



## PROCESS OVERVIEW

### Purpose

When submitting an order, a State Distributing Agency (SDA) or Indian Tribal Organization (ITO) must select a delivery period to identify the range of dates when the sales order should be delivered. Each delivery period has an Order Date, which represents the due date for orders to FNS. In order to receive a delivery during the specified period, the SDA must submit their sales order on or before the Order Date. The purpose of this transaction is for FNS Order Managers to set the delivery periods and order due dates for their SDAs.

### Process Trigger

A commodity is added to the domestic catalog for WBSCM. An FNS Order Manager needs to set delivery periods and order due dates before the SDAs will be able to order it.

### Prerequisites

- Commodity must exist in material master.
- Commodity must exist in domestic catalog.

### Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab → **Order Processing** tab → **Catalog Maintenance** folder → **Maintain Direct-Ship Delivery Periods** link.

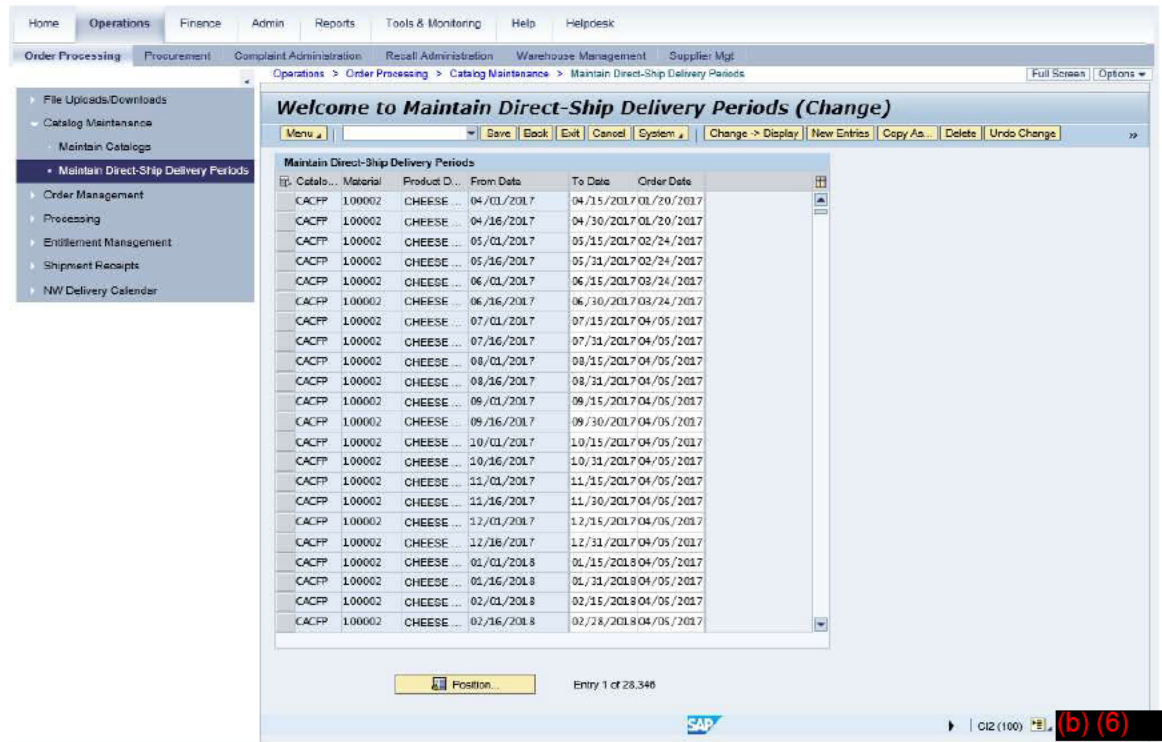
### Tips and Tricks


- 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 Portal Basic Navigation course for tips on creating favorites, performing searches, etc.

**PROCEDURE**

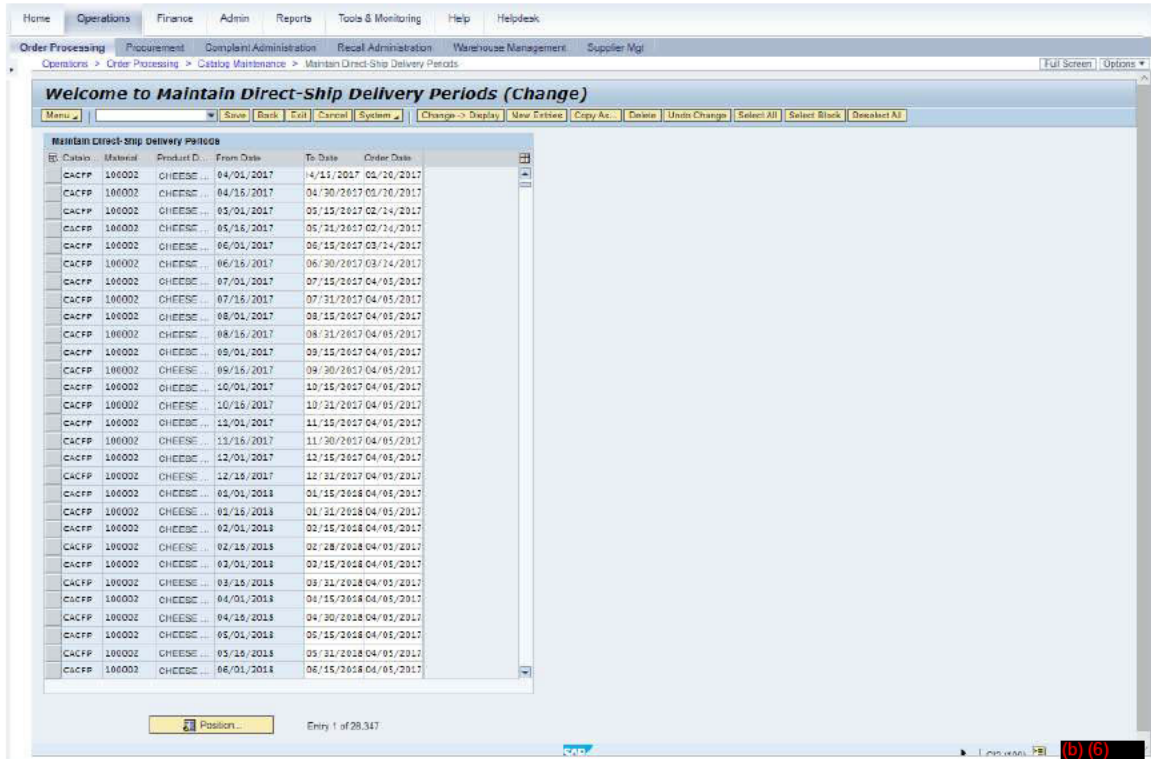
1. Start the transaction using the Portal path: **Operations** tab → **Order Processing** tab → **Catalog Maintenance** folder → **Maintain Direct-Ship Delivery Periods** link.

**Image: Maintain Direct-Ship Delivery Periods (Change) Screen**



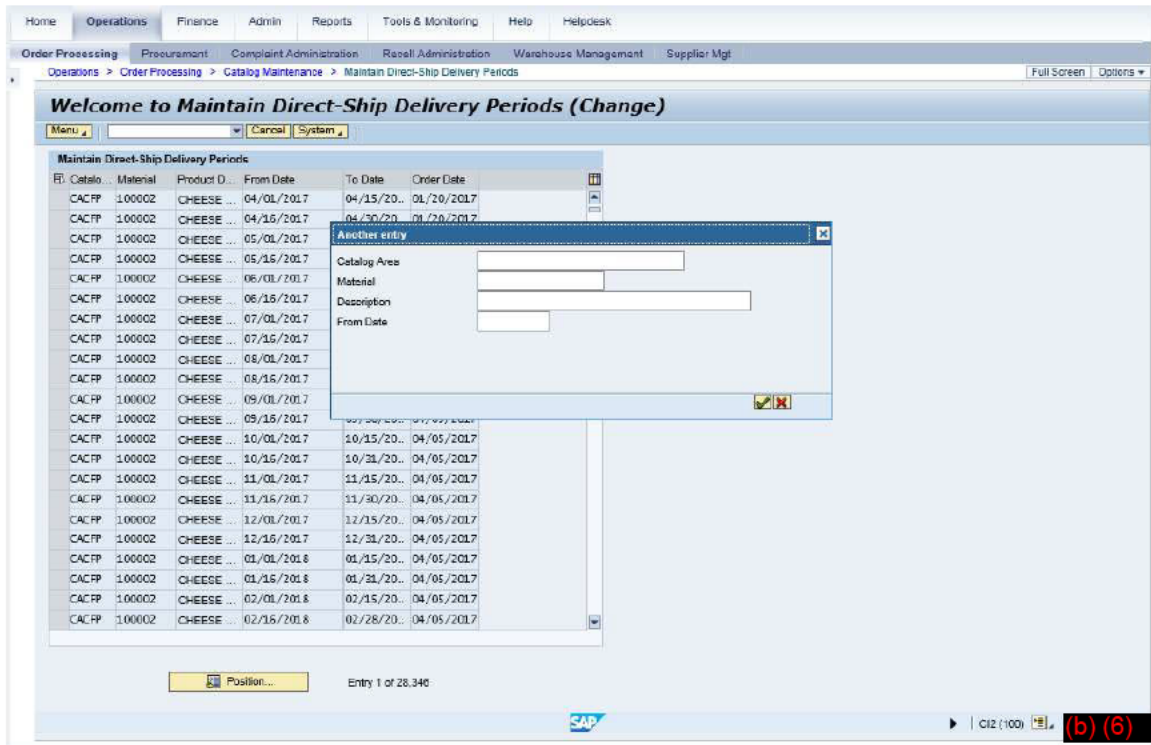
2. Click  (the **Hide Navigator** button) to minimize the Portal menu. Note this can be done with any transaction in WBSCM.

## Image: Maintain Direct-Ship Delivery Periods (Change) Screen







- Click  (the **Position...** button) to locate the required catalog information in the list.

Image: Another entry Pop-Up



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

Field	R/O/C	Description
Catalog Area	R	<p>Indicates the program with which a particular order is associated.</p> <p><b>Example:</b> NSLP</p> <p> (Note) The 1EA42E9629D548D187FD88222DE55 65B61DAE25139534354BB63324476A 7D0BC <b>Catalog Area</b> designates the program. Often a basic commodity like vegetable oil is available to multiple USDA programs. 1EA42E9629D548D187FD88 222DE5565B61DAE25139534354BB63 324476A7D0BC</p>
Material	R	<p>Unique six-digit number representing a specific material/commodity in WBSCM.</p> <p><b>Example:</b> 100937</p> <p> (Note) The 1EA42E9629D548D187FD88222DE55 65B61DAE25139534354BB63324476A 7D0BC <b>Material</b> designates the commodity for which to set delivery</p>

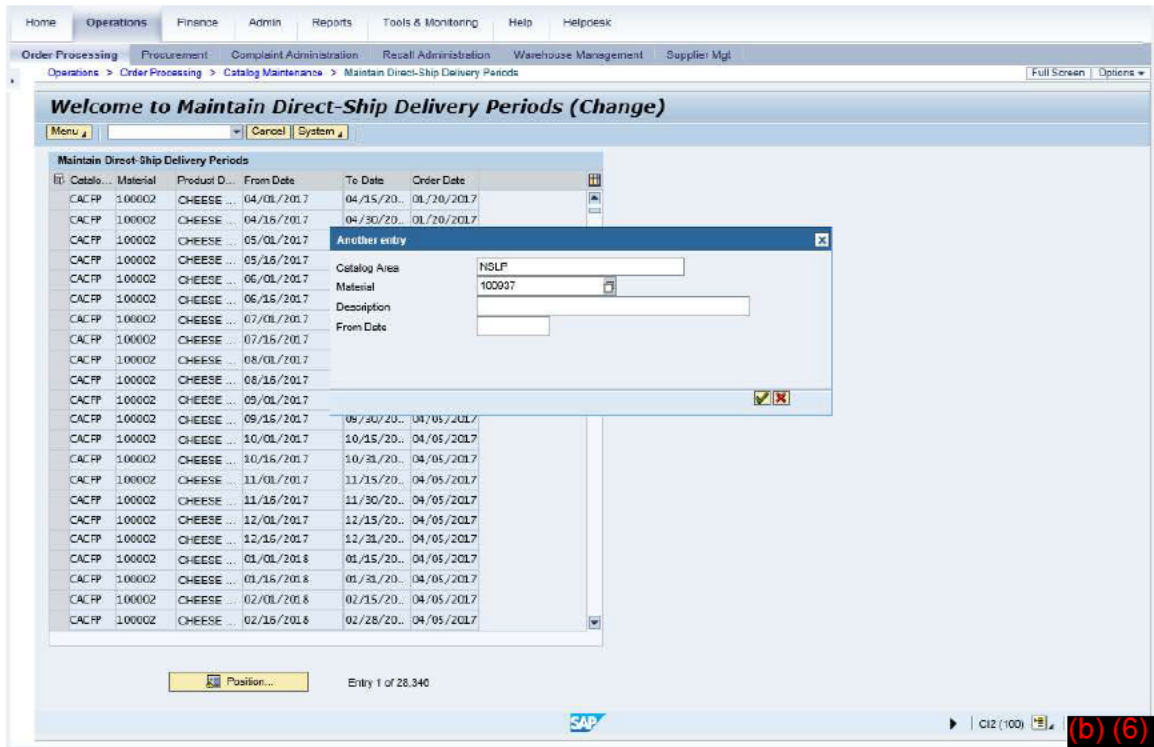
Field	R/O/C	Description
		periods.1EA42E9629D548D187FD8822 2DE5565B61DAE25139534354BB6332 4476A7D0BC
Description	O	Text to identify and characterize an object or activity.   (Note) The 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC <b>Description</b> represents the name of the commodity.1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC
From Date	O	Beginning date for specifying a delivery time period.  <b>Example:</b> 3/30/2021   (Note) The 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC <b>From Date</b> designates the first date of the delivery period. Only delivery periods that begin on or after the <b>From Date</b> will appear in the results table.1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC



(Note) Entering a specific **Catalog Area** and **Material** will return a list of delivery periods for that specific commodity. It is not necessary to search for a specific customer; the delivery period applies for all customers within that program that wish to order that commodity.

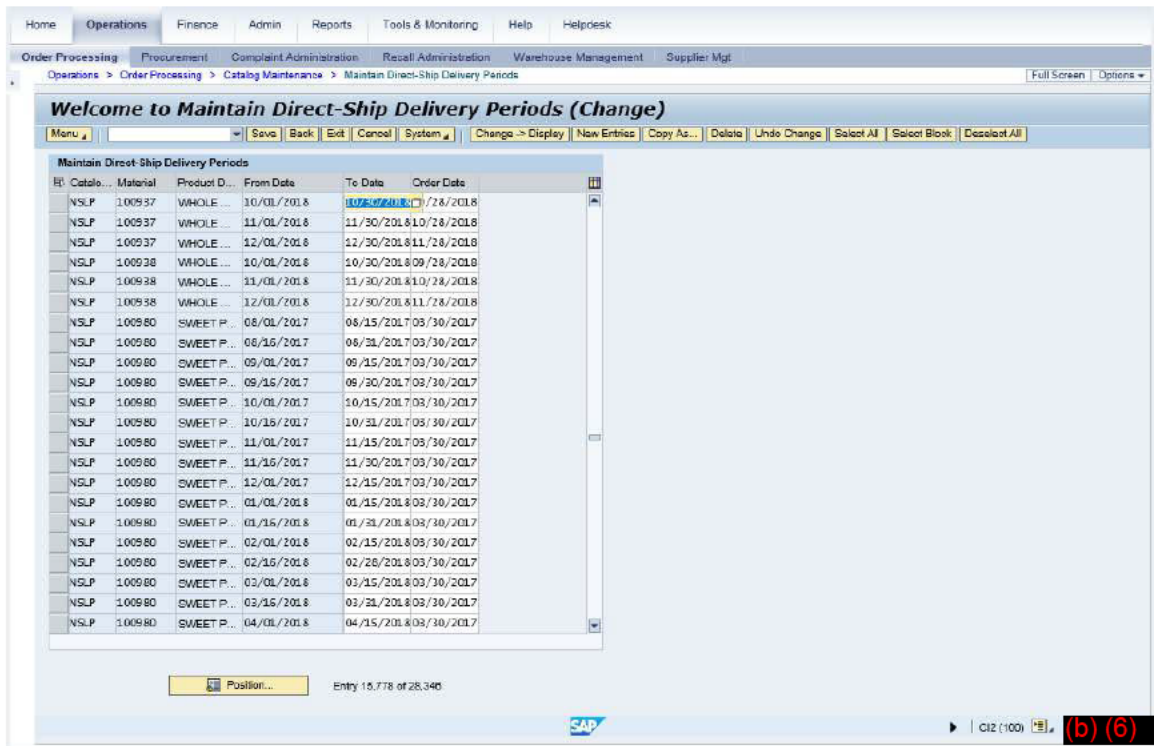
If the exact **Material** is unknown, refer to the [Wildcard and Matchcode Searches](#) Job Aid for tips to search for or select values from a list.

**Image: Another entry Pop-Up**



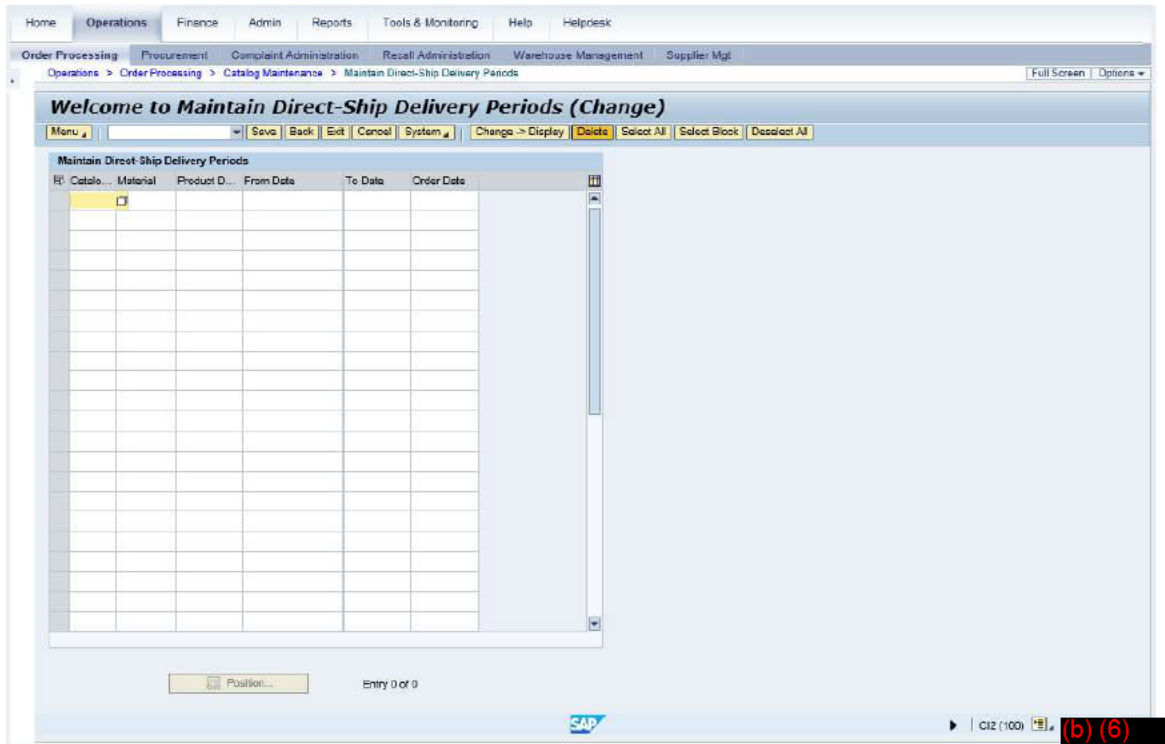
- Click (the **Continue (Enter)** button) to confirm the search criteria entered.

**Image: Maintain Direct-Ship Delivery Periods (Change) Screen**






6. Click **New Entries** (the **New Entries** button) to create a new delivery period.

**Image: Maintain Direct-Ship Delivery Periods (Change) Screen**




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

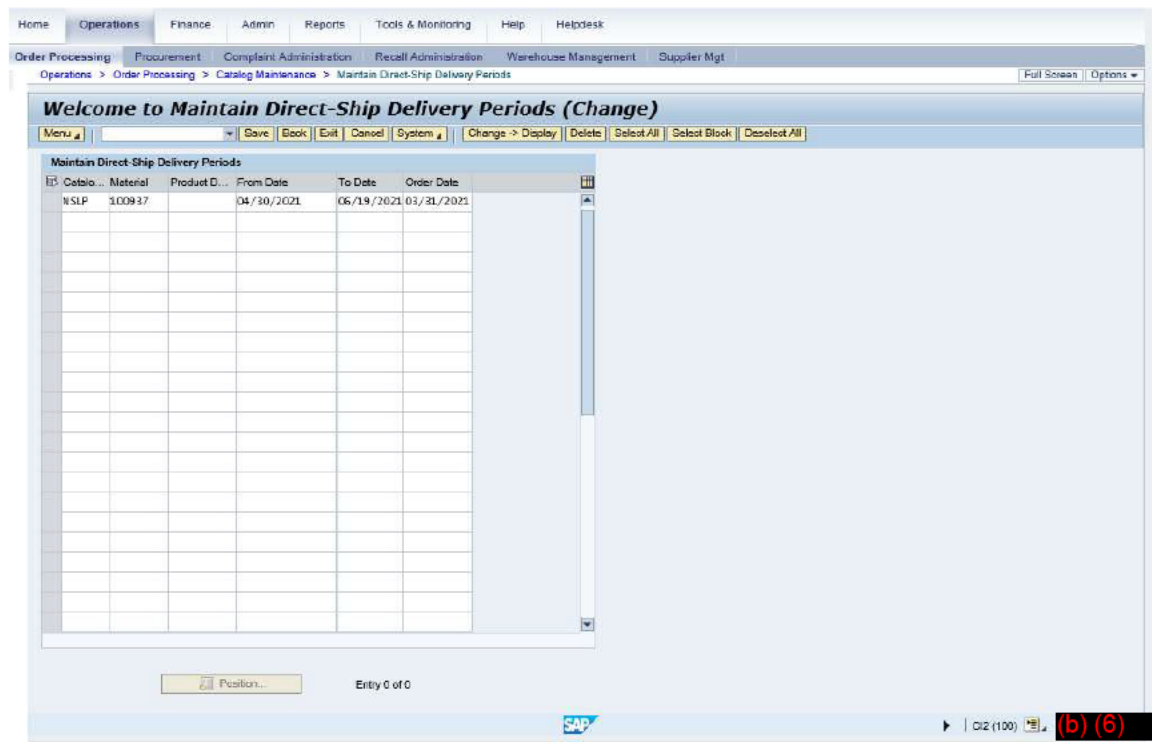
Field	R/O/C	Description
Catalog Area	R	Indicates the program with which a particular order is associated.  <b>Example:</b> NSLP
Material	R	Unique six-digit number representing a specific material/commodity in WBSCM.  <b>Example:</b> 100937
From Date	R	Beginning date for specifying a delivery time period.  <b>Example:</b> 04/30/2021   (Note) The <b>From Date</b> is the first date of the delivery period, the earliest date the SDA should expect to receive their order.

Field	R/O/C	Description
To Date	R	Ending date for specifying a delivery time period.  <b>Example:</b> 06/19/2021   (Note) The <b>To Date</b> is the last date of the delivery period, the latest date the SDA should expect to receive their order.
Order Date	R	Due date for submitting orders.  <b>Example:</b> 03/31/2021   (Note) The <b>Order Date</b> is the due date for SDA to place their order to receive it during the associated delivery period. The Order Date must be greater than current date.



(Note) The user can populate date fields using  (the **Matchcode** button) and selecting the date from the calendar tool, or by entering it directly into the field in a MM/DD/YYYY format.

**Image: Maintain Direct-Ship Delivery Periods (Change) Screen**



8. Press the **Enter** button on the keyboard to confirm the entries.



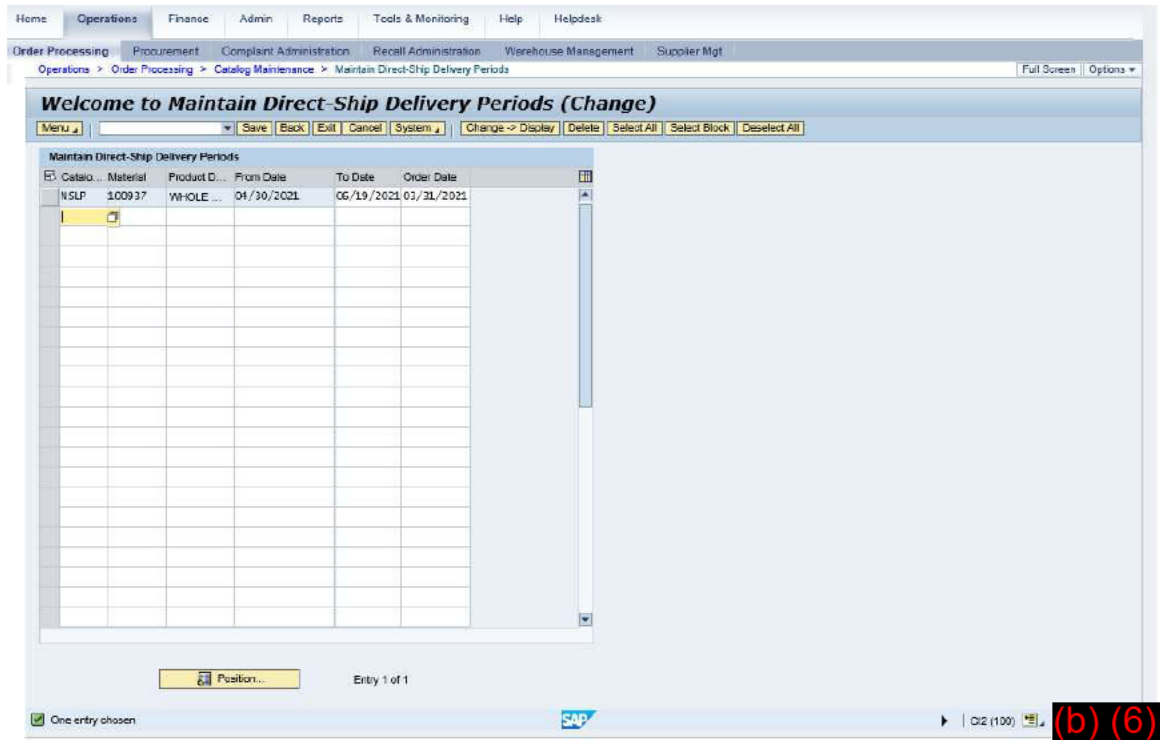
(Note) If any error message appears at the bottom of the screen, make corrections to the appropriate field. In this example, there are no errors.





(Note) In this example, the last delivery period for **Catalog Area NSLP** and **Material 100937** is connected to an **Order Date** of 03/31/2021. This indicates that a customer must place their order by 03/31/2021 to receive it between 04/30/2021 and 06/19/2021.

### Image: Maintain Direct-Ship Delivery Periods (Change) Screen



9. Click **Save** (the **Save** button) to save this delivery period in the system.



(Note) The message at the bottom of the screen confirms the entry was saved.





**RESULT**

A delivery period and order due date have been set for a commodity.



## PROCESS OVERVIEW

### Purpose

Use this procedure to review and update user profile information if there is a change of address or communication information, including email address (required) and alternate methods. Any WBSCM user may follow these steps to update contact information and notification preferences in their own user profile. User Administrators (User Admins) create the initial user profile in WBSCM, and can also update the contact information for the user using the Maintain User Profile transaction.

### Process Trigger

Perform this procedure when:

- a user has a name or address change
- a user needs to update communication methods.

Users may only update their own profile. This process is intended to be done by an individual WBSCM user.

### Prerequisites

- The WBSCM user must exist in the system.

### Portal Path

Follow the Portal path below to complete this transaction:

- Select **Admin** tab → **Manage Users** folder → **Maintain User Profile** link.

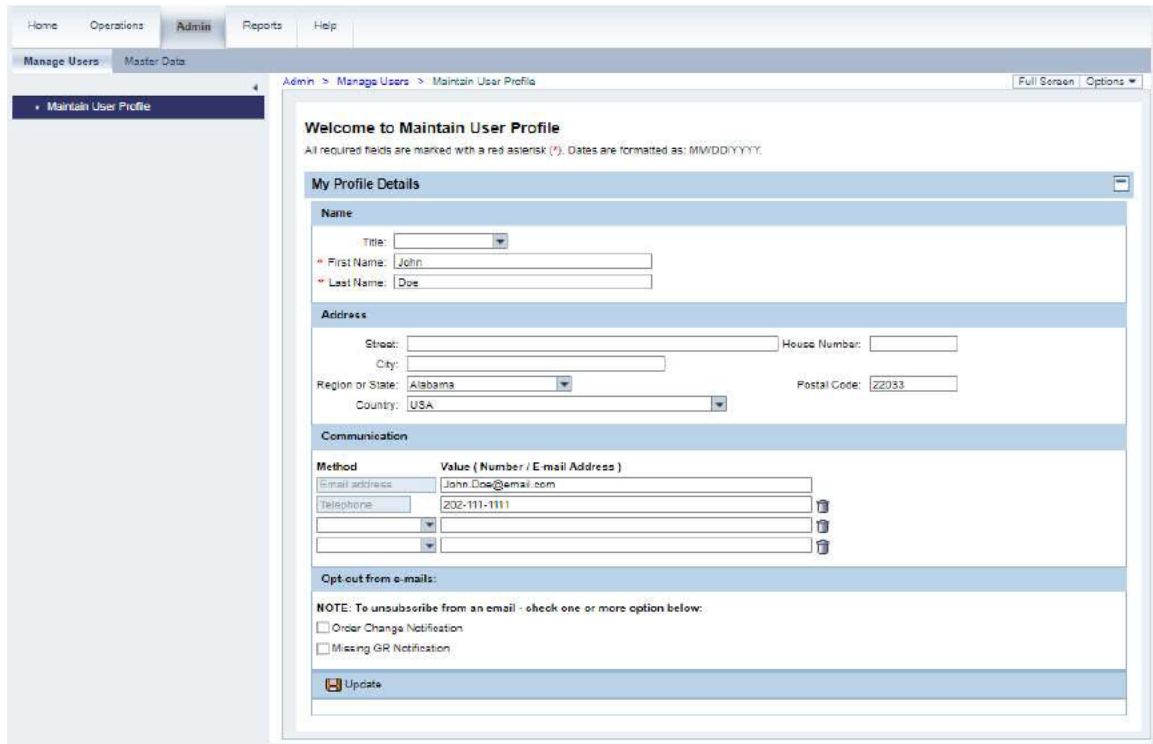
### Tips and Tricks


- 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 navigation training and tips on creating favorites, performing searches, etc.

**PROCEDURE**

1. Start the transaction using the Portal path **Admin** tab → **Manage Users** folder → **Maintain User Profile** link.

**Image: Maintain User Profile Screen**



2. Click  (the **Hide Navigator** arrow) to minimize the Portal menu. This can be done for all transactions in WBSCM.

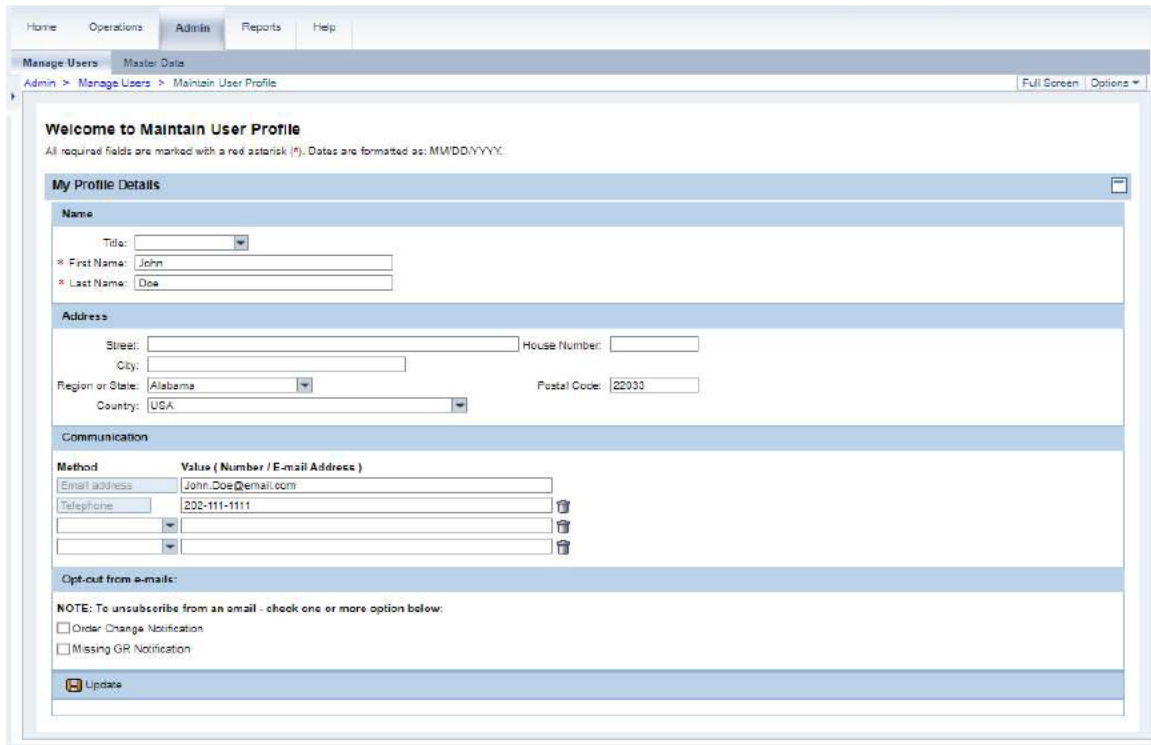


(Note) Recall Contacts have an additional section at the bottom of the screen used to enter preferred communication method in case of recall. For instructions to review or edit the recall communication methods, Recall Contacts should use the [Maintain Recall Notification Preferences](#) work instruction.




(Note) Upon opening the user profile, users will see the information added by the User Administrator at the time of creating the profile. The user can edit these fields as appropriate.

**Image: Maintain User Profile Screen**






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

Field	R/O/C	Description
Title:	O	Mr., Mrs., Ms., Miss, or Dr.  <b>Example:</b> Mr.
First Name:	R	First name of the user.  <b>Example:</b> John
Last name:	R	Last name of the user.  <b>Example:</b> Doe
Street:	O	A free text field in which to enter the street address of the user or organization.  <b>Example:</b> 123 Main Street

Field	R/O/C	Description
House Number:	O	The street number of a house or building, as applicable.
City:	O	City where the user or company is located.  <b>Example:</b> Mobile
Region / State:	R	The State, District, Province, County, or other regional locale.  <b>Example:</b> Alabama   (Note) The <b>Region / State</b> field is dynamically related to the <b>Country</b> field, and will display states or regions relevant to the country selected. To locate the correct region or state, the user must first select the correct country.
Postal Code:	R	A ZIP code.  <b>Example:</b> 12345
Country	R	Country code that represents country name.  <b>Example:</b> USA

4. Perform one of the following:

If	Then
The user needs to add a new Communication Method	<ol style="list-style-type: none"> <li>Click <input type="text"/> (the <b>Method</b> drop-down) to select the communication method.</li> <li>Enter the value in the <b>Value (Number / E-mail Address)</b> field.</li> </ol>  (Note) The <b>Method</b> for the first line in this section is for Email Address and cannot be changed. This is a required field.
The user needs to edit the value of an existing Communication Method	<ol style="list-style-type: none"> <li>Click in the <b>Value (Number / E-mail Address)</b> field for the existing communication method.</li> </ol>

If	Then
	2. Type the new value.
The user needs to change or delete an existing Communication Method	Click  (the <b>Trash Can</b> icon) to clear saved fields.   (Note) To add a new Communication Method to replace the one removed, see steps above.
The user does not need to make any changes to Communication Methods	Go to Step 6.



(Note) All users are required to enter an email address as a Communication Method; additional methods are optional.



(Note) In this transaction, **Method** refers to a communication method. Users may select from **Fax Number**, **Email Address**, **Mobile Phone**, and **Telephone**.

5. If applicable, review and update the user preferences in the *Opt-out from emails*: section



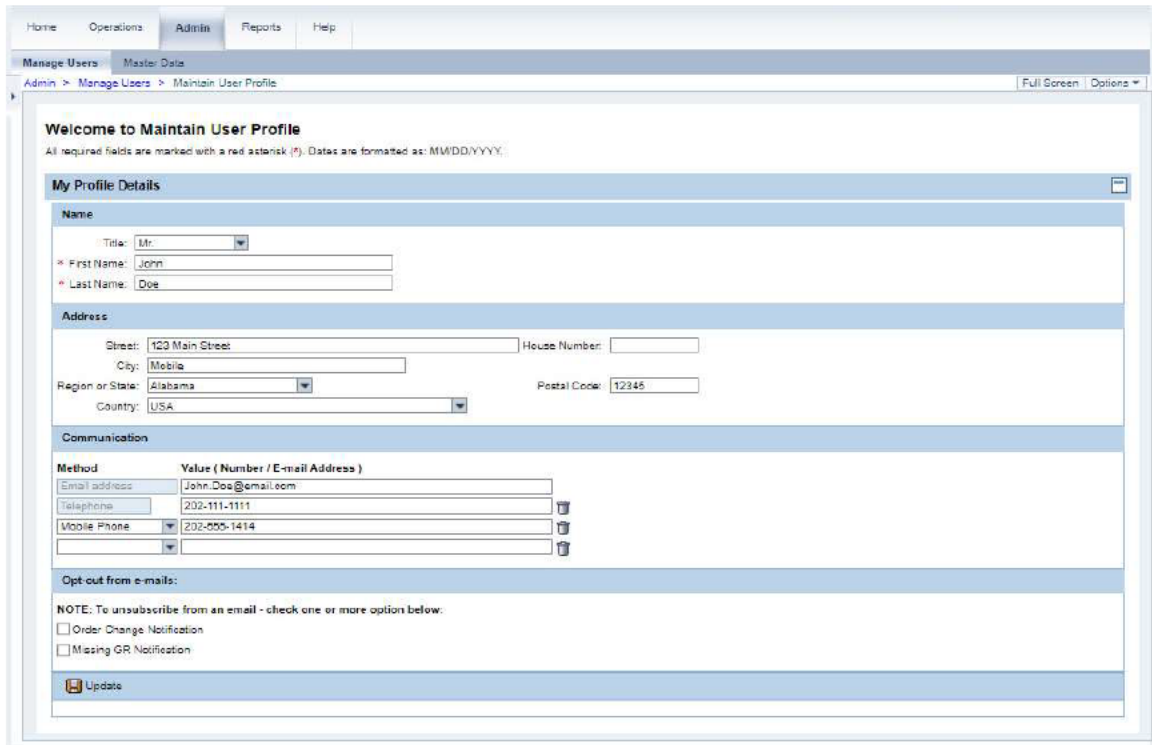
(Note) The **Order Change Notification** checkbox applies to Order Managers. If the **Order Change Notification** checkbox is selected, the user will not receive notifications.



(Note) The **Missing GR Notification** checkbox applies to SDA Order Managers, Ship-to, HQ, and NW Org Admins. If the **Missing GR Notification** checkbox is selected, the user will not receive notifications.



## Image: Maintain User Profile Screen



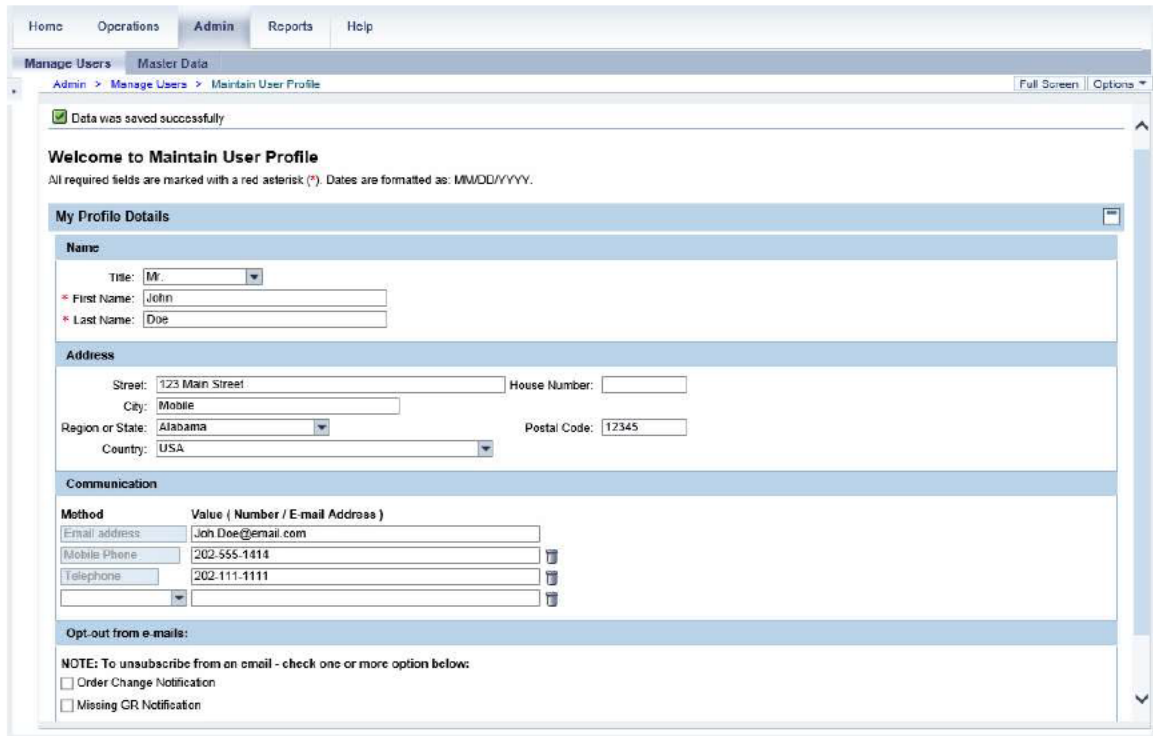
The screenshot shows a web application interface for maintaining a user profile. At the top, there are navigation tabs: Home, Operations, Admin, Reports, and Help. Below these, there are sub-tabs: Manage Users and Master Data. The main content area is titled "Welcome to Maintain User Profile" and includes a note: "All required fields are marked with a red asterisk (\*). Dates are formatted as: MM/DD/YYYY." The form is divided into several sections: "My Profile Details" (Name, Address, Communication), "Opt-out from e-mails", and an "Update" button. The "Name" section includes fields for Title (Mr.), First Name (John), and Last Name (Doe). The "Address" section includes fields for Street (123 Main Street), House Number, City (Mobile), Region or State (Alabama), Country (USA), and Postal Code (12345). The "Communication" section includes a table with columns "Method" and "Value (Number / E-mail Address)". The table contains three rows: Email address (John.Doe@email.com), Telephone (202-111-1111), and Mobile Phone (202-200-1414). Below the table, there is a "NOTE: To unsubscribe from an email - check one or more option below." with two checkboxes: "Order Change Notification" and "Missing GR Notification". At the bottom of the form, there is an "Update" button.

6. Click  (the **Update** button).



(Note) A confirmation message "Data was saved successfully" displays.

**Image: Maintain User Profile Screen**



The screenshot shows a web application interface for maintaining a user profile. At the top, there are navigation tabs: Home, Operations, Admin (selected), Reports, and Help. Below the tabs, there are sub-tabs: Manage Users (selected) and Master Data. The breadcrumb trail reads: Admin > Manage Users > Maintain User Profile. A success message at the top left states: "Data was saved successfully". Below this, a heading reads "Welcome to Maintain User Profile" with a note: "All required fields are marked with a red asterisk (\*). Dates are formatted as: MM/DD/YYYY." The form is divided into sections: "My Profile Details" (with a close icon), "Name", "Address", "Communication", and "Opt-out from e-mails".

**Name**

Title: Mr (dropdown)

\* First Name: John

\* Last Name: Doe

**Address**

Street: 123 Main Street House Number: (empty)

City: Mobile

Region or State: Alabama (dropdown) Postal Code: 12345

Country: USA (dropdown)

**Communication**

Method	Value ( Number / E-mail Address )
Email address	Joh Doe@email.com
Mobile Phone	202-555-1414
Telephone	202-111-1111
(dropdown)	(empty)

**Opt-out from e-mails:**

NOTE: To unsubscribe from an email - check one or more option below:

Order Change Notification

Missing GR Notification

7. The transaction is complete.



Work Instruction  
**Maintain User Profile**

**RESULT**

The User Profile has been reviewed and updated, including changes to name, address, contact methods, and subscriptions. Users who are Recall Contacts may also have updated their Recall Communication Method settings. All updates entered by an individual user will be applied to the user's profile in the Maintain User Profile transaction (for User Admins) as well.



## PROCESS OVERVIEW

### Purpose

State Distributing Agency (SDA) and Indian Tribal Organization (ITO) Organizational Administrators (Org Admins) use this procedure to create and maintain catalogs for their Recipient Agencies (RAs) and Co-ops to allow ordering commodities from the Domestic Order Entry application. Maintenance includes updating the view, as well as assigning/unassigning RAs and Co-ops from catalogs. This work instruction applies to all USDA Domestic programs, although steps and graphics may refer to specific examples. Where applicable, navigation guides and related notes indicate which steps apply for different types of catalog items, including Multi-Food, Direct Delivery, and Processing Diversion.

The procedure to create and maintain an RA catalog view includes the following key steps:

- Create and name new catalog (if applicable)
- Update existing catalog
  - Add/remove commodities on a list of available products in catalog (**View**)
  - Assign/unassign RAs and Co-ops who may access the catalog through Domestic Order Entry (**Organization**)
  - Save catalog updates
  - Delete an RA catalog
- For Direct Delivery and Processing Diversion items, the SDA/ITO will also need to set or update available ordering and delivery dates. See related training material, [Maintain Direct-Ship Delivery Periods](#) for instructions.

### Process Trigger

SDA/ITO Org Admins perform this procedure when they need to create or maintain a catalog to support ordering by the assigned RA and Co-ops. This may be triggered by internal decisions or external factors such as a notification from FNS that the master catalog for a program has been modified.

### Prerequisites

- SDA Org Admin must have a program assigned by FNS.
- SDA must be linked to RA/Co-op as a sponsoring agency. Refer to the training documents, [Create Recipient Agency \(RA\)](#), [Maintain Recipient Agency \(RA\)](#) and [Create Co-op Organization](#).

### Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab → **Order Processing** tab → **Catalog Maintenance** folder → **Manage RA Catalog Views** link to go to the *Manage RA Catalog Views* screen.

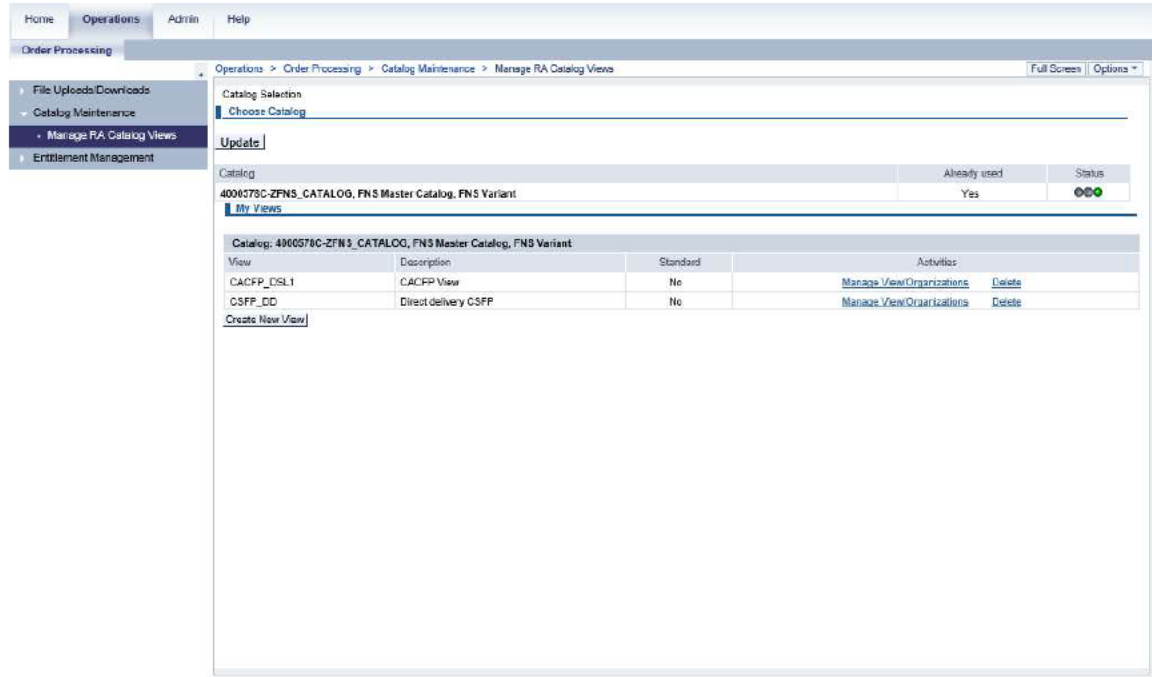
### Tips and Tricks


- 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 → **Order Processing** tab → **Catalog Maintenance** folder → **Manage RA Catalog Views** link.

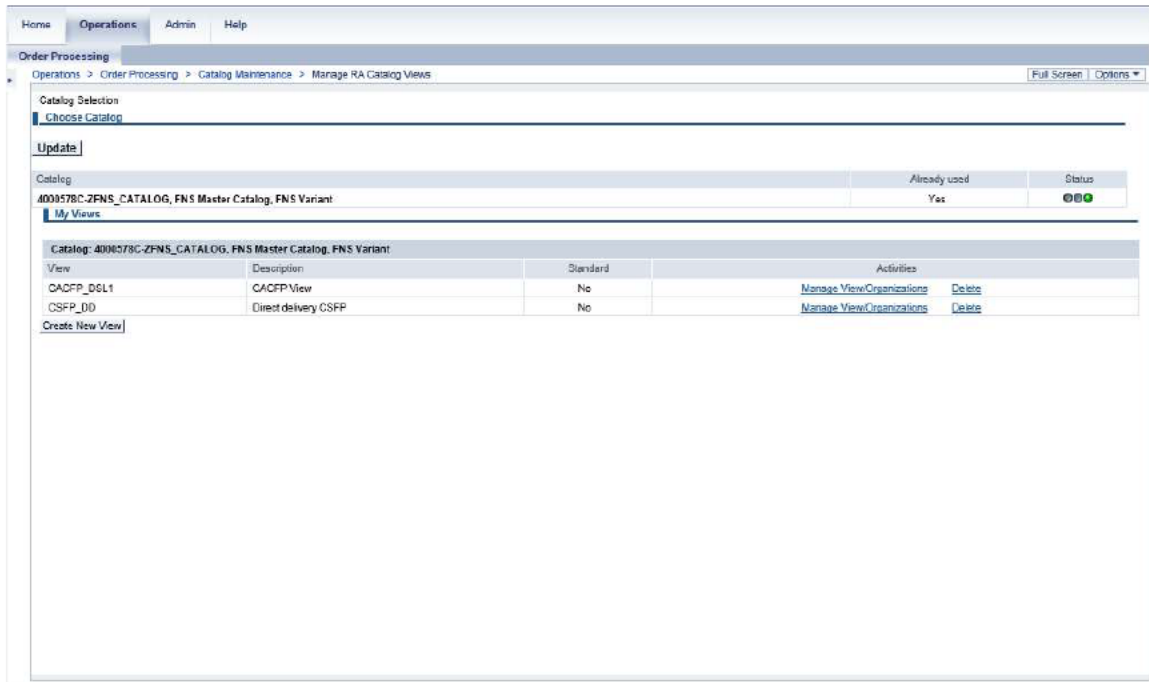
**Image: Manage RA Catalog Views Screen**



2. Click  (the **Hide Navigator** arrow) to minimize the Portal menu. Note that this can be done with any transaction in WBSCM.
3. Perform one of the following:

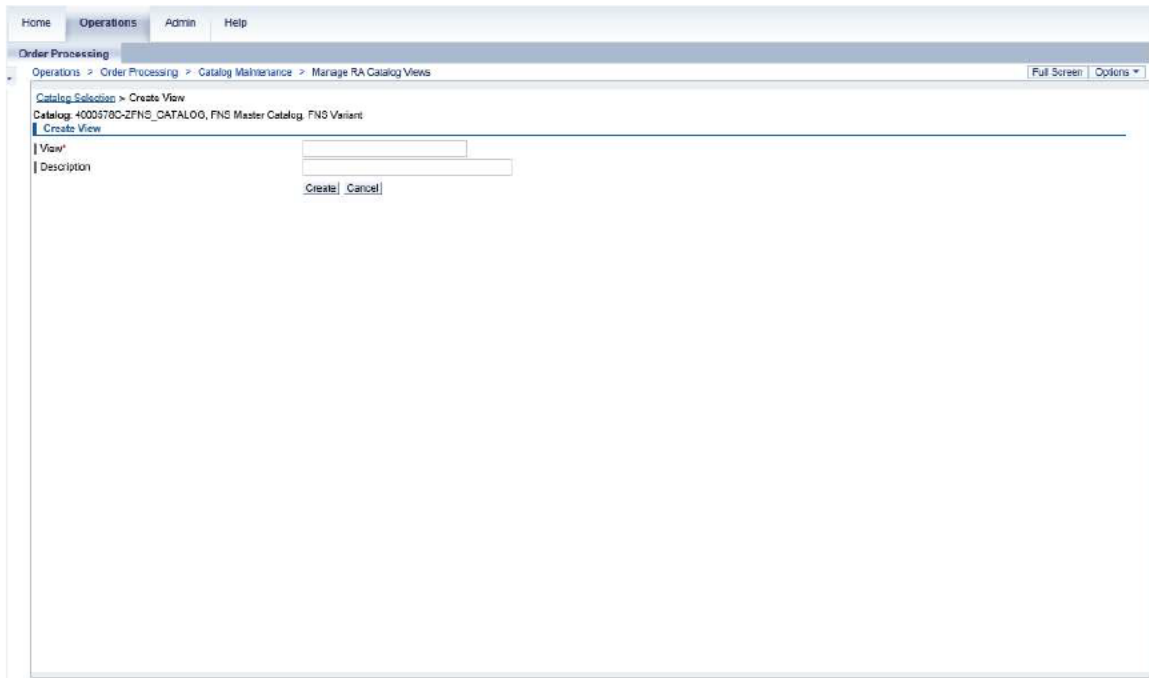
<b>If</b>	<b>Then</b>
The user wants to create a new RA catalog	Go to Step 4.
The user wants to update an existing RA catalog	Go to Step 10.
The user wants to delete an existing RA catalog	Select <a href="#">Delete</a> (the <b>Delete</b> button). The catalog is immediately deleted.

**Image: Manage RA Catalog Views Screen**



- To create a new RA catalog, click [Create New View](#) (the **Create New View** button).

**Image: Manage RA Catalog Views Screen**

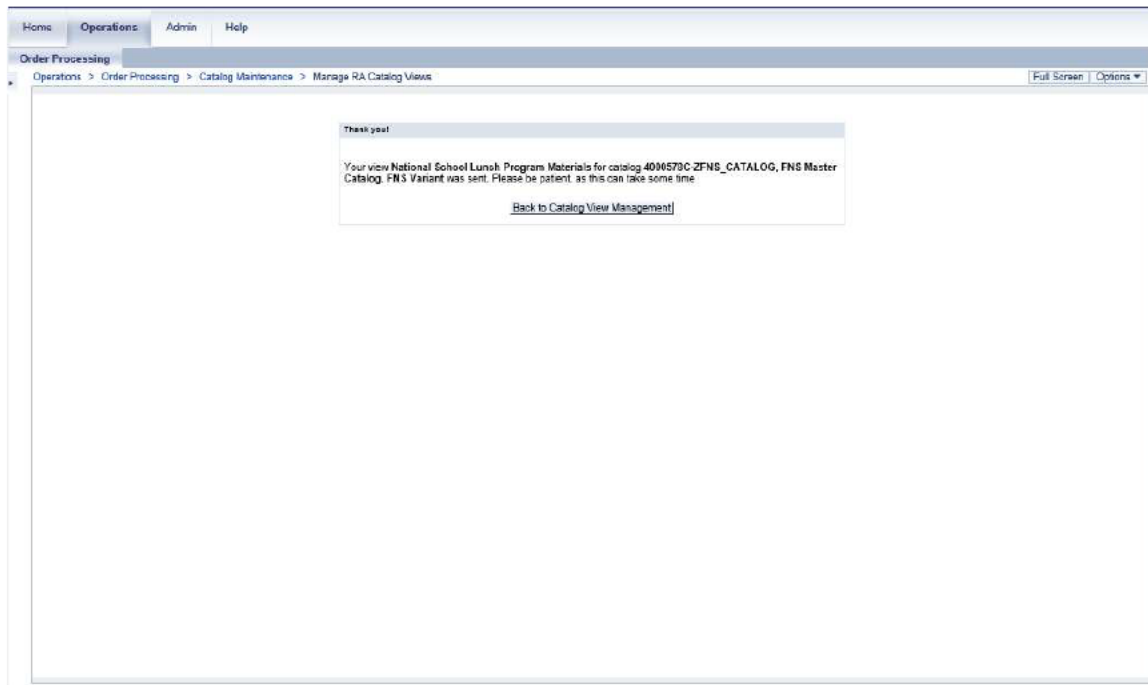


5. As required, complete/review the following fields:

Field	R/O/C	Description
View*	R	The name given to the catalog view being created.  <b>Example:</b> NSLP Materials
Description	O	Text to identify and characterize an object or activity.  <b>Example:</b> National School Lunch Program Materials

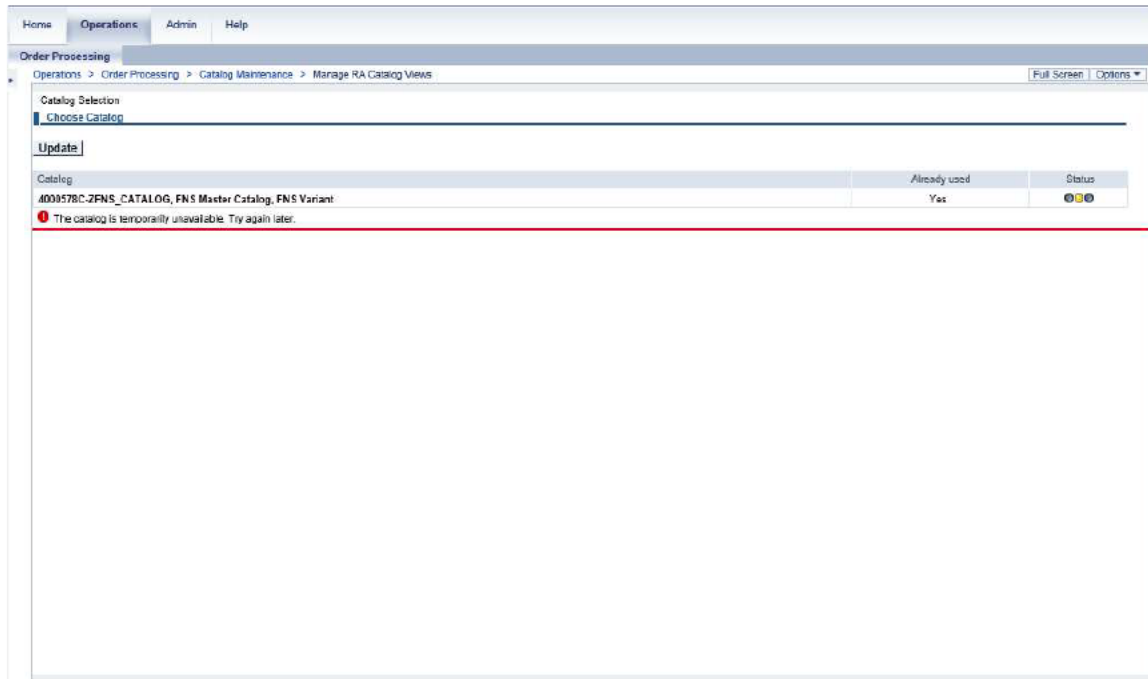
6. Click [Create](#) (the **Create** button) to create the new view.

**Image: Manage RA Catalog Views Screen**



7. Click [Back to Catalog View Management](#) (the **Back to Catalog View Management** button) to return to the catalog selection screen.

**Image: Manage RA Catalog Views Screen**



8. Click **Update** (the **Update** button) after the waiting period to refresh the list of available RA catalog views. In this example, a new catalog view called National School Lunch Program Materials was created to which the user can add commodities for an RA to view and order.



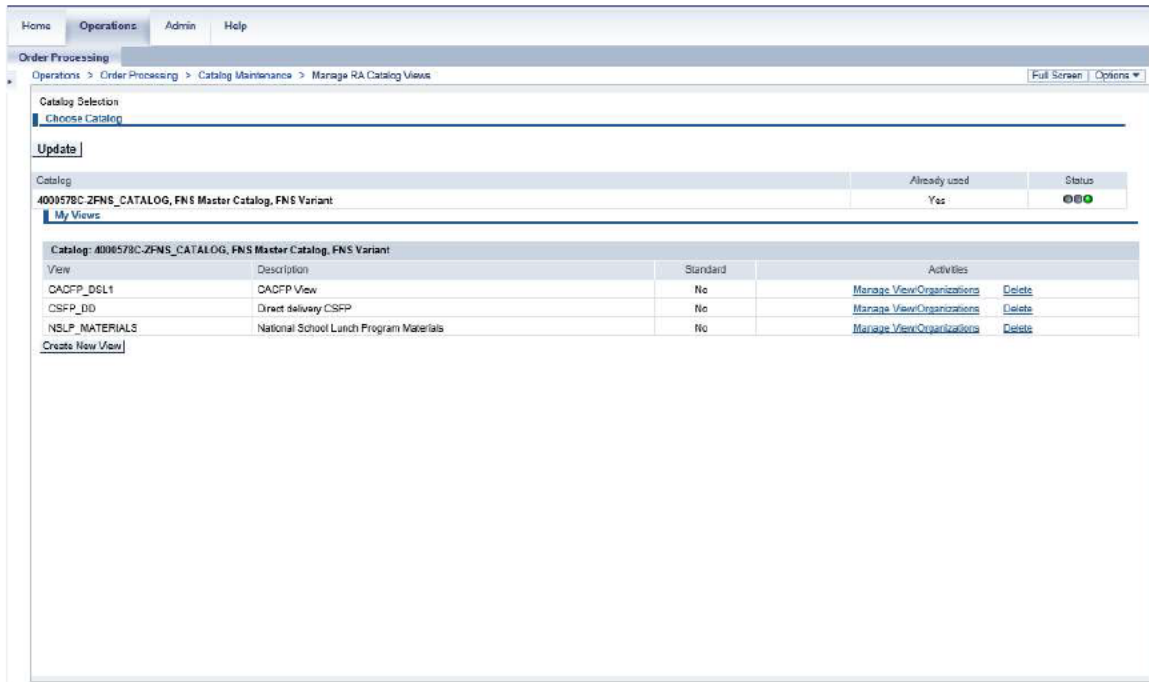
(Note) The waiting period is approximately 2-3 minutes. When the catalog has successfully updated, the Status light will turn green after **Update** (the **Update** button) is clicked, to indicate it is available to view.

9. Perform one of the following:

If	Then
The user wants to create another new RA catalog	Go to Step 4.
The user wants to update an existing RA catalog (including newly created)	Go to Step 10.

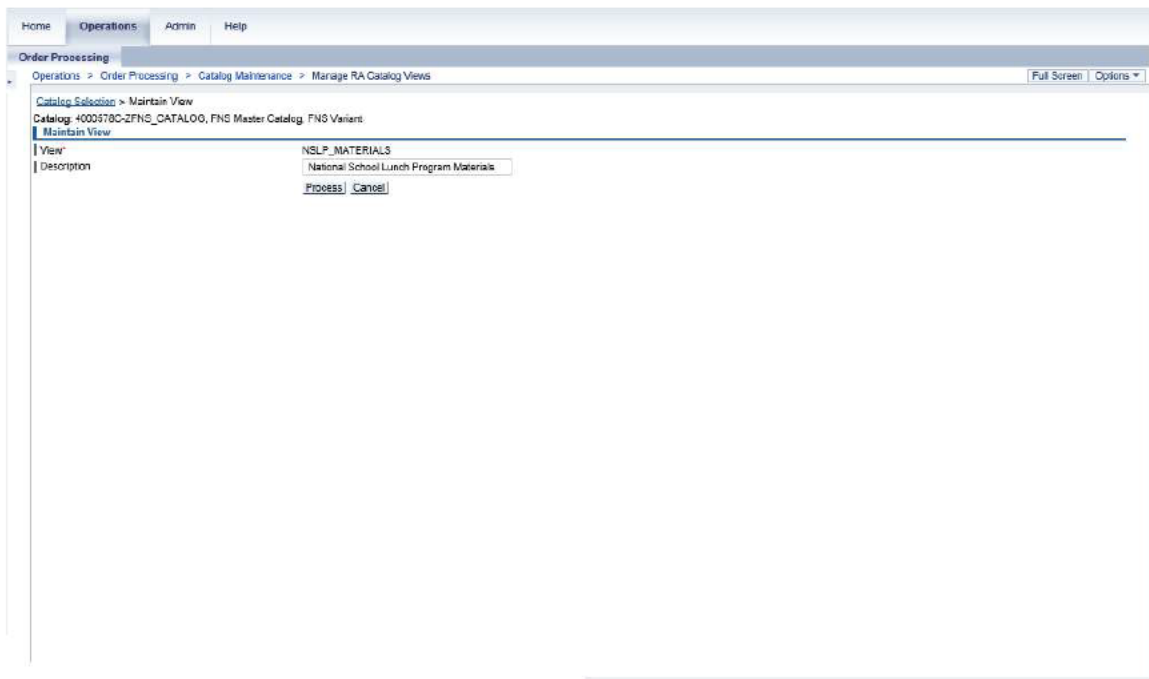


**Image: Manage RA Catalog Views Screen**




10. Click [Manage View/Organizations](#) (the **Manage View/Organizations** link) under the **Activities** column, next to the catalog view to be reviewed and/or updated. In this example, **National School Lunch Program Materials** is selected.

**Image: Manage RA Catalog Views Screen**



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

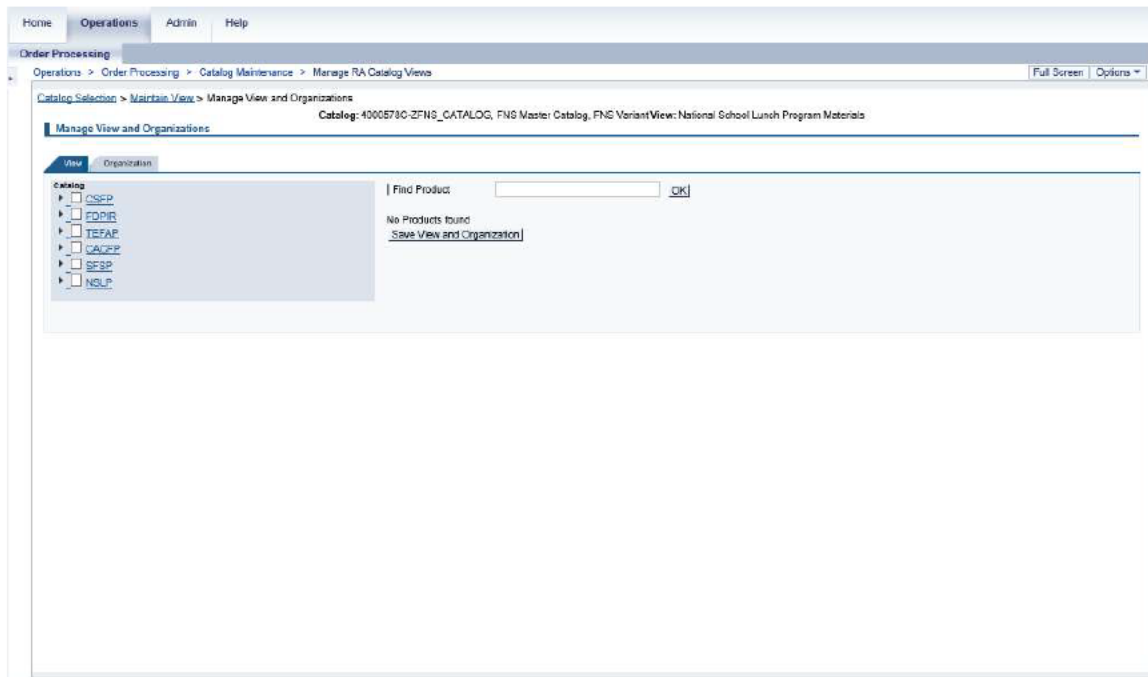
Field	R/O/C	Description
Description	O	Text to identify and characterize an object or activity.  <b>Example:</b> National School Lunch Program Materials   (Note) If needed, the user can change the description of the view by entering new text in this field.

12. Click **Process** (the **Process** button) to open the selected RA catalog view.

13. Perform one of the following:

If	Then
The user wants to update commodities available in this catalog,	Go to Step 14.
The user wants to update RAs/Co-ops assigned to this catalog,	Go to Step 21.

#### Image: Manage RA Catalog Views Screen



14. To add/remove products in the RA catalog view, select the **View** tab if not already active.

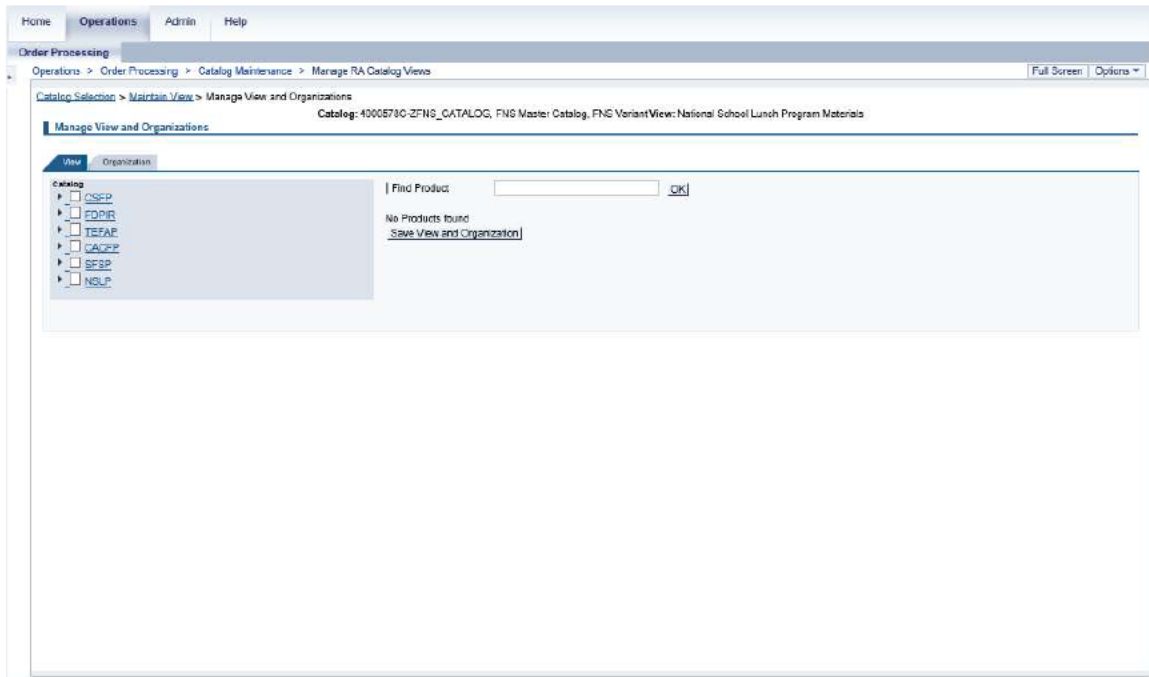


(Note) The user can toggle between the screens for updating the list of materials (**View**) and assigning RAs and Co-ops to a catalog (**Organization**) by clicking on the respective tab.



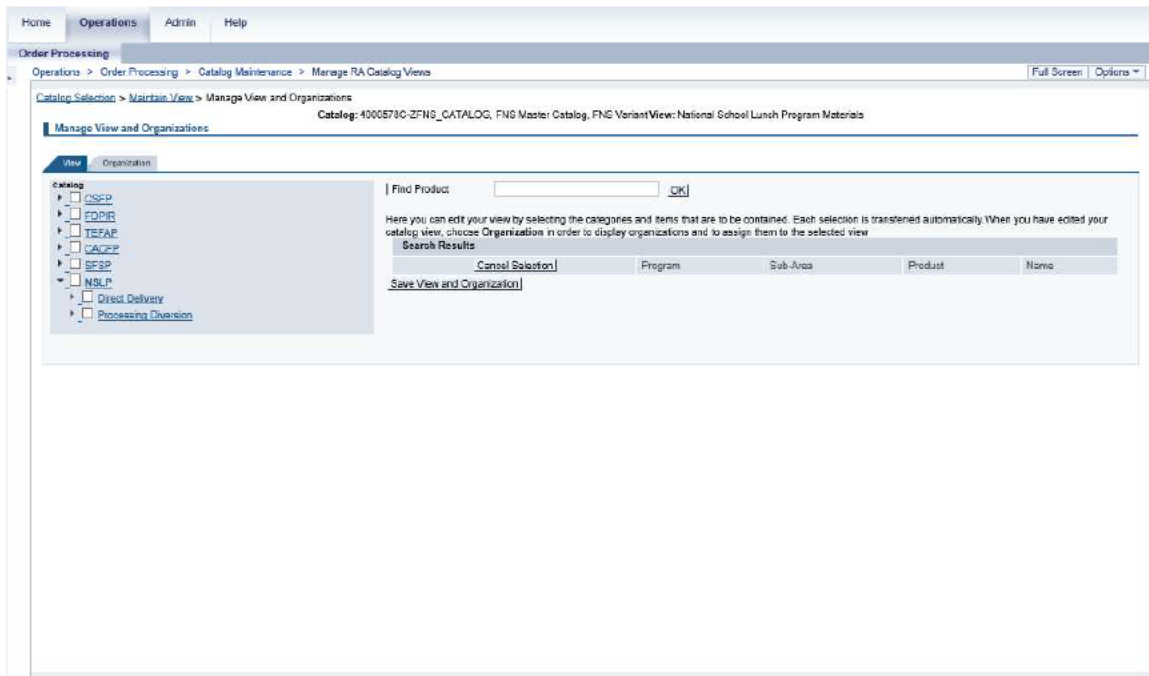
(Note) Clicking  (the **Arrow** button) to the left of the Catalog also opens the catalog.

## Image: Manage RA Catalog Views Screen








15. Click the link for the desired program to update the materials available in the catalog. In this example, **NSLP** was selected.

## Image: Manage RA Catalog Views Screen

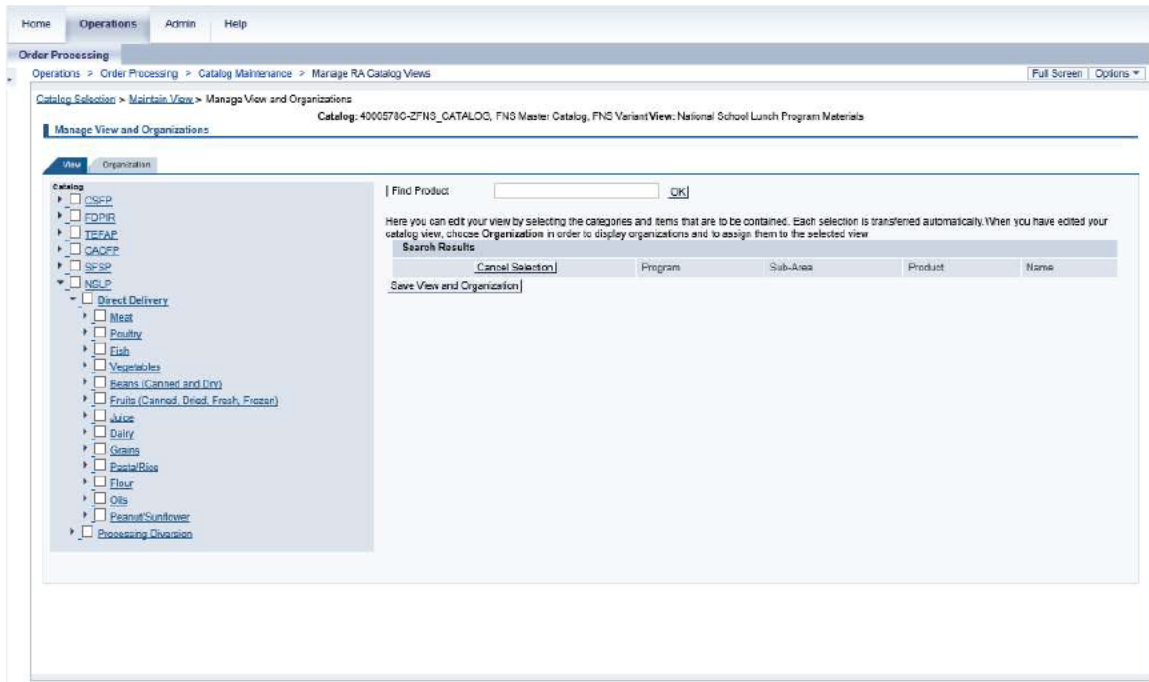


16. Perform one of the following:

If	Then
<p>The user wants to add Direct Delivery commodities to the catalog</p>	<ol style="list-style-type: none"> <li>1. Select <a href="#">Direct Delivery</a> (the <b>Direct Delivery</b> link).</li> <li>2. Go to Step 17.</li> </ol> <p> (Note) <b>Direct Delivery</b> commodities are available for the <b>NSLP, CACFP, SFSP, NSIP, CSFP, FDPIR, and TEFAP</b> programs.</p>
<p>The user wants to add Processing Diversion commodities to the catalog</p>	<ol style="list-style-type: none"> <li>1. Select <a href="#">Processing Diversion</a> (the <b>Processing Diversion</b> link).</li> <li>2. Go to Step 17.</li> </ol> <p> (Note) Processing Diversion commodities are available for the <b>NSLP and CACFP</b> programs.</p>
<p>The user wants to add Multi-Food commodities to the catalog</p>	 <ol style="list-style-type: none"> <li>1. Select <a href="#">Multi-Food</a> (the <b>Multi-Food</b> link)</li> <li>2. Go to Step 17.</li> </ol> <p> (Note) Multi-Food commodities are available for the <b>CSFP and FDPIR</b> programs.</p>

 (Note) Direct Delivery and Processing Diversion items are sourced directly from a vendor, and RA orders undergo review, consolidation, and approval by the SDA/ITO. Multi-Food items are sourced from the assigned National Warehouse, and orders do not require an approval process.

## Image: Manage RA Catalog Views Screen

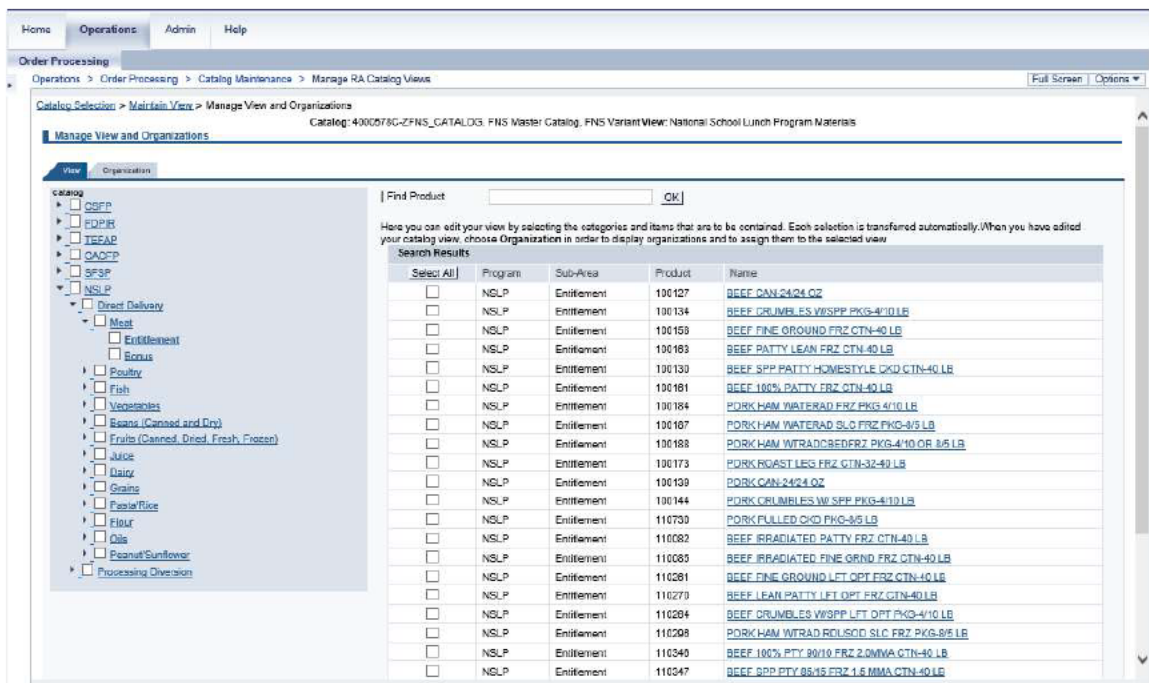


17. Select the corresponding link to view the list of available commodities. For this example, [Meat](#) (the **Meat** link) category is selected.



(Note) Any commodity groups that have commodities already selected for RA ordering will show  (a checked **Checkbox**) to the left of the catalog.

## Image: Manage RA Catalog Views Screen




18. Select the corresponding link for the funding option to view the list of available commodities. For this example, [Entitlement](#) (the **Entitlement** link) category is selected.



(Note) The Entitlement option includes only commodities that can be ordered against the SDA's and RA's entitlement balance. The Bonus option includes only commodities that do not impact entitlement balances when ordered.

19. Perform one of the following:

If	Then
The user wants to select specific commodities from the product list for the catalog view	Select <input type="checkbox"/> (the empty <b>Checkbox</b> ) next to each desired commodity to include in this RA catalog view.
The user wants to select all the commodities from the list for the catalog view	Click <a href="#">Select All</a> (the <b>Select All</b> button).
	 (Note) Always use this option for Multi-Food commodities.
The user wants to de-select specific commodities from the product list for the catalog view	Un-check <input checked="" type="checkbox"/> (the checked <b>Checkbox</b> ) next to each desired commodity to remove from the RA catalog view.
The user wants to de-select all the commodities from the list for the catalog view	Click <a href="#">Cancel Selection</a> (the <b>Cancel Selection</b> button).



(Note) To limit the list to a specific commodity or commodities that match search criteria, enter the commodity number or name into the Find Product field. Then, click **OK** to perform the search.

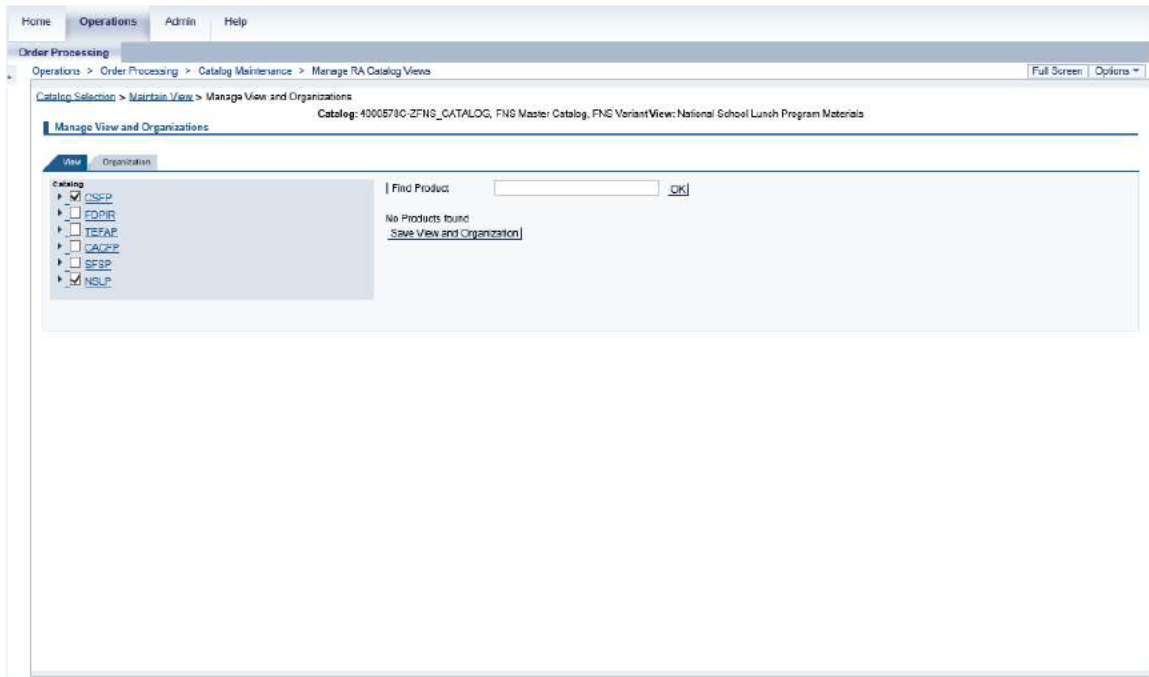


(Note) Although a checkmark is not automatically applied next to the category in the **Catalog** section on the left, selections are saved. The checkmark will appear after either the **Save View and Organization** button is selected or another category is selected.

20. Perform one of the following:

If	Then
The user would like to add other commodities to this catalog view	Go to Step 14.
The user would like to update RAs/Co-ops assigned to this catalog view	Go to Step 21.
The user would like to save changes to the catalog view	Go to Step 27.

**Image: Manage RA Catalog Views Screen**



21. To add/remove organizations assigned to this catalog view, select **Organization** (the **Organization** tab) if not already active.

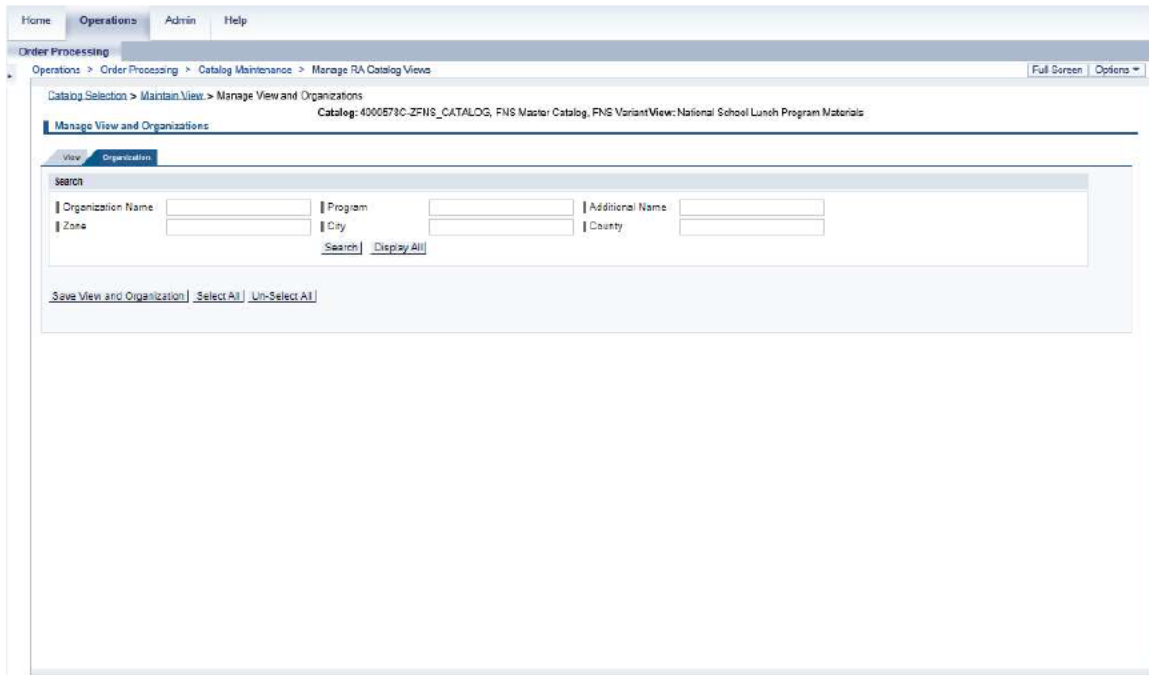


(Note) The user can toggle between the screens for updating the list of materials (**View**) and assigning RAs and Co-ops to a catalog (**Organization**) by clicking on the respective tab.







(Note) Users can perform the search without making any entries in the search fields. To narrow the search results, enter data in one or more of the fields in the *Search* section. In this example, the search fields are left blank.

Image: Manage RA Catalog Views Screen



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

Field	R/O/C	Description
Organization Name	O	The legal name of the approved participating organization in a USDA food program.  <b>Example:</b> Food Bank   (Note) Enter full or partial RA or Co-op <b>Organization Name</b> . Wildcard search is available for this field.
Program	O	Acronym used to identify a USDA food distribution program.   (Note) Enter the exact <b>Program</b> name. Wildcard searches are not available for this field.
Additional Name	O	Text to identify additional name.   (Note) Enter the full or partial <b>Additional Name</b> . Wildcard is available for this field.
Zone	O	Identifying number assigned to an RA by their SDA.   (Note) Enter the exact <b>Zone</b> if known. Wildcard search is available for this field.



Field	R/O/C	Description
City	O	City where the user or company is located.  (Note) Enter the full or partial <b>City</b> or leave the field blank. Wildcard search is available for this field.
County	O	Region or geographical area.  (Note) Enter the full or partial <b>County</b> if known. Wildcard search is available for this field.

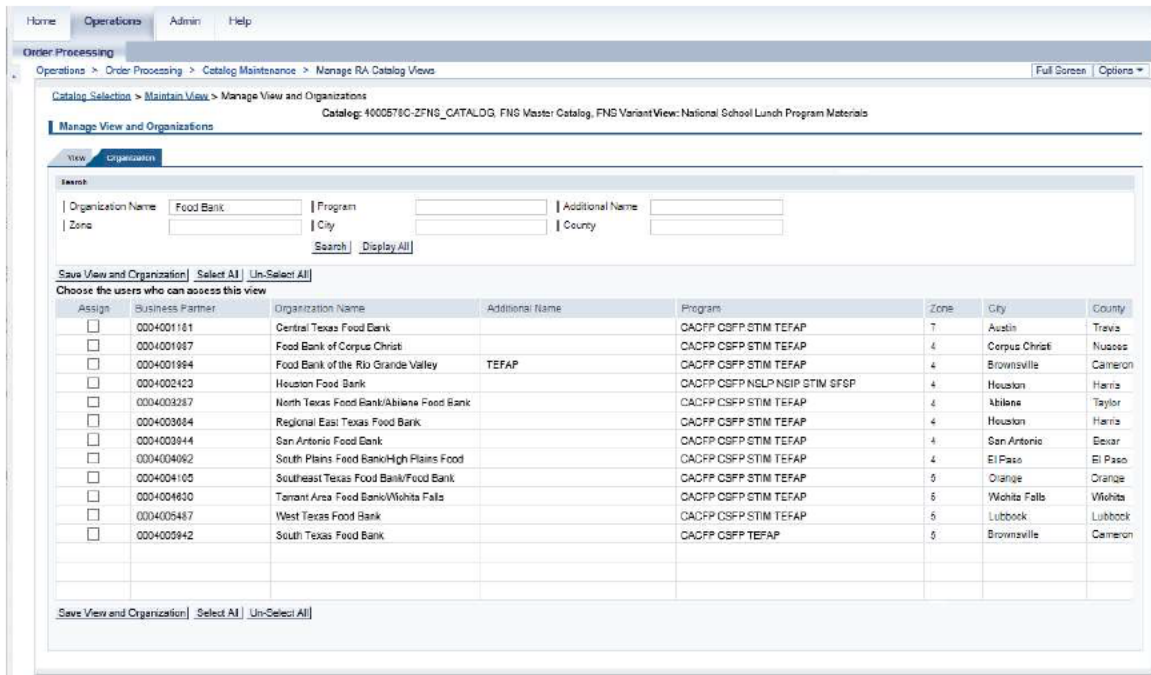
23. Perform one of the following:

If	Then
The user has entered search criteria in any of the <i>Search</i> fields	Click <u>Search</u> (the <b>Search</b> button).
The user would like to display all organizations and programs	Click <u>Display All</u> (the <b>Display All</b> button).




(Note) Refer to the [Wildcard and Matchcode Searches Job Aid](#) for advanced search options.

**Image: Manage RA Catalog Views Screen**



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

Field	R/O/C	Description
Business Partner	O	Number or name assigned to SDAs, ITOs, Co-ops, and RAs in WBSCM.
Organization Name	O	The legal name of the approved participating organization in a USDA food program.   (Note) The <b>Organization Name</b> field indicates the RA or Co-op name.
Program	O	Acronym used to identify a USDA food distribution program.
Additional Name	O	Additional text for the organization's name.
Zone	O	Identifying number assigned to an RA by their SDA.
City	O	City where the user or company is located.
County	O	Region or geographical area.

25. Perform one of the following:

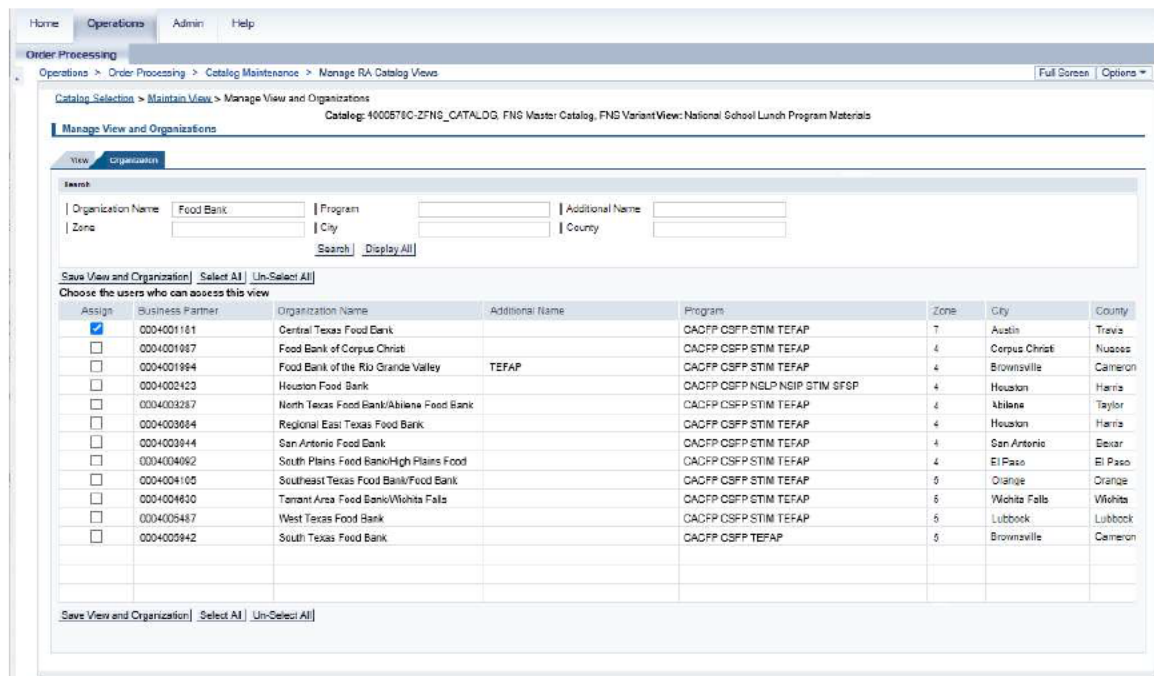
If	Then
The user would like to assign a specific organization from the list to this catalog view	Click <input type="checkbox"/> (the empty <b>Checkbox</b> ) next to each desired organization.
The user would like to assign all the listed organizations to this catalog view	Click <input type="button" value="Select All"/> (the <b>Select All</b> button).
The user would like to unassign a specific organization from the list from this catalog view	Uncheck <input checked="" type="checkbox"/> (the checked <b>Checkbox</b> ) next to each desired organization.

If	Then
The user would like to unassign all the listed organizations from this catalog view	Click <a href="#">Un-Select All</a> (the <b>Un-Select All</b> button).

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

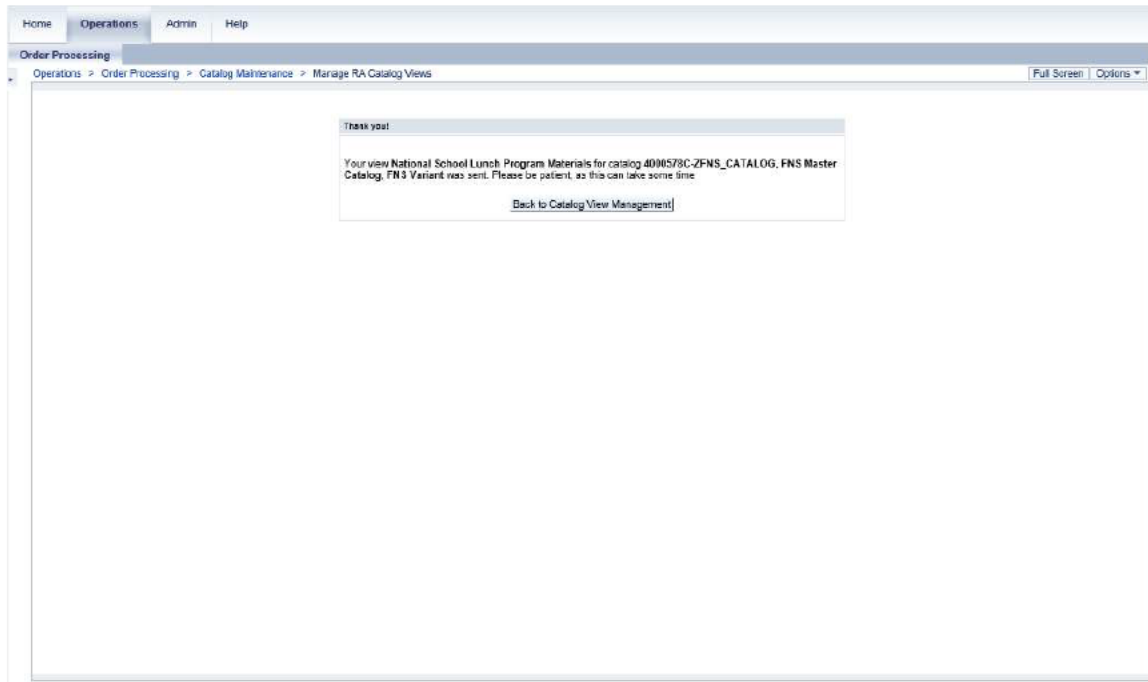
If	Then
The user would like to add or remove commodities in this catalog view	Go to Step <a href="#">14</a> .
The user would like to update RAs/Co-ops assigned to this catalog view	Go to Step <a href="#">21</a> .
The user would like to save changes to this catalog view	Go to Step <a href="#">27</a> .

### Image: Manage RA Catalog Views Screen



**27.** Click [Save View and Organization](#) (the **Save View and Organization** button) to save any updates.

### Image: Manage RA Catalog Views Screen



28. Click [Back to Catalog View Management](#) (the **Back to Catalog View Management** button) to return to the catalog selection screen.



(Note) Click [Update](#) (the **Update** button) in the Catalog View Management screen to refresh the list of available RA catalogs. The waiting period is approximately 2-3 minutes. When the catalog has successfully updated, the Status light will turn green after [Update](#) (the **Update** button) is clicked again. This will allow the user to release the catalog for other users within the agency.

29. The transaction is complete.



(Note) For RA catalogs that contain Direct Delivery and Process Diversion materials, the next step is to set delivery periods and lead time to allow the SDA/ITO to review and consolidate RA orders. Refer to the [Maintain Ship-To Delivery Dates](#) work instruction.



Work Instruction  
Manage RA Catalog Views

**RESULT**

The user has successfully completed the steps to Manage RA Catalog Views by either creating a new catalog view, or updating the products listed in and/or the organizations assigned to an existing one, or deleting an RA catalog that is no longer needed.



## PROCESS OVERVIEW

### Purpose

The purpose of this transaction is to display or post messages to a discussion forum on the WBSCM Home Page.

### Process Trigger

Use this procedure to display or post messages to a discussion forum on the WBSCM Home Page.

### Prerequisites

- None.

### Portal Path

Follow the Portal path below to complete this transaction:

- Select **Home** tab → **News and Alerts** link to go to the *Forums : Forum Home* 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, performing searches, etc.

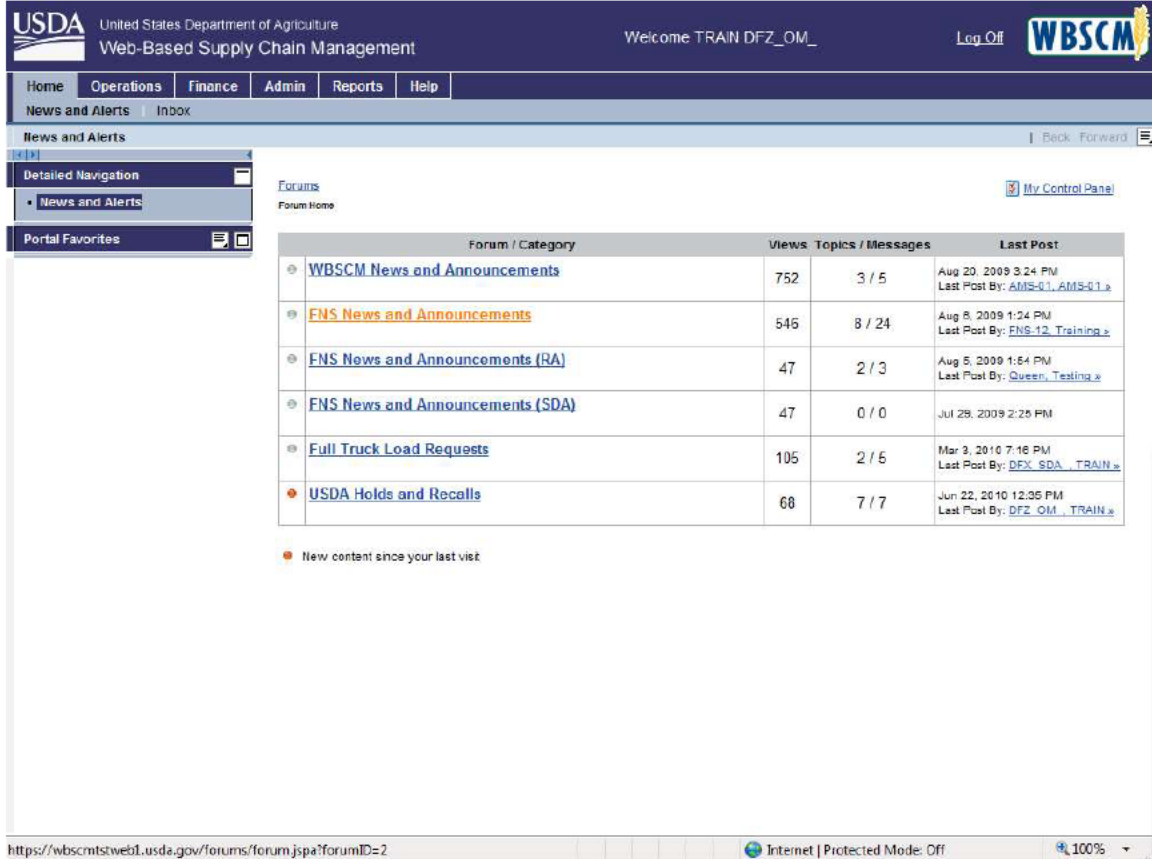
### Reminders

- Remember to check your work
- Refer to the Help Option in the Portal for further assistance.

**PROCEDURE**

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

**Forums : Forum Home Screen**



Forum / Category	Views	Topics / Messages	Last Post
<a href="#">WBSCM News and Announcements</a>	752	3 / 5	Aug 20, 2009 3:24 PM Last Post By: <a href="#">AMS-Q1, AMS-Q1</a>
<b><a href="#">FNS News and Announcements</a></b>	545	8 / 24	Aug 8, 2009 1:24 PM Last Post By: <a href="#">FNS-12, Training</a>
<a href="#">FNS News and Announcements (RA)</a>	47	2 / 3	Aug 5, 2009 1:54 PM Last Post By: <a href="#">Queen, Testing</a>
<a href="#">FNS News and Announcements (SDA)</a>	47	0 / 0	Jul 28, 2009 2:25 PM
<a href="#">Full Truck Load Requests</a>	105	2 / 5	Mar 9, 2010 7:16 PM Last Post By: <a href="#">DFX, SDA, TRAIN</a>
<a href="#">USDA Holds and Recalls</a>	68	7 / 7	Jun 22, 2010 12:05 PM Last Post By: <a href="#">DFZ, OM, TRAIN</a>

● New content since your last visit

2. Click **[FNS News and Announcements](#)** (the **FNS News and Announcements** link) to go to that particular forum.



(Note) The forums that a user can see will depend on the user's agency, whether they are an internal or external user, and whether they are domestic or international. Some users will have posting rights whereas others will have view-only rights.

**Forums : FNS News and Announcements Screen**

The screenshot shows the 'FNS News and Announcements' forum page. At the top, there is a navigation bar with 'Home', 'Operations', 'Finance', 'Admin', 'Reports', and 'Help'. Below this is a 'News and Alerts' section with an 'Inbox' link. The main content area features a 'Post Announcement' link, a 'Watch Forum' link, and a 'Search Forum' input field. A table lists several forum threads with columns for Thread, Author, Views, Replies, and Last Post.

Thread	Author	Views	Replies	Last Post
<a href="#">test</a> Posted By: <a href="#">FNS-01_Training</a> -- Aug 5, 2009 3:29 PM				
<a href="#">which stop for the white house???</a> Posted By: <a href="#">FNS-25_Training</a> -- Aug 5, 2009 1:58 PM				
<a href="#">Eat at Costi!!!</a> Posted By: <a href="#">FNS-25_Training</a> -- Aug 5, 2009 1:54 PM				
<a href="#">Asian Bistro Thursday 4:00 Happy Hours</a> Posted By: <a href="#">FNS-03_Training</a> -- Aug 5, 2009 1:54 PM				
<a href="#">cow joke</a> Posted By: <a href="#">FNS-25_Training</a> -- Aug 5, 2009 1:52 PM				
<a href="#">peggy can't fill any wbscm orders...</a> Posted By: <a href="#">FNS-25_Training</a> -- Aug 5, 2009 1:50 PM				
<a href="#">Let's talk about Ray</a> Posted By: <a href="#">FNS-04_Training</a> -- Aug 5, 2009 1:48 PM				
<a href="#">WBSCM Training</a> Posted By: <a href="#">FNS-19_Training</a> -- Aug 5, 2009 1:47 PM				
<a href="#">happy hour thursday 4:00 Asian bistro</a>	<a href="#">FNS-03_Training</a>	41	3	Aug 6, 2009 1:24 PM Last Post By: <a href="#">FNS-12_Training</a>
<a href="#">I like chocolate.</a>	<a href="#">FNS-13_Training</a>	30	3	Aug 6, 2009 9:28 AM Last Post By: <a href="#">FNS-05_Training</a>
<a href="#">Monuments by Moonlight</a>	<a href="#">FNS-05_Training</a>	16	0	Aug 5, 2009 1:57 PM Last Post By: <a href="#">FNS-05_Training</a>

3. Click **Post Announcement** (the **Post Announcement** link) to post an announcement.



(Note) In some cases, you will have the option to post an announcement or a thread. The difference between announcements and threads is as follows: an announcement does not allow users to respond to it, whereas a thread allows for questions, replies, and responses.





**Forums : Post Announcement Screen**

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

Field	R/O/C	Description
Subject	R	Field used to identify the subsequent message or note.  <b>Example:</b> Apples Available for Bonus!
Body	R	The message to be posted on the discussion forum.  <b>Example:</b> Granny Smith Apples in 5/2 Lb bags will be available for bonus under the NSLP program starting today!

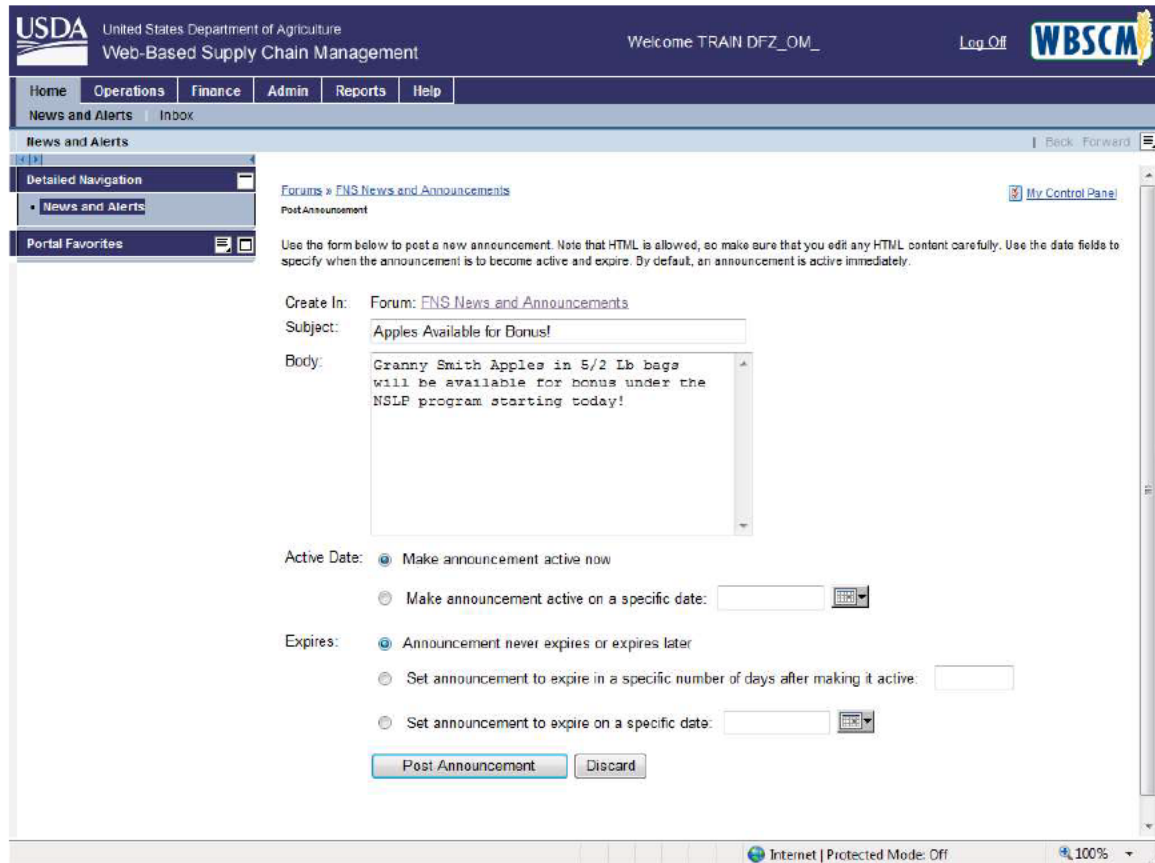
### Forums : Post Announcement Screen

5. Ensure that the **Make announcement active now** radio button is selected to make the announcement active now.



(Note) If desired, you can also choose to make the announcement active starting on a specific date in the future.

## Forums : Post Announcement Screen

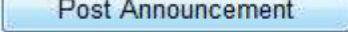


6. Ensure the **Announcement never expires or expires later** radio button is selected to allow the announcement to stay active indefinitely until you delete it.



(Note) If desired, you can also set the announcement to expire on a specific date or within a specific number of days.

### Forums : Post Announcement Screen

7. Click  (the **Post Announcement** button) to post the announcement.

### Forums : Apples Available for Bonus! Screen

The screenshot shows the USDA Web-Based Supply Chain Management (WBSCM) interface. The top navigation bar includes 'Home', 'Operations', 'Finance', 'Admin', 'Reports', and 'Help'. The user is logged in as 'TRAIN DFZ\_OM\_'. The main content area displays a forum post titled 'Announcement: Apples Available for Bonus!'. The post details include: 'Posted By: DFZ\_OM\_TRAIN', 'Created In: Forum: FNS News and Announcements', and 'Posted: Jun 23, 2010 4:04 PM'. The announcement text states: 'Granny Smith Apples in 5/2 Lb bags will be available for bonus under the NSLP program starting today!'. The browser address bar shows the URL: https://wbscmtstweb1.usda.gov/forums/forum.jspa?forumID=2.

8. You have completed this transaction.



(Note) Notice that your message has been posted.



**RESULT**

The transaction has been successfully completed.



## PROCESS OVERVIEW

### Purpose

The purpose of this procedure is to assist State Distributing Agency (SDA)/Indian Tribal Organization (ITO) Org Admins in assigning or un-assigning Ship-To Organizations to the Recipient Agencies (RAs) within their organizational hierarchy. While SDA/ITO Org Admins may manually update Ship-To Organization business partner relationships for RAs individually when needed, they can efficiently mass assign or un-assign Ship-To Organizations to multiple RAs in one transaction.

### Process Trigger

Use this transaction to mass assign or un-assign Ship-To Organizations to RAs.

### Prerequisites

- Ship-To organization must exist in WBSCM.
- RA must exist in WBSCM.
- The user's SDA/ITO must have RAs.

### Portal Path

Follow the Portal path below to complete this transaction:

- Select **Admin** tab → **Organization Maintenance** tab → **Maintain Organization** link → **Mass Assign/Un-assign Ship-To** link to go to the **Mass Assign/Un-assign Ship-To** screen.

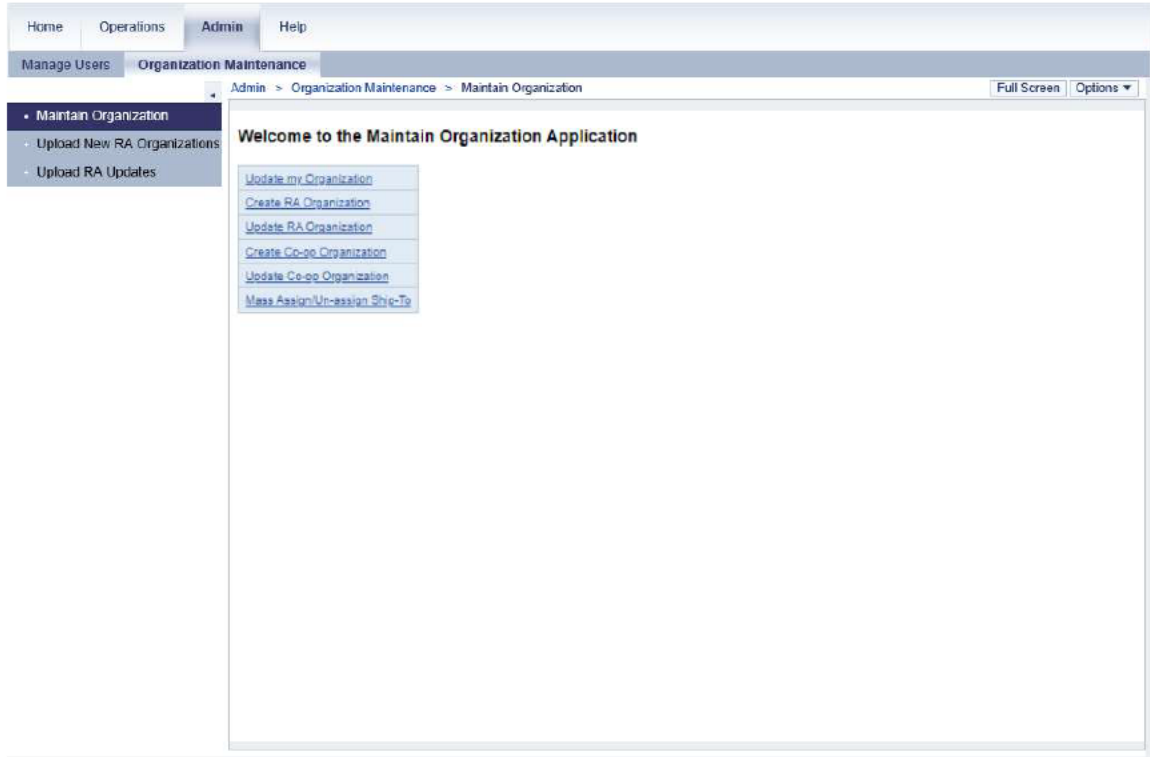
### Tips and Tricks


- 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. Select **Admin** tab → **Organization Maintenance** tab → **Maintain Organization** link.

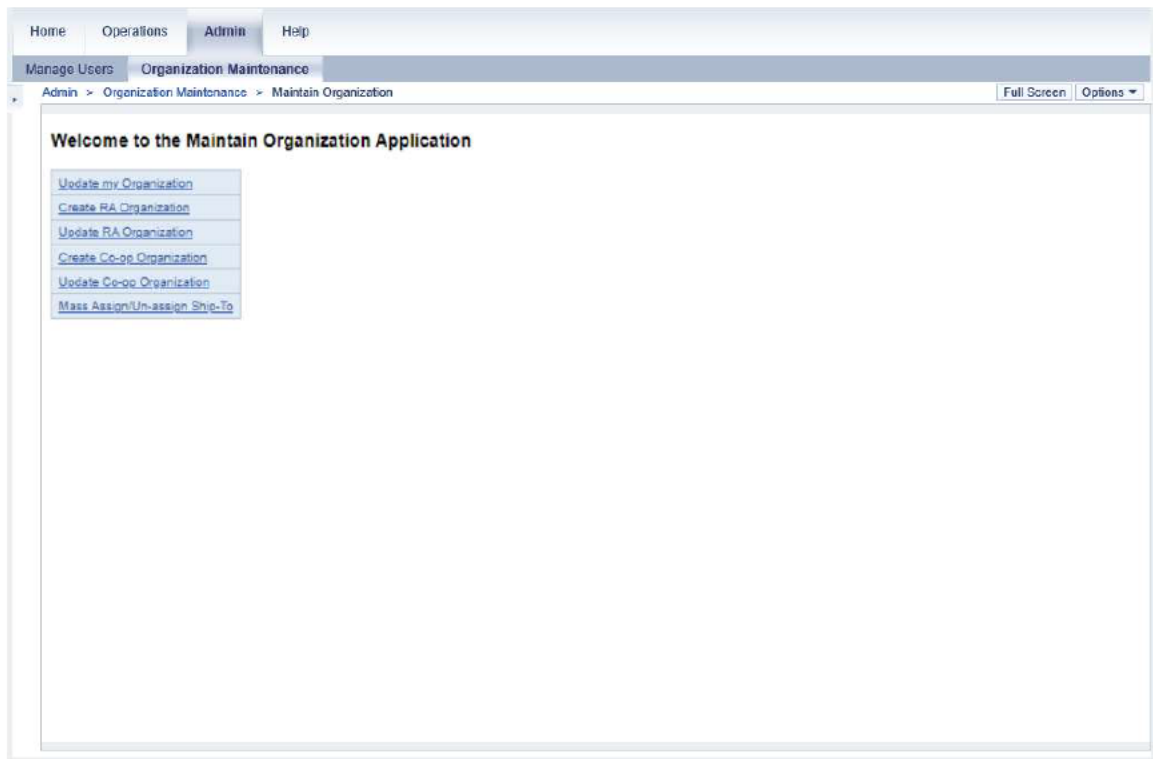
### Image: Maintain Organization Screen



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

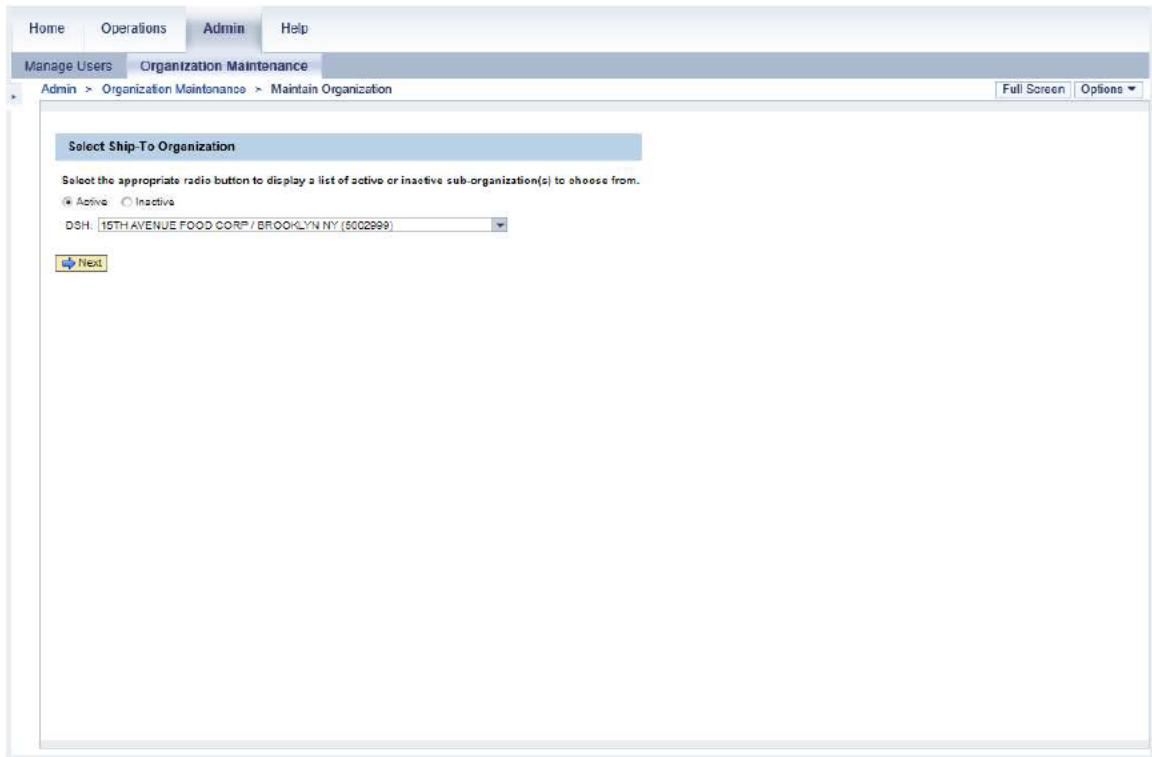


**Image: Maintain Organization Screen**



3. Click [Mass Assign/Un-assign Ship-To](#) (the **Mass Assign/Un-assign Ship-To** link) to mass assign/un-assign RAs to Ship-To Locations.

**Image: Select Ship-To Organization Screen**



4. Click  (the **DSH** drop-down).

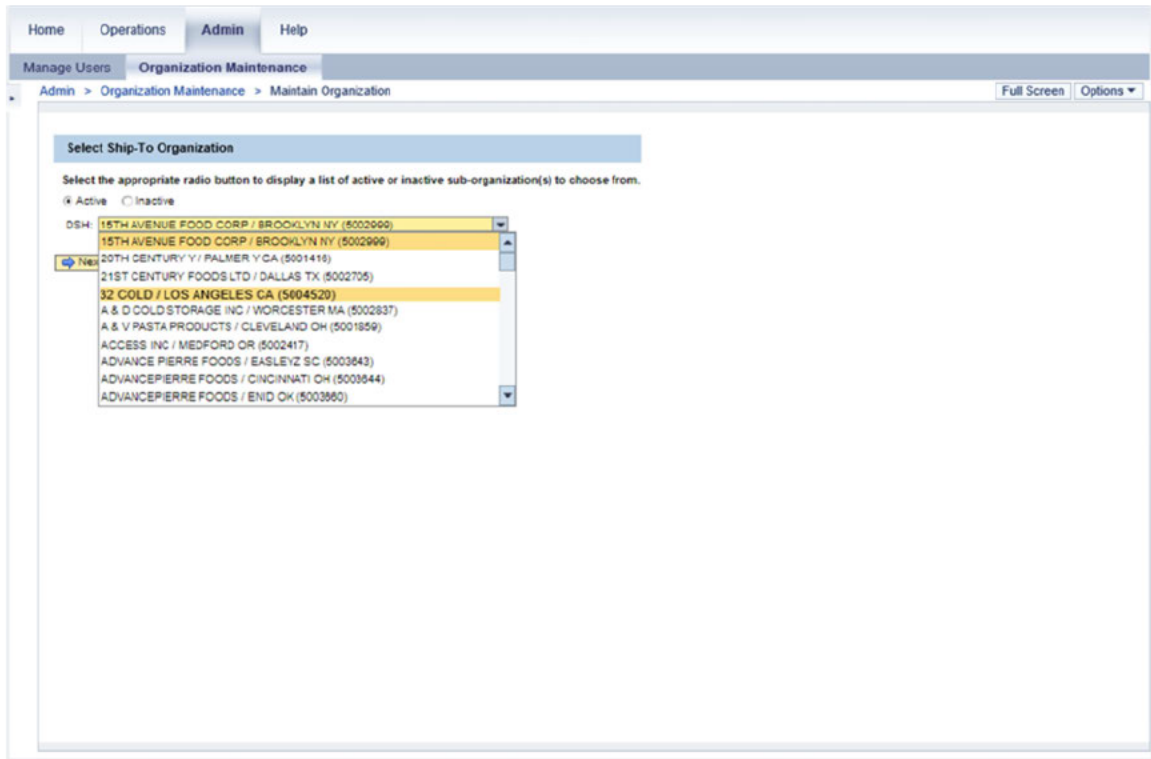


(Note) Type the first letter of the Ship-To Organization to go to the Ship-To Organizations that start with that letter.



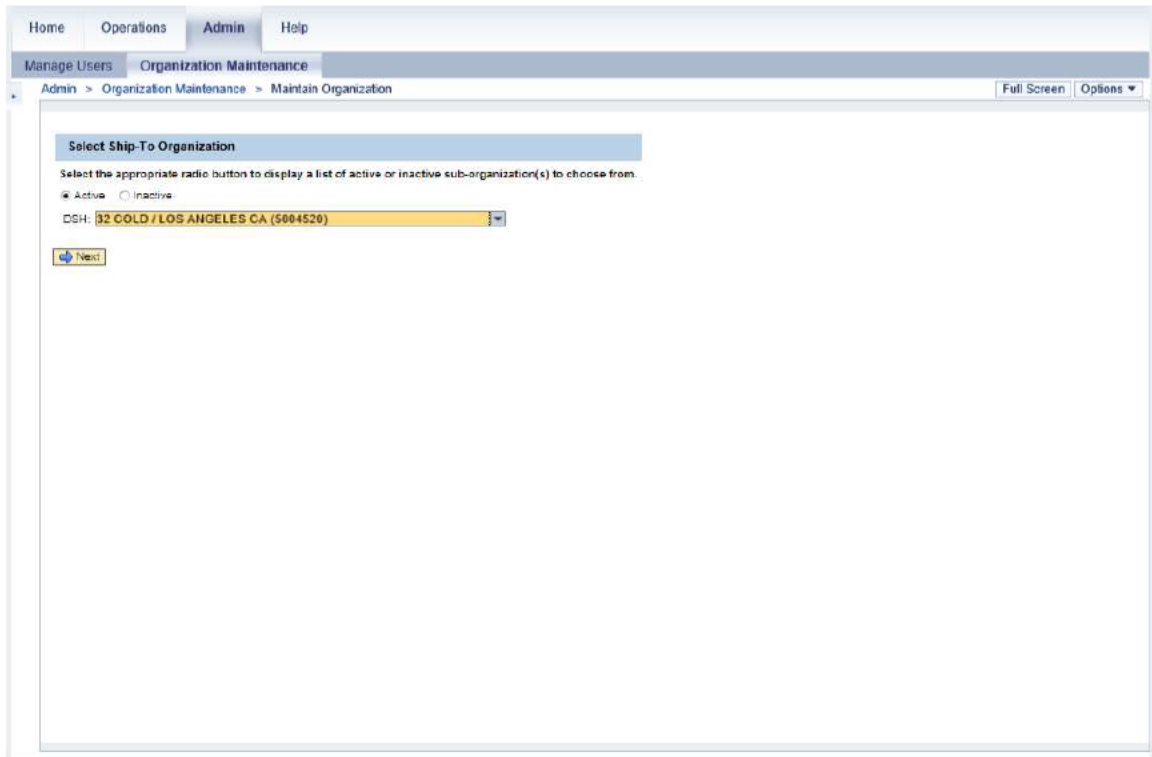
(Note) To request a new Ship-To Organization for the SDA/ITO, domestic business partners should email FNS at [SM.FN.WBSCM-Ship-To@usda.gov](mailto:SM.FN.WBSCM-Ship-To@usda.gov). FNS will create or modify the Ship-To Organization, as needed, and assign it to the organization.

**Image: Select Ship-To Organization Screen**



5. Select the appropriate Ship-To Organization from the drop-down list. In this example, **32 COLD / LOS ANGELES CA (5004520)** (the **32 COLD / LOS ANGELES CA (5004520)** option) is selected.

**Image: Select Ship-To Organization Screen**




6. Click  (the **Next** button) to view details for the selected Ship-To Organization.

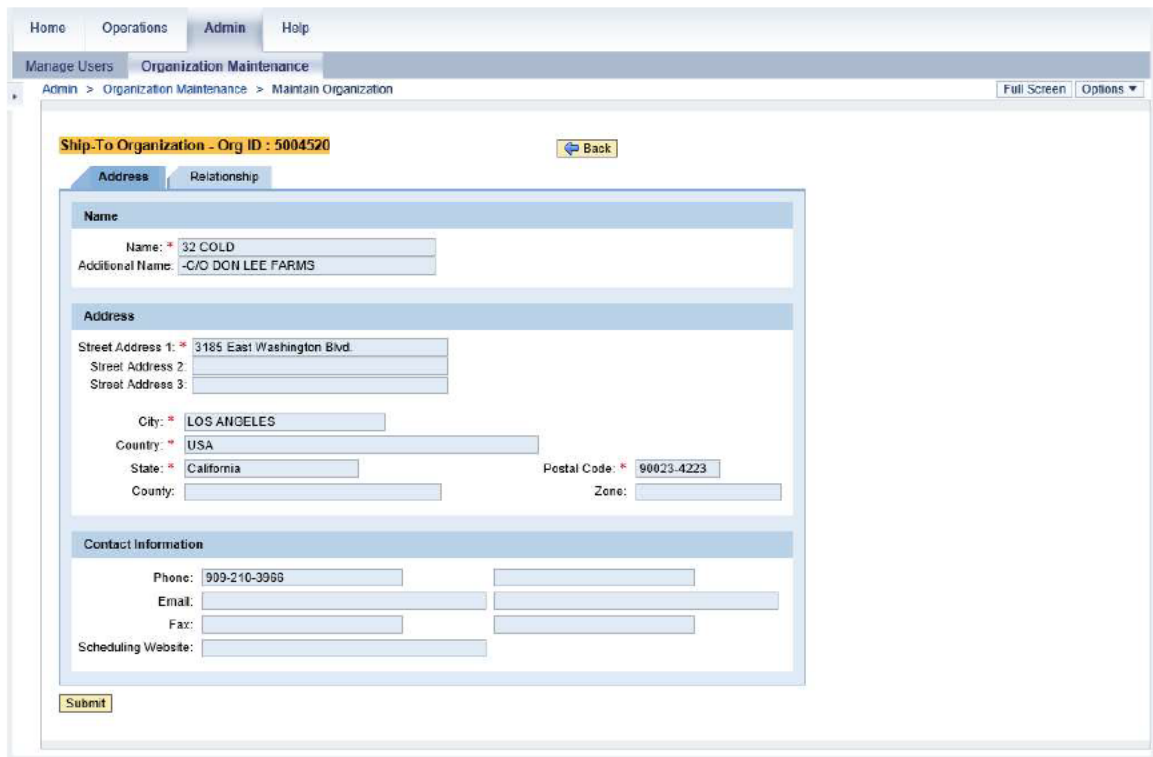


(Note) The Ship-To Organization details display on the *Address* tab in view-only mode and contain the location and contact information for the Ship-To Organization. The *Relationship* tab displays the Ship-To Organization's relationships with RAs in the SDA/ITO's organizational hierarchy.



(Note) Use  (the **Back** button) at any point in the transaction to return to the list of Maintain Organization transactions (Step 3).

**Image: Ship-To Organization (Address) Screen**



Home Operations Admin Help

Manage Users Organization Maintenance

Admin > Organization Maintenance > Maintain Organization Full Screen Options

Ship-To Organization - Org ID : 5004520 Back

**Address** Relationship

**Name**

Name: \* 32 COLD  
Additional Name: -C/O DCN LEE FARMS

**Address**

Street Address 1: \* 3185 East Washington Blvd.  
Street Address 2:  
Street Address 3:

City: \* LOS ANGELES  
Country: \* USA  
State: \* California  
County:

Postal Code: \* 90023-4223  
Zone:

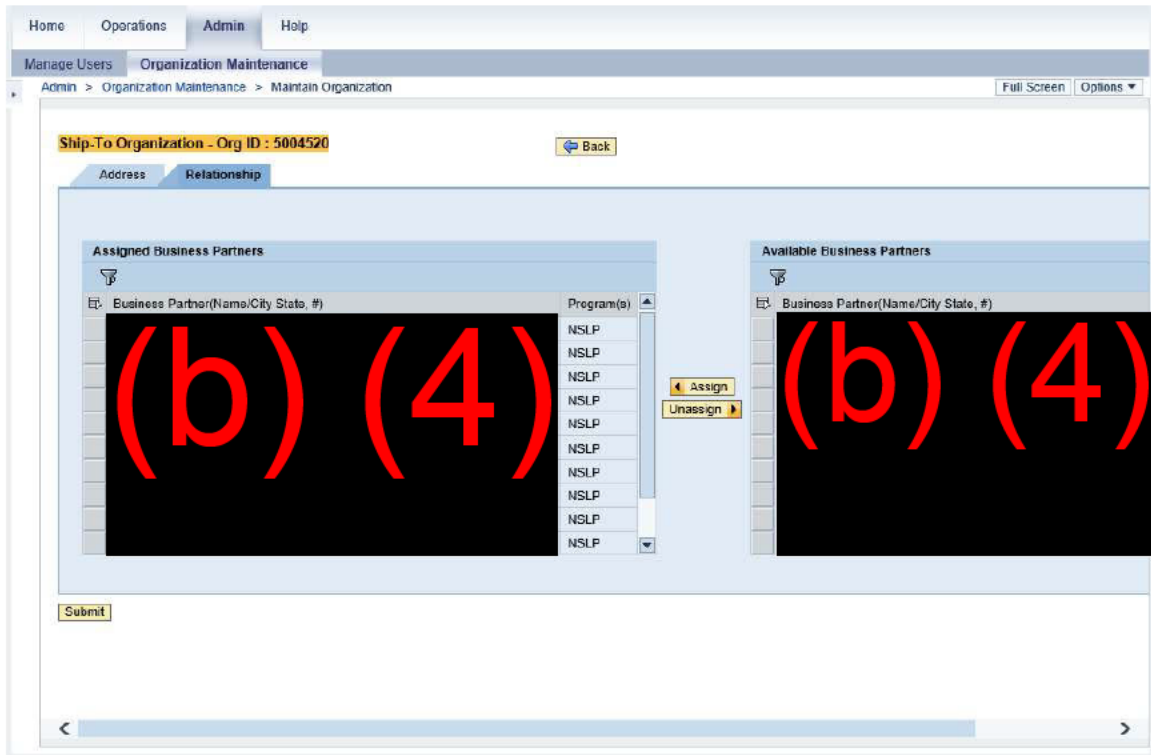
**Contact Information**

Phone: 909-210-3966  
Email:  
Fax:  
Scheduling Website:

Submit

7. Click **Relationship** ( the **Relationship** tab) to access the existing business partner relationships.

**Image: Ship-To Organization (Relationship) Screen**



**8.** Perform one or more of the following:

If	Then
The existing relationship between the Ship-To Organization and the RAs needs to be removed.	Go to step 9.
New relationships need to be assigned to the Ship-To Organization and RAs.	Go to step 12.
No other changes are needed.	Go to step 15.



(Note) The RAs are listed in ascending order by business partner number. Use the vertical scrollbar to find the appropriate RAs.



(Note) To select multiple business partners:

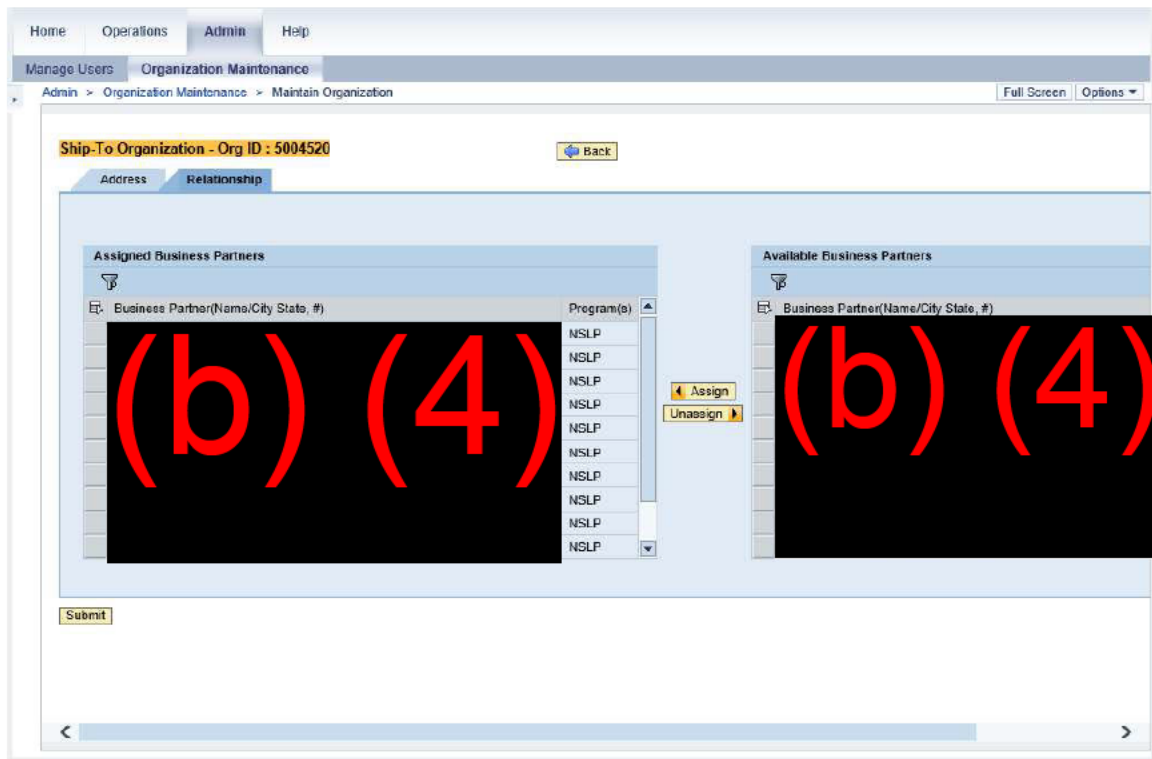
If the business partners are listed in consecutive rows, hold down the **Shift** key and click the first and last selection boxes.

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



(Note) The *Available Business Partners* panel will not include RA organizations that have been archived or marked for deletion.


**Image: Ship-To Organization (Relationship) Screen**



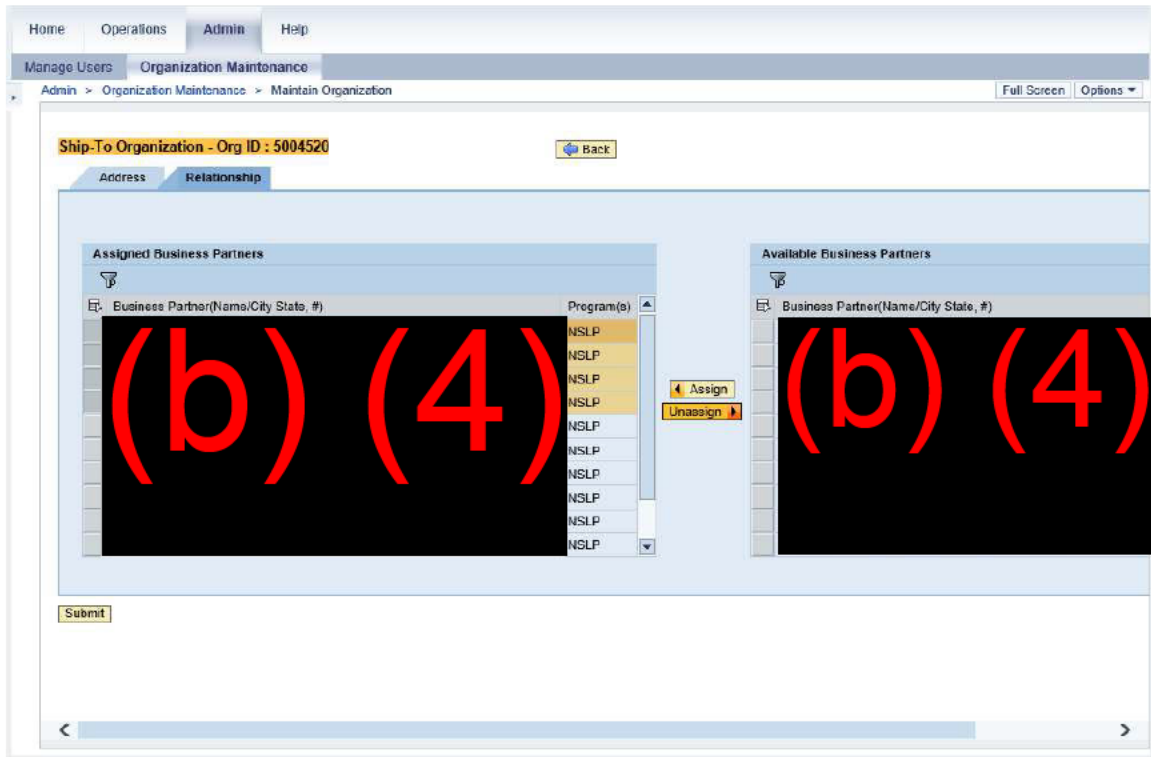
9. Click  (the **Select** button) in the *Assigned Business Partners* panel next to the appropriate RA(s) to be removed from this Ship-To Organization. In this example, the following four business partners are selected: (b) (4)

(b) (4)



(Note) Use  (the **Filters** icon) to quickly search for an RA. Additionally, use "\*" (the **Asterisk** symbol) as a wildcard at the beginning of the search term (e.g., \*DEPT) to search for an RA that ends with the term or use the asterisk symbol at the beginning and the end of the search term (e.g., \*SCHOOL\*) to search for an RA that contains the term.

**Image: Ship-To Organization (Relationship) Screen**



10. Click  (the **Unassign** button) to remove the relationship.

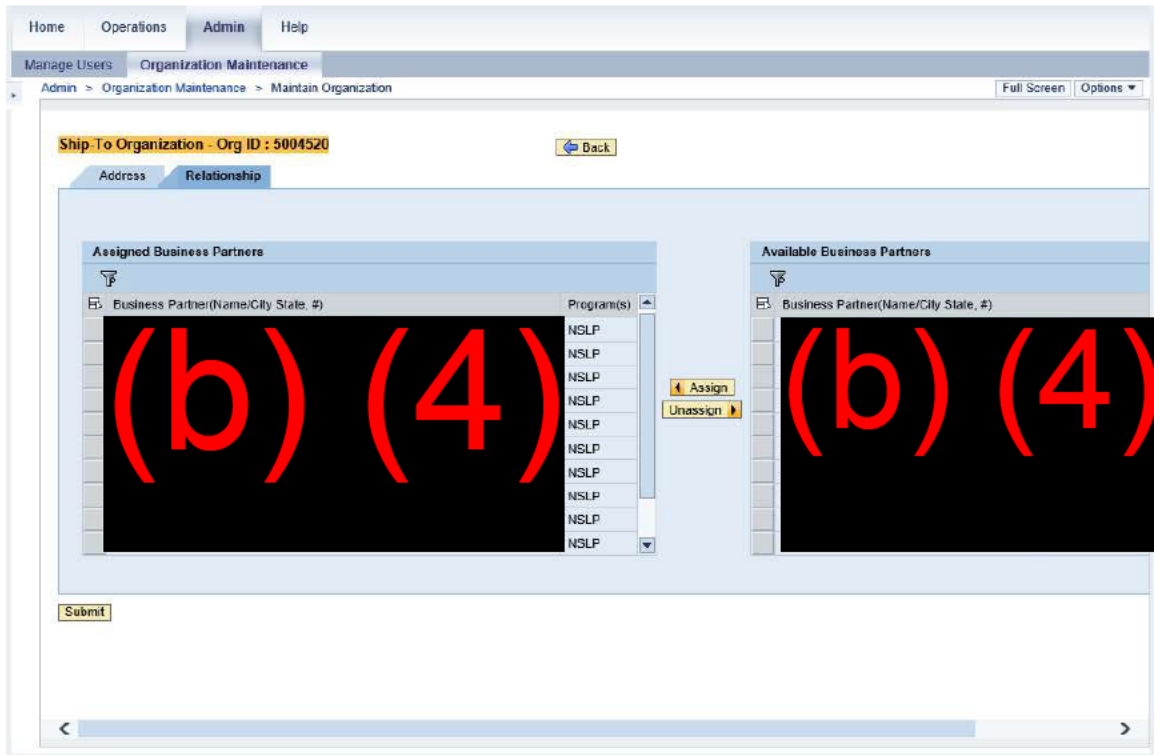



(Note) The selected RAs are moved to the *Available Business Partners* panel.

11. Go to step 8.




**Image: Ship-To Organization (Relationship) Screen**



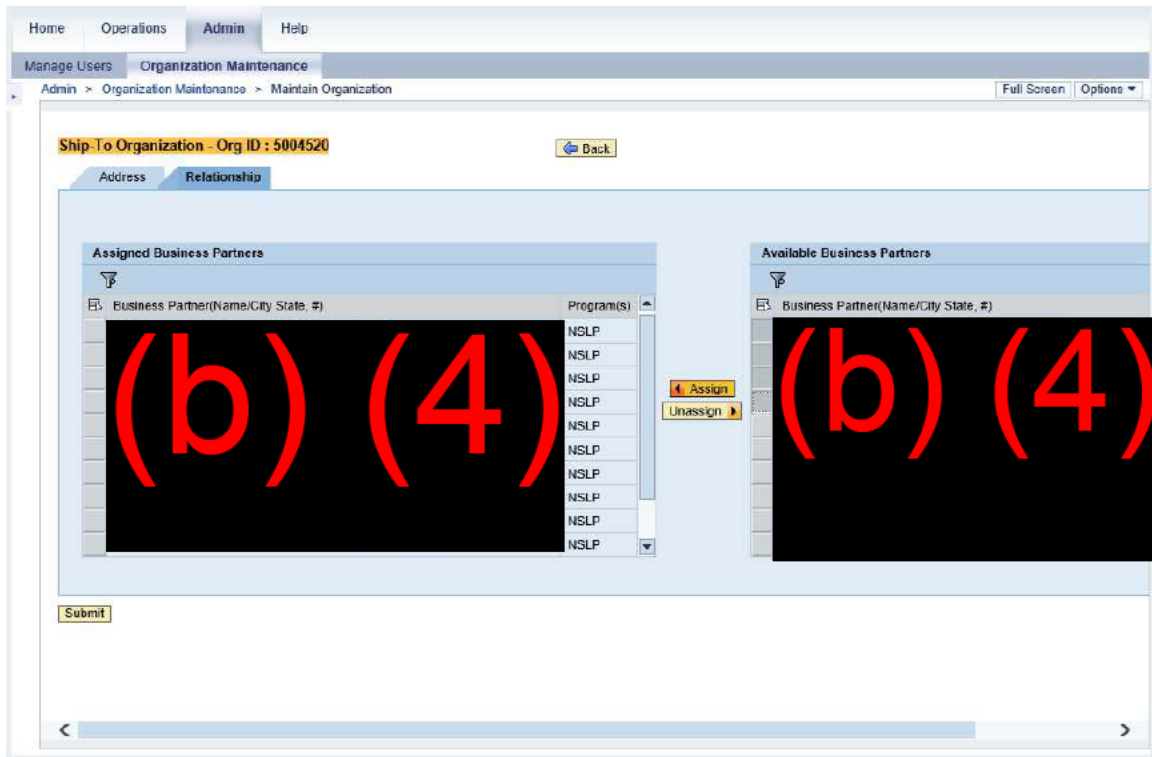
12. Click  (the **Select** button) in the *Available Business Partners* panel next to the appropriate RA(s) to be assigned to this Ship-To Organization. In this example, the following four business partners are selected: (b) (4)


(b) (4)



(Note) Use  (the **Filters** icon) to quickly search for an RA. Additionally, use "\*" (the **Asterisk** symbol) as a wildcard at the beginning of the search term (e.g., \*DEPT) to search for an RA that ends with the term or use the asterisk symbol at the beginning of the term.

**Image: Ship-To Organization (Relationship) Screen**



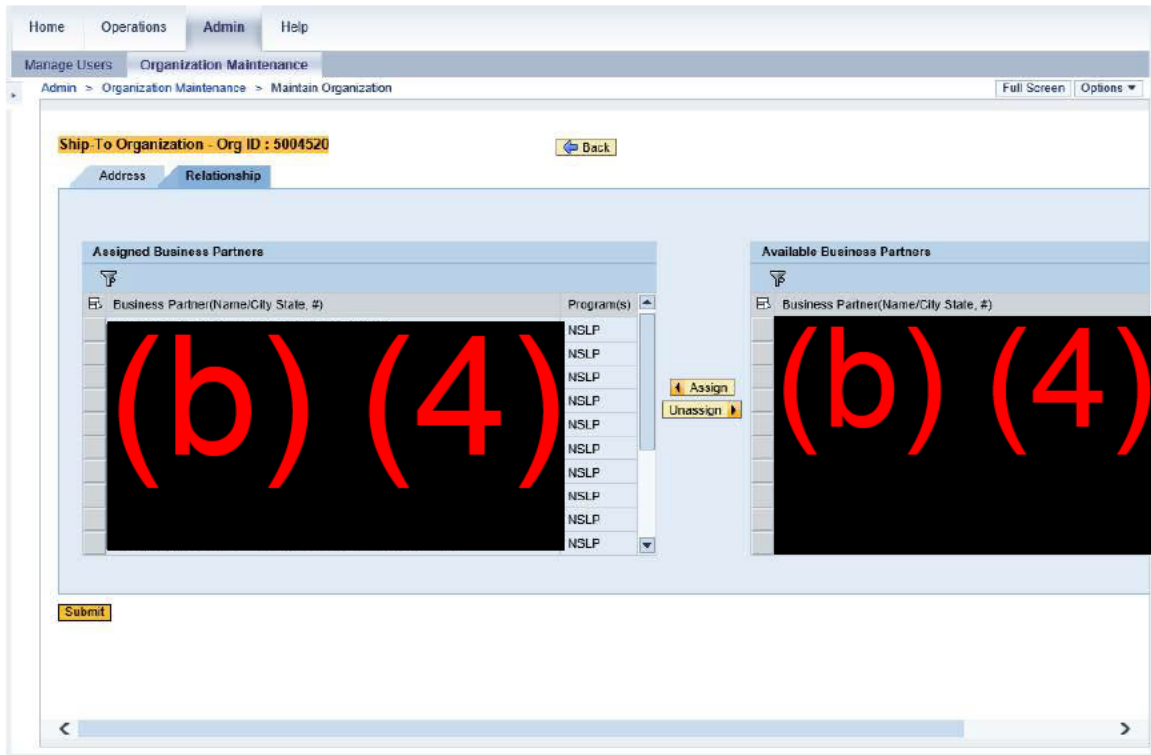
13. Click  (the **Assign** button) to create a relationship between the Ship-To Organization and the selected RAs.



(Note) The selected RAs are moved to the *Assigned Business Partner* panel.

14. Go to Step 8.

**Image: Ship-To Organization (Relationship) Screen**



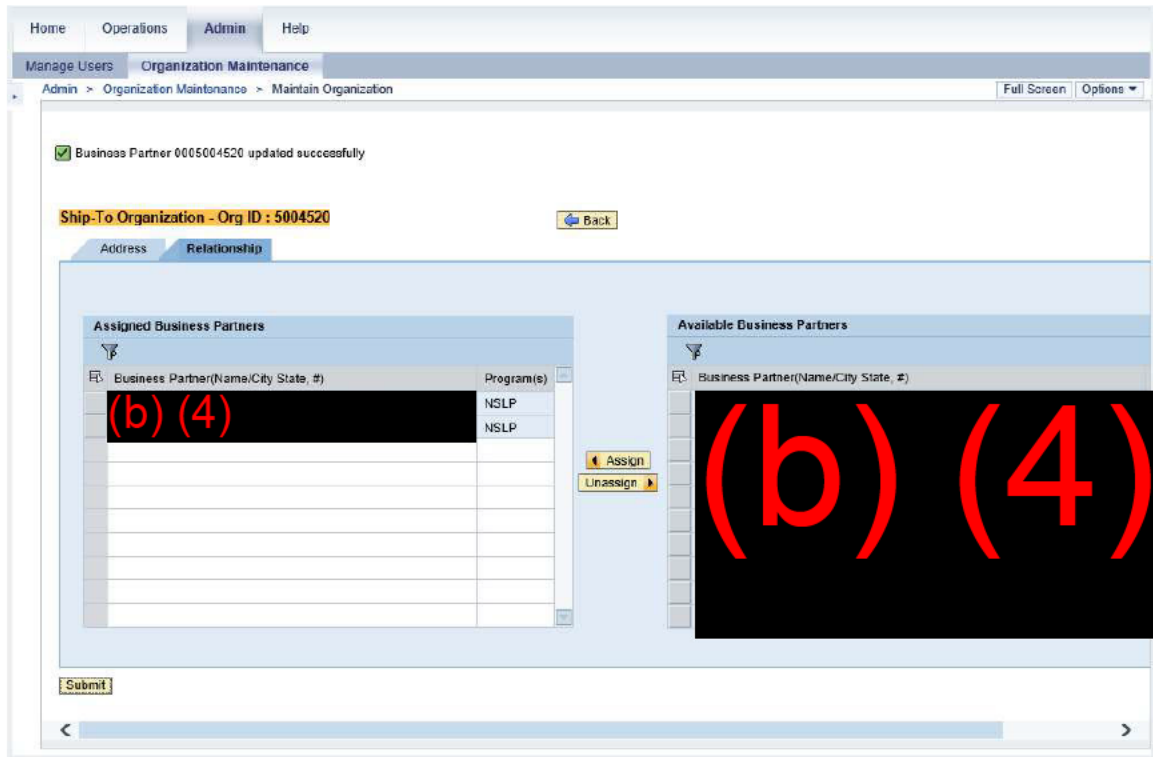
15. Click **Submit** (the **Submit** button) to update the Ship-To Organization's business partner relationships.



(Note) A confirmation message "*Business Partner 000500xxxx updated successfully*" displays, confirming that business partner relationships for this Ship-To Organization were updated in WBSCM.

If there is a problem with the update, an error message displays: Error updating ship-to relationships. Repeat this transaction from Step 3.

**Image: Ship-To Organization (Relationship) Screen**



16. The transaction is completed.



---

## RESULT

The Ship-To Organization has been assigned or unassigned to multiple Recipient Agencies (RAs) within the user's organizational hierarchy.