Purpose

Use this transaction to execute a transaction report. Transaction reports are customized reports that users can run on a variety of topics: procurement, fulfillment, and finance. Users can determine search criteria, sort columns in ascending or descending order, establish hidden and displayed columns, filter search results, determine visual display, print specifications for the report, print the report, and export the report to excel. Transaction reports can encompass a variety of topics. The topics of the reports will vary based on your User ID and security access.

Process Trigger

Perform this transaction to run a Transaction report in WBSCM.

Prerequisites

- Transactions must have been completed in the WBSCM system before a report can be run on them.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Reports** tab ➜ **Order Processing** tab ➜ **Multi-Food Requisition Report** link to go to the *Multi-Food Requisition Report* initial screen.

Tips and Tricks

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

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

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

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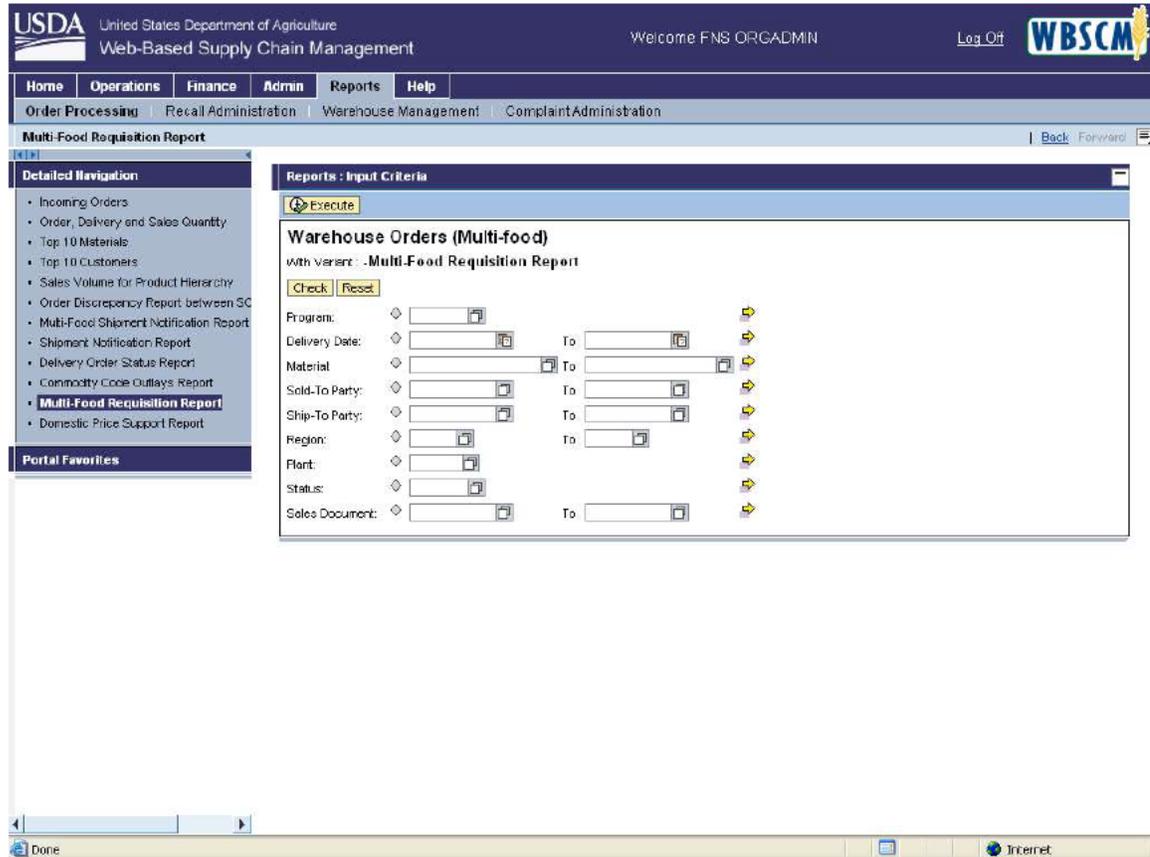
Reminders

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

PROCEDURE

1. Start the transaction using the following Portal path: **Reports** tab ➔ **Order Processing** tab ➔ **Multi-Food Requisition Report**
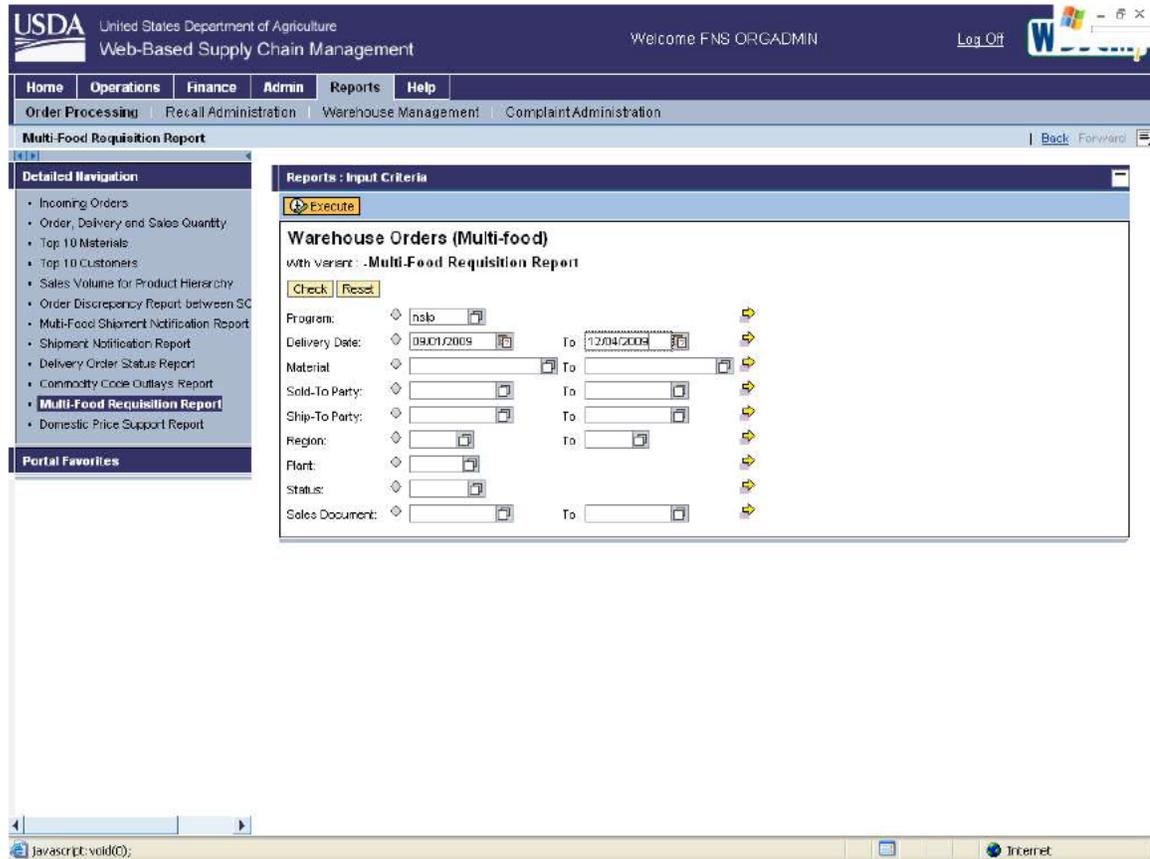
Multi-Food Requisition Report Screen

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

Field	R/O/C	Description
Program	R	Acronym to identify a USDA program. **Example:** nslp
Delivery Date	R	Use the Delivery Date field to enter the desired delivery date for the order. **Example:** 09/01/2009

Field	R/O/C	Description
To	R	Upper limit of the range to be selected from a list. **Example:** 12/04/2009

Multi-Food Requisition Report Screen

3. Click [Execute] (the **Execute** button) to run a Multi-Food Requisition Report based on the filter criteria you have established.

Multi-Food Requisition Report Screen

4. Scroll to the right of the screen.

(Note) The report is organized in table format, with each column containing a unique type of data. Scrolling to the right-hand side of the report will display some options for customizing the display of the report. For example, columns in the report can be displayed or hidden by using the *Settings* feature.

Multi-Food Requisition Report Screen

	Ship-to Party	Ship-to Name	Ship-to City	Ship-to State	Qty. Requested	Sales Unit	Net Dollar Value	Req. Delivery Date	Created On
					• 33,209.000		• 6,392,331.56		
GETABLES/CANNED				IL	540.000	CS	69,669.32	10/01/2009	10/01/2009
				IL	333.000	CS	113,473.61	10/01/2009	10/01/2009
E/SHREDDED				NY	100.000	CS	41,236.50	09/30/2009	09/30/2009
CANNED				NM	126.000	CS	70,502.11	10/01/2009	10/01/2009
				NM	85.000	CS	1,327.19	10/01/2009	10/01/2009
				NM	85.000	CS	12,464.34	10/01/2009	10/01/2009
				NM	168.000	CS	24,772.23	10/01/2009	10/01/2009
S/JUICE				NM	168.000	CS	21,975.86	10/01/2009	10/01/2009
				NM	480.000	CS	43,244.16	10/01/2009	10/01/2009
				NM	224.000	CS	36,366.12	10/01/2009	10/01/2009
				NM	480.000	CS	57,609.22	10/01/2009	10/01/2009
AVES				OR	80.000	CS	31,460.90	10/01/2009	10/01/2009
				OR	40.000	CS	3,603.68	10/01/2009	10/01/2009
E				OR	54.000	CS	22,744.59	10/01/2009	10/01/2009
				OR	40.000	CS	5,996.34	10/01/2009	10/01/2009
CANNED				OR	40.000	CS	6,607.08	10/01/2009	10/01/2009
				OR	80.000	CS	12,987.90	10/01/2009	10/01/2009
				OR	80.000	CS	11,796.30	10/01/2009	10/01/2009
S/JUICE				OR	80.000	CS	10,464.70	10/01/2009	10/01/2009
NNED				OR	40.000	CS	4,334.05	10/01/2009	10/01/2009

5. Click **Filter** (the **Filter** link) to establish a filter for a column in the report.

(Note) By clicking the **Filter** link, a filter row is displayed. A filter row is a blank row at the top of the table. You may enter search criteria (filter criteria) into this row. For example, to view entries with the ship-to state of Illinois (IL), enter **IL** into this filter row, and press the enter button on your keyboard. Only items containing IL in this field will display in the table.

Multi-Food Requisition Report Screen

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

Field	R/O/C	Description
Req Delivery Date Filter	R	A filter for the Req Delivery Date column. **Example:** 10/01/2009

Multi-Food Requisition Report Screen

7.   Press the **Enter** key on your keyboard to establish the filter.

Multi-Food Requisition Report Screen

8. Click **Settings** (the **Settings** link) to access further options for personalizing the display of the report.

Multi-Food Requisition Report Screen

9. There are 2 tables visible in the **Column Selection** tab of the **Settings** pop-up . One is dedicated to hidden columns, and the other to displayed columns. Moving columns from one table to the other using the Add and Remove buttons, determines whether the column will be displayed or hidden in the report. To move a column, highlight [ ] (the **Blue** box) next to the desired column you wish to move.

(Note) To select multiple columns, hold the Control button on your keyboard and click [ ] (the **Blue** Box) next to each column.

Multi-Food Requisition Report Screen

10. Hold the Control button on your keyboard while you click ▢ (the **Blue** box) to the left of **Ship-to Name** to select this column for hiding.

Multi-Food Requisition Report Screen

11.   Hold the Control button on your keyboard while you click ▢ (the **Blue** box) to the left of **Ship-to City** to select this column for hiding.

Multi-Food Requisition Report Screen

12. Hold the Control button on your keyboard while you click ☐ (the **Blue** box) to the left of **Ship-to State** to select this column for hiding.

Multi-Food Requisition Report Screen

13.   Click [Remove] (the **Remove** button) to remove these Ship-to information columns from the **Displayed Columns** table and move them into the **Hidden Columns** table.

Multi-Food Requisition Report Screen

14. Navigate through the other tabs next to the **Column Selection** tab to further customize the report. When you have finished making selections, click OK (the **OK** button) to apply your customized settings.

> (Note) Notice that the **Column Selection** tab is currently selected, the other tabs in the **Settings** pop-up serve various functions:
>
> **Column Selection** - choose from over thirty available columns. Designate which columns are hidden and which are displayed in the report. Determine the sequence of columns in your report.
>
> **Sort** - select a column name. Designate whether you would like the column sorted in ascending or descending order.
>
> **Calculation** - calculate the sums and averages for particular columns in the report.
>
> **Filter** - add a filter row. Filter the report by certain criteria documented on this tab.
>
> **Display** - determine the visual display of the report, including the number of rows displayed in a page, and the coloration of the report.
>
> **Print Version** - determine print specifications including page dimensions, landscape or portrait printing, and header and footer dimensions.

Multi-Food Requisition Report Screen

USDA	United States Department of Agriculture Web-Based Supply Chain Management	Welcome FNS ORGADMIN	Log Off	WBSCM

Home	Operations	Finance	Admin	Reports	Help

Order Processing | Recall Administration | Warehouse Management | Complaint Administration

Multi-Food Requisition Report | Back Forward

Warehouse Orders (Multi-food)
With Variant : Multi-Food Requisition Report

Go Back | View ALL Rows | View ALL Columns

View [Standard View] | Print Version | Export

Prod. Hierarchy	Qty. Requested	Sales Unit	Net Dollar Value	Req. Delivery Date	Created On	Created By	Plant Desc	Program
				10/01/2009				
	3,943.000		768,974.61					
VEGETABLES/MIXED VEGETABLES/CANNED	540.000	CS	69,669.32	10/01/2009	10/01/2009	RANDOLPHM	2000 NW AmeriCold Syracuse	CSFP
MEAT/BEEF/CANNED	333.000	CS	113,473.61	10/01/2009	10/01/2009	RANDOLPHM	2000 NW AmeriCold Syracuse	CSFP
INFANT/FORMULA DRY/CANNED	128.000	CS	70,502.11	10/01/2009	10/01/2009	WF-BATCH	2200 NW Paris Brother KC	CSFP
FRUIT/APPLES/CANNED	85.000	CS	1,327.19	10/01/2009	10/01/2009	WF-BATCH	2200 NW Paris Brother KC	CSFP
FRUIT/PLUMS/CANNED	85.000	CS	12,464.34	10/01/2009	10/01/2009	WF-BATCH	2200 NW Paris Brother KC	CSFP
FRUIT/ORANGE/JUICE	168.000	CS	24,772.23	10/01/2009	10/01/2009	WF-BATCH	2200 NW Paris Brother KC	CSFP
VEGETABLES/TOMATOES/JUICE	168.000	CS	21,975.86	10/01/2009	10/01/2009	WF-BATCH	2200 NW Paris Brother KC	CSFP
MILK/EVAP/CANNED	480.000	CS	43,244.16	10/01/2009	10/01/2009	WF-BATCH	2200 NW Paris Brother KC	CSFP
FRUIT/APPLES/JUICE	224.000	CS	36,366.12	10/01/2009	10/01/2009	WF-BATCH	2200 NW Paris Brother KC	CSFP
PASTA/MACARONI/BOX	480.000	CS	57,609.22	10/01/2009	10/01/2009	WF-BATCH	2200 NW Paris Brother KC	CSFP
CHEESE/PROCESSED/LOAVES	60.000	CS	31,460.90	10/01/2009	10/01/2009	RANDOLPHM	2200 NW Paris Brother KC	CSFP
MILK/EVAP/CANNED	40.000	CS	3,603.68	10/01/2009	10/01/2009	RANDOLPHM	2200 NW Paris Brother KC	CSFP
MILK/INSTANT/PACKAGE	54.000	CS	22,744.59	10/01/2009	10/01/2009	RANDOLPHM	2200 NW Paris Brother KC	CSFP
FRUIT/APRICOT/CANNED	40.000	CS	5,996.34	10/01/2009	10/01/2009	RANDOLPHM	2200 NW Paris Brother KC	CSFP
FRUIT/FRUIT COCKTAIL/CANNED	40.000	CS	6,607.08	10/01/2009	10/01/2009	RANDOLPHM	2200 NW Paris Brother KC	CSFP
FRUIT/APPLES/JUICE	80.000	CS	12,987.90	10/01/2009	10/01/2009	RANDOLPHM	2200 NW Paris Brother KC	CSFP
FRUIT/ORANGE/JUICE	80.000	CS	11,796.30	10/01/2009	10/01/2009	RANDOLPHM	2200 NW Paris Brother KC	CSFP
VEGETABLES/TOMATOES/JUICE	80.000	CS	10,464.70	10/01/2009	10/01/2009	RANDOLPHM	2200 NW Paris Brother KC	CSFP
VEGETABLES/CORN/CANNED	40.000	CS	4,334.05	10/01/2009	10/01/2009	RANDOLPHM	2200 NW Paris Brother KC	CSFP

https://wbscmint.wbscm.usda.gov/irj/portal#   Internet

15.   You have completed this transaction.

RESULT

You have created and personalized a Multi-Food Requisition Report.

PROCESS OVERVIEW

Purpose

The purpose of this transaction is for a National Warehouse Org Admin to export multi-food orders placed by SDAs, ITOs, RAs, or Co-ops from WBSCM to a download file in CSV, XML, or XLS format. After exporting the orders, they can use the tools available in their spreadsheet application or other software to customize the layout and content using settings, filters, and search criteria.

Process Trigger

Use this transaction to export multi-food orders that need to be filled by the National Warehouse.

Prerequisites

- Multi-food orders must exist in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab ➔ **Warehouse Management** tab ➔ **File Uploads/Downloads** folder ➔ **National Warehouse Orders to be Filled** link to go to the *National Warehouse Orders to be Filled* screen.

Tips and Tricks

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

PROCEDURE

1. Start the transaction using the following Portal path: **Operations** tab ➔ **Warehouse Management** tab ➔ **File Uploads/Downloads** folder ➔ **National Warehouse Orders to be Filled** link.

   Image: National Warehouse Orders to be Filled Screen
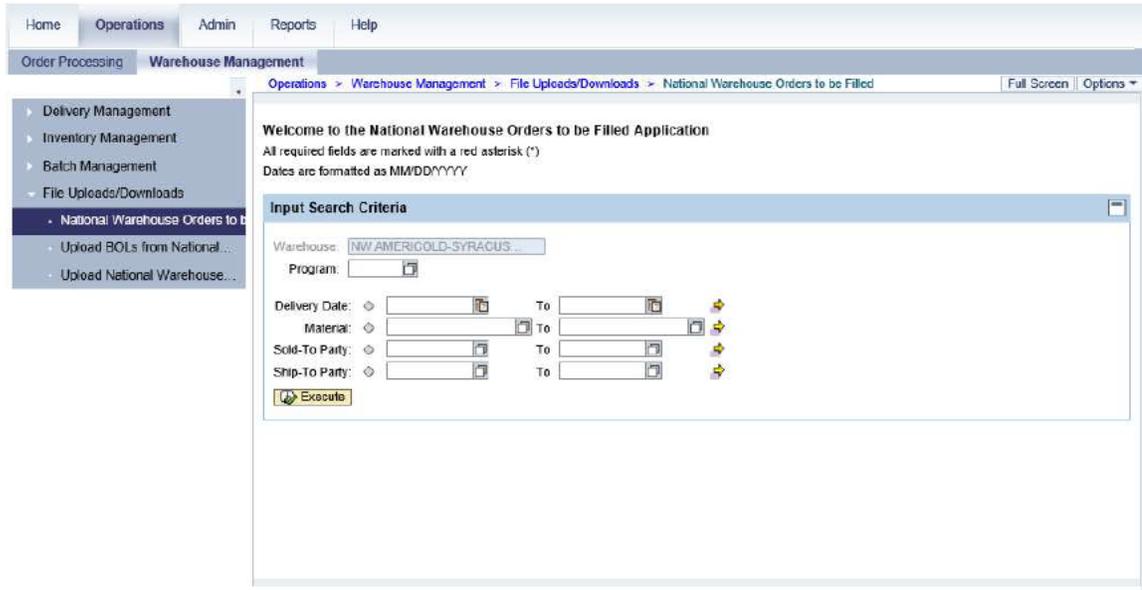
2. Click [icon] (the Hide Navigator arrow) to minimize the Portal menu. Note that this can be done with any transaction in WBSCM

   Image: National Warehouse Orders to be Filled Screen

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

Field	R/O/C	Description
Program	O	Acronym to identify a USDA food distribution program.
Delivery Date	O	Range of dates when materials/commodities may be delivered. (Note) This is the date the customer requested for delivery of materials/commodities to the specified Ship-to party location. Use the ⬚ (the Calendar button) to select dates from a calendar.
Material	O	Unique six-digit number representing a specific material/commodity in WBSCM.
Sold-To Party	O	Unique identifying number associated with a particular customer in WBSCM.
Ship-To Party	O	Unique identifying number associated with a person or company that receives the goods.

(Note) The results list will display all orders that match the search criteria. In this example, a **Delivery Date** range of **05/01/2019** to **06/01/2020** was entered.

Image: National Warehouse Orders to be Filled Screen
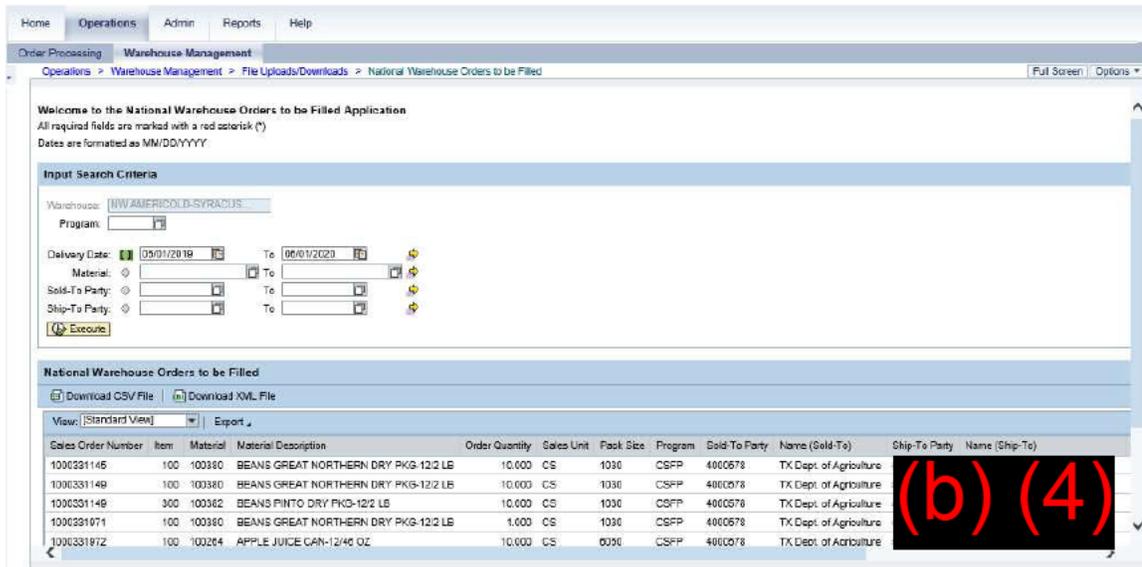
4. Click [Execute] (the **Execute** button) to start the search.

Image: National Warehouse Orders to be Filled Screen
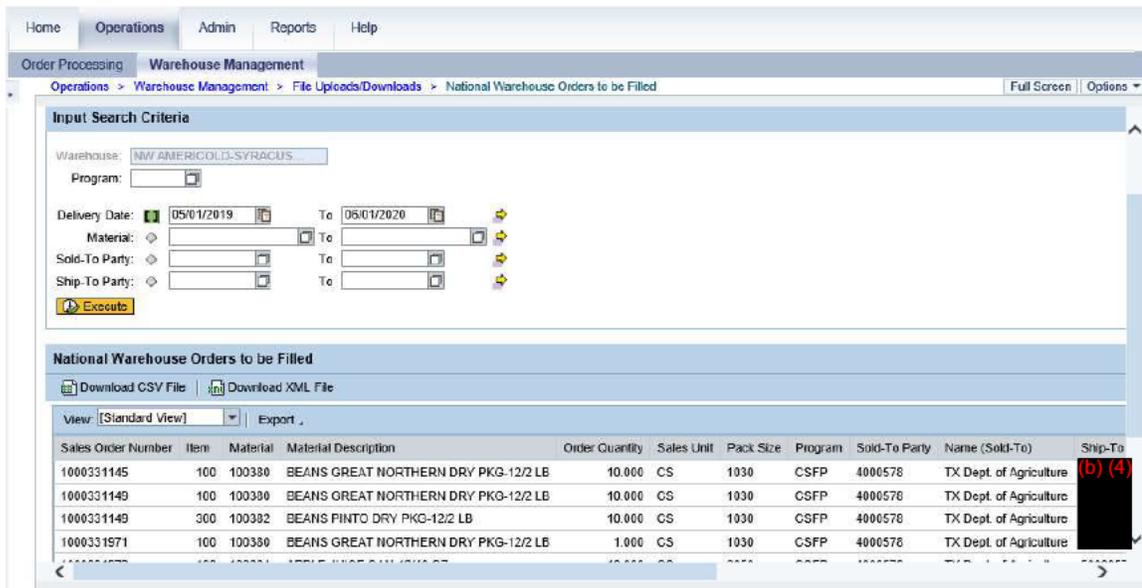
5. Review the result list.

6. Perform any of the following:

If	Then
The user needs to download the results list as XML file	1. Click [Download XML File] (the **Download XML File** button) to download the file. 2. Click [Save] (the **Save** button) to save the

If	Then
	file.
	3. Enter **File name** and click [Save] (the **Save** button) to close the pop-up window.
The user needs to download the results list as CSV file	1. Click [Download CSV File] (the **Download CSV File** button) to download the file.
	2. Click [Save ▾] (the **Save** button) to save the file.
	3. Enter **File name** and click [Save] (the **Save** button) to close the pop-up window.
The user needs to download the results list as a spreadsheet file	1. Click [Export ▾] (the **Export** button) to view export options.
	2. Click [Export to Microsoft Excel] (the **Export to Microsoft Excel** option).
	3. Click [Save ▾] (the **Save** button) to save the file.
	4. Enter **File name** and click [Save] (the **Save** button) to close the pop-up window.
	Note: This generates an XLS file, which is compatible with Microsoft Excel and many other spreadsheet applications.
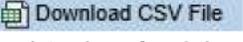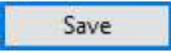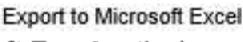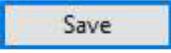
7.   The transaction is complete.

RESULT

The user exported the list of orders to the specified download format for offline use.

PROCESS OVERVIEW

Purpose

A Recipient Agency (RA) is a domestic customer that has access to create orders in WBSCM. SDA Org Admins are responsible for creating new RAs in WBSCM. They can do this in two ways - by manually entering in the RA data or by importing an XML file. Most commonly, they will use the "Create RA Organization" procedure, except when they wish to transfer information storage in USDA's legacy systems. Use this transaction to import a new Recipient Agency organization via an XML file upload.

Process Trigger

After an XML file has been created and contains all required data for the new RA, use this transaction to upload this file and create the new RA in WBSCM.

Prerequisites

- An XML file containing all required data for the new RA must exist.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Admin** tab ➜ **Organization Maintenance** tab ➜ **Upload New RA Organizations** to go to the *Upload New RA Organizations* initial 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: select **Admin** tab ➜ **Organization Maintenance** tab ➜ **Upload New RA Organizations**

    Image: Upload New RA Organizations Screen
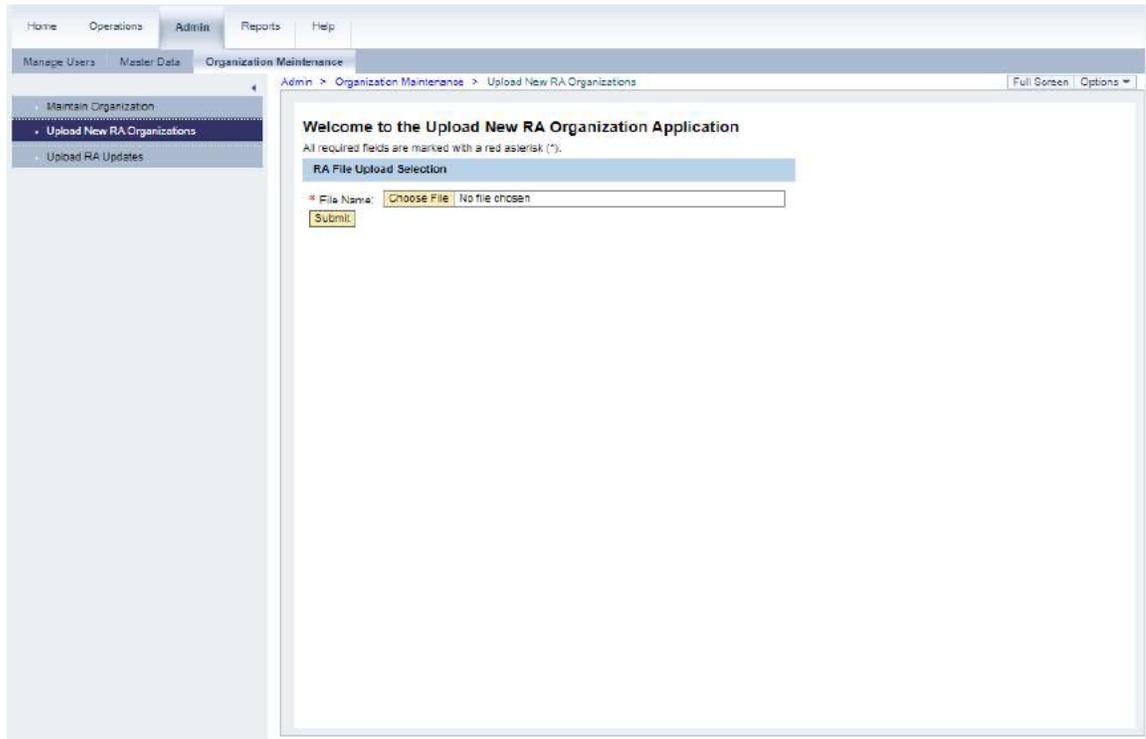
2. Click ◄ (the **Hide Navigator** arrow) to minimize the Portal menu. This can be done with any transaction in WBSCM.

Image: Upload New RA Organizations Screen
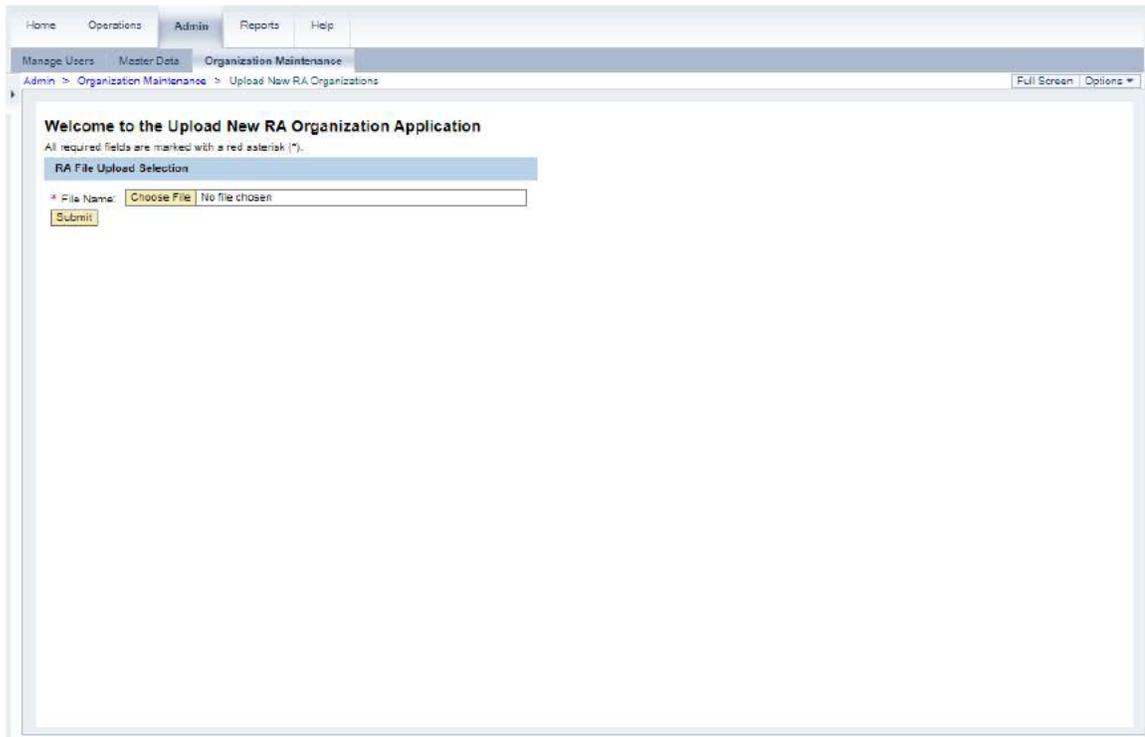
3. Click [Choose File] (the **Choose File** (button) to locate and select the file.

> (Note) RA upload XML file can contain a maximum of 200 RAs.

Image: Upload New RA Organizations Screen
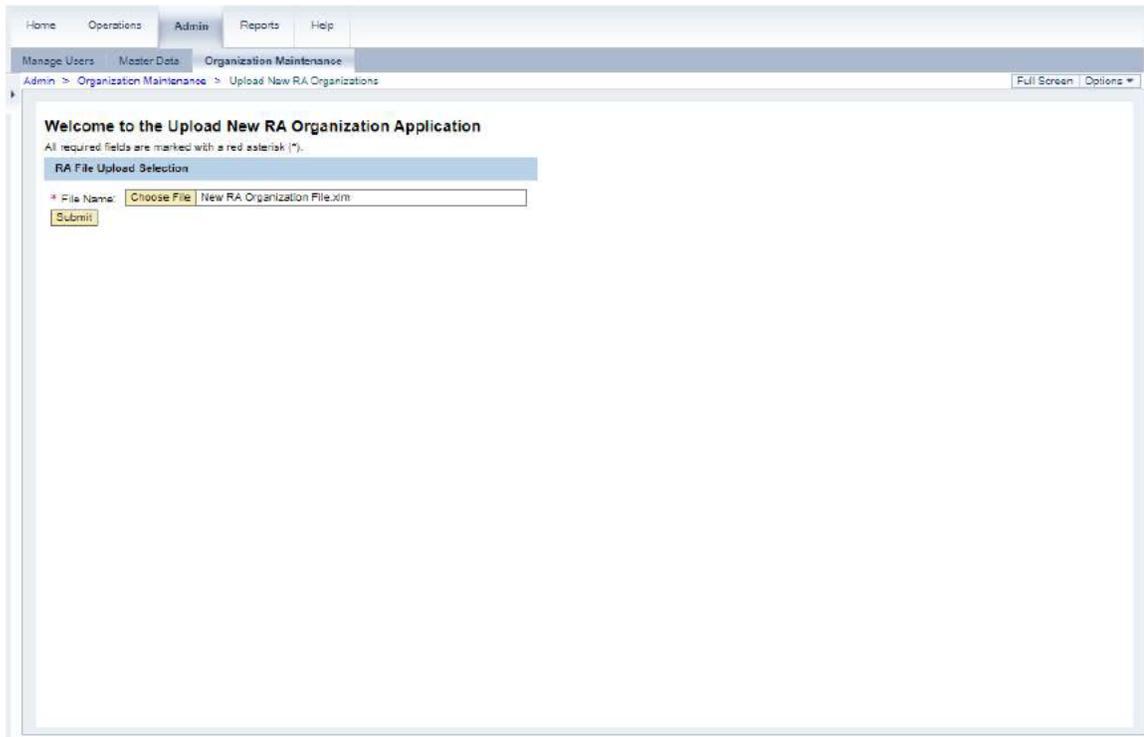
4. Click [Submit] (the **Submit** button) to upload the file. In this example, the **New RA Organization File.xlm** file is selected for upload.

Image: Upload New RA Organizations Screen
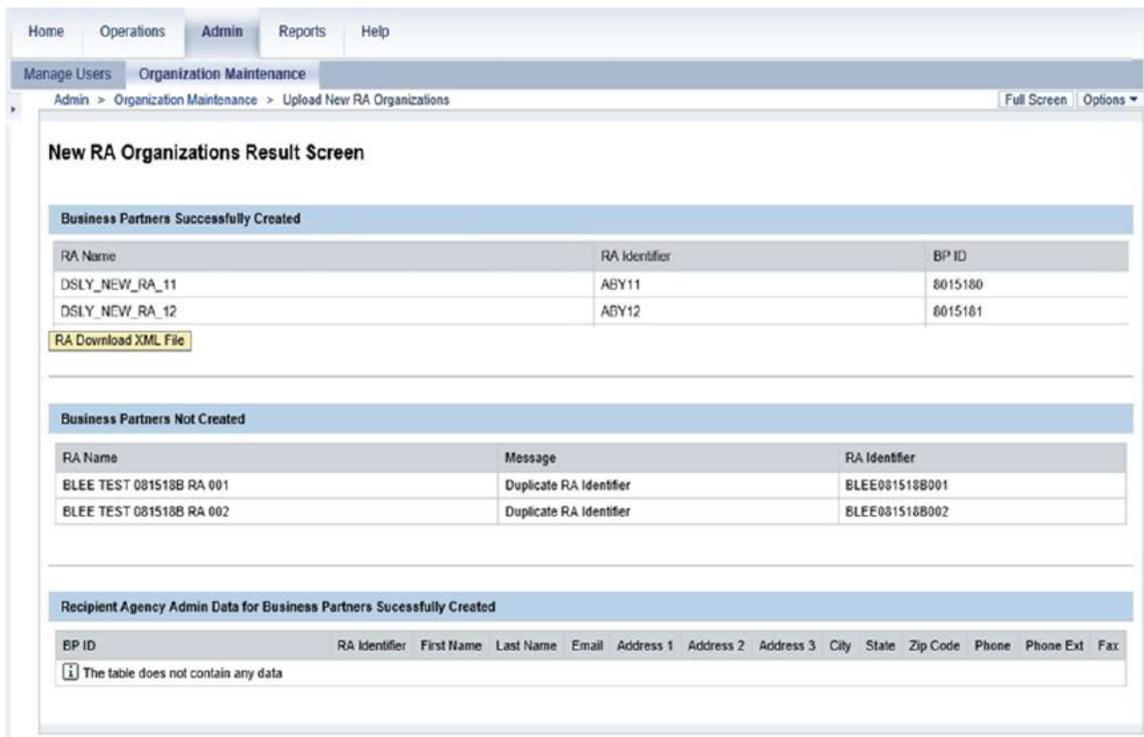
5.   The transaction is complete.

> (Note) A list of RAs successfully created will appear in the *Business Partners Successfully Created* screen section. A list of any RAs not created will appear in the *Business Partners Not Created screen* section.

RESULT

SDA/ITO org admin has created a new RA organizations using the upload option in WBSCM.

<div style="background:#3b3b6d;color:white;padding:4px;font-weight:bold;">PROCESS OVERVIEW</div>

Purpose

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

Process Trigger

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

Prerequisites

- None

Portal Path

Follow either Portal path below to complete this transaction:

- **Home** tab ➔ **Forums** tab ➔ **Full Truck Load and Transfer Requests** link
- **Operations** tab ➔ **Order Management** folder ➔ **Full Truck Load and Transfer Requests** link

Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - **Required (R)** – a mandatory field necessary to complete the transaction
  - **Optional (O)** – a non-mandatory field not required to complete the transaction
  - **Conditional (C)** – a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM 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 either of the above Portal paths. In this example, **Home** tab ➜ **Forums** tab ➜ **Full Truck Load and Transfer Requests** link portal path is selected.

Image: Forums Screen
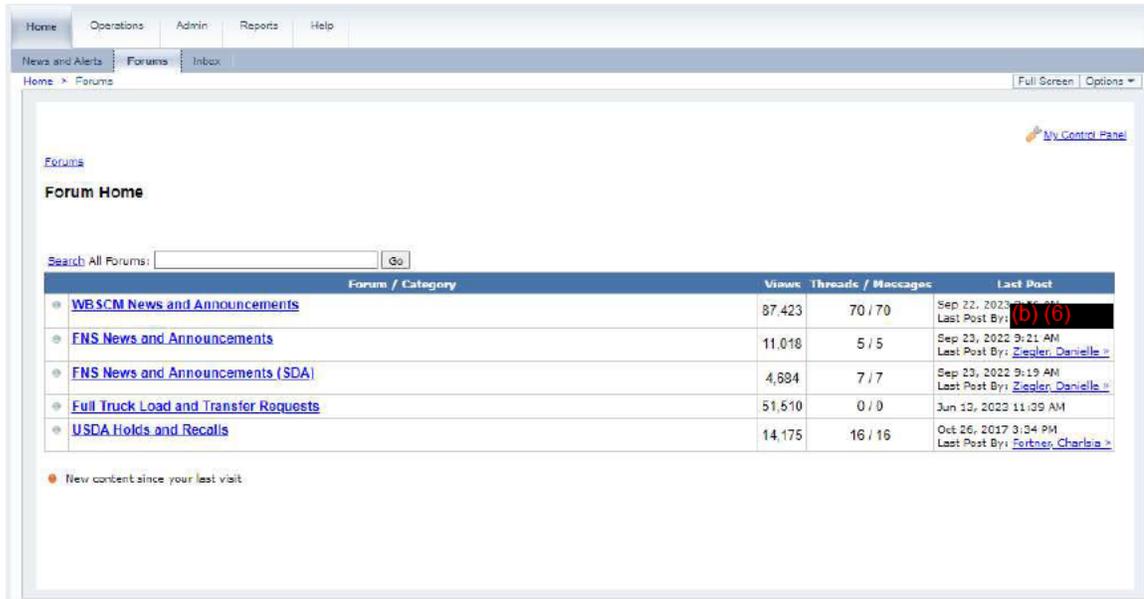
2. Click **Full Truck Load and Transfer Requests** (the **Full Truck Load and Transfer Requests** link) to open the *Full Truck Load and Transfer Requests* forum.

Image: Forums: Full Truck Load and Transfer Requests Screen
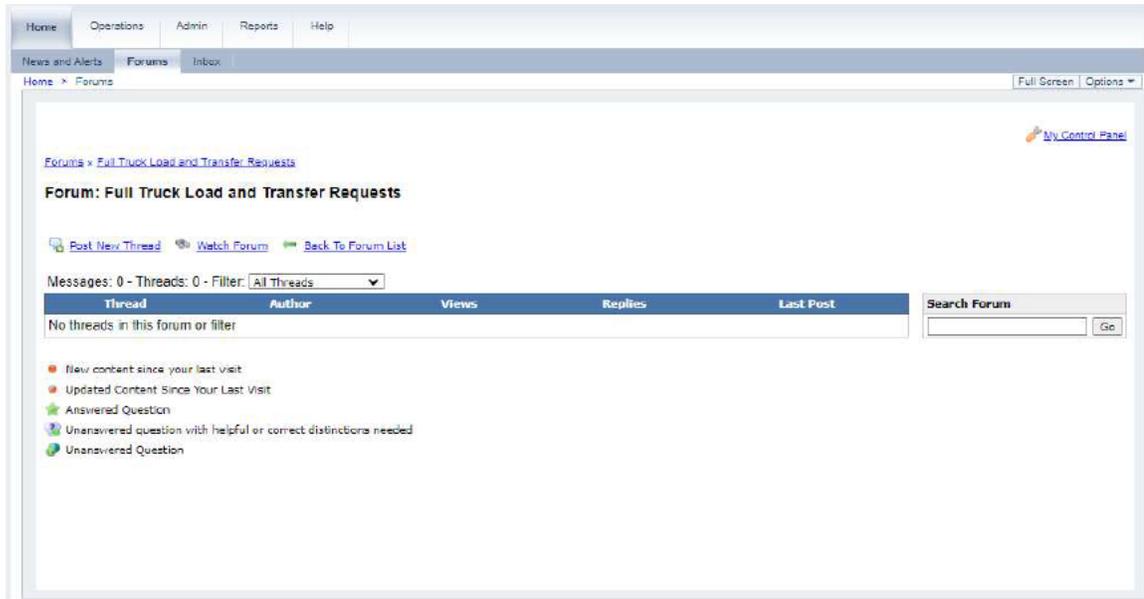
3. Click **Post New Thread** (the **Post New Thread** link) to add a new thread.

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

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

Use (the **Search Forum** field) to perform a search for keywords on the discussion forum.

For more information on WBSCM forums, refer to the **WBSCM Forums Notification Settings** job aid.

Image: Forums: Full Truck Load and Transfer Requests Screen

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

Field	R/O/C	Description
Subject:	R	Subject of the message being posted to the forum. **Example:** Cereal Shipment in Southwest Region
Message:	C	Message being posted to the forum. This is a free text field that allows entry of a message. **Example:** Are you interested in splitting with us? We have 500 cases of cereal (material code 100530) going to Houston on 12/31/2023. We need someone to order 400 more cases to make a full truck. When you are consolidating,

Field	R/O/C	Description
		enter group number 50000193 to link your order with ours so that they go on the same truck.

Image: Forums: Full Truck Load and Transfer Requests Screen
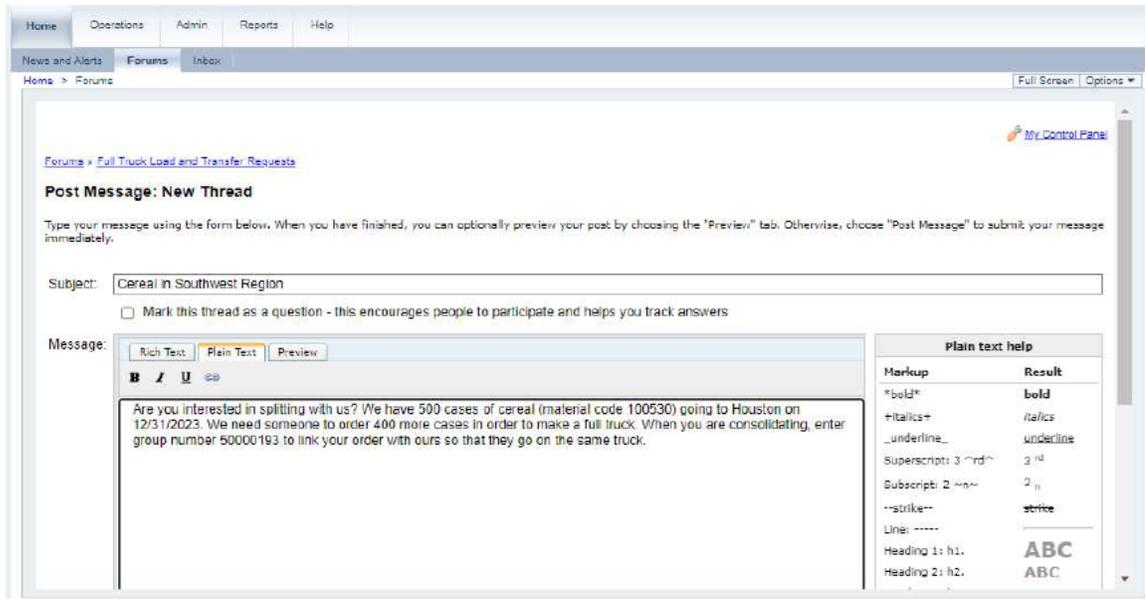
5. Select ☐ (the **"Mark this thread as a question - this encourages people to participate and helps you track answers"** check box).

Image: Forums: Full Truck Load and Transfer Requests Screen
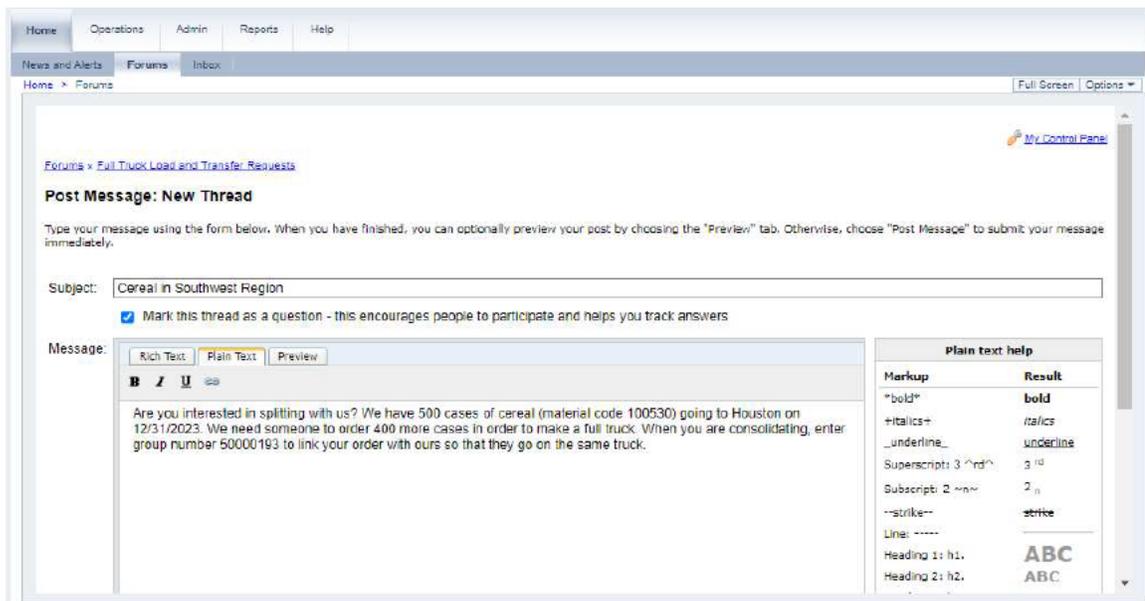
6. If necessary, click ▼ (the **Down** arrow) on the vertical scrollbar to scroll to the bottom of the page.

Image: Forums: Full Truck Load and Transfer Requests Screen
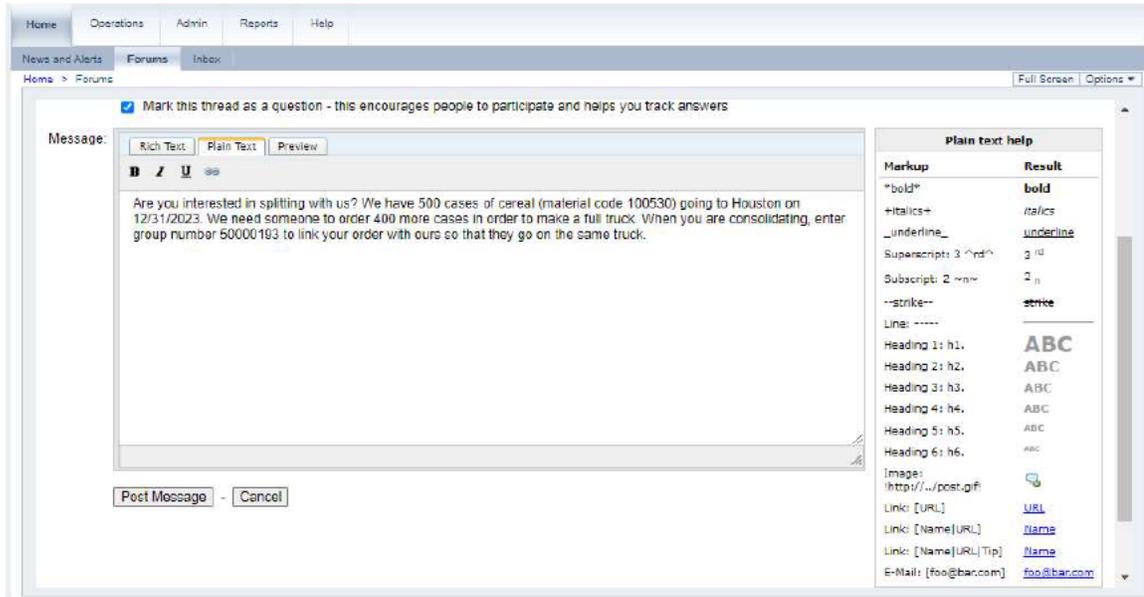
7. Click [Post Message] (the **Post Message** button).

Image: Forums: Full Truck Load and Transfer Requests Screen
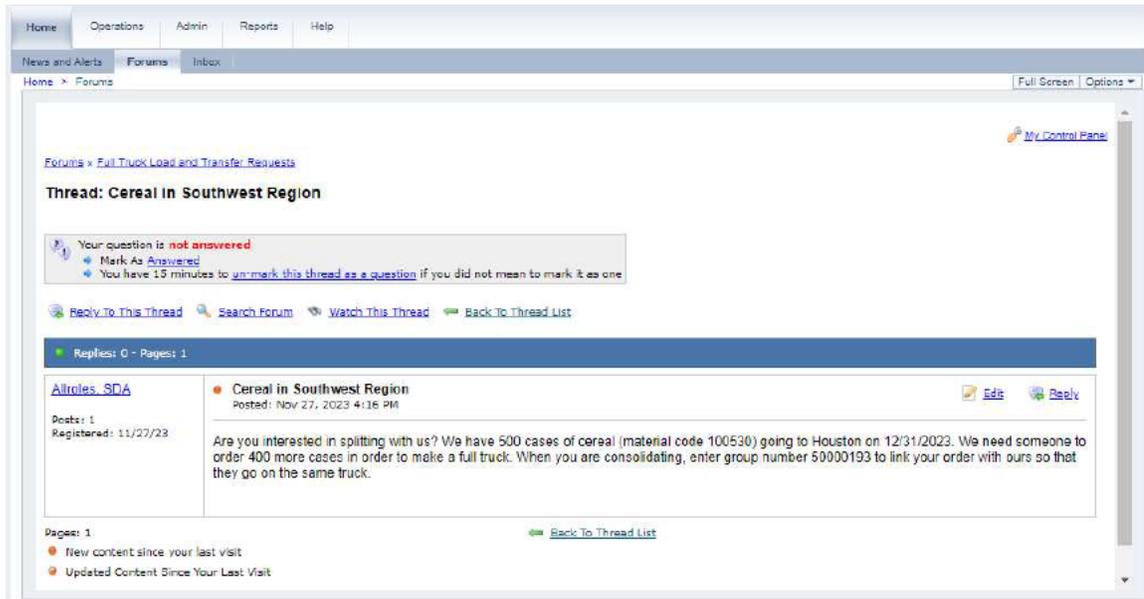
8. Review the displayed information.

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

Use 🐾 Watch This Thread (the **Watch This Thread** link) to receive an email notification whenever a response is posted.

Use ⇐ Back To Thread List (the **Back To Thread List** link) to return to the *Full Truck Load Request* forum page.

For more information on WBSCM forums, refer to the **WBSCM Forum Notification Settings** job aid.

9.   The transaction is complete.

RESULT

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

PROCESS OVERVIEW

Purpose

The purpose of this transaction is for a National Warehouse Org Admin to determine delivery dates for the SDAs and ITOs ordering out of their warehouse. After the National Warehouse Org Admin performs this transaction, the SDA and ITO users may log in and create non-delivery dates off the same calendar.

Process Trigger

Use this procedure to set the delivery calendar in WBSCM after the NW Org Admin and the customer have agreed on delivery dates.

Prerequisites

- SDA/ITO must be part of a multi-food program.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab ➔ **Order Processing** tab ➔ **NW Delivery Calendar** folder ➔ **Maintain National Warehouse Delivery Calendar** link to go to the *Maintain National Warehouse Delivery Calendar* screen.

Tips and Tricks

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

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

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

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

Reminders

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

PROCEDURE

1. Start the transaction using the following Portal path: **Operations** tab ➜ **Order Processing** tab ➜ **NW Delivery Calendar** folder ➜ **Maintain National Warehouse Delivery Calendar**

Maintain National Warehouse Delivery Calendar Screen

2. Select an organization from the *Organization* dropdown list. In this case, we selected 0004000043 :MI Dept. of Education (the **0004000043 :MI Dept. of Education** option).

> (Note) After you select an organization, the Ship-To Location field (a dropdown list) will become populated with the ship-to locations that correspond to the organization. These will be displayed in ascending order numerically.

Maintain National Warehouse Delivery Calendar Screen

3. Select the ship-to location from the *Ship-To Location* dropdown list. In this case, we selected (b) (4) _____ (the (b) (4) _____ (b) (4) option).

Maintain National Warehouse Delivery Calendar Screen
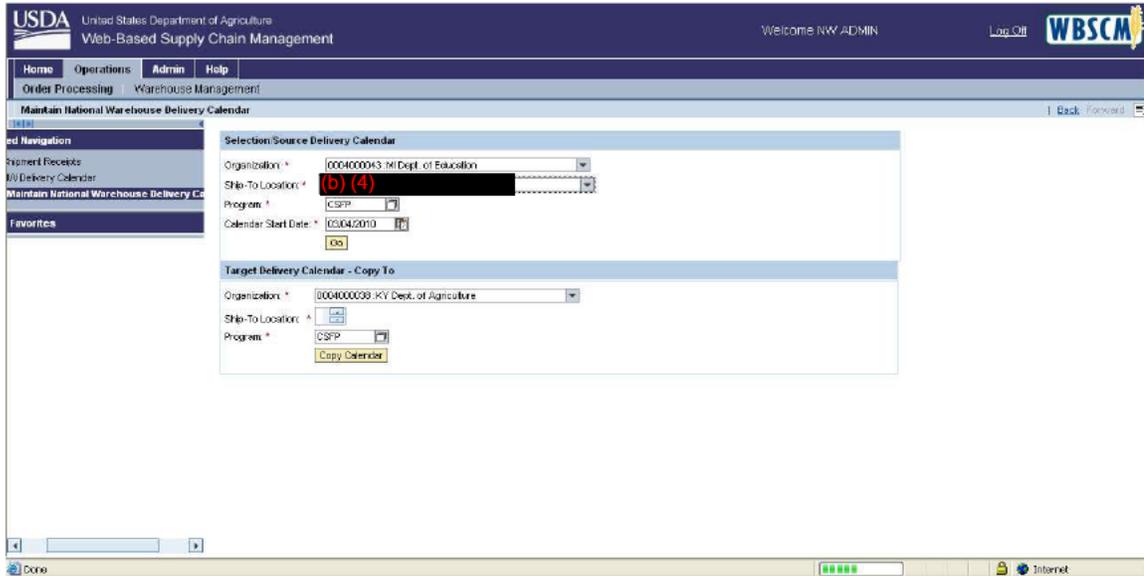
4. As required, complete/review the following fields:

Field	R/O/C	Description
Program: *	R	Abbreviation for the specific program through which you are placing your orders. If you do not know the program abbreviation, use the WBSCM search functionality to locate it. **Example:** CSFP
Calendar Start Date: *	R	Date when you would like the delivery calendar to start. This is a free text field. You may use the calendar icon to display calendars of upcoming months and select the appropriate date. **Example:** 03/04/2010

(Note) Remember that required fields have a red asterisk adjacent to them. If you do not enter data in a required field, you will receive a hard stop and an error message; you will be prompted to enter the missing information.

To perform the *Selection/Source Delivery Calendar* query, you will need to select an Organization, Ship-To Location, Program, and Calendar Start Date. Use this to create an initial delivery calendar, or to modify an existing delivery calendar.

To perform the *Target Delivery Calendar - Copy-To* query/transaction, you will need to select an Organization, Ship-To Location, and Program. Use this to copy details over from an existing

delivery calendar, and create a replica for a different organization.

For purposes of this transaction, we are only performing the *Selection/Source Delivery Calendar* query.

Maintain National Warehouse Delivery Calendar Screen
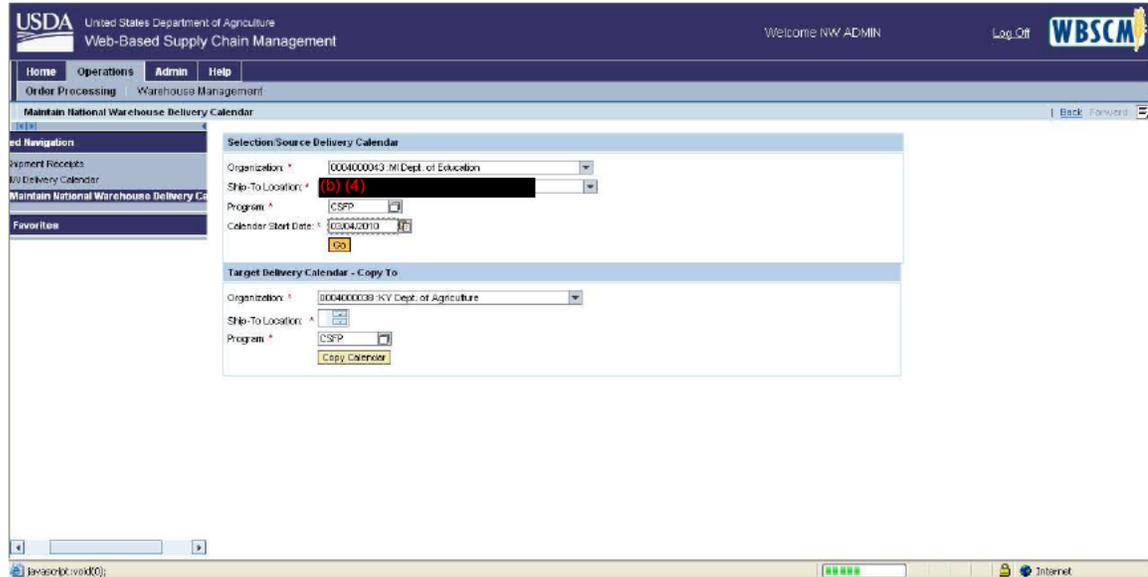
5. Click [Go] (the **Go** button) to display the calendar specified by your criteria.

Maintain National Warehouse Delivery Calendar Screen
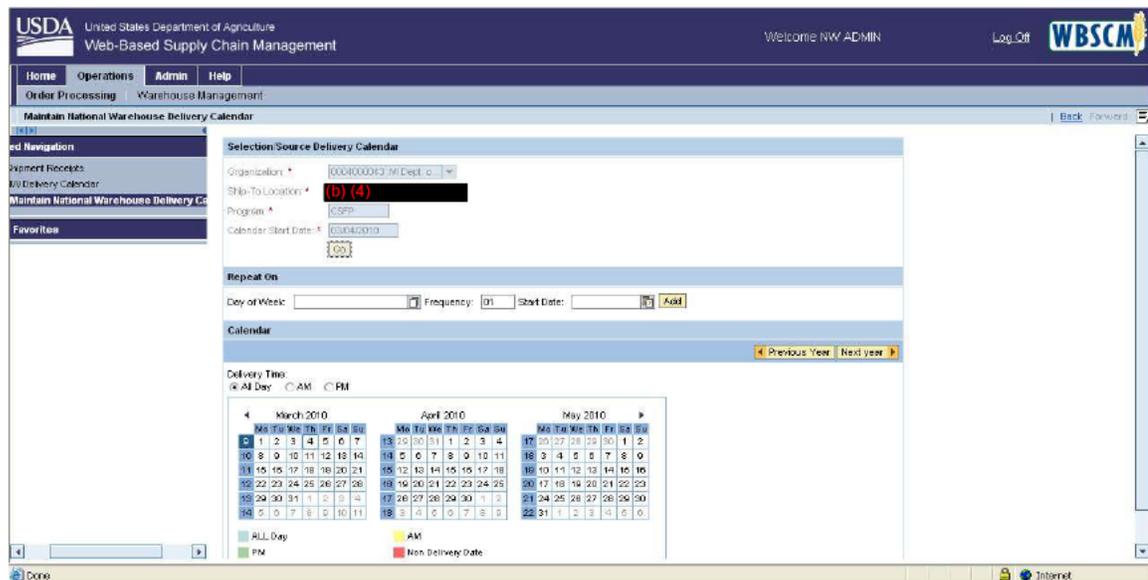
6. Select the radio button beside the **PM** field under Delivery Time to indicate that you wish to add afternoons for the specified dates to the regular delivery calendar.

> (Note) Notice that the page displays a delivery calendar beginning with the start date you specified. You can select a specific day of the week and frequency (i.e. entering Wednesday and

four will select the next four Wednesdays following the start date). You can scroll to the **Previous Year** and **Next Year** using the respective buttons.

If the **Next Year** button is clicked to add dates to a future year, a Pop-up box will open asking "Do you want to save changes" with "yes", "no" and "cancel" options.

• **Yes:**   Dates in the current year and next year are saved, and the user will be directed to the next year's screen.
• **No:**   None of the dates are saved and the user will be directed to the next year's screen.
• **Cancel:** User continues to stay on the same screen

.

Maintain National Warehouse Delivery Calendar Screen
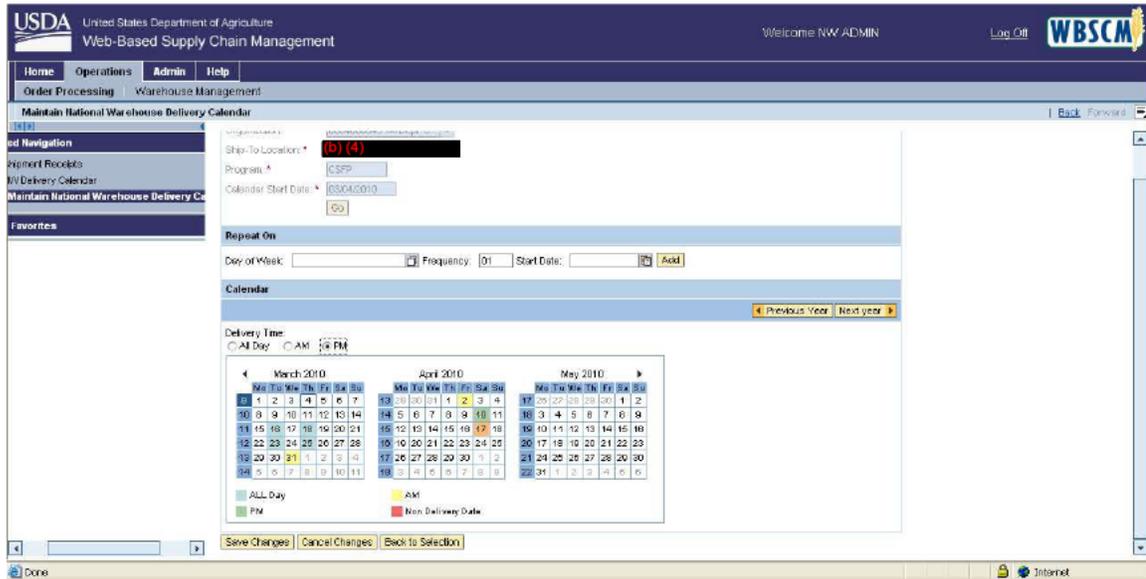
7.   As required, complete/review the following fields:

Field	R/O/C	Description
Day of Week:	R	Enter a day of the week that you wish to include on the delivery calendar. **Example:** Monday
Frequency:	R	Frequency with which you want the delivery date to occur. **Example:** 3
Start Date:	R	First delivery date. **Example:** 5/04/2010

Maintain National Warehouse Delivery Calendar Screen

8.   Click [Add] (the **Add** button) to add the delivery date to the calendar.

(Note) You may also select single delivery dates (instead of using the "Repeat On" functionality) by clicking the desired delivery date directly on the calendar. Use the left and right arrows next to the displayed calendar months to go to the previous or to the next month within the same calendar year.

Maintain National Warehouse Delivery Calendar Screen
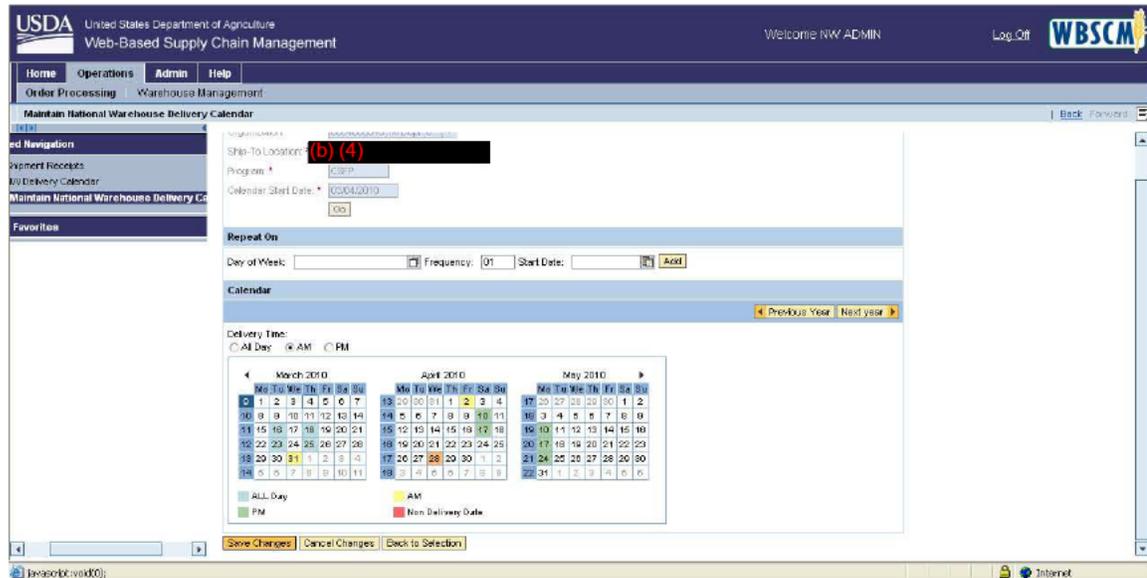
9.   Click [Save Changes] (the **Save Changes** button) to save your changes.

(Note) When displaying the calendar, notice there is a color-coding system, as follows:

Blue boxes indicate you are available to deliver to this organization and ship-to at any time during the day.

Green boxes indicate you are available to deliver to this organization and ship-to at any time in the afternoon.

Yellow boxes indicate that you are available to deliver to this organization and ship-to at any time in the morning.

Red boxes indicate that this is a non-delivery date (such as a holiday) specified by the SDA and that the SDA is unavailable for deliveries.

Maintain National Warehouse Delivery Calendar Screen
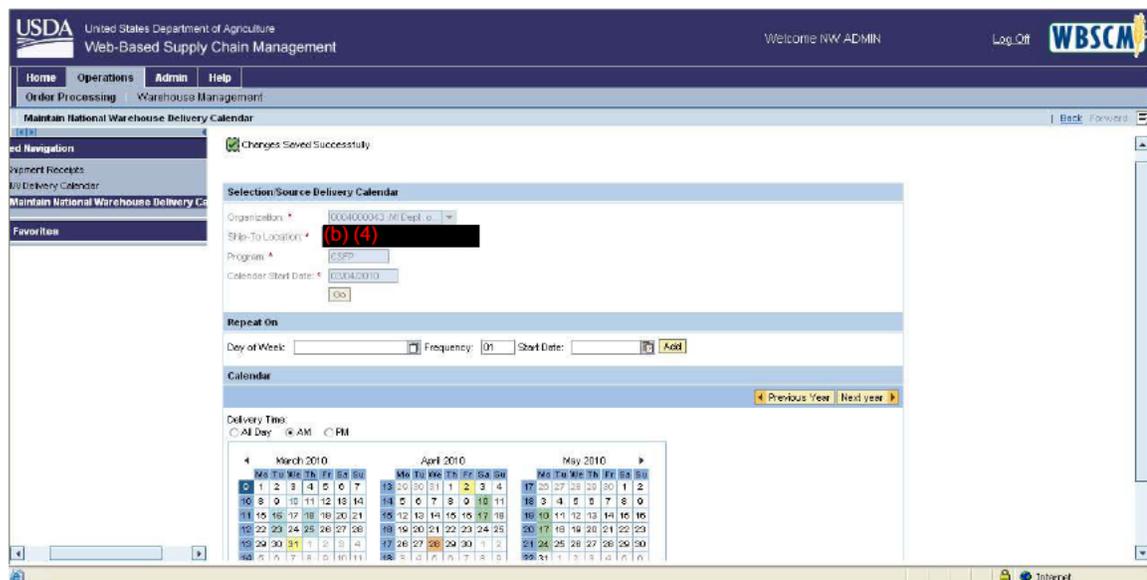
10. You have completed this transaction.

(Note) A confirmation message displays: "Changes Saved Successfully"

RESULT

The transaction has been successfully completed.

PROCESS OVERVIEW

Purpose

The purpose of this transaction is to modify or display a Domestic HQ Organization in WBSCM. The updates can include:

- Name and address
- Assign or unassign Business Partner relationships
- Activate or Inactivate Business Partner

Process Trigger

The information for an existing Domestic HQ has changed.

Prerequisites

- A Domestic HQ must exist in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

- To **Maintain** the Domestic HQ - select **Admin** tab ➔ **Organization Maintenance** tab ➔ **Maintain Organization** link ➔ **Maintain HQ Organization** link to go to the *Maintain Organization* screen.
- To **Display** the Domestic HQ - select **Admin** tab ➔ **Organization Maintenance** tab ➔ **Maintain Organization** link ➔ **Display HQ Organization** link to go to the *Display Organization* screen.

Tips and Tricks

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

PROCEDURE

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

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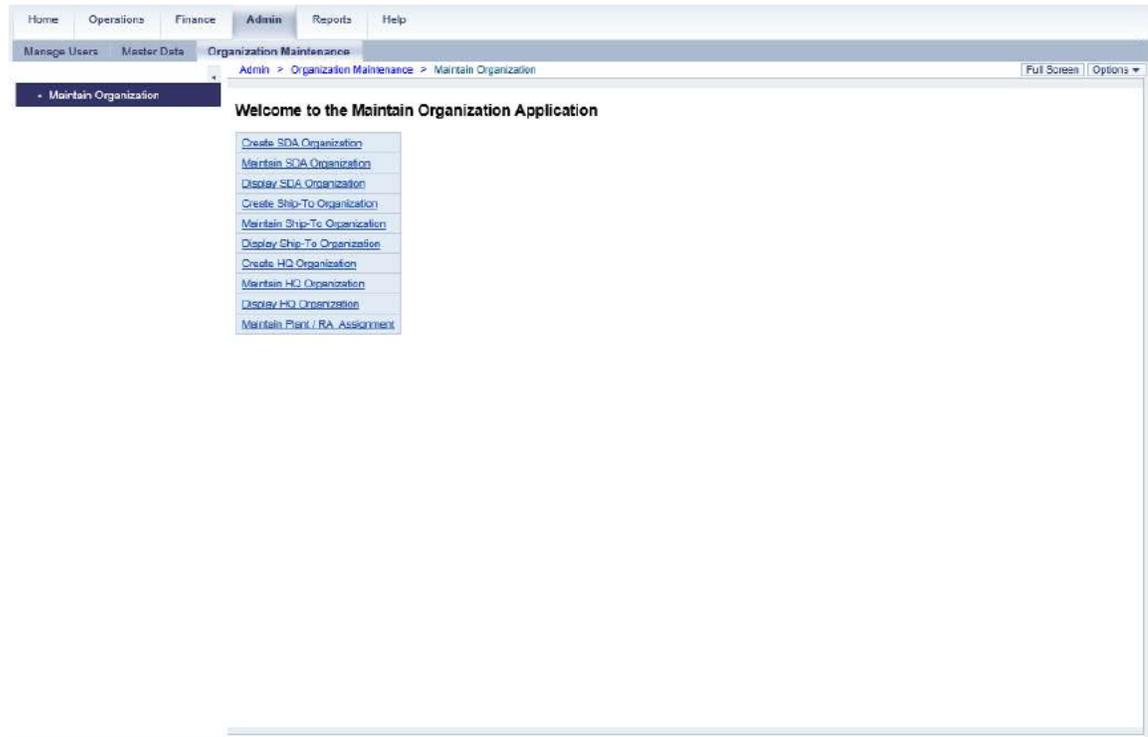
2. Click ⬝ (the **Hide Navigator** arrow) to minimize the Portal menu. Note that this can be done with any transaction in WBSCM.

Image: Maintain Organization Screen

Home	Operations	Finance	Admin	Reports	Help

Manage Users   Master Data   **Organization Maintenance**

Admin > Organization Maintenance > Maintain Organization   Full Screen | Options ▼

Welcome to the Maintain Organization Application

Create SDA Organization
Maintain SDA Organization
Display SDA Organization
Create Ship-To Organization
Maintain Ship-To Organization
Display Ship-To Organization
Create HQ Organization
Maintain HQ Organization
Display HQ Organization
Maintain Plant / RA Assignment

3.   Click Maintain HQ Organization (the **Maintain HQ Organization** link) to update.

![info icon]   (Note) This work instruction reviews the steps to update a HQ organization. To view the information for a HQ without making changes, click Display HQ Organization (the **Display HQ Organization** link). In display mode, fields are not editable and will appear with a gray background.

Image: Select Sub-Organization Screen

Home	Operations	Finance	Admin	Reports	Help

| Manage Users | Master Data | Organization Maintenance | | | |

Admin > Organization Maintenance > Maintain Organization   Full Screen | Options ▾

Select Sub-Organization

Select the appropriate radio button to display a list of active or inactive sub-organization(s) to choose from.

⦿ Active   ○ Inactive

HQ: **(b) (4)**   ▼

⬥ Next

---
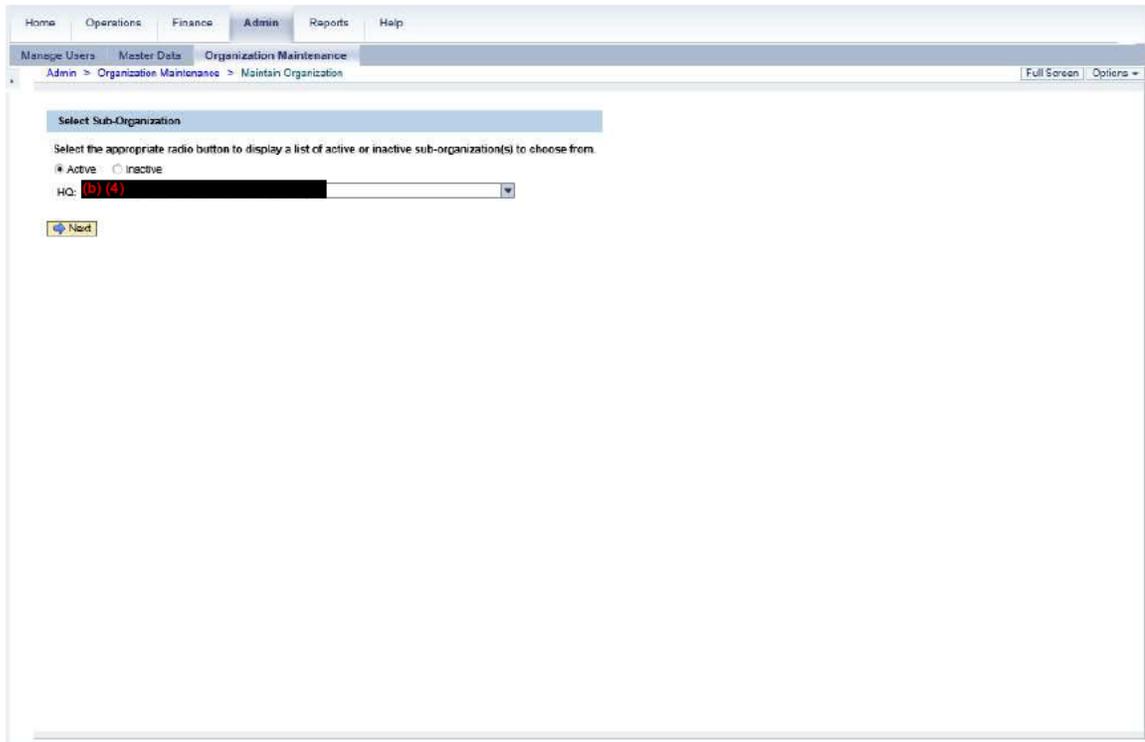
4.   Click ▼ (the **HQ** drop-down).

ℹ️   (Note) WBSCM defaults to display active HQs in the drop-down when ⦿ Active (the **Active** radio button) is selected. If the user needs to display inactive HQs, click ○ Inactive (the **Inactive** radio button) prior to clicking ▼ (the **HQ** drop-down).

Image: Select Sub-Organization Screen
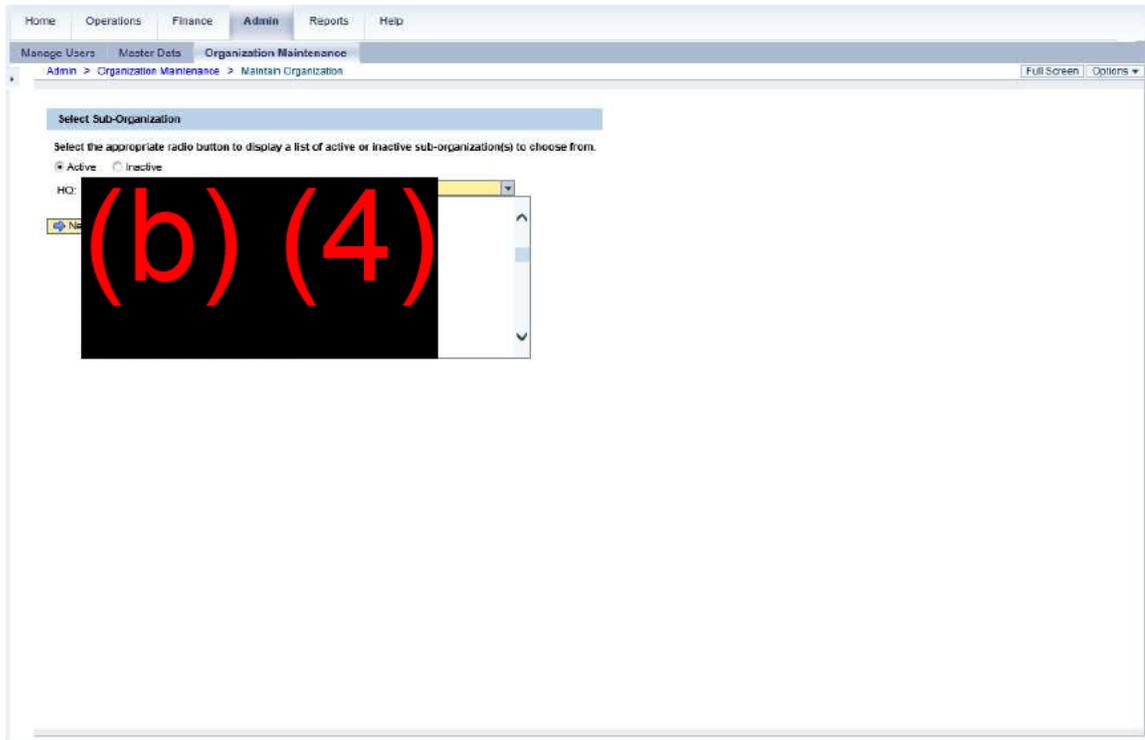
5. Select the appropriate HQ from the drop-down list. In this example, (b) (4) the (b) (4) option) is selected.

> (Note) Only one HQ can be modified at a time.

> (Note) The available HQs are listed in alphabetical order by name. Use the vertical scrollbar to search through the list, or type the first letter of the name to select from HQ organizations that start with that letter.

Image: Select Sub-Organization Screen
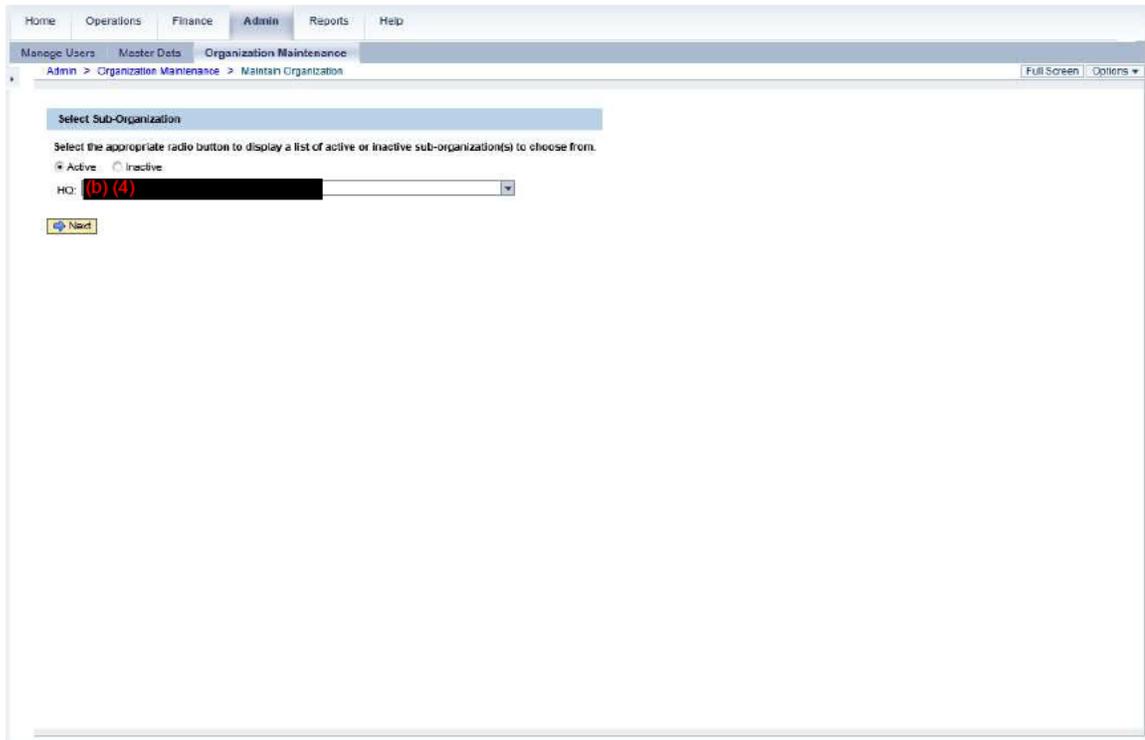
6. Click ⇨ Next (the **Next** button) to open the record for the selected HQ.

7. Perform one of the following:

If	Then
The user needs to update an existing HQ organization	Go to Step 8.
The user needs to activate/inactivate an existing HQ organization	Go to Step 15.
The user needs to submit the updates	Go to Step 19

Image: Maintain HQ Organization (Address) Screen

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

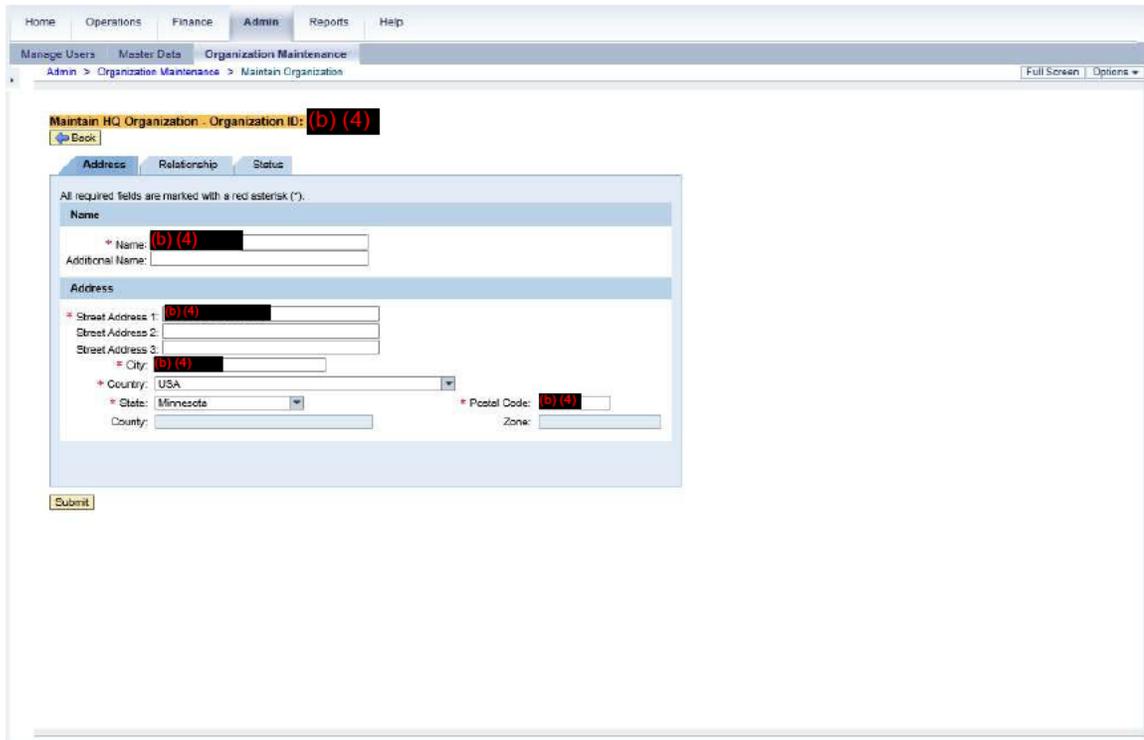| Field	R/O/C	Description
Name:	R	Person or business partner's name. **Example:** (b) (4) ██████ HQ
Additional Name:	O	A free text field to enter an additional name or name of recipient.
Street Address 1:	R	A free text field to enter the main street address of the user or organization. **Example:** 123 Main Street
Street Address 2:	O	A free text field to enter an additional row of street address of the user or organization.

| Field	R/O/C	Description
Street Address 3:	O	A free text field to enter an additional row of street address of the user or organization.
City:	R	City where the user or company is located. **Example:** (b) (4)
Country:	R	Country code that represents country name. **Example:** USA (Note) The Country ▼ (**Drop-down** button) displays a list of countries.
State:	R	The abbreviation of United States territory, district or state. **Example:** Minnesota (Note) The State ▼ (**Drop-down** button) displays a list of states and territories.
Postal Code:	R	A ZIP code. **Example:** (b) (4)

Image: Maintain HQ Organization (Address) Screen

9. Click [Relationship] (the **Relationship** tab) to review and modify a relationship between the HQ and the business partner(s).

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

Image: Maintain HQ Organization (Relationship) Screen
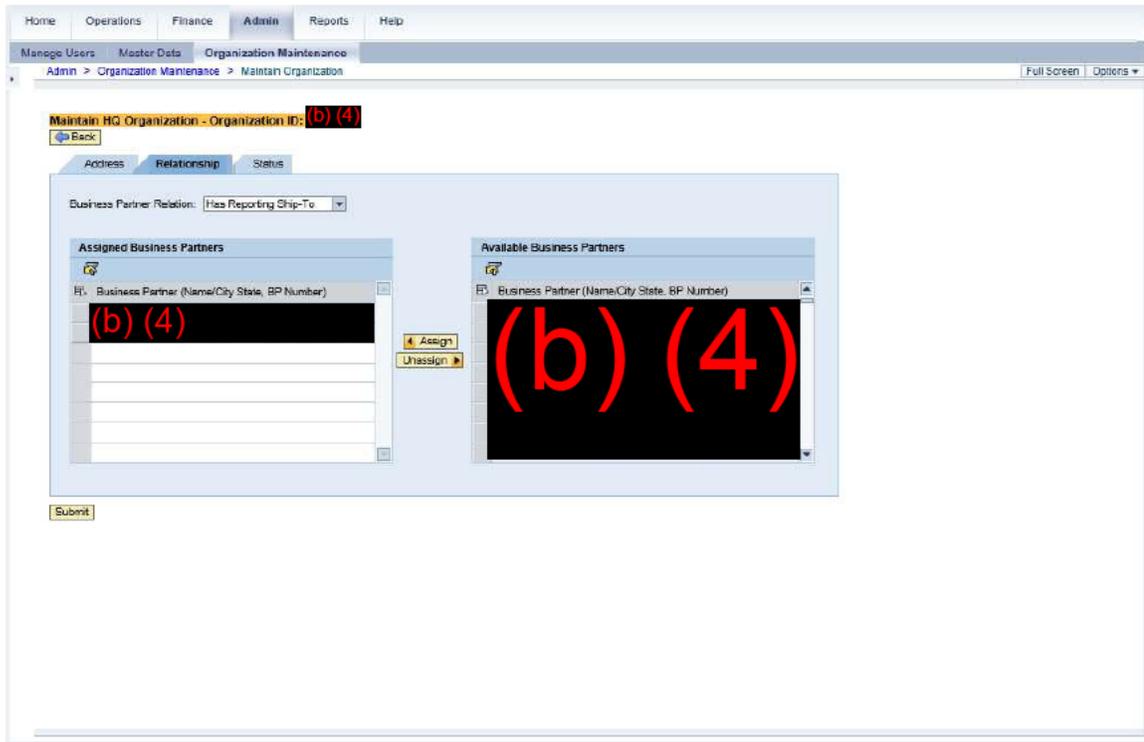
10. Click ☐ (the **Select** button) beside the approrpriate business partner to unassign a relationship with the selected business partner. In this example, (b) (4) (b) (4) is selected.

> ℹ (Note) The business partners are listed in alphabetical order. Use the vertical scrollbar to find the appropriate business partners.
>
> To select multiple business partners:
>
> - If the business partners are listed in consecutive rows, hold down the **Shift** key and click the first and last selection buttons.
> - To select business partners from non-consecutive rows, hold down the **Ctrl** key while clicking each selection button.

> ℹ (Note) To filter the list of Business Partners click on the column **Business Partner**
>
> (All)
> (User-Defined Filter...)
>
> **(Name/City State, BP Number)** field. Select (the **User-Defined Filter...** option) and enter required criteria. Use " * " (the **Asterisk** symbol) at the beginning and at the end of a search term (e.g., *Craven* or *5001716*) to search for a business partner that contains the term. The asterisk searches part of a word as well (e.g., *Califor*). See also the Wildcard and Matchcode Searches job aid.
>
> To remove the filter, select the **(All)** option.

11. Click **Unassign ▶** (the **Unassign** button) to remove a relationship between the HQ and the selected business partner.

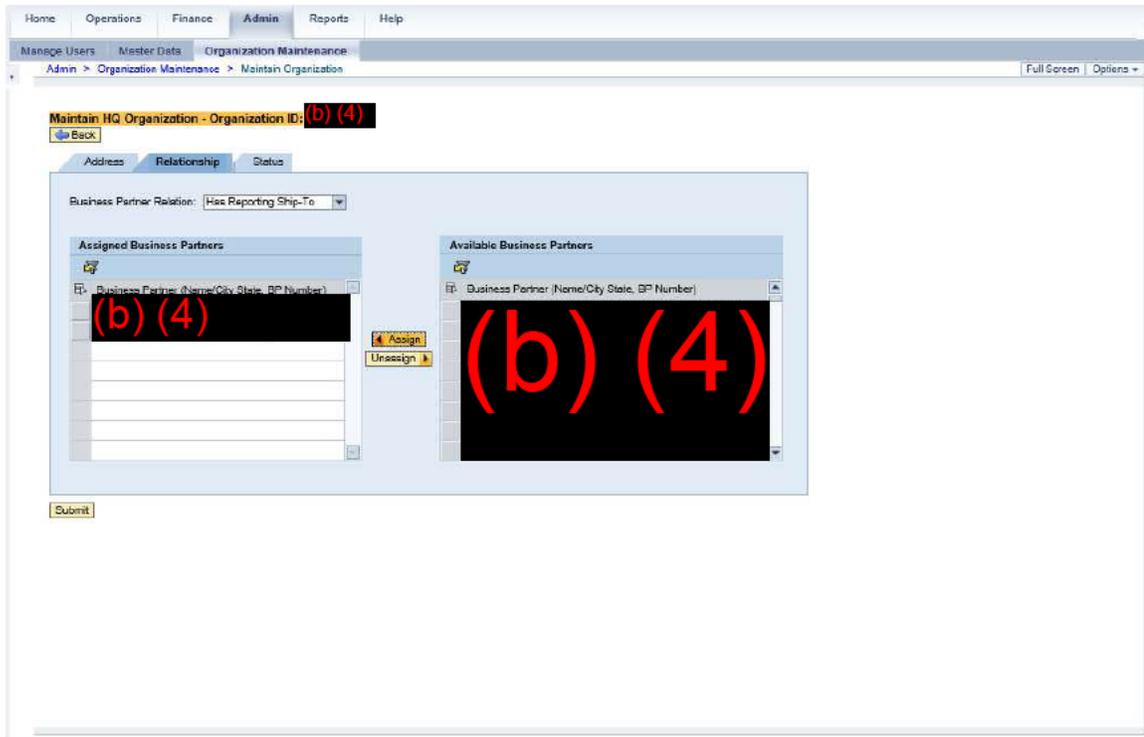**Image: Maintain HQ Organization (Relationship) Screen**
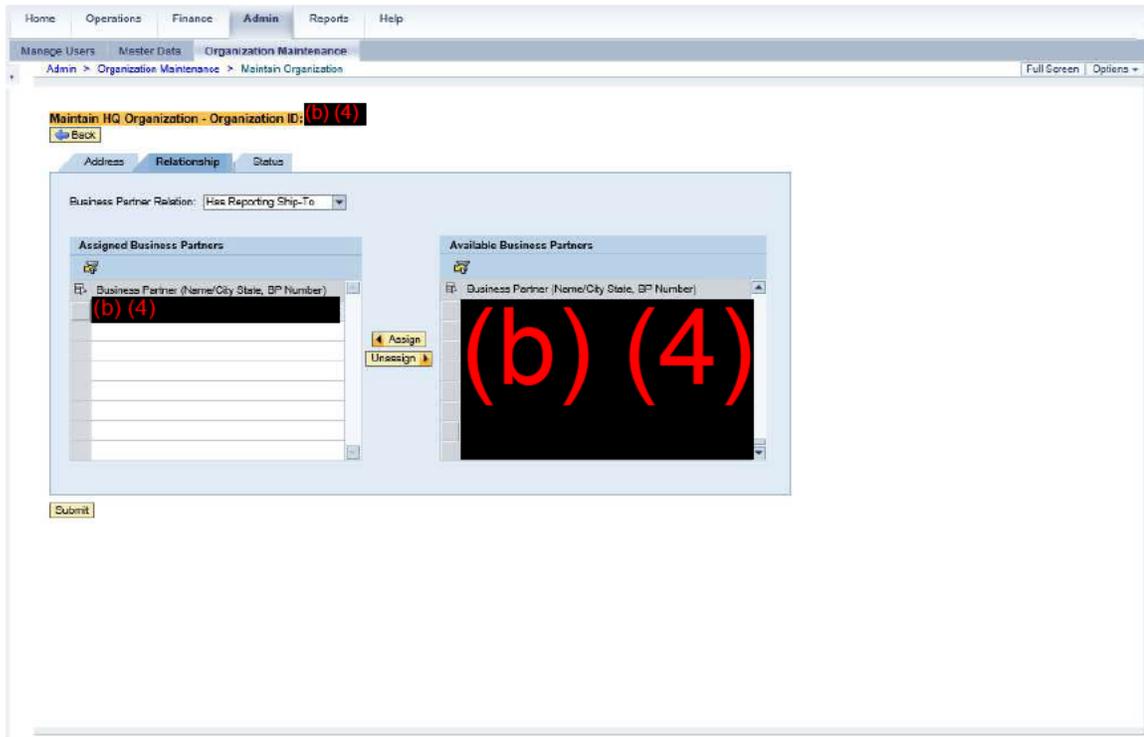
12. Click ☐ (the **Select** button) beside the appropriate business partner to assign a relationship with the selected business partner. In this example, (b) (4) ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓ is selected.

Image: Maintain HQ Organization (Relationship) Screen
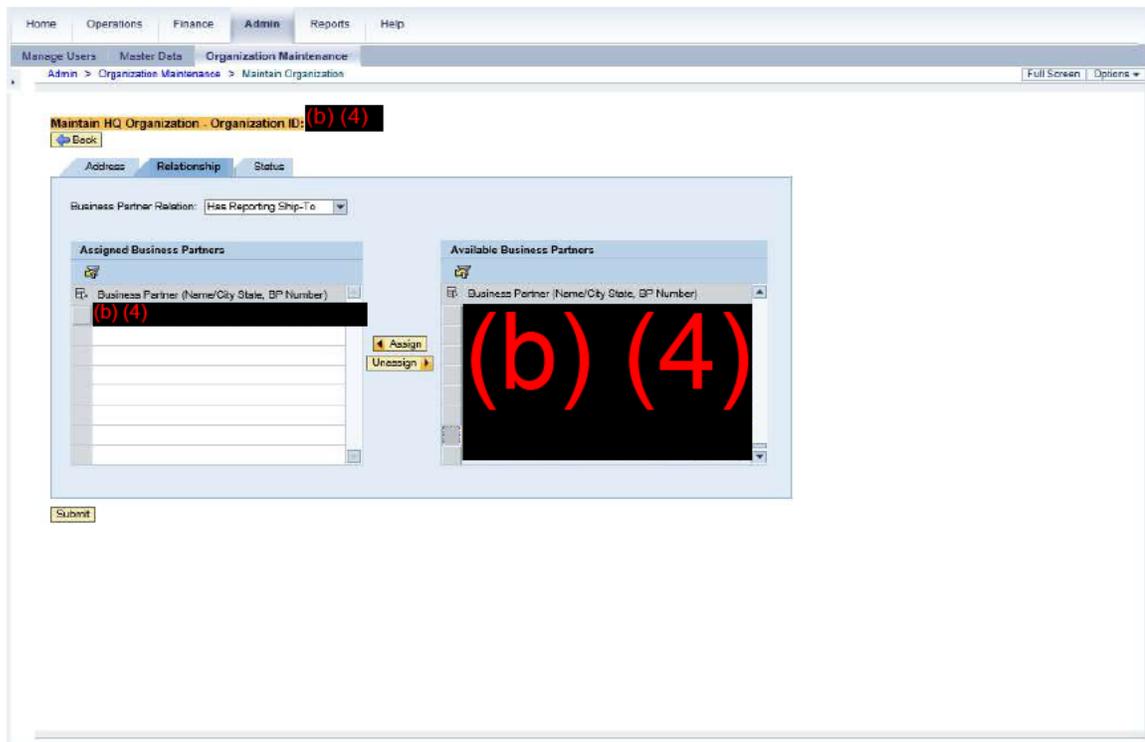
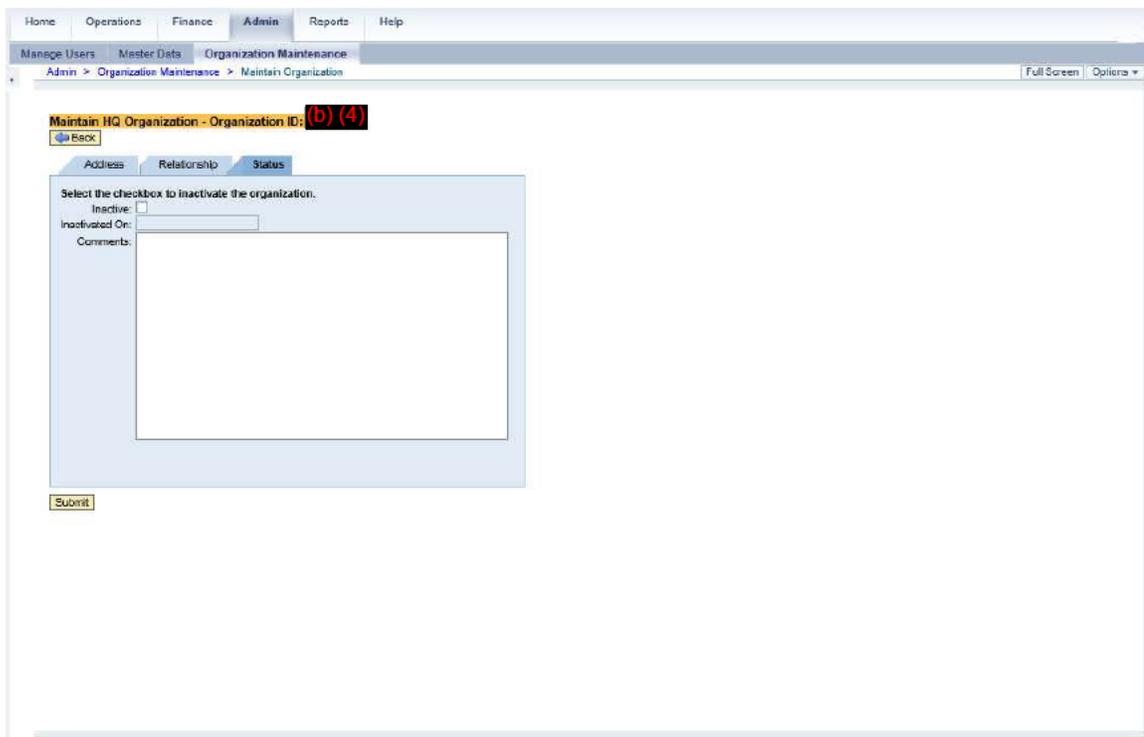13. Click ◄ Assign the **Assign** button) to create a new relationship between the HQ and the selected business partner.

14. Go to Step 7.

Image: Maintain HQ Organization (Relationship) Screen

15. If necessary, click [Status] (the **Status** tab) to activate or inactivate an HQ.

Image: Maintain HQ Organization (Status) Screen

16.   If necessary, click ☐ (the **Inactive** checkbox) to select and inactivate the existing HQ.

(Note) If ☐ (the **Inactive** checkbox) is selected, deselecting it will make the HQ active. Also, the date from the **Inactivated On** field will be cleared automatically, as the organization is not inactive anymore.

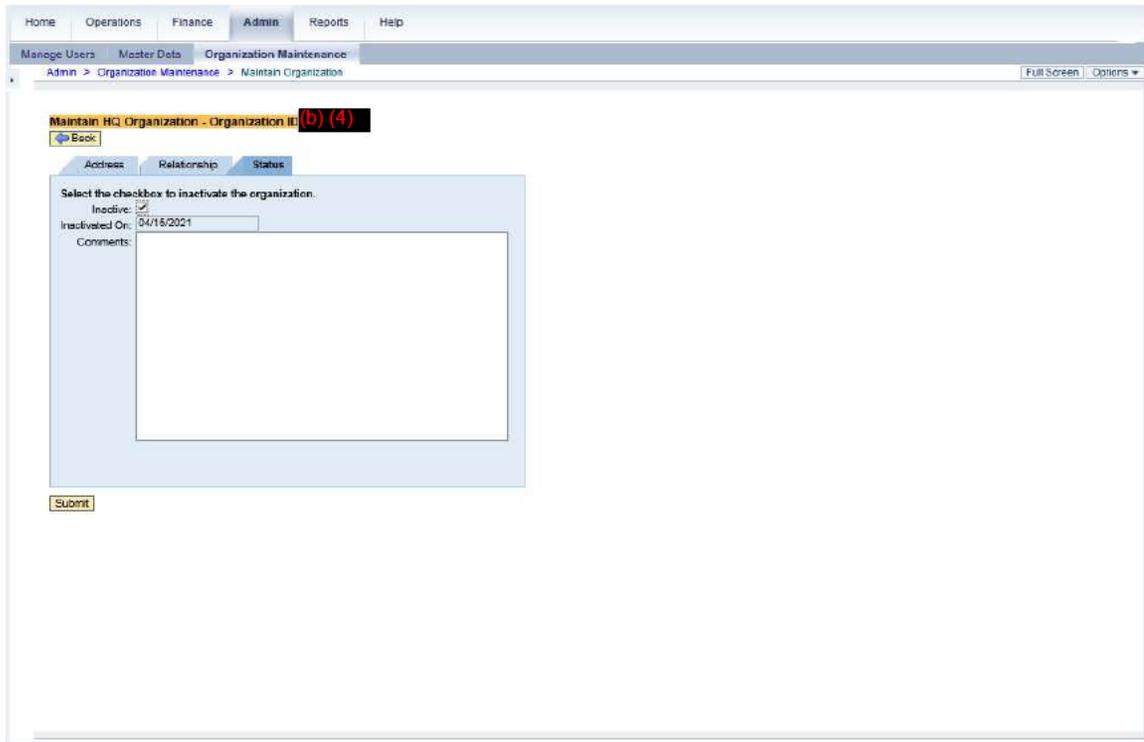**Image: Maintain HQ Organization (Status) Screen**

17.   If necessary, enter any business reasons for active/inactive change in the **Comments** field. In this example, no reason was entered.

(Note) When ☑ (the **Inactive** checkbox) is checked, the **Inactivated On** field is auto-populated with the date the organization was inactivated. This field is not editable.

18.   Return to Step 7.

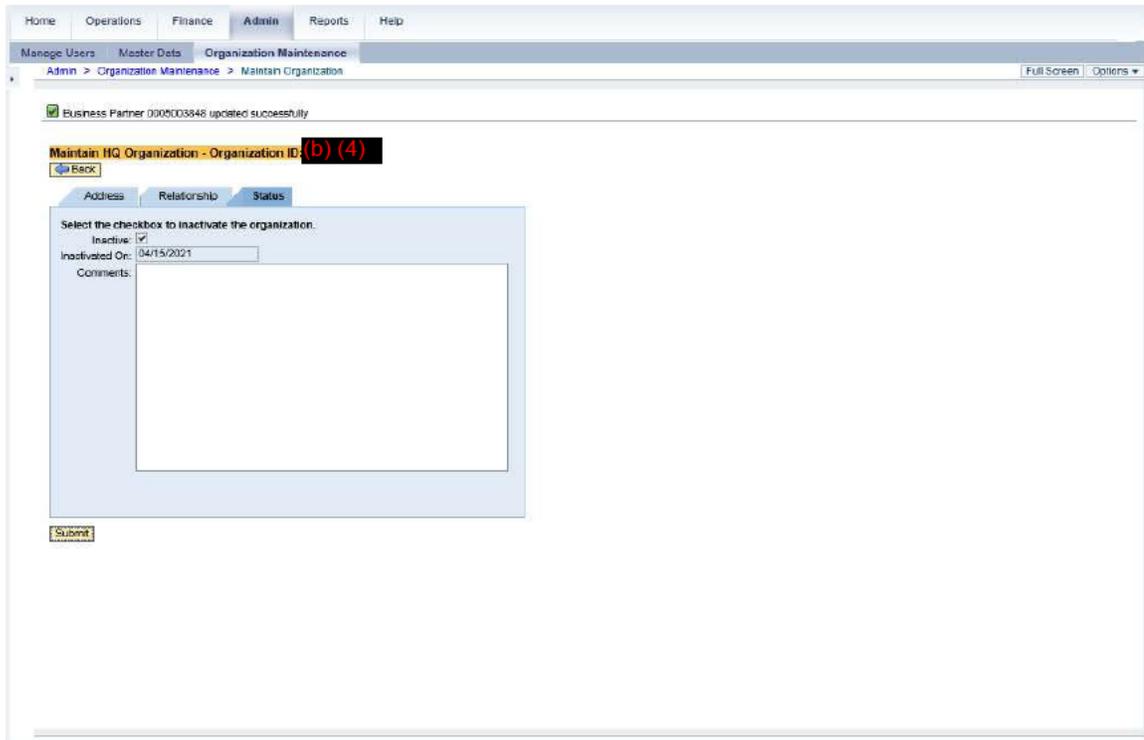## Image: Maintain HQ Organization (Status) Screen

19. Click `Submit` (the **Submit** button) to save the modifications.

> (Note) A confirmation message displays: "*Business Partner XXXXXX updated successfully.*"

Image: Maintain HQ Organization (Status) Screen

20.   The transaction is complete.

RESULT

An existing HQ Organization has been reviewed and updated as applicable, including:

- Contact information
- Business partner relationship(s)
- Active or Inactive status