example: (Note) The 1EA42E9629D548D187FD88222DE55 65B61DAE25139534354BB63324476A 7D0BCRA Order By Date is calculated by subtracting the SDA Lead Time from the FNS Order By Date.1EA42E9629D548D187FD88222 DE5565B61DAE25139534354BB63324 476A7D0BC (Note) For Multi-Food entries, this field will be "Not Applicable".1EA42E9629D548D187FD 88222DE5565B61DAE25139534354BB 63324476A7D0BC
SDA Lead Time	0	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.1EA42E9629D548D187FD88222D E5565B61DAE25139534354BB633244 76A7D0BC



Field	R/O/C	Description
FNS Order By Date	0	The date by which FNS requires the consolidated order to be submitted.
		(Note) For Multi-Food entries, this field will be blank.1EA42E9629D548D187FD88222 DE5565B61DAE25139534354BB63324 476A7D0BC
Deliver By Date	0	The date by which the products should be delivered.
		(Note) The 'NO Delivery Date Set" value will appear under the 1EA42E9629D548D187FD88222D E5565B61DAE25139534354BB633244 76A7D0BC RA Order By Date column field when SDAs do not assign to their RA View.1EA42E9629D548D187FD88222 DE5565B61DAE25139534354BB63324 476A7D0BC
		(Note) For Multi-Food entries, this field will be blank.1EA42E9629D548D187FD88222 DE5565B61DAE25139534354BB63324 476A7D0BC

6. Perform any of the following:

lf	Then	
The user needs to download RA catalog view		port (the Export button) to expoog view data.
	2. Click E	port to Microsoft Excel (the Export
	to Micro	soft Excel button).
	3. Click	Open (the Open button).
		ind save the spreadsheet as
	appropria	
	5. Click 🗡	(the Close button) to close the
	spreadsh	eet and return to the transaction.
The user needs to customize the appearance of	1. Click	🥨 (the Open Settings button)
the RA catalog		n the right side of the screen.
	As appro	priate, select fields in the Hidden
	Columns	and click
	Add butt	on) to add columns to the
	displayed	l view.
		priate, select fields in the
	Displaye	d Columns and click
	Kem	ove (the Remove button) to



Work Instruction Display RA Catalog Views

lf	Then
	 remove columns from the displayed view 4. As appropriate, select fields in the Displayed Columns and click T T A A A A A A A A A A A A A A A A A A
	 Click Save as (the Save asbutton) to save the new view.
	6. Name the new view in the Description field.
	7. Click (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	 Click (the Open Settings button) located on the right side of the screen.
	2. Click Filter (the Filter tab).
	 Click (the Drop-down button) in the find to select the column to be filtered from the drop-down list.
	 Click I (the Matchcode button) in the th 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

(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.



PROCESS OVERVIEW

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.
 - A **Conditional field**: an entry that becomes required as a result of entering something previous to it, which then deems it required
 - An **Optional field:** you may enter information in an optional field, but an entry is not required for the completion of the transaction
- Refer to WBSCM Portal Basic Navigation course for tips on creating favorites, perform searches, etc.

Reminders

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



PROCEDURE

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

WBSCM Homepage Screen

Home Operations Admin News and Alerts Inbox	Help			
News and Alerts	_			Back Forwer
Detailed Havigation F • Ilews and Alerts Portal Favorites E, 0		60		📓 My Control Panel
	Search All Forums: Forum / Category		Topics / Messages	Last Post
	WBSCM News and Announcements	489	274	Aug 5, 2009 1:55 PM Last Post By: <u>FNS-05, Training »</u>
	FNS News and Announcements	471	8/24	Aug 6, 2009 1:24 PM Last Post By: <u>FNS-12, Training w</u>
	• ENS News and Announcements (SDA)	22	070	Jul 29, 2009 2:25 PM
	Full Truck Load Requests	55	1/3	Aug 5, 2009 1:54 PM Last Post By: <u>FNS-05, Training »</u>
	USDA Holds and Recalls	23	0/0	Jul 29, 2009 2:28 PM
				l

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.



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orum: USD	A Holds and Reca	alls		
			Search Forum	
		🤝 Watch Forum 🔍 S	Search Forum	Go
Thread	Author	Views	Replies	Last Post

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** (the **FNS Case #514: Ham Recall** ink) to view this thread.

(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

Stand of an address of the second s	artment of Agriculture upply Chain Manageme	ent	Welcome SDA-01 SE	X4-01	
Home Operations Adm	nin Help				
News and Alerts Inbox					
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	Thread	Author	Vicws	Replics	Last Post
		514: Ham Recall S-01, FNS-01 Aug 14, 2	009 1:20 PM		
	New content sind	ce 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.
 - 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 Portal path: Operations tab → Recall Administration tab → Create/Display Recall

Search: Cases Screen

e Operations	Admin R	eports	Help					
er Processing Co	mplaint Admir	nistration	Recall Admin	nistration	Warehouse Management			
ch: Cases								Back Forward
							Saved Searches 532	💌 Go Advanced
earch: Cases								
Search Criteria								Hide Search Fiel
Case ID		≠ is		-		00		
Case Type		* is		-		00		
Case Description		▼ is				00		
Status		≠ is		-		00		
				Makimur	n Number of Results 100			
Search Clear			Save Search A	s	Save			
Result List								
C New								
Recall ID			Recall Descrip	tion	Status		Respon	se Deadline

2. Click the Case ID field.



Search: Cases Screen

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arch: Cases						
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Case ID	٣			00		
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Search Clear		Save Search As	Save			
Result List						
C ^o New						e 🖬
		Recall Des	ariation	Status	Response Deadline	

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

Field	R/O/C	Description
Case ID	0	A unique identifying number associated with the recall
		case.
		Example:
		552



Search: Cases Screen

						Saved Searches	▼ Go Advance
earch: Cases							
Search Criteria							Hide Search Fields
Case ID	¥	is	▼ 552		0.0		
Case Type	-		-		00		
Case Description	*	is	-		00		
Status	*	is	-	*	00		
		Ma	ximum Nu	mber of Results 100			
Search Clear		Save Search As		Save			
Result List							
C? New							9 🖬
Recall ID		Recall Des	ription		Status	Response Deadline	

4. Click Search (the Search button) to process your entry.



(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

				Saved Searches	▼ Ge Advanced
arch: Cases					
Search Crite <mark>r</mark> ia					Hide Search Fields
Case ID	▼ is	▼ 552	00		
Case Type	▼ is	-	* 0 0		
Case Description	💌 is	•	00		
Status	🔻 is	•	- 00		
		Maximum Number of I	Results 100		
Search Clear	Save Sea	rch As	(B) Save		
Result List: 1 Case Four	d				
C New					a
Recall ID	F	lecall Description	Status	Response Deadline	
552	C	hicken Recall	In Process		

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



(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

							Saved Searches	Go Advanced
FNS Rec	alls: 552, Ch	nicken Rec	all					
Save 1	🗙 Cancel 🛛 📑	New I 🗈 I	More *					N 6
• Case D	etails 🕼 E	dit						*
Genera	al Data				Proces	sing Data		
	(Organization I	FNS Recalls			Case Type Recall		
	Re	call/Hold ID	552			Status In Process		
		Description	Chicken Recall					
	Externa	al Reference			Dates			
	Recall/Hold A	dministrator				Earliest Notification Date 01/11/2011		
	Higher-Lev	rel Recall ID				Response Deadline Date 01/27/2011		
	Recall/Hold	Created By	RECALLA0001			Recall/Hold Created On 01/11/2011		
	Recall/Hold (Changed By I	RECALLA0001			Recall/Hold Changed On: 01/11/2011		
· Parties	Involved i	Edit List						🗐 💟 🍝
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* Refere	nce Objects	Edit List						🗐 🕅 4
Ас Тур	e .	ID	Descripti	ion		Link Reason		
	duct	130193	PORK P	ICNIC BNLS FRZ CTN-60 LB		Contamination		
D Pro	duct	130098	CHICKEI	N CUT-UP FRZ CTN-40 LB		Illness caused	by food	

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

						Saved Searches	💌 Go Advanced 🗊
FNS Red	calls: 552, Chi	cken Recal	1.1				
Save	XCancel 🛐 N						N &
		yanıcanını i ix			sabe type neurit		
	Rec	all/Hold ID 553	2		Status In Process		
	0	Description Ch	icken Recall				
	External	Reference		Dates			
	Recall/Hold Ad	ministrator			Earliest Notification Date 01/11/2011		
	Higher-Leve	Recall ID			Response Deadline Date 01/27/2011		
	Recall/Hold C	created By RE	CALLA0001		Recall/Hold Created On 01/11/2011		
	Recall/Hold Cl	nanged By RE	CALLA0001		Recall/Hold Changed On 01/11/2011		
* Parties	s Involved E	dit List					
Actions	Function		ID	Name	Address		Main Pa
Ū.	Sold-To Party						
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* Notes	Edit List						@ 🖾 e
No res	ult found						
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Ac Ty	ре	ID	Description		Link Reason		
D Pro	oduct	130193	PORK PICNIC	BNLS FRZ CTN-60 LB	Contamination		
D Pro	oduct	130098	CHICKEN CU	T-UP FRZ CTN-40 LB	Illness caused b	y food	
* Attach	ments 📴 Atta	achment 📴 U	RL 🕑 With Templ	ste Advanced			1 🖬 🖬 🛥
Actions	Name			Туре	Created By	Crea	ited On
Deservation	Internation Des			DDC City (Adalas, Associate Constraints/Davids	-) DECALLAGODA	04/4	

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

Home Operations Admin	Reports Help	
Order Processing		
	Operations > Order Processing > File Uploads/Downloads > Download Catalog	Full Screen Options V
File Uploads/Downloads		
Download Catalog	Catalog Selection	
Download Purchase Orders Download Sales Orders Upload SDA Sales Orders Catalog Maintenance Order Management Shipment Receipts NW Delivery Calendar	Program: CSFP TEFAP NSIP CACFP SFSP From Date: CSV From Date: CSV File	
	Submit	

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

er Processing			
Operations > Order	Processing > File Uploads/0	ownioads > Download Catalog	Full Screen Options
Catalog Selection			
Pro	ram: NSIP CACFP SFSP NSLP DA		
From	Second Press and a second s		
NLT Date (Order by D	late): 05/09/2019	19	
File Type Selection			
• XML File			

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

Operations > Order Press	ssing > File Uploads/Downloads > Download Catalog	Full Screen Options
operations (2) Cittlet Proce	sang > The opposition of a contribute catalog	Fon Screen Copions
Catalog Selection		
Program:	TEFAP NSIP CACFP SFSP	
From Date:	NSLP DA 66/02/2019 [E] to: 06/01/2020 [E]	
NLT Date (Order by Date):	05/09/2019 [[7] to:	
File Type Selection		
🖲 XML File		
O CSV File		

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

Operations > Order Proce	ssing > File Uploads/Downloads > Download Catalog	Full Screen Options
Catalog Selection		
Program. From Date:	CACFP INSLP DA	
INE I Date (Order by Date):		
File Type Selection		

6. Click Submit (the Submit button) to apply the selected options and initiate the download.

Image: Download Catalog Screen

Processing	
Operations > Order Processing > File Uploads/Downloads > Download Catalog	Full Screen Optio
Catalog Selection	
Program: TEFAP NSIP CACEP SFSP SFSP SFSP NSLP Date From Date: 06/02/2019 VLT Date (Order by Date): 05/09/2019	
File Type Selection	
○XML File	
CSV File	
Submit	
Do you want to open or save Product_Catalog.CSV from wbscmint.wbscm.usda.gov? Open	Save Y Cancel X

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 <u>WBSCM</u> <u>Portal Navigation</u> 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

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

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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
То	с	Upper limit of the range to be selected from a list. Example: 08/01/09



Download Purchase Orders Screen

https://wbscmdevweb1.usda.go Fie Edt View Favorites Tools	v - Download Purchase Orders - WBSCM Portal Help				
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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

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

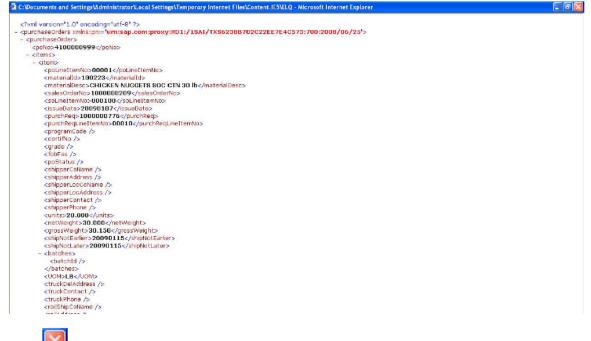


File Download Screen

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Do you want to o	pen or save this file?
Туре	notices_to_deliver.xml XML Document, 2.95 KB wbscmdevweb1.usda.gov Open Save Cancel
🕜 harm your i	from the Internet can be useful, some files can potentially computer. If you do not trust the source, do not open or e. What's the risk?

5. You can either click (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 (the Close button) to close the structure data.



Download Purchase Orders Screen

United States Departme Web-Based Supp		igemer	t				Welcome	SDA User - 2	Eerso	inalize Log Off	WBSCA
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7. Click Download CSV (the Download CSV button) to download in CSV format.

File Download Pop-up

)o you	want to open or save this file?
	Name: notices_to_deliver.csv
959	Type: csv_auto_file, 2.60 KB
	From: wbscmdevweb1.usda.gov
	Open Save Cancel
2	While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. <u>What's the risk?</u>

8.



Save As Pop-up

Save As						? 🛛
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9. As required, complete/review the following fields:

Field	R/0/C	Description
File name:	R	The name that the file is to be saved as.
		Example: notices_to_deliver



Save As Pop-up

Save As			2 🛛
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10. Click Save (the Save button) to save the CSV file to your local drive.

Download complete Pop-up

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11.



Notices_to_Deliver - Notepad Screen

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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:

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 <u>Upload SDA Sales Order</u> 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

rder Processing Complaint Admin	Distration Recall Adminis Operations > Order Proce		ile Uploads/Dov	micads > Dov	inicad Sales Ord	ers			Full Screen Opt
File Uploads/Downloads									
Download Catalog	Download Sales Orde	rs Selecti	on Criteria						[
Download Purchase Orders	Note: At least 1 of following	g criteria mu	ist be provided.	Requested Del	ivery Date, Shipr	nent Receipt	Date or Ord	der Number	
Download Sales Orders	Check Reset								
Upload SDA Sales Orders	Sold-To Party:	- 40004	91	То		\$			
Catalog Maintenance	Program.	♦	đ	2004880 C #0	1	\$			
Order Management	Material Number	۵ 📃	100.005	To		0 🖈			
Entitlement Management	Ship-To Party:		D	То	D	4			
Shipment Receipts	Requested Delivery Date:		10	То	<u>c</u> e	5			
NW Delivery Calendar	Shipment Receipt Date:	S	1	То	1	t t			
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		Order Line I		Number Sol	d-To Sold-To I	Description	Ship-To	Ship-To Description	Sched Line Dat
	i The table does not con	itain any dal	ta						
	X								

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

		Recall Administration						
Operations > Order Proc	essing > File Uploads/Do	wnloads > Download Sa	les Orders				Full Screen C)p
Download Sales Orde	ers Selection Criteria							
Note: At least 1 of followin	g criteria must be provideo	: Requested Delivery Dat	e, Shipment Rec	eipt Date or Order Number				
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Last Updated:		То	(C) 5	>				
Order Number:	۵ <u> </u>	To	0 5	>				
View: WBSCM_STAND	Download XML File (感) ARD ▼ Export 4	Download CSV File					Ŗ	
Sales Order No. 5	Sales Order Line Item	Material Number	Sold-To	Sold-To Description	Ship-To	Ship-To Description	Sched Line Date	
i The table does not co	ntain any data		1000000000		1000			

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:	С	Date when customer would like the material/commodity to arrive at the Ship-To. Example: 06/12/2017
Shipment Receipt Date:	с	The date the shipment is received. (Note) Users need to limit date ranges to within one year.
Last Updated:	0	Most recent date for update.



Field	R/O/C	Description
Order Number:		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

r Processing Comp Operations > Order Proce		Administratio			Iministration	alas Ordaro					Full Screen	Onti
operations > Order Proci	and a line	1 > File Obi	1446/12/0	mioads	< Download S	area 010818					[ruli Screen]	opt
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Note: At least 1 of followin	g crite	eria must be p	rovided	Reques	ted Delivery Da	te, Shipment	Rece	ipt Date or Order Number				
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		Order Line Ite	m	Mat	erial Number	Sold-Te	9	Sold-To Description	Ship-To	Ship-To Description	Sched Line Date	
The table does not cor	ntain a	any data										

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

Operations > Or	Jer Proces	sing > File Up	loads/Downloads > [Download Sales	Orders				Full Screen	Opt	lion
										-lansity	
Download Sale	es Order	s Selection C	Triteria								
Note: At least 1 of	following	criteria must be	provided: Requested I	Delivery Date, S	hipment Re	eceipt Date o	Order Number				ì
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Material N		٥ 🗌	To To	- 040		\$					
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	Salcs (100306	4000491	All Dept. of	Education			08/15/2017		
Sales Order No.		D			100000 0 00000	Education Education	(h)		08/15/2017 08/15/2017		
Sales Order No. 5000302126	800100	0	100306	4000491	/II Dept. of		(b)) (4	1 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7		

5. Perform one of the following:

Then
Click Download XML File (the Download XML File button) to save the XML file locally.
Click Download CSV File (the Download CSV File button) to save the CSV file locally.
 Click Export ∡ (the Export button). 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.
is displayed in each column.

(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

6.



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

Image: Download Sales Orders Screen

er Processing	Complaint Administrati						
Operations > Ord	ler Processing > File Up	ploads/Downloads > D	Download Sale	e Orders			Full Screen Op
Download Sale	s Orders Selection C	Criteria					E
Note: At least 1 of	following criteria must be	provided: Requested I	Delivery Date,	Shipment Receipt Date	or Order Numl	ber	
Check Reset							
Sold-Tr	o Party 📕 4000491	To		\$			
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Material N	lumber: 🗄	To To		5 🕏			
Ship-Te	o Party. 🔶	To To		7 \$			
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View: WBSCM_	Salae Order Line Hom	Material Number	Sold To				
Sales Order No.	Sales Order Line Item	Material Number	Sold-To	Sold-To Description			
Sales Order No. 5000302126	000100	100306	4000491	MI Dept. of Education	5004126	(b)	
Sales Order No.				1		(b) (4)	

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 <u>FNS policy</u> requires <u>entry of</u> <u>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 commaseparated values (CSV) or extensible markup language (XML) file.

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

- <u>Modify Domestic Shipment Receipt</u> used when the user needs to modify a recently entered shipment receipt.
- <u>Cancel Shipment Receipt</u>- used when an ASN does not exist (BOL # field is not populated) for a line item.
- <u>Enter Multi-Food Shipment Receipt</u> used for multi-food shipments, when the user needs to enter shipment receipts manually.
- <u>Upload Domestic Shipment Receipt</u> 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

Home Operations Admin	Reports Help
Order Processing	
	Operations > Order Processing > Shipment Receipts > Enter Shipment Receipt Full Screen Option
 File Uploads/Downloads Catalog Maintenance Order Management 	Welcome to Enter Shipment Receipt All requires fails are nariad with a red astansk (*) Detea are formated as MMDD*YYYY
Entitlement Management Shipment Receipts	Order Search WISCM has the ability to receipt Salas Orders, Delivery Documents; and Penthase Orders. To search for an open order in the system to receipt, please enter your order number and olick "Search".
Enter Shipment Receipt Upload Shipment Receipt NW Delivery Calendar	* Order Number: Search

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

Ord						
Ora	er Processing					
	Operations > Order Pi	ocessing > Ship	pment Recei	pts > Enter Shipment Receipt	Full Screen	Options •
	Al required fields are marked v Dates are formatted as MM/DD Order Search					
	WESCM has the ability to rea	eipt Sales Orders, De	slivery Doounter	ts, and Purchase Orders. To search for an open order in the system to reseipt, please enter your order number and olicic "Search".		

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.



Home	Operatio	ns Finance	Suppliers	Àdmin	Reports	Help				
Order Pr	ocessing	Procurement	Warehouse Man	agement	Suppler Mgt					
Operation	ns > Order	Processing > SI	hipment Receipts	> Enter Shi	pment Receipt					Full Screen Options *
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•	Order Numbe	er: 5000370678			Search	1				

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

Image: Associated Order Summary Screen

leports Help		
ion Recall Administration		
nt Receipts > Enter Shipment Receipt		
Summary		
Associated Document Type	Associated Document	
Standard Domestic	4100012785	
5	ton Recall Administration Int Receipts > Enter Shipment Receipt Summary Associated Document Type	for Recall Administration Int Receipt > Enter Shipment Receipt Summary Associated Document Type Associated Document

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.

Ð

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



Operatio	ons > Order Prod	cessing > Shipmen	it receipts > t	CINCI OIN	pment Receipt					Full Scree	en Option
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245	phed by:		Date Received	·	100						
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View:		Peccipt Status	Sales Doc.	Item	Purch.Doc. 🛦	Item 🛦	Material	Material Description	ASN Number A	Signed by	Date Rec
View:	eINV_VIEW		Sales Doc. 5000370666	Item 100	Purch.Doc. A 4100012785	Item 🛦 9	Material 100166	Material Description BEEF ROAST ROUND FRZ CTN-38-42 LB	ASN Number ▲ 6100030997	Signed by	Date Rec
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View:	eINV_VIEW Further Actions	Receipt Status Ready to Receipt Ready to Receipt Recept Processed	5000370666 5000370666 5000370671	100 100 100		9	100156 100156 100156	BEEF ROAST ROUND FRZ CTN-38-42 LB BEEF ROAST ROUND FRZ CTN-38-42 LB BEEF ROAST ROUND FRZ CTN-38-42 LB	6100030997 6100030998 6100030995	t	11/25/201
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View:	Further Actions	Receipt Status Ready to Receipt Ready to Receipt Recpt Processed Recpt Processed Ready to Receipt	5000370666 5000370666 5000370671 5000370672 5000370633	100 100 100 100 100		9 14 15 58	100156 100166 100166 100166 100166	BEEF ROAST ROUND FRZ CTN-38-42 LB BEEF ROAST ROUND FRZ CTN-38-42 LB	610003D997 610003D998 610003D995 610003D900 610003D900	t	11/25/201

6. Perform one of the following:

Then
Review the Enter Multi-Food Shipment Receipt work instruction.
Go to Step 7. (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.
Go to Step 10.
Go to Step 20.



peration	ns > Order Pro	cessing > Shipmen	nt Receipts 🛸 I	Enter Shi	pment Receipt					Full Scree	en Option
📺 Ва	ck to Summary	Back to Searc	h					Ξ			
Receip	pt Header										
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Sig	ned By: John (Doe	Date Receive	d: 02/2	5/2019						
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Com	nments:										
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7. As required, complete/review the following fields:

Field	R/O/C	Description
Railcar/BOL:	0	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:		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

Operatio	ons > Order Proc	essing > Shipmen	t Receipts > E	Inter Shi	pment Receipt					Full Scre	en Optio
E Ba	ack to Summary	(M) Back to Searc	h					Ξ			
Rece	ipt Header										
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Laboration	eINV_VIEW	Receipt Status	Sales Doc.	licm	Purch.Doc. 🛓	Item A	Material	Material Description	ASN Number a	Signed by	Date Re
View.	eINV_VIEW			Item 100	Purch.Doc. 🛓 4100012785	ltom a 9	Material 100166	Material Description BEEF ROAST ROUND FRZ CTN-38-42 LB	ASN Number = 6100030997	Signed by	Date Re
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View:	eINV_VIEW Further Actions	Receipt Status Ready to Receipt Ready to Receipt Recpt Processed Recpt Processed	5000370666 5000370666 5000370671 5000370672 5000370633	100 100 100 100		9 14 15	100166 100166 100166 100166	BEEF ROAST ROUND FRZ CTN-38-42 LB BEEF ROAST ROUND FRZ CTN-38-42 LB BEEF ROAST ROUND FRZ CTN-38-42 LB BEEF ROAST ROUND FRZ CTN-38-42 LB	6100030997 6100030998 6100030995 6100030900	t	11/25/20
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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 *Checkbox*).



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operan		or and the second second								T di Scro	cii Opeo
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View:	eINV_VIEW Further Actions	Receipt Status Ready to Receipt Ready to Receipt	5000370666 5000370666	100 100		9	100166 100166	BEEF ROAST ROUND FRZ CTN-38-42 LB BEEF ROAST ROUND FRZ CTN-38-42 LB	6100030997 6100030998 6100030995	Signed by t	11/25/201
View:	eINV_VIEW Further Actions	Receipt Status Ready to Receipt Ready to Receipt Recept Processed	5000370666 5000370666 5000370671	100 100 100		9 14	100166 100166 100166	BEEF ROAST ROUND FRZ CTN-38-42 LB BEEF ROAST ROUND FRZ CTN-38-42 LB BEEF ROAST ROUND FRZ CTN-38-42 LB	6100030997 6100030998 6100030995	1	11/25/201
View:	eINV_VIEW Further Actions	Receipt Status Ready to Receipt Ready to Receipt Recpt Processed Recpt Processed Ready to Receipt	5000370666 5000370666 5000370671 5000370672	100 100 100 100		9 14 15	100166 100166 100166 100166	BEEF ROAST ROUND FRZ CTN-38-42 LB BEEF ROAST ROUND FRZ CTN-38-42 LB BEEF ROAST ROUND FRZ CTN-38-42 LB BEEF ROAST ROUND FRZ CTN-38-42 LB	6100030997 6100030998 6100030995 6100030990	1	11/25/201
View:	eINV_VIEW Further Actions	Receipt Status Ready to Receipt Ready to Receipt Recpt Processed Recpt Processed	5000370666 5000370666 5000370671 5000370672 5000370633	100 100 100 100 100		9 14 15 58	100166 100166 100166 100166 100166	BEEF ROAST ROUND FRZ CTN-38-42 LB BEEF ROAST ROUND FRZ CTN-38-42 LB	610003D997 610003D998 610003D995 610003D900 610003D900	1	

11. Perform one of the following:

lf	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 <i>Receipt Header</i> 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 <i>Receipt Header</i> section.
Good Qty.	С	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)	С	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	0	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 over the ASN quantity display in red. Quantities that are receipted under the ASN quantity are included in the Open Qty total for that line.
Previous Qty	0	The amount of materials that were previously receipted on the line item.



Field	R/O/C	Description
Open Qty	0	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.	0	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

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													2
	ASN Number ≞				Open Qly.			Good Qty (in CS)					BOL#
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42 LB 42 LB	610003D997 610003D998	Jane Doe Jane Doe	12/25/2019 12/25/2019	0.000	1,000.000	39,985.000 4,000.000	LB LB	1,000.000 100.000	9	0.000	0.000 0.000	cs CS	BOL # BOL 003 BOL98760
42 LB 42 LB	610003D997 610003D998	Jane Doe Jane Doe	12/25/2019	0.000	1,000.000	39,985.000	LB LB	1,000.000	9	0.000	0.000	cs CS	BOL# BOL003
42 LB 42 LB 42 LB	610003D997 610003D998 610003D995	Jane Doe Janc Doe	12/25/2019 12/25/2019	0.000	1,000.000	39,985.000 4,000.000	LB LB LB	1,000.000 100.000	9	0.000	0.000 0.000	CS CS CS	BOL # BOL 003 BOL98760
42 LB 42 LB 42 LB 42 LB	610003D997 610003D998 610003D995	Jane Dos Janc Doc t TT	12/25/2019 12/25/2019 11/25/2018	0.000 0.000 1,000.000	1,000.000 100.000 0.000	39,985.000 4,000.000 0.000	LB LB LB LB	1,000.000 100.000 1,000.000	9 9 14	0.000 000.0 000.0	0.000 0.000 0.000	cs cs cs cs	BOL # BOL 003 BOL98760 BOL 103
42 LB 42 LB 42 LB 42 LB 42 LB 42 LB	610003D997 610003D998 610003D995 610003D900	Jane Dos Janc Doc t TT	12/25/2019 12/25/2019 11/25/2018	0.000 0.000 1,000.000 1,000.000 1,000.000 1,000.000	1,000.000 100.000 0.000 0.000 0.000	39,985.000 4,000.000 0.000 0.000 40,000.000	LB LB LB LB LB	1,000.000 100.000 1,000.000 1,000.000	9 9 14 15 58	0 000 0 000 0 000 0 000 0	0.000 0.000 0.000 0.000 0.000	CS CS CS CS CS	BOL # BOL 003 BOL 99760 BOL 103 BOL 98765 BOL 35454
n 42 LB 42 LB 42 LB 42 LB 42 LB 42 LB 42 LB	610003D997 610003D998 610003D995 610003D900 610003D900	Jane Dos Jane Dos t	12/25/2019 12/25/2019 11/25/2018	0.000 0.000 1,000.000 1,000.000	1,000.000 100.000 0.000 0.000	39,985.000 4,000.000 0.000 0.000	LB LB LB LB LB LB	1,000.000 100.000 1,000.000 1,000.000 1,000.000	9 9 14 15	0.000 0.000 0.000 0.000 0.000	0.000 0.000 0.000 0.000	CS CS CS CS CS CS CS	BOL # BOL 003 BOL98760 BOL 103 BOL98765



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 <i>Receipt Header</i> 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 <i>Receipt Header</i> section.
Good Qty.	С	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)	С	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	0	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	0	The amount of materials that were previously receipted on the line item.
Open Qty	0	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	ο	The amount of materials that are not usable and thus rejected.

Ð

(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

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42 LB
42 LB 42 LB
12 L.B 12 L.B 12 L.B
12 L.B 12 L.B 12 L.B
42 LB 42 LB 42 LB 42 LB
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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

	cessing									
Opera	ations > Order Proc	Enter Damage Details	adaaraa Madaa Dhigaa aada Da			X			Full St	preen Option
	=			Document NO: 410001	2785 Item NO: 000058					
		Damage Info								
		Damage Quantity:	0.000 CS							
		When Discovered	Carrier Info							
		Before Unloading: During Unloading: After Unloading:	Refrigeration Equip	Agent Name: ment Running: arrier Present: Unit Temp(F):000 erior Temp(F):000						
			Comme	odity Temp(F): 0.00						
		Miscellaneous De		odity Temp(F): 0.00						P _b
a	ASN Number 🗠			odity Temp(F): 0.00		ige Qty.	Reject Qty.	Over Qty.	Qty. UcM	Bol.#
	ASN Number + 6100030997	Miscellaneous De Comments		odity Temp(F): 0.00		ige Qty.	Reject Qty. 0.000	Over Qty. 0.000		
42 L.B	1.367771.4771.8777			odity Temp(F): 0.00		ige City. 9			CS	BOL#
42 LB 42 LB	6100030997			sdity Temp(F): 0.00		9	0.000	0.000	CS CS	BOL# BOL003
42 LB 42 LB 42 LB	6100030997 6100030998			odity Temp(F): 0.00		9	0.000	0.000	CS CS CS	BOL# BOL003 BOL987600
42 LB 42 LB 42 LB 42 LB 42 LB	6100030997 6100030998 6100030995			odity Temp(F): 0.00	OK	9 9 14 15	0.000 0.000 0.000	0.000	CS CS CS CS	BOL# BOL003 BOL987600 BOL103
42 LB 42 LB 42 LB 42 LB 42 LB 42 LB	6100030997 6100030998 6100030995 6100030995		taile	odity Temp(F): 0.00	OK. 1,000.000	9	0.000 0.000 0.000 0.000	0.000 0.000 0.000 0.000	CS CS CS CS CS	BOL# BOL003 BOL987600 BOL103 BOL987654
n 42 LB 42 LB 42 LB 42 LB 42 LB 42 LB 42 LB	6100030997 6100030998 6100030995 6100030900 6100030995		toile 0.000 1,000:			9 9 14 15 58	0.000 0.000 0.000 0.000 0.000	0.000 0.000 0.000 0.000 0.000	CS CS CS CS CS CS	BOL# BOL003 BOL937600 BOL103 BOL987654 BOL354540

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 Un l oading:	Ο	A checkbox to indicate that the damaged materials were received "before unloading" from the carrier.
During Unloading:	0	A checkbox to indicate that the damaged materials were received "during unloading" from the carrier.



Field	R/O/C	Description
After Unloading:	0	A checkbox to indicate that the damaged materials were received "after unloading" from the carrier.
Agent Name:	0	An agent who is responsible for delivering the materials to the recipient.
Refrigeration Equipment Running:	0	A checkbox to indicate that the refrigeration equipment was running at the time of receiving the materials.
Carrier Present:	0	A checkbox to indicate that the person who delivered the materials was present at the time of receiving the materials.
Unit Temp(F):	0	The temperature of the unit at the time of receiving.
Interior Temp(F):	0	The temperature of the interior container or truck where the materials were kept.
Commodity Temp(F):	0	The temperature of the materials received.
Comments:	0	Free text field to describe details related to the shipment, if necessary.

18. Click OK (the OK button) to accept the damage details and return to the *Enter Shipment Receipt* screen.



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19. Perform one of the following:

lf	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

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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

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operations	s Ofder Pidde	ssing > Shipmen	it Hacelpts > t	ciner Sin	priteitt Receipt					Fui Screen	Opad
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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 <u>FNS Policy</u> 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.
- 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 <u>Upload Domestic</u> <u>Shipment Receipts</u> 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

der Processing Complaint Administration	Recall Administration	
1	Operations > Order Processing > Shipment Receipts > Enter Shipment Receipt	Full Screen Options
File Uploads/Downloads		
Catalog Maintenance	Welcome to Enter Shipment Receipt	
Forecasting	All required fields are marked with a red asterisk (*). Dates are formatted as: MM/DD/YYYY.	
Order Management	Order Search	
Entitlement Management Shipment Receipts	WBSCM has the ability to receipt Sales Orders, Delivery Documents, and Purchase Orders. To search for an o your order number and olick "Search".	pen order in the system to receipt, please enter
Enter Shipment Receipt	* Order Number: Search	
Upload Shipment Receipt		
NW Delivery Calendar		

2. Click **1** (the **Hide Navigator** arrow) to minimize the Portal menu. Note that this can be done with any transaction in WBSCM.



	Processing Complaint Admin	nistration Recall Administration	
All required fields are marked with a red asterisk (*). Dates are formatted as: MMIDD////Y. Order Search WBSCM has the ability to receipt Bales Orders, Delivery Documents, and Purchase Orders. To search for an open order in the system to receipt, please enter your order number and disk "Search".	tions > Order Processing > Sh	njoment Reseipts 🔀 Enter Shipment Receipt	Full Screen Option
All required fields are marked with a red asterisk (*). Dates are formatted as: MMIDD////Y. Order Search WBSCM has the ability to receipt Bales Orders, Delivery Documents, and Purchase Orders. To search for an open order in the system to receipt, please enter your order number and disk "Search".	Velcome to Enter Ship	oment Receipt	
WBSCM has the ability to receipt Gales Orders, Delivery Documents, and Purchase Orders. To search for an open order in the system to receipt, please enter your order number and disk "Search".			
	Order Search		
* Order Number: Search	WBSCM has the ability to receipt	sales Orders, Delivery Documents, and Purchase Orders.To search for an open order in the system to receipt,	please enter your order number and diok "Search".
	* Order Number	Search	

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

ne Operations	Admin Repor	rts Help				
er Processing	Complaint Administration	Recal Administration				
rations > Order Pro	coessing > Shipment Re	eceipts > Enter Shipment P	Receipt			Full Screen Op
	Enter Shipment F	Receipt				
Order Search						
WBSCM has the a	ability to receipt Sales Ord	ders, Delivery Documents, s	and Purchase Orders.To sea	roh for an open order in the s	ystem to receipt, please enter your	order number and click "Search".
* Order Number:	1000264118	[Search			

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

Image: Associated Order Summary Screen

Processing Complaint Administr	ation Recall Administration ent Receipts > Enter Shipment Receipt		Full Screen
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Associated Order	r Summary		Back to Sea
View Default View			*1
Sales Document	Associated Document Type	Associated Document	
1000264118	Outbound Delivery	0080038473	



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

Operations > Onder Processing > Shipmert Rescript Full Stores Enter Shipment Rescript Details Image: Shipmert Rescript Details Image: Back to Summary Image: Shipmert Rescript Details Image: Shipmert Rescript Details Image: Shipmert Rescript Details Verve: Image: Details Image: Shipmert Rescript Details	Enter Shipment Receipt Details	0.000	Boed Gty.	Uol Entry							
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6. Perform one of the following:

If	Then
The displayed view is eINV_VIEW	Review the <u>Enter Domestic Shipment Receipt</u> 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 <i>Receipt Header</i>	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.



lf	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 <u>Reporting Navigation</u> 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

Enter Shipment Raceipt Details	Signed by Date Reserved Prev. Cty. Open Cty. Uct/ Enty Geod Cty. Reject City. 8000 2.000 C5 0.000 0.000
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er suun neeu	

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

Field	R/O/C	Description
Signed By:	С	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:	С	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



Work Instruction Enter Multi-Food Shipment Receipt

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:	0	Free text field to describe details related to the shipment, if necessary.

Image: Enter Shipment Receipt Details Screen

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	Submit Receip	pt													

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

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

Ð

(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 items (the **Checkbox**) in the **Select** column.

11. Perform one of the following:

lf	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

Creder Processing Completert Administration Operationx > Onder Processing > Shipmert Receipt Full Science Enter Shipment Receipt Details Image: Shipmert Receipt Details Image: Shipmert Receipt Details Image: Shipment Receipt Details Image: Shipmert Receipt Details Image: Shipmert Receipt Details Image: Shipment Receipt Details Image: Shipmert Receipt Beak to Summery Image: Shipmert Receipt		ssing Co	moleint	Administrati	nn Rec	all Admin	wirafien									
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		1000264118	200		20	100380	BEANS GREAT NORTHERN DRY PKG-12/2 LB	CSFP	5003713			0.000	10.000	6	0.000	
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		1000264118	200		20	100380	BEANS GREAT NORTHERN DRY PKG-12/2 LB	CSFP	5003713			0.000	10.000	2	0.00	
		1000264118	200		20	100380	BEANS GREAT NORTHERN DRY PKG-12/2 LB	CSFP	<u>5003713</u>			0.000	10.000	2	0.00	
		1000264118	200		20	100380	BEANS GREAT NORTHERN DRY PKG-12/21.B	CSFP	5003713			0.000	10.000	2	0000	
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		1000264118	200		20	100380	BEANS GREAT NORTHERN DRY PKG-12/2 LB	CSFP	5003713			000.0	10.000	3	0000	
		1000264118	200		20	100380	BEANS GREAT NORTHERN DRY PKG-12/2 LB	CSFP	5003713			0000	10.000	2	0.00	
		1000264118	200		20	100380	BEANS GREAT NORTHERN DRY PKG-12/2 LB	CSFP	<u>5003713</u>			0000	10.000	2	000	
		1000264118	200		20	100380	BEANS GREAT NORTHERN DRY PKG-12/2 LB	CSFP	5003713			000.0	10.000	2	000	

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 <i>Receipt Header</i> 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/0/C	Description
Good Qty (in CS)	С	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.	с	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.	0	The amount of materials that were previously receipted on the line item.
Open Qty.	с	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.	0	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

н	ome Operations Admin Reports	Help													
Or	der Processing Compleint Administration	Recall A	dministration												
	Operations > Order Processing > Shipment Re			Receipt									F	ull Screen	Options *
				Ξ											
	LLROLEK Railcar/BOL:														
	19														
															e,
	Material Description	Program										Over City.	Good City (in CS)		
	APRICOT HALVES CAN-24/300	CSFP	5003713	John Doe	09/12/2021	6.000	2.000		1.000	0.000		0.000	0.000		56299
	BEANS GREAT NORTHERN DRY PKG-12/2 LB	CSFP	<u>6003713</u>			0.000	10.000	CS	0.000	0.000	20	0.000	0.000		54948
	¢														>

14. Click the number icon in the **Damage Qty.** column. In this example, (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

Home	Operations /	Admin R	leports	Help																
Order P	recessing Comple	int Administra	stion	Recall Ad	ministra	ation														
Ope	arations > Order Proces	ising > Shipr	ment Reo	eipts > E	nier Shi	pment Receipt												F	full Screen	Options *
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APP	RICOT HALVES CAN-24	/300		CSFP											1	10	0.000			56298
BEA	ANS GREAT NORTHER	N DRY PKG-1	2/2 LB	CSFP		Comments:										20	0.000	0.00	0	54948
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					-										a di					
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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:	0	A checkbox to indicate that the damaged materials were received "before unloading" from the carrier.
During Unloading:	0	A checkbox to indicate that the damaged materials were received "during unloading" from the carrier.



Field	R/O/C	Description
After Unloading:	0	A checkbox to indicate that the damaged materials were received "after unloading" from the carrier.
Agent Name:	0	An agent who is responsible for delivering the materials to the recipient.
Refrigeration Equipment Running:	0	A checkbox to indicate that the refrigeration equipment was running at the time of receiving the materials.
Carrier Present:	0	A checkbox to indicate that the person who delivered the materials was present at the time of receiving the materials.
Unit Temp(F):	0	The temperature of the unit at the time of receiving.
Interior Temp(F):	0	The temperature of the interior container or truck where the materials were kept.
Commodity Temp(F):	0	The temperature of the materials received.
Comments:	0	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

		Enter Damage D		2			
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LROLEK Raicar/BOL:	1	Damage Int	b				
D			nity: 3.000 (CS				
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			Interior Temp(F): 0.00 Commodity Temp(F): 0.00				
		Miscellane	us Details				(B)
Material Description APRICOT HALVES CAN-24/300	Program Dr CSFP		Inventory damaged during storage process in house	Damage Qty. 4	Over City, 0.000	Good City (in CS) 0.000	 Batch 56208
BEANS GREAT NORTHERN DRY PKG-12/2 LB		Comments:	95 EL 2059 2051	20	0.000	0.000	54945
	t.		OK .				

- **16.** Click (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

Operations	> Order Pr					stration									
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View: DOM		EW	-												
Select Sal				ltem# 4	Material	Naterial Description	Program	Delivery Point	Signed by	Date Received	Prev. Qtv.	Coen Qtv.	UoN Entry	Good Qty.	Reject Qtv.
100	00264118	100	80038473	10		APRICOT HALVES CAN 24/300	CSFP		John Doe		8.000	2.000		1.000	
	00264118	200	80038473	20	100380	BEANS GREAT NORTHERN DRY PKG-12/2 LB	CSFP	5003713			0.000	10.000	CS	0.000	0.000
		-													
🖉 🎯 Subi	brit Receipt	5													

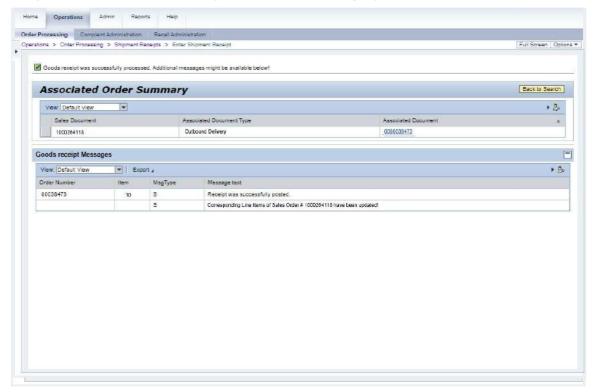
18. Click Submit Receipt (the Submit Receipt button) to submit the receipt to USDA.

(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 <u>Multi-Food Received Shipment Report</u> 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