



PROCESS OVERVIEW

Purpose

The purpose of this transaction is to modify a domestic requisition in WBSCM. Recipient Agencies (RA), Co-ops, State Distributing Agencies (SDA), and Indian Tribal Organizations (ITO) can modify a requisition in **Draft** status or that has been returned to the user. Domestic requisitions can be modified at the header or line item level.

Process Trigger

Perform this transaction to modify a domestic requisition.

Prerequisites

- Domestic requisition must exist in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab → **Order Processing** tab → **Order Management** folder → **Domestic Order Entry** link to go to the *Domestic Order Entry* screen.

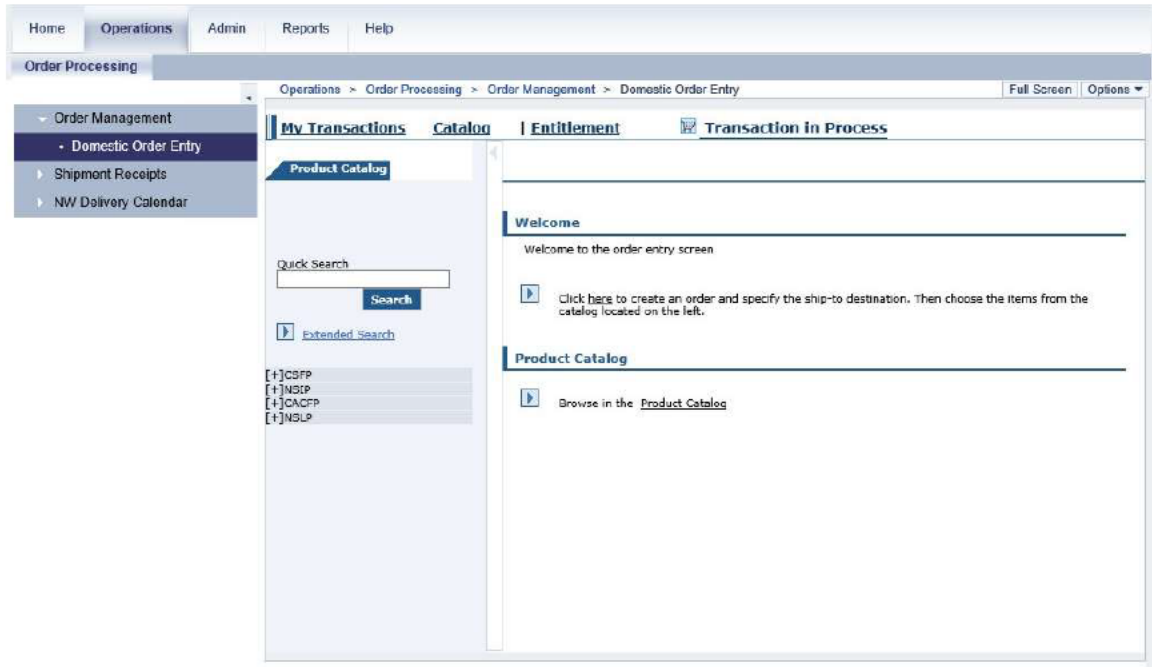
Tips and Tricks

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

PROCEDURE

1. Start the transaction using the Portal path: **Operations** tab → **Order Processing** tab → **Order Management** folder → **Domestic Order Entry** link.

Image: Domestic Order Entry Screen




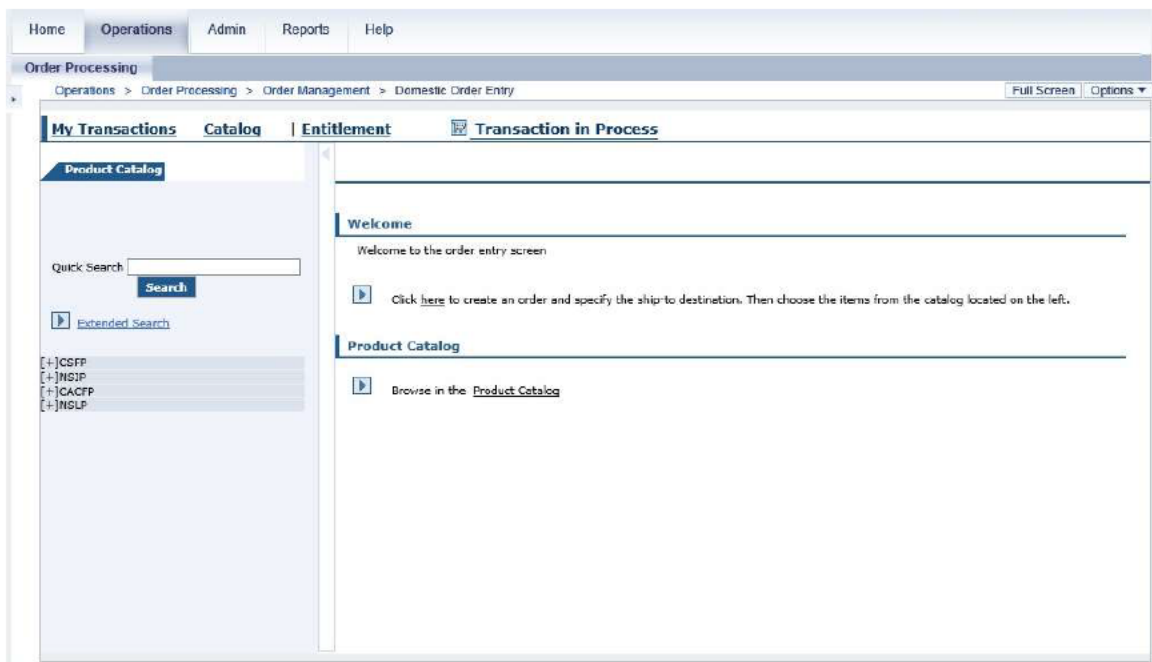
2. Click  (the **Hide Navigator** arrow) to minimize the Portal menu. Note that this can be done with any transaction in WBSM.

Image: Domestic Order Entry Screen

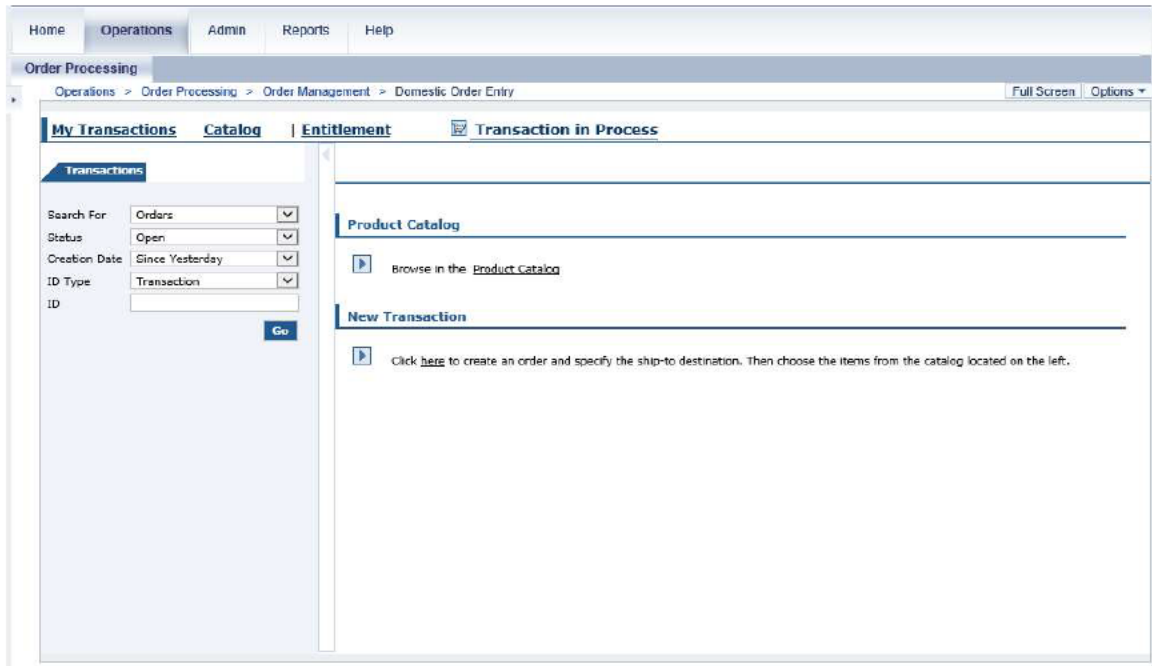


3. Click **My Transactions** (the **My Transactions** link) to search for an existing domestic requisition.



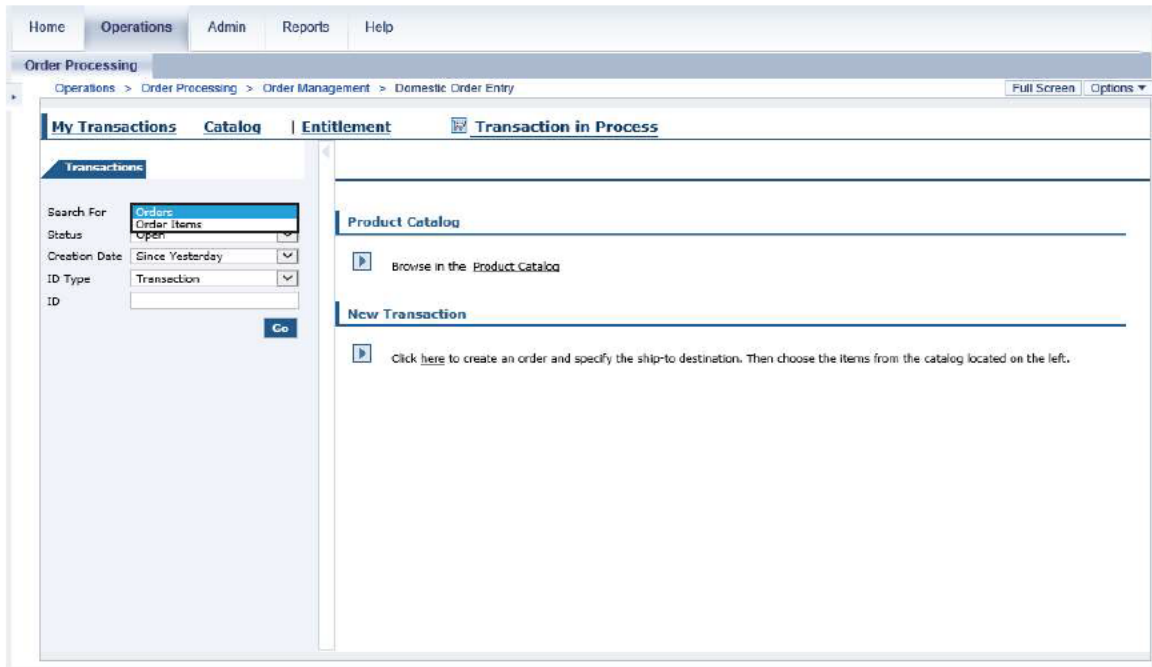
(Note) The *Transactions* section can also be used to search for sales orders, which comprise requisitions that have been consolidated into full truckloads by the SDA or ITO and then submitted to FNS for approval and purchase. In contrast, domestic requisitions are created by an RA, Co-op, SDA, or ITO in quantities that fulfill the needs of that organization regardless of full truckload quantities.

Image: Domestic Order Entry Screen



4. Click  (the **Search For** drop-down).

Image: Domestic Order Entry Screen

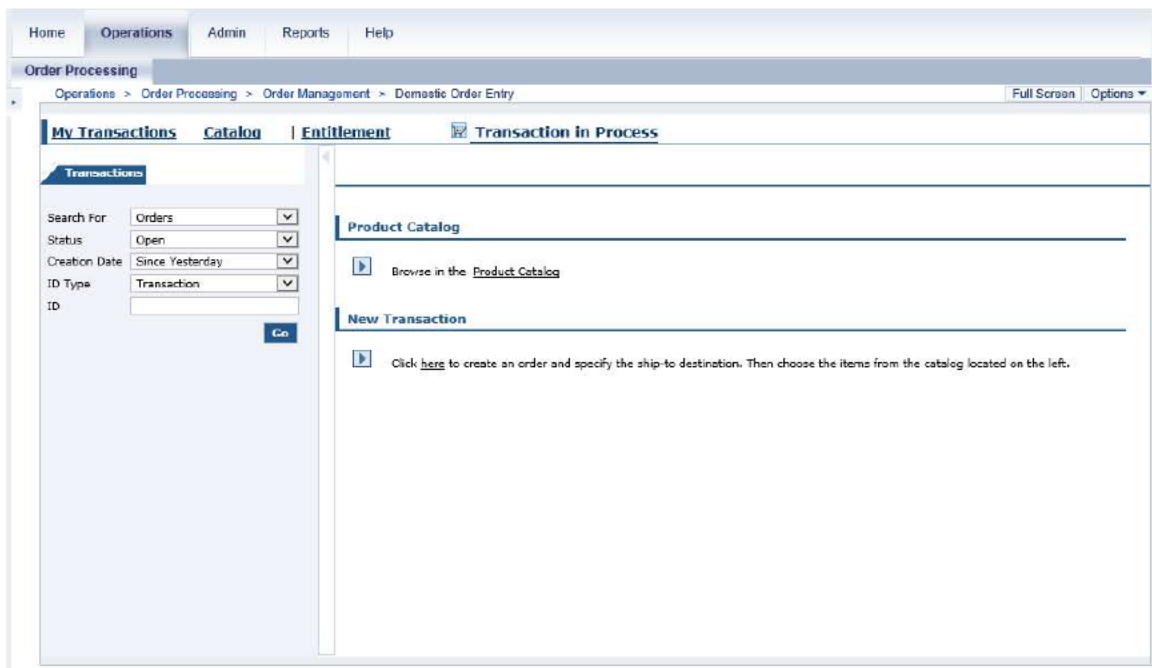


5. Select the appropriate order type option from the **Search For** list. In this example, **Orders** (the **Orders** option) is selected.



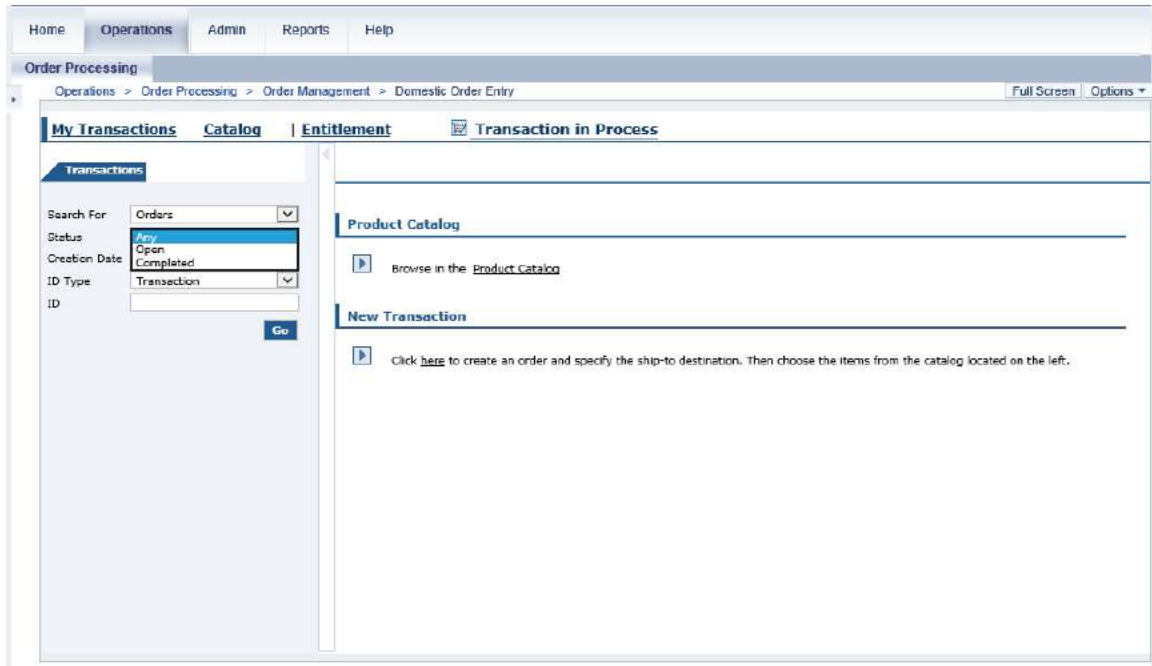
(Note) If the material ID is known, the user may select the **Order Items** option and enter the ID number in the text field. Only orders that contain this product are displayed in the results.

Image: Domestic Order Entry Screen



6. Click  (the **Status** drop-down).

Image: Domestic Order Entry Screen



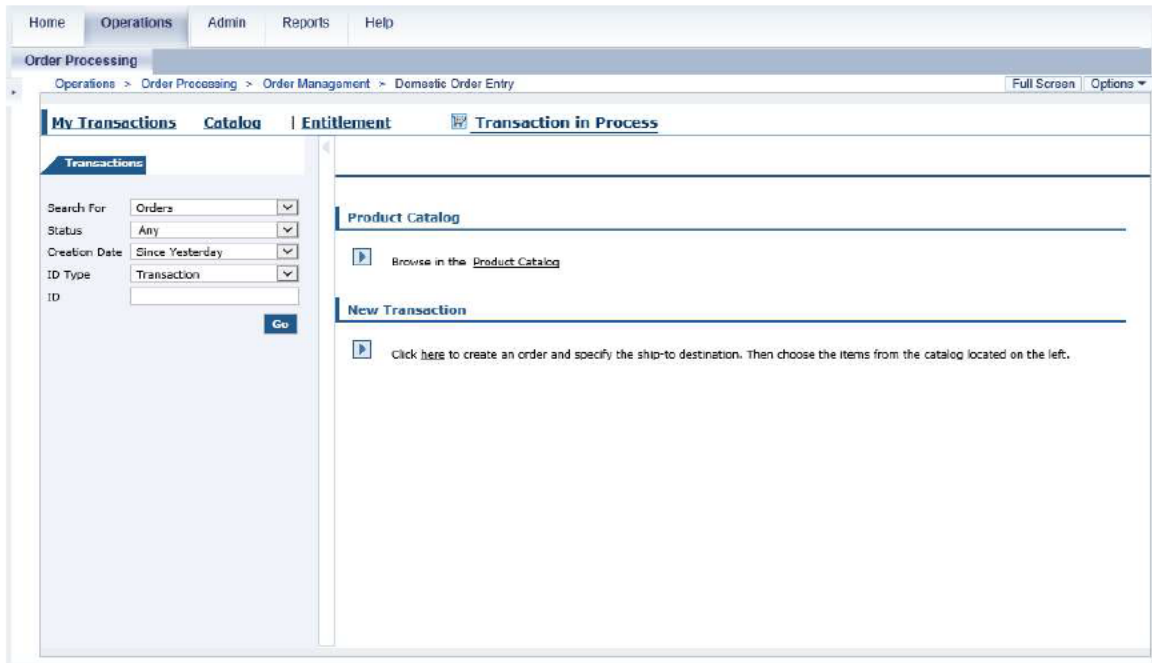
7. Select the appropriate status option from the **Status** list. In this example, **Any** (the **Any** option) is selected.



(Note) The options for **Status** are:

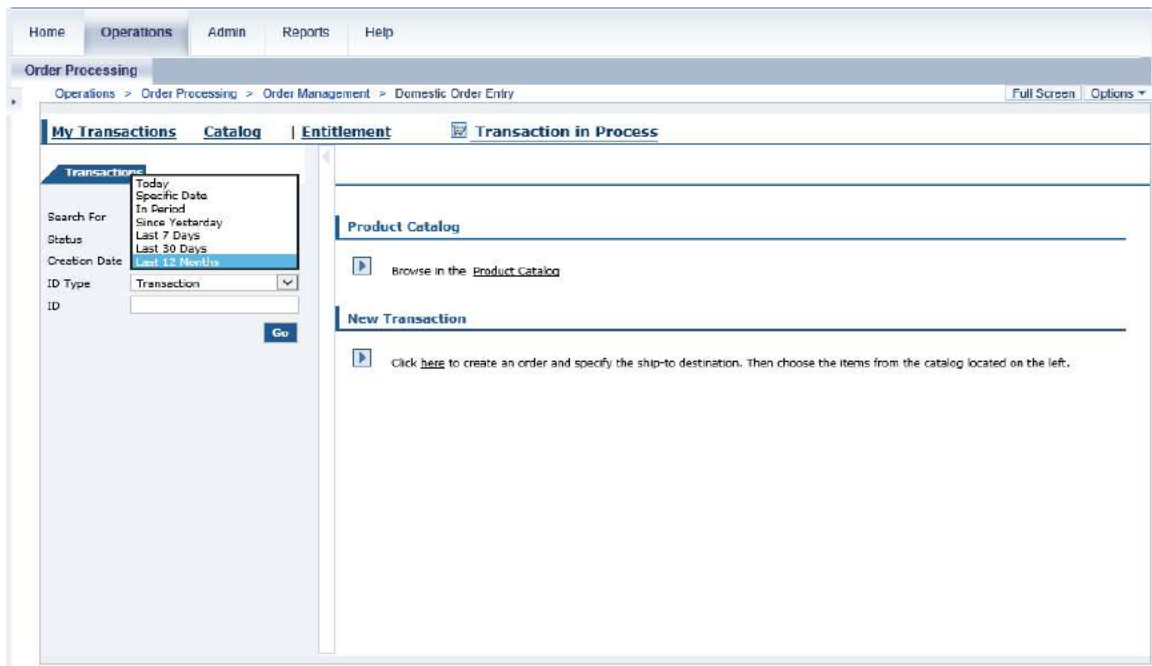
- **Any** displays all requisitions regardless of status.
- **Open** displays only requisitions in open status (i.e., drafted, submitted, or approved).
- **Closed** displays only requisitions in closed status (i.e., delivered or cancelled).

Image: Domestic Order Entry Screen



8. Click (the **Creation Date** drop-down).

Image: Domestic Order Entry Screen



9. Select the appropriate option from the **Creation Date** list. In this example, **Last 12 Months** (the **Last 12 Months** option) is selected.



(Note) SDAs and ITOs will also see a **Created** field, which allows them to limit the

search to only the requisitions created by their own organization (**By Myself**) or to include requisitions created by their RAs and Co-Ops (**By All Business Partners**).

The options for **Created** are:

- **By Myself** displays only requisitions created by the user's organization.
- **By All Business Partners** displays requisitions created by the user as well as its associated suborganizations such as RAs.



(Note) The options for **Creation Date** are:

- **Today** displays only requisitions created today.
- **Specific Date** allows users to enter a specific date in the text field and displays only requisitions for that date.
- **In Period** allows user to enter a From Date and To Date and displays only requisitions that fall between those dates.
- **Since Yesterday** displays requisitions created yesterday and today.
- **Last 7 Days** displays requisitions created in the last 7 days.
- **Last 30 Days** displays requisitions created in the last 30 days.
- **Last 12 Months** displays requisitions created in the last 12 months.

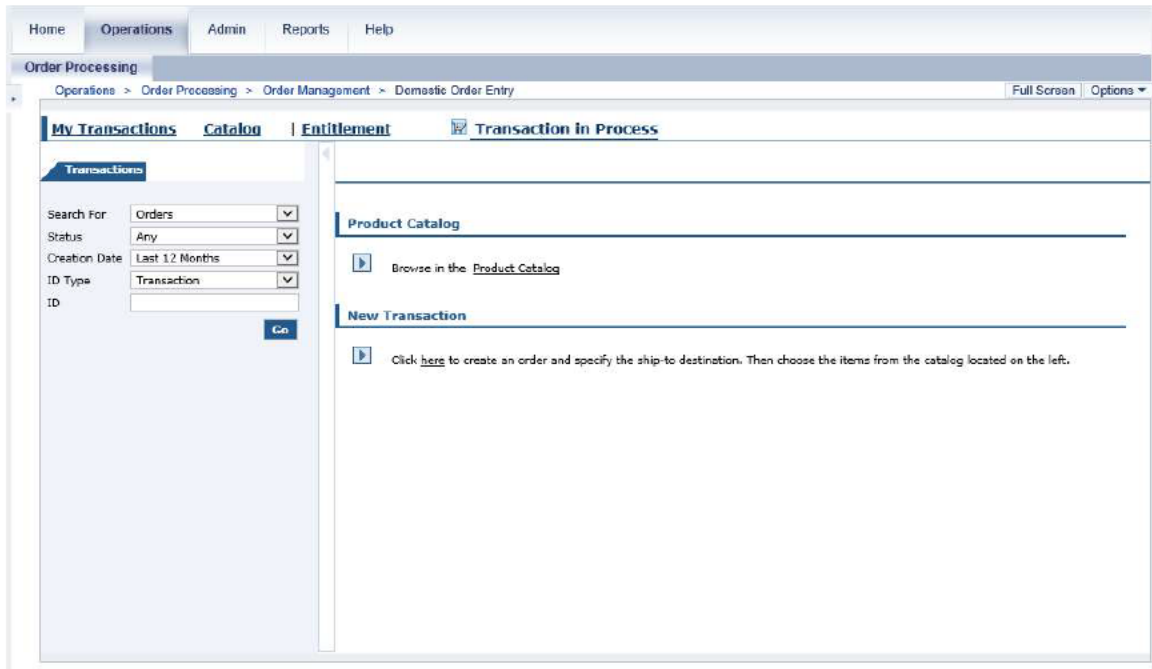
10. Perform one of the following:

If	Then
The user does not know the requisition number	Go to Step 11 .
The user knows at least part of the requisition number	<ol style="list-style-type: none"> 1. Select the Transaction option from the ID Type drop-down list. 2. Enter the requisition number of part thereof in the ID field, using the wildcard symbols as needed. 3. Go to Step 11.



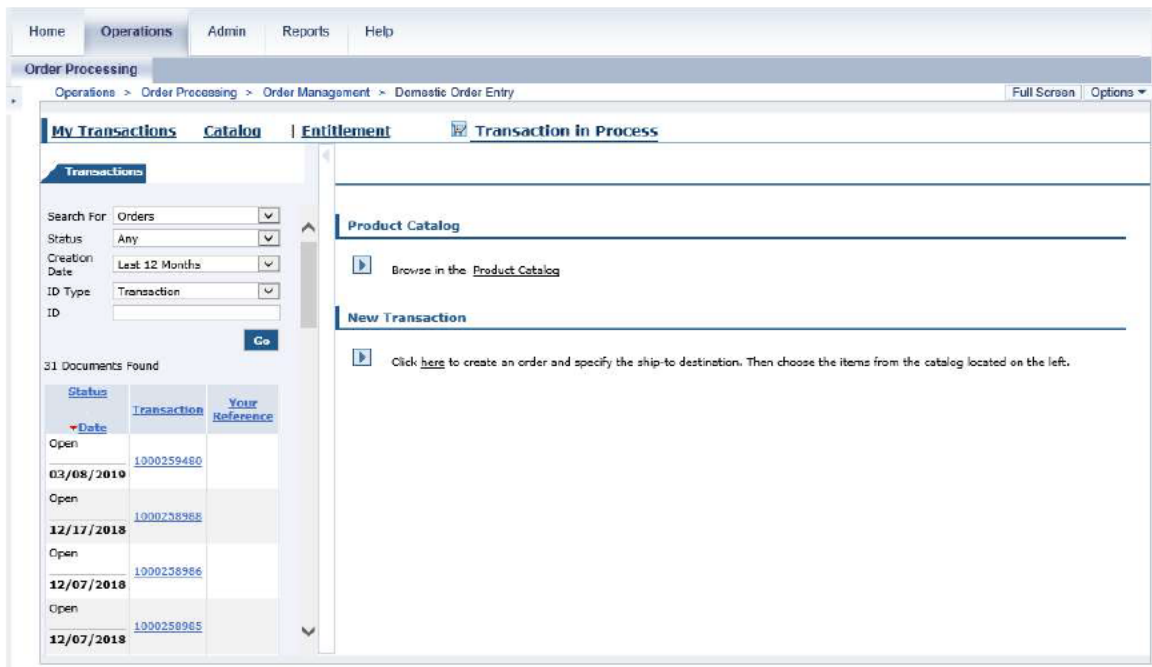
(Note) Refer to the [Wildcard and Matchcode Searches](#) job aid for additional detail.

Image: Domestic Order Entry Screen



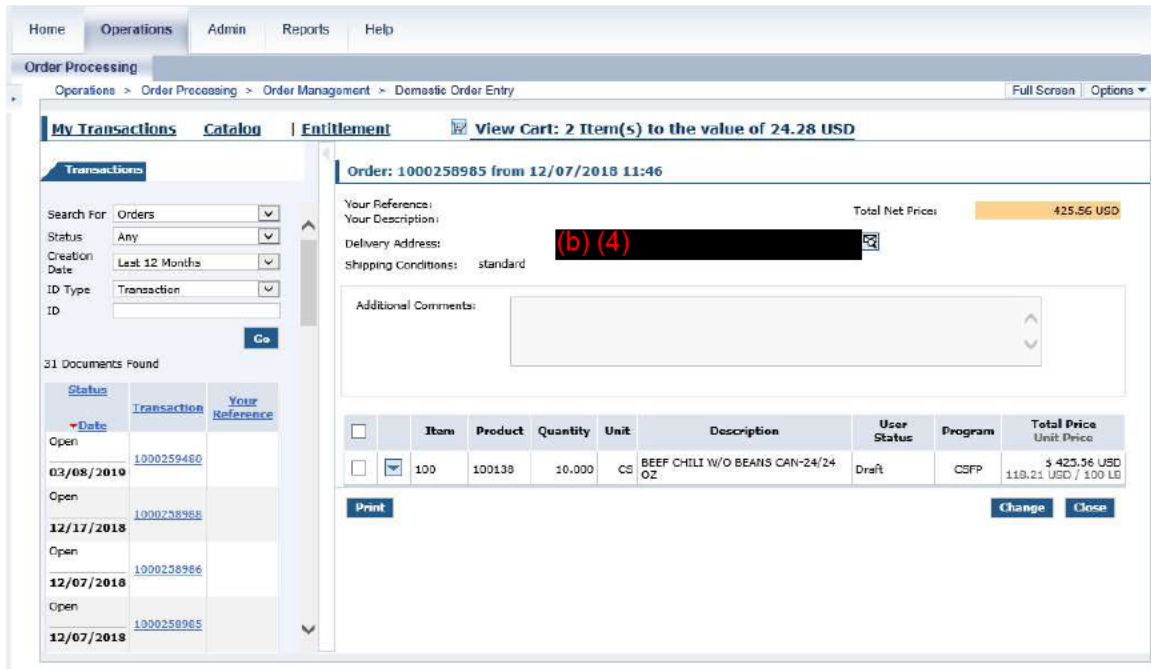
11. Click **Go** (the **Go** button) to execute the search.

Image: Domestic Order Entry Screen



12. Select the appropriate domestic requisition to modify from the list of search results. In this example, [1000258985](#) (the **1000258985** link) is selected.

Image: Domestic Order Entry Screen



13. Click  (the **Hide Navigator** button) to hide the search criteria and results.

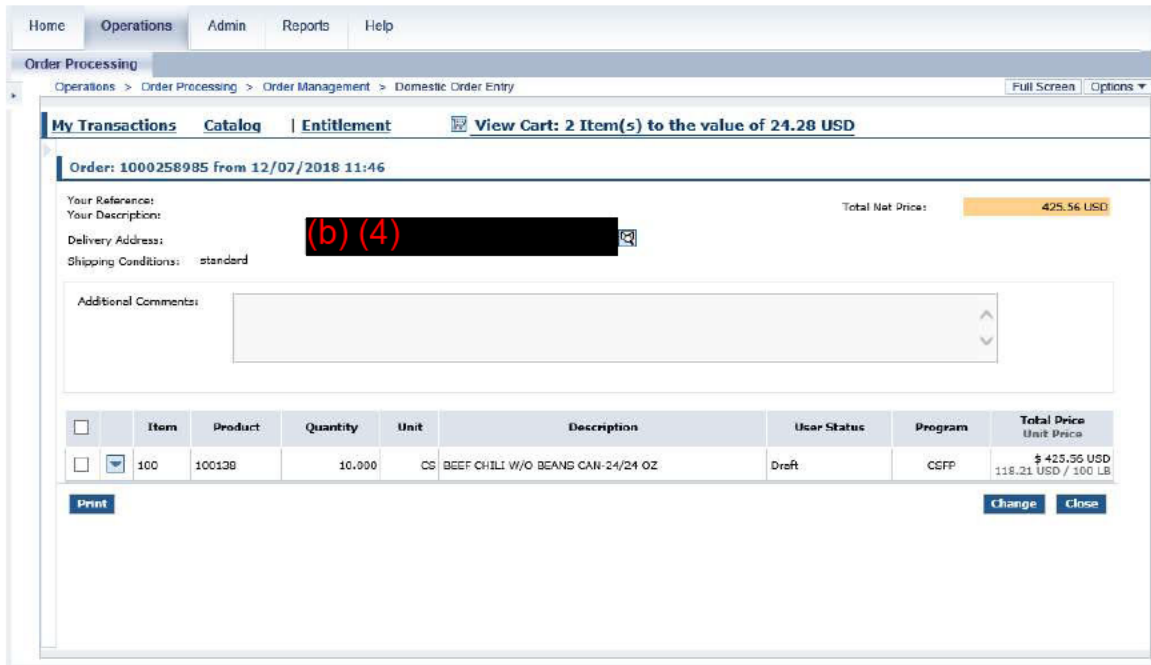


(Note) At the top of the screen, the header displays general information about the customer, delivery, and overall status and net price for this requisition. If applicable, any reference, description, or comments previously entered are also displayed. Below the header, details about specific products ordered on this requisition are listed; it may be necessary to scroll down to view the entire list.



(Note) The domestic requisition displays in the main pane.

Image: Domestic Order Entry Screen



14. Click **Change** (the **Change** button) to allow the user to modify the domestic requisition.



(Note) A domestic requisition can be modified only when the status is **Draft**, **Returned by COOP**, or **Returned by SDA**.

If ALL of the line items have the status of **Ready for Approval**, **Approved by COOP**, **Approved by SDA**, or **Cancelled**, the requisition cannot be edited and the change button will not be available.

15. Perform one of the following:

If	Then
The user needs to change the status	Go to Step 16.
	(Note) Once status of Ready for Approval or Cancelled has been saved, the requisition line cannot be edited further.
The user needs to change the Delivery Point	Go to Step 20.
The user needs to adjust the quantity of a product	Go to Step 25.
The user needs to add more products to the cart	Go to Step 29.
The user needs to remove one or more product(s) from the cart	Go to Step 37.
	(Note) Once status of Cancelled has been saved, the requisition line cannot be edited further.
The user is ready to save the modifications	Go to Step 41.

Image: Domestic Order Entry Screen

Home | Operations | Admin | Reports | Help

Order Processing

Operations > Order Processing > Order Management > Domestic Order Entry

My Transactions | Catalog | Entitlement | 1 Item(s) to the value of 425.56 USD

Order: 1000258985 from 12/07/2018 11:46

Your Reference: Total Net Price: 425.56 USD
 Your Description:

Message
Additional Comments:

Item	Product	Quantity	Unit	Description	User Status	Program	Requested Delivery Date	Total Price Unit Price
100	100136	10	CS	BEEF CHILI W/O BEANS CAN-24/24 OZ	Draft	CSP /	01/15/2019	\$425.56 USD 118.21 USD / 100 LB

Update Close Save

- Click the **User Status** drop-down.

Image: Domestic Order Entry Screen

Home | Operations | Admin | Reports | Help

Order Processing

Operations > Order Processing > Order Management > Domestic Order Entry

My Transactions | Catalog | Entitlement | 1 Item(s) to the value of 425.56 USD

Order: 1000258985 from 12/07/2018 11:46

Your Reference: Total Net Price: 425.56 USD
 Your Description:

Message
Additional Comments:

Item	Product	Quantity	Unit	Description	User Status	Program	Requested Delivery Date	Total Price Unit Price
100	100136	10	CS	BEEF CHILI W/O BEANS CAN-24/24 OZ	Ready for Approval Cancelled Draft	CSP /	01/15/2019	\$425.56 USD 118.21 USD / 100 LB

Update Close Save

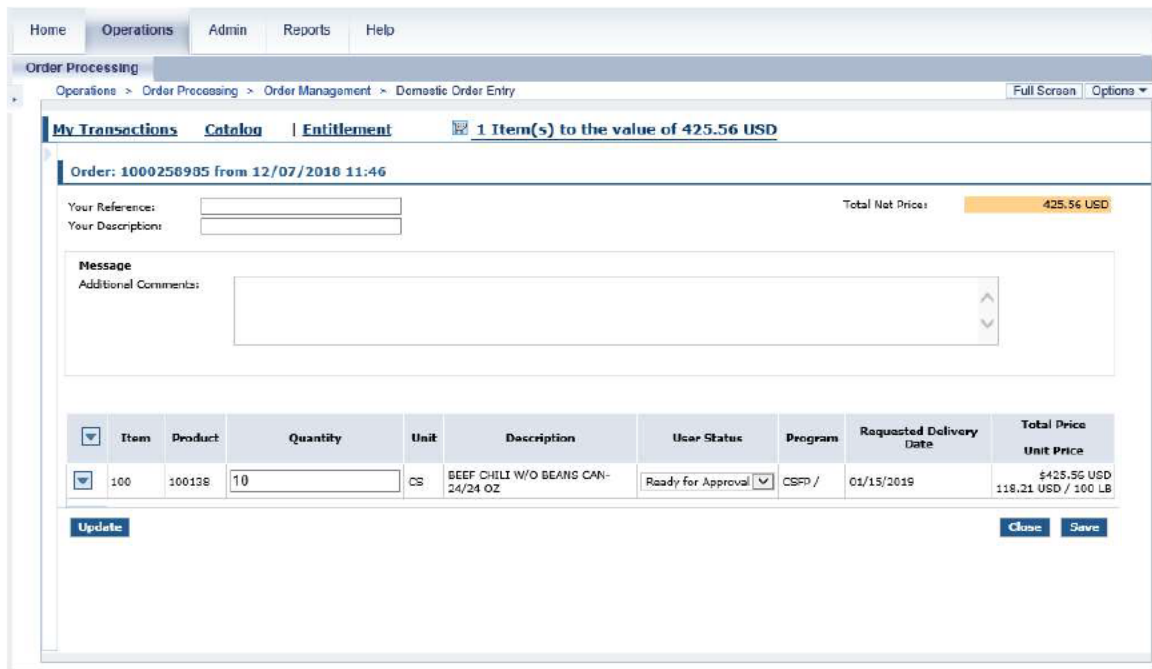
- Select the appropriate status option from the **User Status** list. In this example, (the **Ready for Approval** option) is selected.



(Note) When modifying a returned order, the user can only set the **User Status** field to **Ready for**

Approval or Cancelled.

Image: Domestic Order Entry Screen



18. Click  (the **Update** button) to save changes.



(Note) Once status of **Ready for Approval** or **Cancelled** has been saved, the requisition line cannot be edited further.

19. Return to Step 15.

Image: Domestic Order Entry Screen

Home | Operations | Admin | Reports | Help

Order Processing

Operations > Order Processing > Order Management > Domestic Order Entry Full Screen Options

My Transactions | Catalog | Entitlement | 1 Item(s) to the value of 425.56 USD

Order: 1000258985 from 12/07/2018 11:46

Your Reference:
Your Description:

Total Net Price: 425.56 USD

Message
Additional Comments:

Item	Product	Quantity	Unit	Description	User Status	Program	Requested Delivery Date	Total Price
								Unit Price
100	100136	10	CS	BEEF CHILI W/O BEANS CAN-24/24 OZ	Ready for Approval	CSFP /	01/15/2019	\$425.56 USD 118.21 USD / 100 LB

Update Close Save

20. Click (the **Display Additional Fields** drop-down) for the appropriate line item to display its details.



(Note) To view details for all line items, click (the **Display All Additional Fields** drop-down) in the top row.

Image: Domestic Order Entry Screen

Home | Operations | Admin | Reports | Help

Order Processing

Operations > Order Processing > Order Management > Domestic Order Entry Full Screen Options

My Transactions | Catalog | Entitlement | 1 Item(s) to the value of 425.56 USD

Order: 1000258985 from 12/07/2018 11:46

Your Reference:
Your Description:

Total Net Price: 425.56 USD

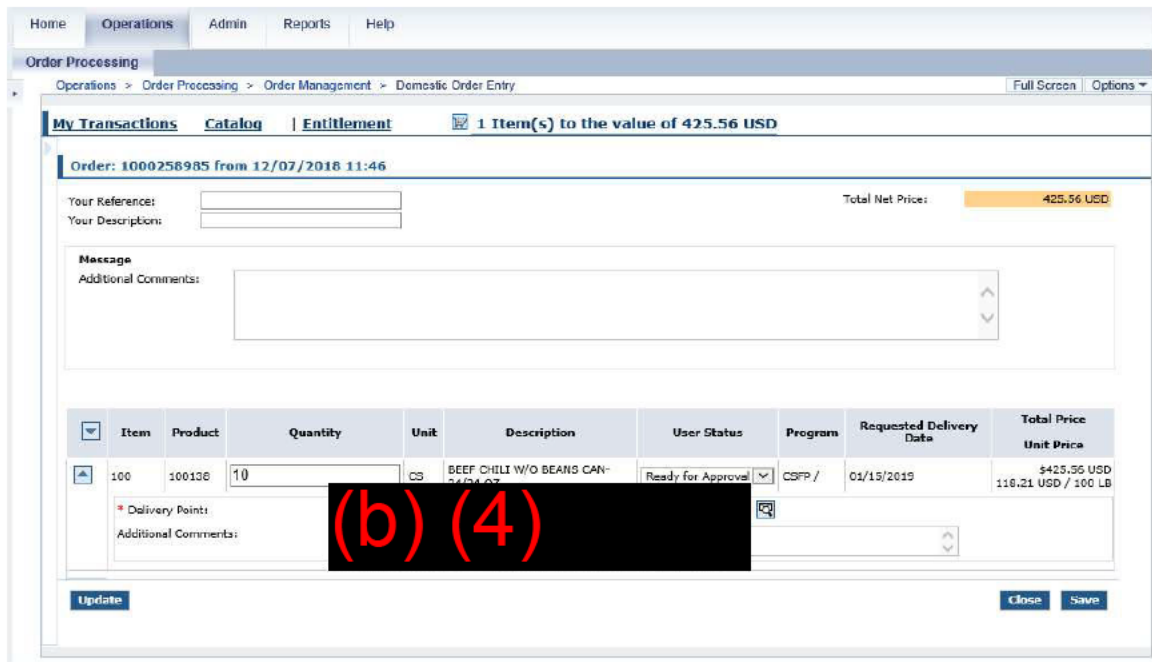
Message
Additional Comments:

Item	Product	Quantity	Unit	Description	User Status	Program	Requested Delivery Date	Total Price
								Unit Price
100	100136	10	CS	BEEF CHILI W/O BEANS CAN-24/24 OZ	Ready for Approval	CSFP /	01/15/2019	\$425.56 USD 118.21 USD / 100 LB
				Delivery Points:	<input type="text" value="(D) (4)"/>			
				Additional Comments:	<input type="text"/>			

Update Close Save

21. Click (the **Delivery Point** drop-down).

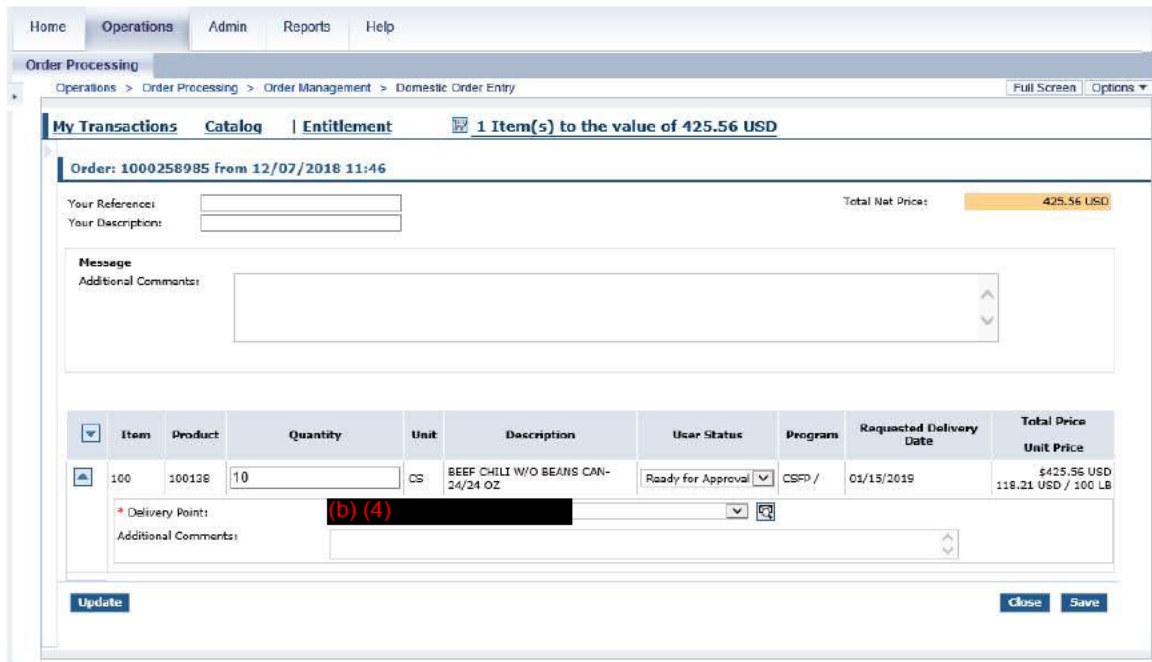
Image: Domestic Order Entry Screen



22. Select the appropriate delivery address from the drop-down list. In this example,

(b) (4) (the (b) (4) option) is selected.

Image: Domestic Order Entry Screen



23. Click **Update** (the **Update** button) to save the new Delivery Point.

24. Return to Step 15.

Image: Domestic Order Entry Screen

The screenshot shows the 'Domestic Order Entry' screen. At the top, there are navigation tabs: Home, Operations, Admin, Reports, and Help. Below this is the 'Order Processing' section with a breadcrumb trail: Operations > Order Processing > Order Management > Domestic Order Entry. A status bar indicates '1 Item(s) to the value of 425.56 USD'. The order number is 1000258985, dated 12/07/2018 11:46. There are input fields for 'Your Reference:' and 'Your Description:'. A 'Message' section contains an 'Additional Comments' text area. Below this is a table with the following columns: Item, Product, Quantity, Unit, Description, User Status, Program, Requested Delivery Date, and Total Price Unit Price. The table contains one row for item 100, product 100138, with a quantity of 10, unit CS, and description 'BEEF CHILI W/O BEANS CAN-24/24 OZ'. The user status is 'Ready for Approval', the program is 'CSFP /', and the requested delivery date is '01/15/2019'. The total price is \$425.56 USD, and the unit price is 118.21 USD / 100 LB. Below the table, there are fields for 'Delivery Point:' (containing '(b) (4)') and 'Additional Comments:'. At the bottom, there are 'Update', 'Close', and 'Save' buttons.

Item	Product	Quantity	Unit	Description	User Status	Program	Requested Delivery Date	Total Price	Unit Price
100	100138	10	CS	BEEF CHILI W/O BEANS CAN-24/24 OZ	Ready for Approval	CSFP /	01/15/2019	\$425.56 USD	118.21 USD / 100 LB

25. Click the Quantity field.

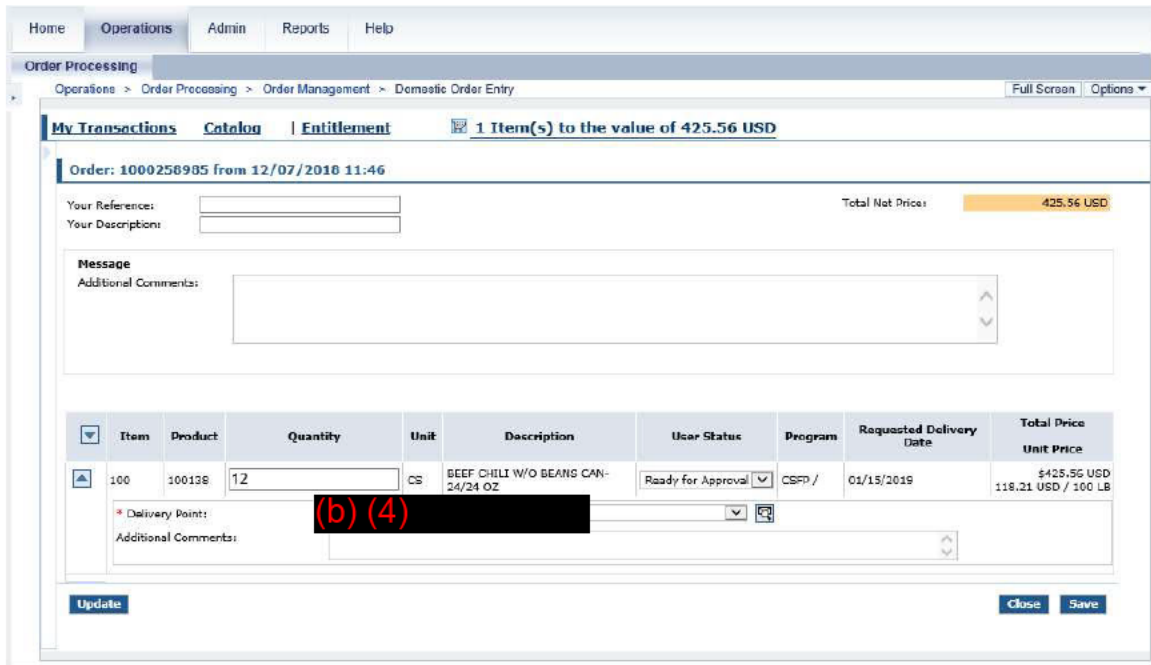
Image: Domestic Order Entry Screen

This screenshot is identical to the previous one, but the 'Quantity' field in the table row for item 100 is now highlighted, indicating it is selected for editing. The value '10' is still present in the field.

Item	Product	Quantity	Unit	Description	User Status	Program	Requested Delivery Date	Total Price	Unit Price
100	100138	12	CS	BEEF CHILI W/O BEANS CAN-24/24 OZ	Ready for Approval	CSFP /	01/15/2019	\$425.56 USD	118.21 USD / 100 LB

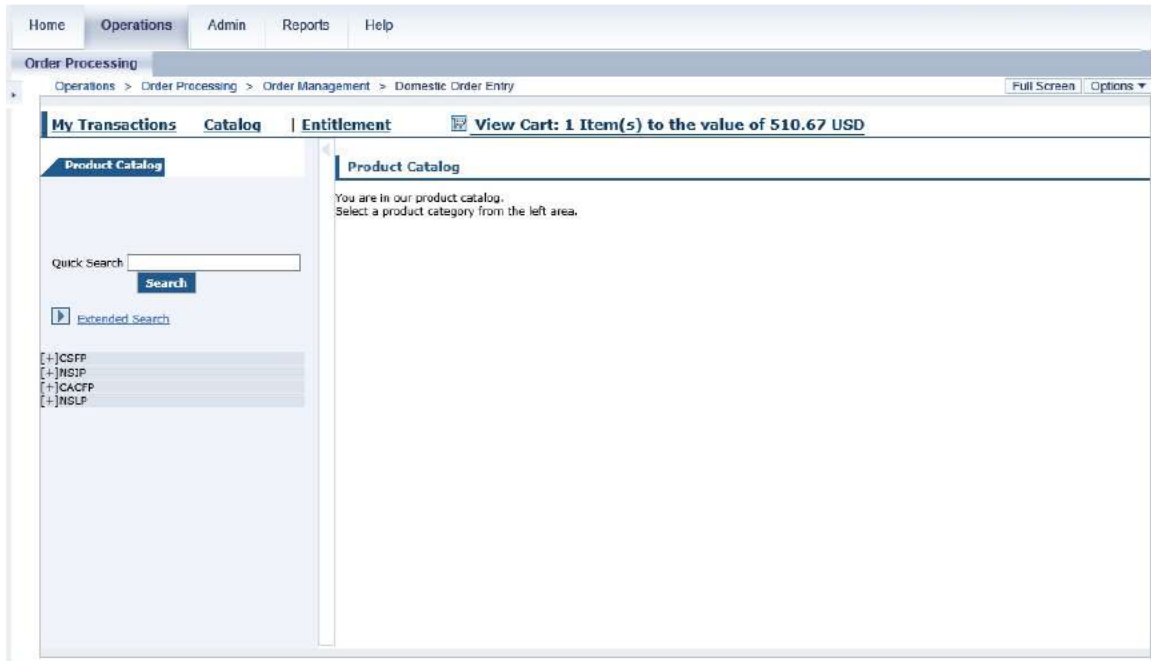
26. Enter a new value for the appropriate line item in the Quantity field. In this example, 12 was entered in the Quantity field for line item 100.

Image: Domestic Order Entry Screen



27. Click **Update** (the **Update** button) to save the modifications.
28. Return to Step 15.

Image: Domestic Order Entry Screen

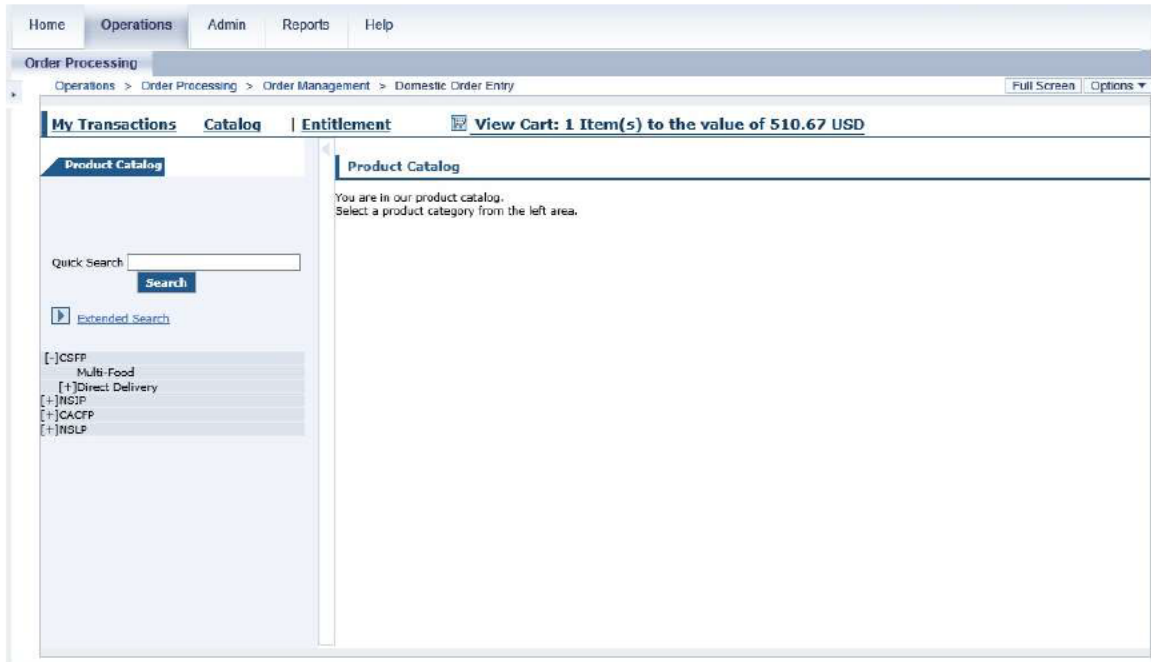


29. In the *Product Catalog* section, click **[+]** (the **Plus** icon) next to the appropriate program. In this example, **[+]
CSFP** (the **CSPF** option) is selected.



(Note) To review the list of materials available for ordering, the user will drill down through the product catalog beginning with the program.

Image: Domestic Order Entry Screen



30. Click **[+]** (the **Plus** icon) next to the type of order. In this example, **[+] Direct Delivery** (the **Direct Delivery** option) is selected.



(Note) Domestic requisitions are used for the following types of orders:

- **Direct Delivery** - An order that is sourced from a vendor and delivered directly to the customer.
- **Processing Diversion** - An order that is sourced from a vendor and delivered to a processor before being received in final form by the customer. For example, flour may be processed into bread.



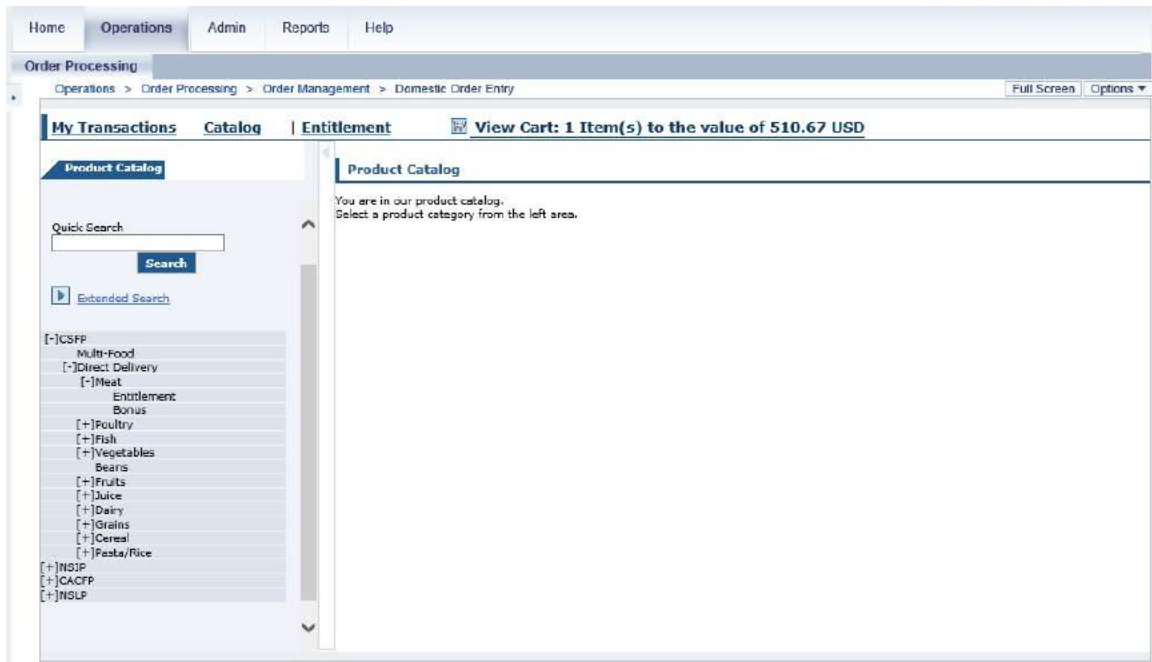
(Note) Multi-food orders sourced from a national warehouse are processed differently than domestic requisitions and cannot be modified via the process described in this document. Refer to the [Create Multi-Food Order RA](#) or [Create Multi-Food Order SDA](#) work instructions for additional detail.

Image: Domestic Order Entry Screen



31. Click **[+]** (the **Plus** icon) next to the appropriate commodity group. In this example, **[+]Meat** (the **Meat** option) is selected under the **Direct Delivery** order type.

Image: Domestic Order Entry Screen



32. Select the option that corresponds to how the entitlement budget is impacted. In this example, **Entitlement** (the **Entitlement** option) is selected under the **Meat** option.



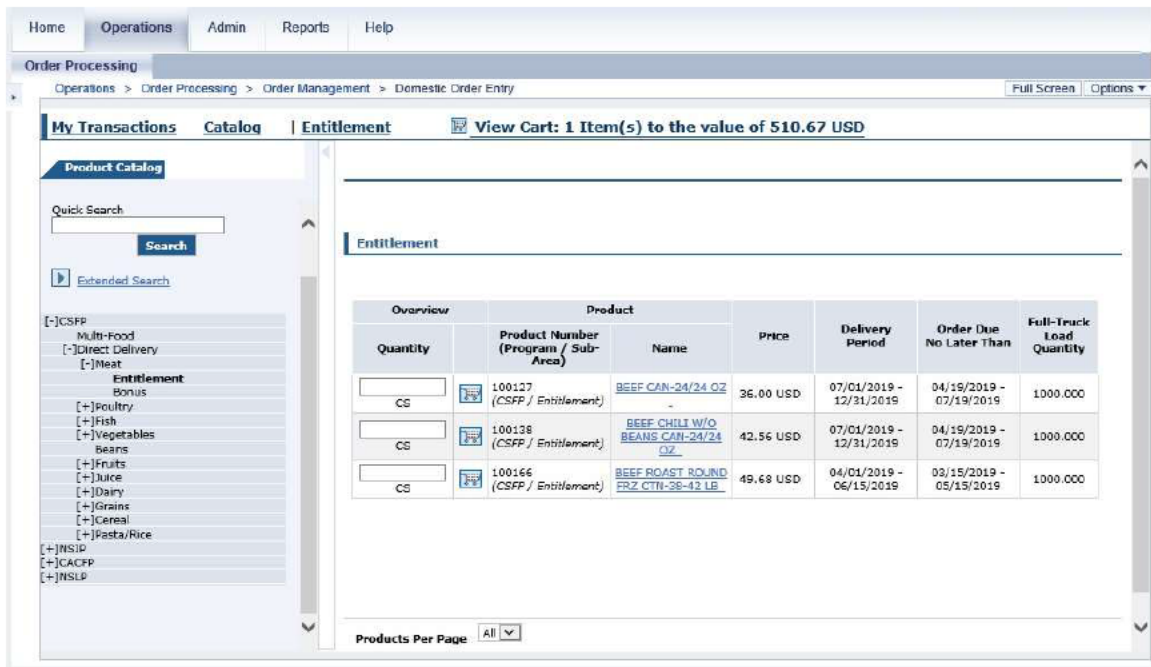
(Note) Depending on the program selected, options may include:

- **Entitlement** - Ordering these products will decrease the entitlement balance.
- **Bonus** - Ordering these products will not impact the customer's entitlement. FNS may offer bonus commodities when there is a surplus.



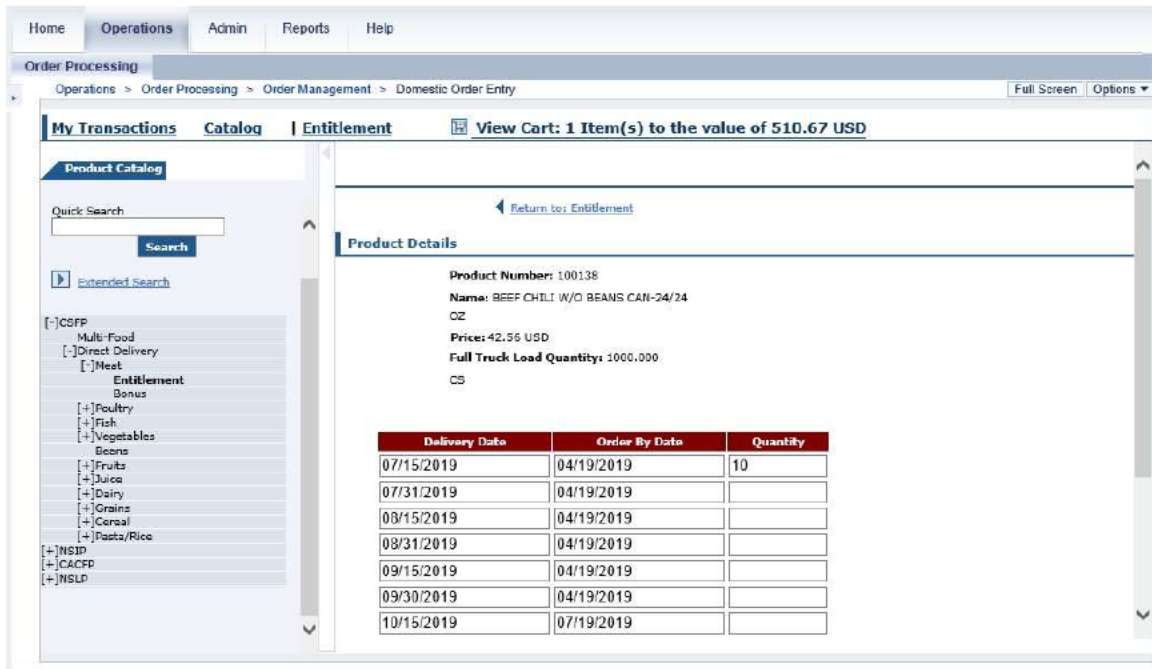
(Note) After an option is selected, the screen displays a list of all products available for the selected criteria. At the bottom of the list, the user may adjust the number of products to display on a page.

Image: Domestic Order Entry Screen



33. Click (the **Shopping Cart** icon) next to a product to view details, including available delivery dates. Do not enter a value in the **Quantity** field from the list of products.

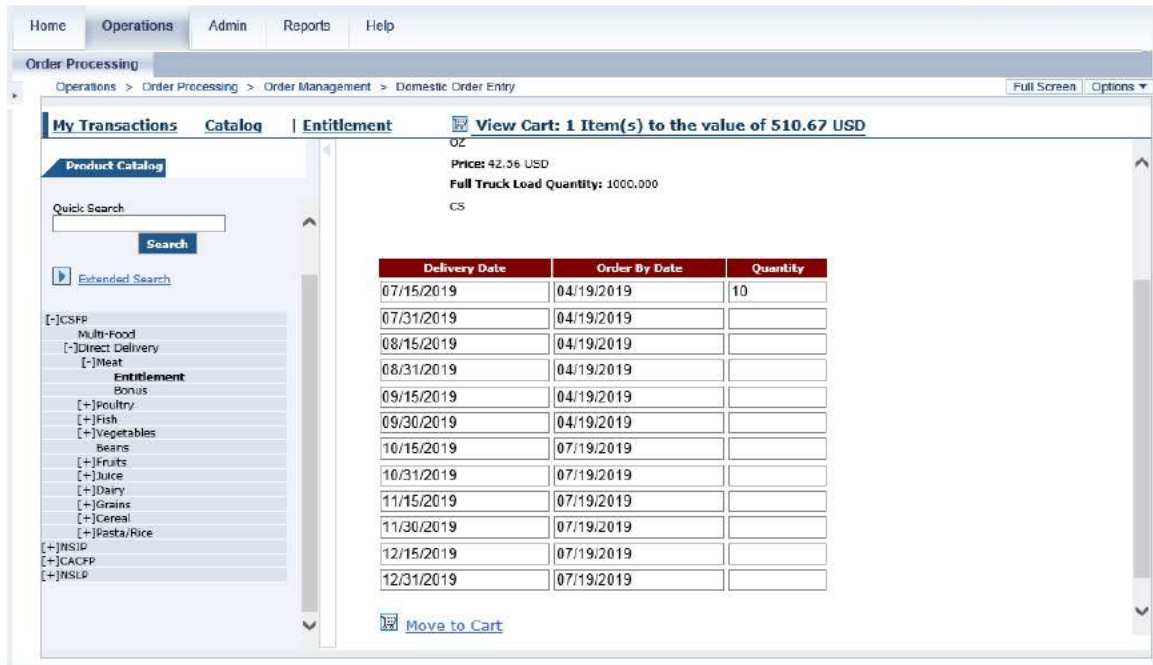
Image: Domestic Order Entry Screen



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

Field	R/O/C	Description
Delivery Date	R	Range of dates when commodities may be delivered. Example: 07/15/2019
Order By Date	R	Last date to submit orders for the corresponding Delivery Date. Example: 04/19/2019
Quantity	R	Number of items. Example: 10

Image: Domestic Order Entry Screen



35. Click [Move to Cart](#) (the **Move to Cart** button) to add the selected product quantities to the shopping cart.



(Note) A summary at the top of the screen displays the number and total value of products contained in the shopping cart.

36. Return to Step 15.

Image: Domestic Order Entry Screen

Home | Operations | Admin | Reports | Help

Order Processing

Operations > Order Processing > Order Management > Domestic Order Entry

My Transactions | Catalog | Entitlement | 2 Item(s) to the value of 936.23 USD

Order: 1000258985 from 12/07/2018 11:46

Your Reference: Total Net Price: 936.23 USD

Your Description:

Message
Additional Comments:

Item	Product	Quantity	Unit	Description	User Status	Program	Requested Delivery Date	Total Price
100	100138	12	CS	BEEF CHILI W/O BEANS CAN-24/24 OZ	Ready for Approval	CSFP /	01/15/2019	\$510.67 USD 118.21 USD / 100 LB
200	100138	10	CS	BEEF CHILI W/O BEANS CAN-24/24 OZ	Draft	CSFP / Entitlement	07/15/2019	\$425.56 USD 118.21 USD / 100 LB

Update Close Save

37. Click the **User Status** drop-down in the appropriate line item to update.

Image: Domestic Order Entry Screen

Home | Operations | Admin | Reports | Help

Order Processing

Operations > Order Processing > Order Management > Domestic Order Entry

My Transactions | Catalog | Entitlement | 2 Item(s) to the value of 936.23 USD

Order: 1000258985 from 12/07/2018 11:46

Your Reference: Total Net Price: 936.23 USD

Your Description:

Message
Additional Comments:

Item	Product	Quantity	Unit	Description	User Status	Program	Requested Delivery Date	Total Price
100	100138	12	CS	BEEF CHILI W/O BEANS CAN-24/24 OZ	Ready for Approval	CSFP /	01/15/2019	\$510.67 USD 118.21 USD / 100 LB
200	100138	10	CS	BEEF CHILI W/O BEANS CAN-24/24 OZ	Cancelled	CSFP / Entitlement	07/15/2019	\$425.56 USD 118.21 USD / 100 LB

Update Close Save

38. Select **Cancelled** (the **Cancelled** option) from the drop-down list for **User Status**.



(Note) Once the status of **Cancelled** has been saved, the requisition line cannot be edited further.

Image: Domestic Order Entry Screen

Home | Operations | Admin | Reports | Help

Order Processing

Operations > Order Processing > Order Management > Domestic Order Entry

My Transactions | Catalog | Entitlement | 2 Item(s) to the value of 936.23 USD

Order: 1000258985 from 12/07/2018 11:46

Your Reference:
Your Description:

Total Net Price: 936.23 USD

Message
Additional Comments:

Item	Product	Quantity	Unit	Description	User Status	Program	Requested Delivery Date	Total Price
100	100138	12	CS	BEEF CHILI W/O BEANS CAN-24/24 OZ	Ready for Approval	CSFP /	01/15/2019	\$510.67 USD 118.21 USD / 100 LB
200	100138	10	CS	BEEF CHILI W/O BEANS CAN-24/24 OZ	Cancelled	CSFP / Entitlement	07/15/2019	\$425.56 USD 118.21 USD / 100 LB

Update Close Save

39. Click **Update** (the **Update** button) to save the modifications.
40. Return to Step 15.

Image: Domestic Order Entry Screen

Home | Operations | Admin | Reports | Help

Order Processing

Operations > Order Processing > Order Management > Domestic Order Entry

My Transactions | Catalog | Entitlement | 2 Item(s) to the value of 510.67 USD

Order: 1000258985 from 12/07/2018 11:46

Your Reference:
Your Description:

Total Net Price: 510.67 USD

Message
Additional Comments:

Item	Product	Quantity	Unit	Description	User Status	Program	Requested Delivery Date	Total Price
100	100126	12	CS	BEEF CHILI W/O BEANS CAN-24/24 OZ	Ready for Approval	CSFP /	01/15/2019	\$510.67 USD 118.21 USD / 100 LB
200	100138	10	CS	BEEF CHILI W/O BEANS CAN-24/24 OZ	Cancelled	CSFP / Entitlement	07/15/2019	\$0 USD 0.00 USD / 1 LB

Update Close Save

41. Click **Save** (the **Save** button) to save the modified domestic requisition.



(Note) In this example, all of the line items were updated to **Ready for Approval** status. Once saved, the requisition is sent to the SDA/ITO for consolidation and can no longer be edited by an RA.

Image: Message from webpage Pop-Up Screen

The screenshot shows the 'Domestic Order Entry' screen with a 'Message from webpage' pop-up. The pop-up asks: 'Do you really want to save the transaction?' with 'OK' and 'Cancel' buttons. The background screen shows order details for order 1000258985, including a table of items and a total net price of 510.67 USD.

Item	Product	Quantity	Unit	Description	User Status	Program	Requested Delivery Date	Total Price Unit Price
100	100138	12	CS	BEEF CHILI W/O BEANS CAN-24/24 OZ	Ready for Approval	CSFP /	01/15/2019	\$510.67 USD 118.21 USD / 100 LB
200	100139	10	CS	BEEF CHILI W/O BEANS CAN-24/24 OZ	Cancelled	CSFP / Entitlement	07/15/2019	\$0 USD 0.00 USD / 1 LB

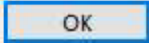
42. Click  (the **OK** button) to confirm the modifications.

Image: Domestic Order Entry Screen

The screenshot shows the 'Confirmation of receipt' screen. It displays the order details and a table of items. The total net price is 510.67 USD. The items table shows the status of each item.

Item	Item Details	QTY	Unit	User Status	Total Price Unit Price
100	100138 : BEEF CHILI W/O BEANS CAN-24/24 OZ Delivery Point: (b) (4) Requested Delivery Date: 01/15/2019	12.000	CS	Ready for Approval	\$510.67 USD 118.21 USD / 100 LB
200	100139 : BEEF CHILI W/O BEANS CAN-24/24 OZ Delivery Point: (b) (4) Requested Delivery Date: 07/15/2019	10.000	CS	Cancelled	\$0 USD \$0 / 100 LB 0.00 USD / 1 LB



Work Instruction
Modify a Domestic Requisition

43. Click **Close** (the **Close** button).
44. The transaction is complete.



Work Instruction
Modify a Domestic Requisition

RESULT

An existing domestic requisition has been modified. This may have included updating the order status, delivery location, and/or product quantity as well as adding or removing line items.



PROCESS OVERVIEW

Purpose

This transaction will demonstrate how to modify and resubmit returned sales orders from FNS. As the SDA Order Manager, you have the ability to go into the Returned FNS Orders Workbench and access the orders returned by FNS. From this screen, you are able to view and make updates to the order. After modifying the returned order, this will be submitted back to FNS for approval.

Process Trigger

Perform this transaction to display, modify, decline, return to workbench and resubmit returned sales orders from FNS.

Prerequisites

- Sales Order must be returned by FNS.
- Original Sales Order must have been created by SDA from consolidating requisitions or Sales Order Upload.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab → **Order Processing** tab → **Order Management** folder → **Returned FNS Orders** link to go to the *Returned FNS Orders* screen.

Tips and Tricks

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

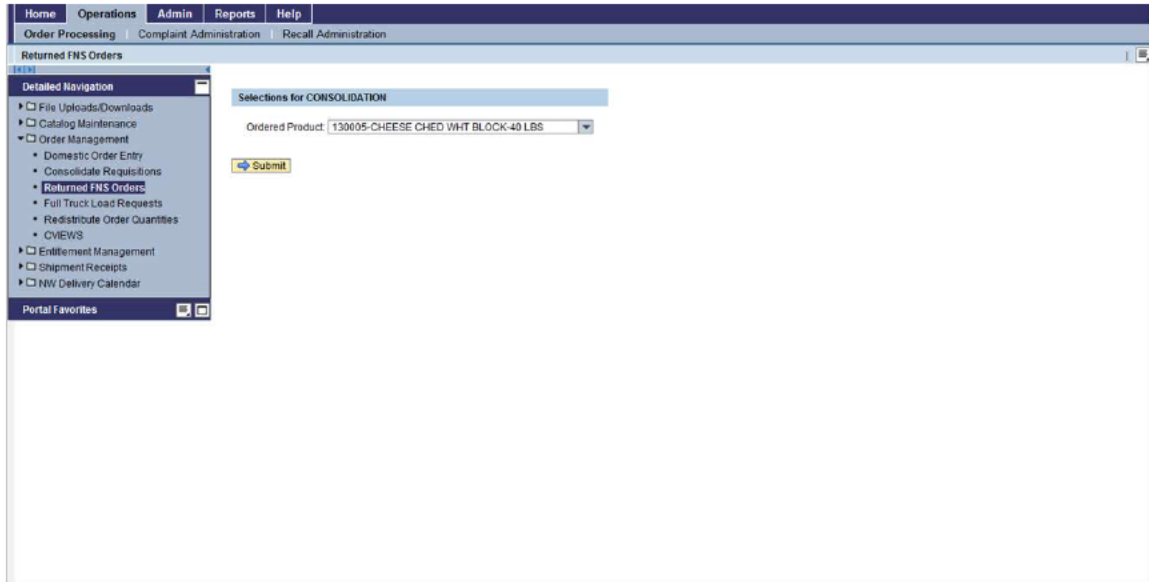
Reminders

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


PROCEDURE

1. Start the transaction using the following Portal path: **Operations** tab → **Order Processing** tab → **Order Management** folder → **Returned FNS Orders**

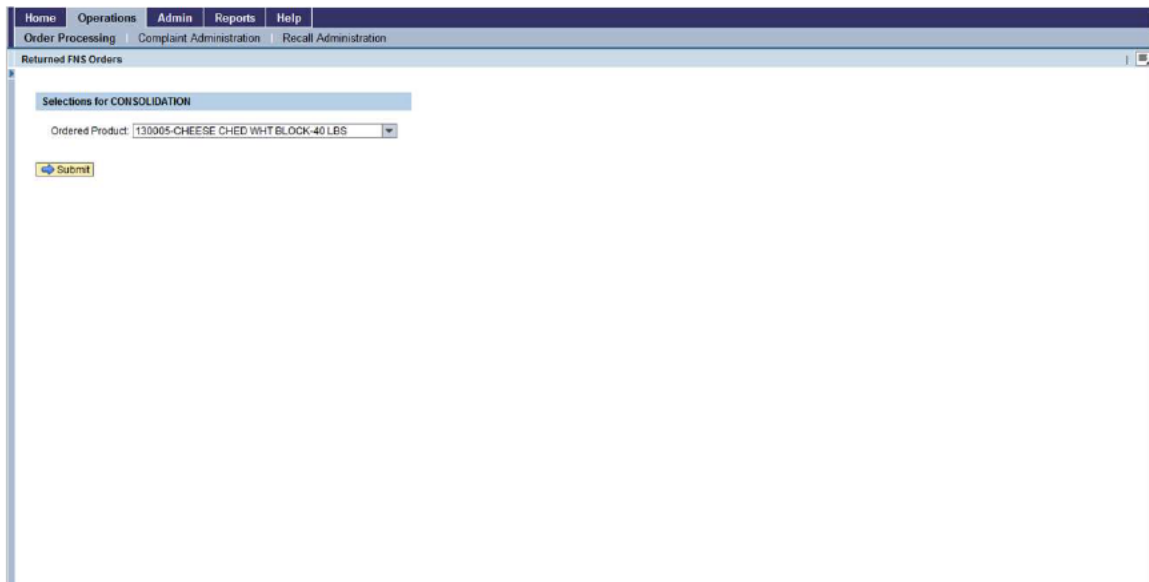
Returned FNS Orders Screen




The screenshot shows the 'Returned FNS Orders' screen in the WBSCM portal. The top navigation bar includes 'Home', 'Operations', 'Admin', 'Reports', and 'Help'. Below this, there are tabs for 'Order Processing', 'Complaint Administration', and 'Recall Administration'. The 'Returned FNS Orders' page title is visible. On the left, a 'Detailed Navigation' menu is expanded, showing options like 'File Uploads/Downloads', 'Catalog Maintenance', 'Order Management', 'Domestic Order Entry', 'Consolidate Requisitions', 'Returned FNS Orders' (highlighted), 'Full Truck Load Requests', 'Redistribute Order Quantities', 'C/IEWS', 'Entitlement Management', 'Shipment Receipts', and 'NW Delivery Calendar'. The main content area is titled 'Selections for CONSOLIDATION' and contains a dropdown menu for 'Ordered Product' with the value '130005-CHEESE CHED WHT BLOCK-40 LBS' and a 'Submit' button.

2. Click  (the **Hide Navigation** arrow button) to minimize the Portal menu. Note that you can do this with any transaction in WBSCM - not just fulfillment transactions.

Returned FNS Orders Screen



The screenshot shows the 'Returned FNS Orders' screen with the navigation menu minimized. The top navigation bar and tabs are the same as in the previous screenshot. The 'Detailed Navigation' menu is now collapsed. The main content area is titled 'Selections for CONSOLIDATION' and contains the same 'Ordered Product' dropdown menu and 'Submit' button as in the previous screenshot.

3. In the **OrderedProduct** field, click  (the **Down** arrow) to display products tied to orders that you have submitted that have been rejected/returned by FNS.



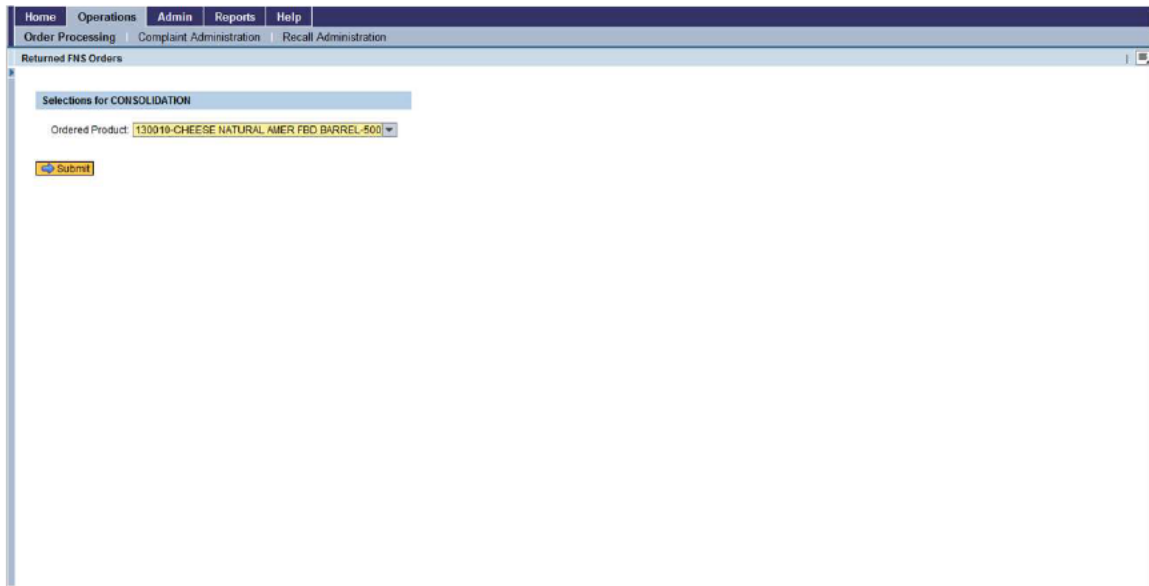
Returned FNS Orders Screen

The screenshot shows the 'Returned FNS Orders' screen. At the top, there is a navigation bar with tabs for 'Home', 'Operations', 'Admin', 'Reports', and 'Help'. Below this, there are sub-tabs for 'Order Processing', 'Complaint Administration', and 'Recall Administration'. The main content area is titled 'Returned FNS Orders' and contains a section for 'Selections for CONSOLIDATION'. Under this section, there is a dropdown menu for 'Ordered Product:' with the selected item '130005-CHEESE CHED WHT BLOCK-40 LBS'. To the left of the dropdown is a 'Submit' button. Below the dropdown is a list of product options:

- 130005-CHEESE CHED WHT BLOCK-40 LBS
- 130010-CHEESE NATURAL AMER FBD BARREL-500 LB
- 130125-TURKEY ROASTS FRZ CTN-32-48 LB
- 130139-PORK CAN-24/24 OZ
- 130159-BEEF FINE GROUND FRZ PKG-40/1 LBS
- 130530-CEREAL CORN FLKS -SUBST

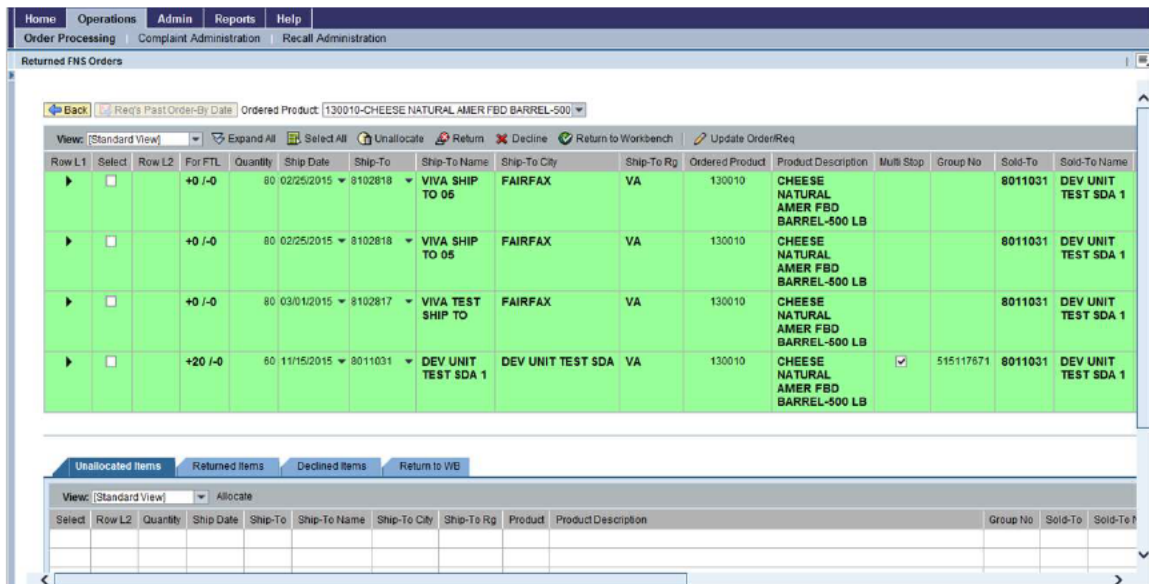
4. Select the product you wish to reallocate from this list. For this example, click **130010-CHEESE NATURAL AMER FBD BARREL-500 LB** (the **130010-CHEESE NATURAL AMER FBD BARREL-500 LB** option).

Returned FNS Orders Screen



- Click (the **Submit** button) to continue with the reallocation.

FNS Returned Orders Screen



- A list of FNS Returned orders will display. Next to each consolidated order, there is an arrow icon. You can use this icon to display all the requisitions that were part of that sales order. For this example, click (the **Arrow** icon) beside the first sales order to display the requisitions.



Work Instruction Modify and Resubmit Returned FNS Orders

FNS Returned Orders Screen

Row L1	Select	Row L2	For FTL	Quantity	Ship Date	Ship-To	Ship-To Name	Ship-To City	Ship-To Rg	Ordered Product	Product Description	Multi Stop	Group No	Sold-To	Sold-To Name
	<input type="checkbox"/>		+0 /-0	80	02/25/2015	8102818	VIVA SHIP TO 05	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB	<input type="checkbox"/>		8011031	DEV UNIT TEST SDA 1
	<input type="checkbox"/>			80	02/25/2015	8102818	VIVA SHIP TO 05	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB	<input type="checkbox"/>		8011034	
	<input type="checkbox"/>		+0 /-0	80	02/25/2015	8102818	VIVA SHIP TO 05	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB	<input type="checkbox"/>		8011031	DEV UNIT TEST SDA 1
	<input type="checkbox"/>		+0 /-0	80	03/01/2015	8102817	VIVA TEST SHIP TO	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB	<input type="checkbox"/>		8011031	DEV UNIT TEST SDA 1
	<input type="checkbox"/>		+20 /-0	80	11/15/2015	8011031	DEV UNIT TEST SDA 1	DEV UNIT TEST SDA	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB	<input checked="" type="checkbox"/>	515117671	8011031	DEV UNIT TEST SDA 1

7. All requisitions associated to the sales order in line item 1 are displayed.

Modifications that can be made to sales order line items include:

- Changing Quantity, Ship Date and Ship-To information
- Removing Group No. by deselecting the Multi Stop checkbox.
- Unallocating a sales order from the list of sales orders displayed
- Declining a sales order
- Returning sales order to Workbench

FNS Returned Orders Screen

Row L1	Select	Row L2	For FTL	Quantity	Ship Date	Ship-To	Ship-To Name	Ship-To City	Ship-To Rg	Ordered Product	Product Description	Multi Stop	Group No	Sold-To	Sold-To Name
	<input type="checkbox"/>		+0 /-0	80	02/25/2015	8102818	VIVA SHIP TO 05	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB	<input type="checkbox"/>		8011031	DEV UNIT TEST SDA 1
	<input type="checkbox"/>			80	02/25/2015	8102818	VIVA SHIP TO 05	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB	<input type="checkbox"/>		8011034	
	<input type="checkbox"/>		+0 /-0	80	02/25/2015	8102818	VIVA SHIP TO 05	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB	<input type="checkbox"/>		8011031	DEV UNIT TEST SDA 1
	<input type="checkbox"/>		+0 /-0	80	03/01/2015	8102817	VIVA TEST SHIP TO	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB	<input type="checkbox"/>		8011031	DEV UNIT TEST SDA 1
	<input type="checkbox"/>		+20 /-0	60	11/15/2015	8011031	DEV UNIT TEST SDA 1	DEV UNIT TEST SDA	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB	<input checked="" type="checkbox"/>	515117671	8011031	DEV UNIT TEST SDA 1

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

Field	R/O/C	Description
Quantity	R	Number of items being processed. Example: 70



(Note) When changing a sales order, the Quantity, Ship Date and Ship-To fields can be modified. For this step, the quantity will be changed. When modifying the quantity, users may change from FTL to Split or from Split to FTL quantity. When changing quantity from Split to FTL, adjust the quantity to FTL and uncheck the Multi Stop checkbox. After refreshing, the Group No. values will be deleted automatically.

The changes made here will automatically update the associated requisition line items when the sales order is updated and then the RAs and Co-ops can view the changes on their Domestic Order Entry screen under My Transactions. They may also view the updated quantities in the Requisition Status Report & Order Status Report.

Returned FNS Orders Screen

Row L1	Row L2	For FTL	Quantity	Ship Date	Ship-To	Ship-To Name	Ship-To City	Ship-To Rg	Ordered Product	Product Description	Multi Stop	Group No	Sold-To	Sold-To Name
		+0 /-0	70	02/25/2015	8102818	VIVA SHIP TO 05	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB			8011031	DEV UNIT TEST SDA 1
			80	02/25/2015	8102818	VIVA SHIP TO 05	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB			8011034	
		+0 /-0	80	02/25/2015	8102818	VIVA SHIP TO 05	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB			8011031	DEV UNIT TEST SDA 1
		+0 /-0	80	03/01/2015	8102817	VIVA TEST SHIP TO	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB			8011031	DEV UNIT TEST SDA 1
		+20 /-0	60	11/15/2015	8011031	DEV UNIT TEST SDA 1	DEV UNIT TEST SDA	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB	<input checked="" type="checkbox"/>	515117671	8011031	DEV UNIT TEST SDA 1

- A sales order can be unallocated from the work area if user chooses to work on it at a later time. First, click (the **Checkbox**) beside the desired sales order or aggregate line, in this case for aggregate line item 2.

Returned FNS Orders Screen

Row L1	Row L2	For FTL	Quantity	Ship Date	Ship-To	Ship-To Name	Ship-To City	Ship-To Rg	Ordered Product	Product Description	Multi Stop	Group No	Sold-To	Sold-To Name
		+10 /-0	70	02/25/2015	8102818	VIVA SHIP TO 05	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB			8011031	DEV UNIT TEST SDA 1
			70	02/25/2015	8102818	VIVA SHIP TO 05	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB			8011034	
		+0 /-0	80	02/25/2015	8102818	VIVA SHIP TO 05	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB	<input checked="" type="checkbox"/>		8011031	DEV UNIT TEST SDA 1
		+0 /-0	80	03/01/2015	8102817	VIVA TEST SHIP TO	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB			8011031	DEV UNIT TEST SDA 1
		+20 /-0	60	11/15/2015	8011031	DEV UNIT TEST SDA 1	DEV UNIT TEST SDA	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB	<input checked="" type="checkbox"/>	515117671	8011031	DEV UNIT TEST SDA 1

- Click (the **Unallocate** button).

Returned FNS Orders Screen

Row L1	Select	Row L2	For FTL	Quantity	Ship Date	Ship-To	Ship-To Name	Ship-To City	Ship-To Rg	Ordered Product	Product Description	Multi Stop	Group No	Sold-To	Sold-To Name
	<input type="checkbox"/>		+10 /-0	70	02/25/2015	8102818	VIVA SHIP TO 05	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB			8011031	DEV UNIT TEST SDA 1
	<input type="checkbox"/>			70	02/25/2015	8102818	VIVA SHIP TO 05	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB			8011034	
	<input type="checkbox"/>		+0 /-0	80	03/01/2015	8102817	VIVA TEST SHIP TO	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB			8011031	DEV UNIT TEST SDA 1
	<input type="checkbox"/>		+20 /-0	60	11/15/2015	8011031	DEV UNIT TEST SDA 1	DEV UNIT TEST SDA	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB	<input checked="" type="checkbox"/>	515117671	8011031	DEV UNIT TEST SDA 1

- The sales order has been removed from the top frame and is now visible in the **Unallocated** tab in the lower portion of the screen for this transaction. When you run the transaction again, it will be visible in the upper frame.

If you would like to restore this sales order to the upper frame, click the checkbox beside the sales order in the **Unallocated** tab and then click the **Allocate** button.

Next, to decline a sales order, click (the **Checkbox**) beside the desired sales order.

Returned FNS Orders Screen

Row L1	Select	Row L2	For FTL	Quantity	Ship Date	Ship-To	Ship-To Name	Ship-To City	Ship-To Rg	Ordered Product	Product Description	Multi Stop	Group No	Sold-To	Sold-To Name
	<input type="checkbox"/>		+10 /-0	70	02/25/2015	8102818	VIVA SHIP TO 05	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB			8011031	DEV UNIT TEST SDA 1
	<input checked="" type="checkbox"/>			70	02/25/2015	8102818	VIVA SHIP TO 05	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB			8011034	
	<input checked="" type="checkbox"/>		+0 /-0	80	03/01/2015	8102817	VIVA TEST SHIP TO	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB			8011031	DEV UNIT TEST SDA 1
	<input type="checkbox"/>		+20 /-0	60	11/15/2015	8011031	DEV UNIT TEST SDA 1	DEV UNIT TEST SDA	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB	<input checked="" type="checkbox"/>	515117671	8011031	DEV UNIT TEST SDA 1

- Click **Decline** (the **Decline** button) if you choose to cancel the sales order and the associated requisition(s).



Work Instruction Modify and Resubmit Returned FNS Orders

Returned FNS Orders Screen

The screenshot shows the 'Returned FNS Orders' screen. At the top, there are navigation tabs: Home, Operations, Admin, Reports, Help. Below these are sub-tabs: Order Processing, Compliant Administration, Recall Administration. The main area is titled 'Returned FNS Orders' and contains a table with columns: Row L1, Select, Row L2, For FTL, Quantity, Ship Date, Ship-To, Ship-To Name, Ship-To City, Ship-To Rg, Ordered Product, Product Description, Multi Stop, Group No, Sold-To, and Sold-To Name. The table has three rows of data. Below this table are tabs for 'Unallocated Items', 'Returned Items', 'Declined Items', and 'Return to WB'. The 'Unallocated Items' tab is active, showing a table with columns: Select, Row L2, Quantity, Ship Date, Ship-To, Ship-To Name, Ship-To City, Ship-To Rg, Product, Product Description, Group No, Sold-To, and Sold-To Name. This table has one row of data.

13. The sales order has been removed from the top frame and is now visible in the **Declined Items** tab in the lower portion of the screen. If you would like to restore the sales order to the upper frame, click the checkbox beside the sales order and then click the **Allocate** button.

Important: once the screen is updated by clicking the **Update Order/Req** button, any declined sales orders will be canceled and removed from the list of returned sales orders for this material.

Next, to return a sales order to the Workbench, click (the **Checkbox**) beside the desired sales order.

Returned FNS Orders Screen

This screenshot is similar to the previous one, but the 'Declined Items' tab is active. The 'Declined Items' table has three rows of data, with the first row having a checked checkbox in the 'Select' column. The 'Unallocated Items' table is still visible below it.

14. Click (the **Return to Workbench** button) to cancel the sales order and return the requisition(s) back to the Consolidation Workbench.

Returned FNS Orders Screen

Row L1	Select	Row L2	Quantity	Ship Date	Ship-To	Ship-To Name	Ship-To City	Ship-To Rg	Ordered Product	Product Description	Multi Stop	Group No	Sold-To	Sold-To Name	Identification
	<input checked="" type="checkbox"/>		+10 /-0	70 02/25/2015	8102818	VIVA SHIP TO 05	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB			8011031	DEV UNIT TEST SDA 1	
	<input type="checkbox"/>			70 02/25/2015	8102818	VIVA SHIP TO 05	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB			8011034		

Select	Row L2	Quantity	Ship Date	Ship-To	Ship-To Name	Ship-To City	Ship-To Rg	Product	Product Description	Group No	Sold-To	Sold-To Name	Ident
<input type="checkbox"/>		60	11/15/2015	8011031	DEV UNIT TEST SDA 1	DEV UNIT TEST SDA	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB	515117671	8011031	DEV UNIT TEST SDA 1	

15. The sales order has been removed from the top frame and is now visible in the **Return to Workbench** tab in the lower portion of the screen. If you would like to restore the sales order to the upper frame, click (the **Checkbox**) beside the sales order and then click the **Allocate** button. Once the screen is updated, any return to workbench sales orders will be removed from the list of returned sales orders for this material and you will not be able to Allocate back again.

Returned FNS Orders Screen


Row L1	Select	Row L2	Quantity	Ship Date	Ship-To	Ship-To Name	Ship-To City	Ship-To Rg	Ordered Product	Product Description	Multi Stop	Group No	Sold-To	Sold-To Name	Identification
	<input checked="" type="checkbox"/>		+10 /-0	70 02/25/2015	8102818	VIVA SHIP TO 05	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB			8011031	DEV UNIT TEST SDA 1	
	<input type="checkbox"/>			70 02/25/2015	8102818	VIVA SHIP TO 05	FAIRFAX	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB			8011034		

Select	Row L2	Quantity	Ship Date	Ship-To	Ship-To Name	Ship-To City	Ship-To Rg	Product	Product Description	Group No	Sold-To	Sold-To Name	Ident
<input checked="" type="checkbox"/>		60	11/15/2015	8011031	DEV UNIT TEST SDA 1	DEV UNIT TEST SDA	VA	130010	CHEESE NATURAL AMER FBD BARREL-500 LB	515117671	8011031	DEV UNIT TEST SDA 1	

16. Click (the **Allocate** button).


FNS Returned Orders Screen

17. The sales order has been removed from the **Return to Workbench** tab and is now visible in the upper frame.

After any modifications have been made to the sales order(s), click  **Update Order/Req** (the **Update Order/Req** button) to execute the changes.

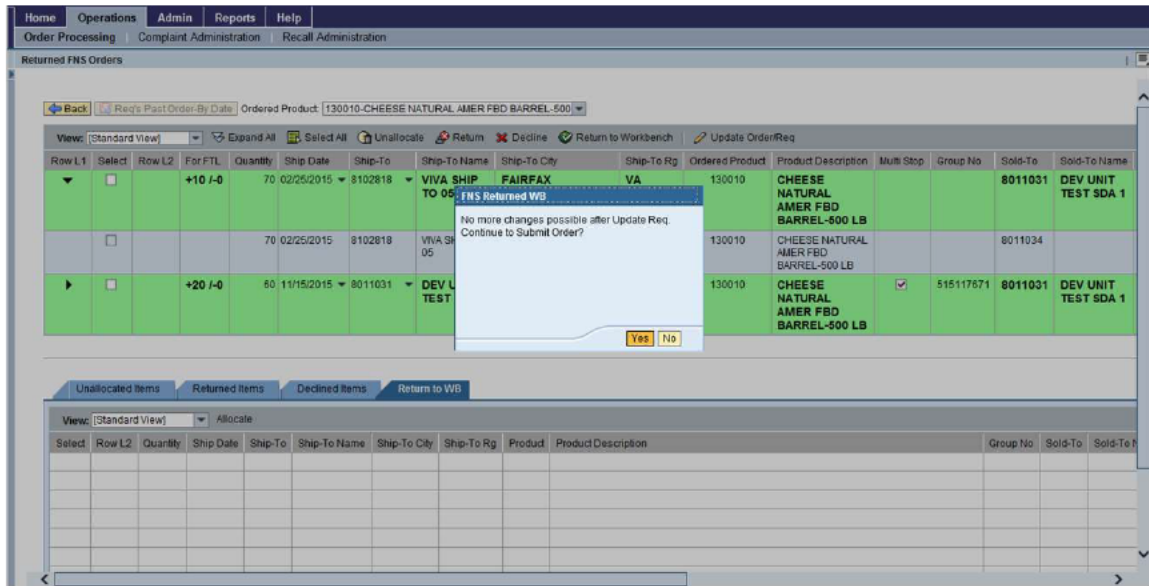


(Note) In the event that you receive the error message shown below after clicking the **Update Order/Req** button, wait a few minutes and try again. The error occurs when the Sales Order is locked by another user (or system process).

 **Request Failed: Following Requisition(s) are being processed : Transaction 5000269560**

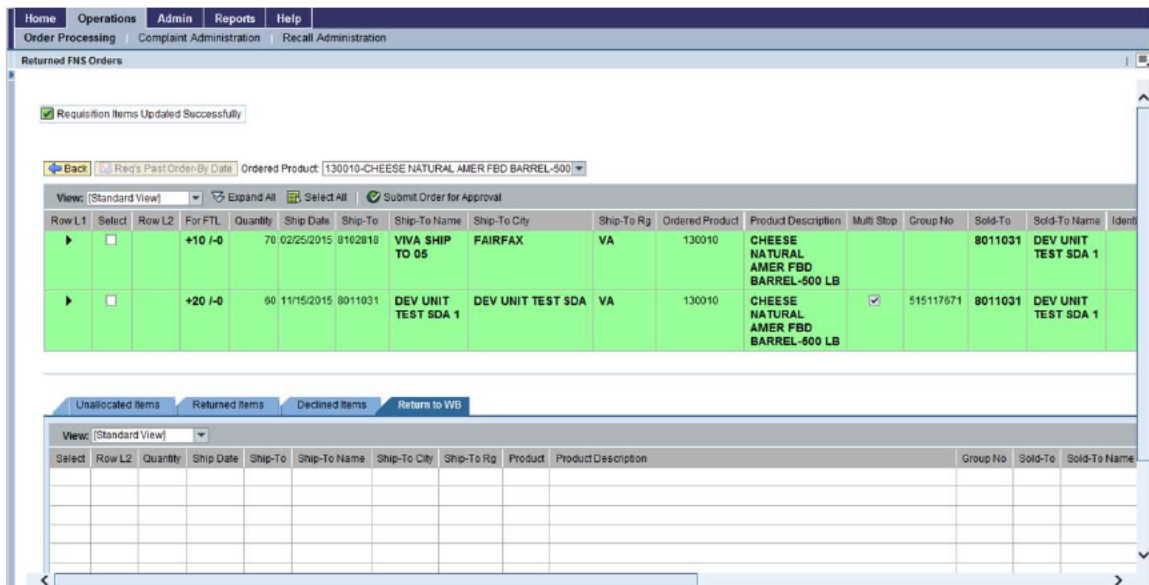
“Request Failed: Following Document(s) are being processed : Transaction <Document Number> is being processed by user <USER ID>”

FNS Returned Orders Pop-up



18. Click **Yes** (the **Yes** button) to continue to submit the order(s).

FNS Returned Orders Screen



19. Finally, before submitting for FNS approval, select the check box beside the order(s) to which you are making the changes.




(Note) Notice the green checkmark at the upper left side of the screen indicating that the requisition item(s) were updated successfully.



(Note) In the event that you receive the error message shown below after clicking the **Submit Order for Approval** button, wait a few minutes and try again. This error occurs

when the Sales Order is locked by another user (or system process).

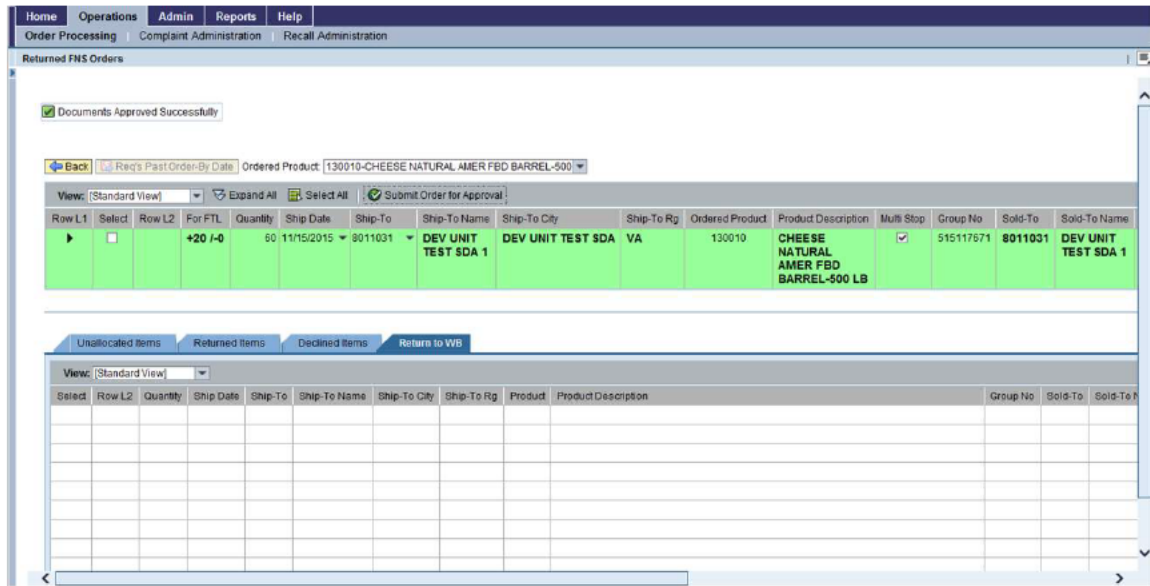
 Request Failed: Document 5000269560 is being processed by user REZAM0001

“Request Failed: Following Document(s) are being processed : Transaction <Document Number> is being processed by user <USER ID>”



(Note) If you do not submit your orders for approval, they will not be processed by FNS.

FNS Returned Orders Screen



The screenshot shows the 'Returned FNS Orders' screen. At the top, there is a navigation bar with 'Home', 'Operations', 'Admin', 'Reports', and 'Help'. Below this, there are tabs for 'Order Processing', 'Complaint Administration', and 'Recall Administration'. The main content area displays a message: 'Documents Approved Successfully'. Below the message, there is a 'Back' button and a 'Req's Past Order-By Date' field. The 'Ordered Product' is '130010-CHEESE NATURAL AMER FBD BARREL-500'. There are options for 'View: [Standard View]', 'Expand All', 'Select All', and 'Submit Order for Approval'. A table with the following columns is visible: Row L1, Select, Row L2, For FTL, Quantity, Ship Date, Ship-To, Ship-To Name, Ship-To City, Ship-To Rg, Ordered Product, Product Description, Multi Stop, Group No, Sold-To, and Sold-To Name. The table contains one row with the following data: Row L1: 1, Select: , Row L2: 1, For FTL: +20 /-0, Quantity: 60, Ship Date: 11/15/2015, Ship-To: 0011031, Ship-To Name: DEV UNIT TEST SDA 1, Ship-To City: DEV UNIT TEST SDA, Ship-To Rg: VA, Ordered Product: 130010, Product Description: CHEESE NATURAL AMER FBD BARREL-500 LB, Multi Stop: , Group No: 515117671, Sold-To: 8011031, Sold-To Name: DEV UNIT TEST SDA 1. Below the table, there are tabs for 'Unallocated Items', 'Returned Items', 'Declined Items', and 'Return to WB'. Another table is visible below these tabs, but it is empty.

20. You have completed this transaction.



(Note) Notice the message that indicates the order was approved successfully.



Work Instruction
Modify and Resubmit Returned FNS Orders

RESULT

The transaction has been successfully completed.



PROCESS OVERVIEW

Purpose

A Co-op Organization is an organization that places orders in WBSCM on behalf of member Recipient Agencies (RAs). The purpose of a Co-op is to leverage buying power by consolidating orders based on the needs of their RAs. Use this transaction to modify a pre-existing Co-op Organization in WBSCM. Modifications can include:

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

Process Trigger

An existing WBSCM Co-op Organization must be updated.

Prerequisites

- A Co-op Organization must exist in the WBSCM system before its information can be altered.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Admin** tab → **Organization Maintenance** tab → **Maintain Organization** → **Update Co-op Organization** link to go to the *Maintain Organization* initial screen.

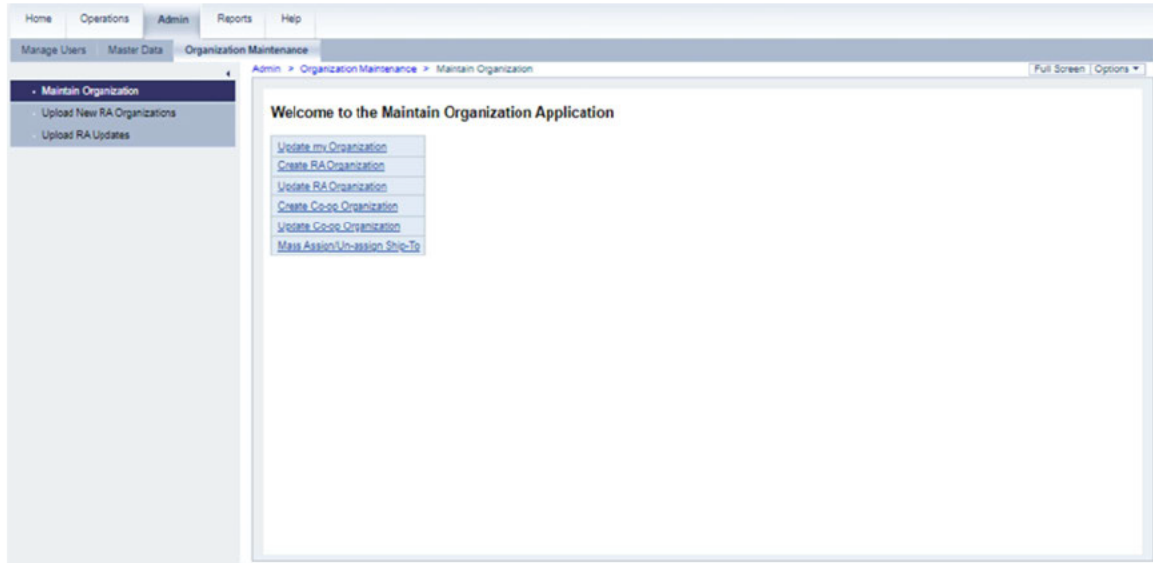
Tips and Tricks

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

PROCEDURE

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

Image: Maintain Organization Screen




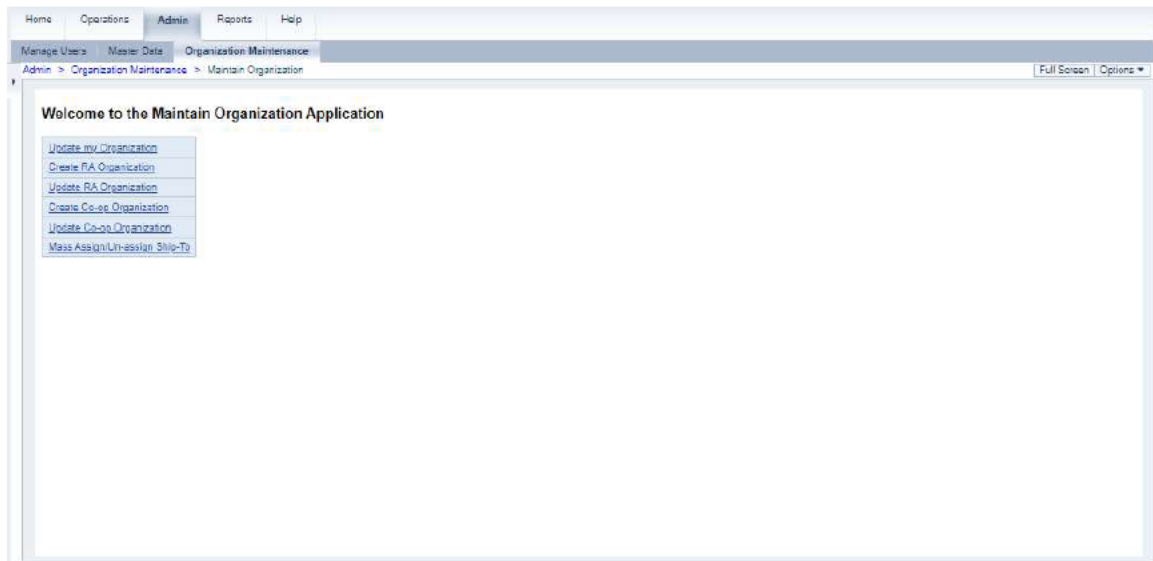
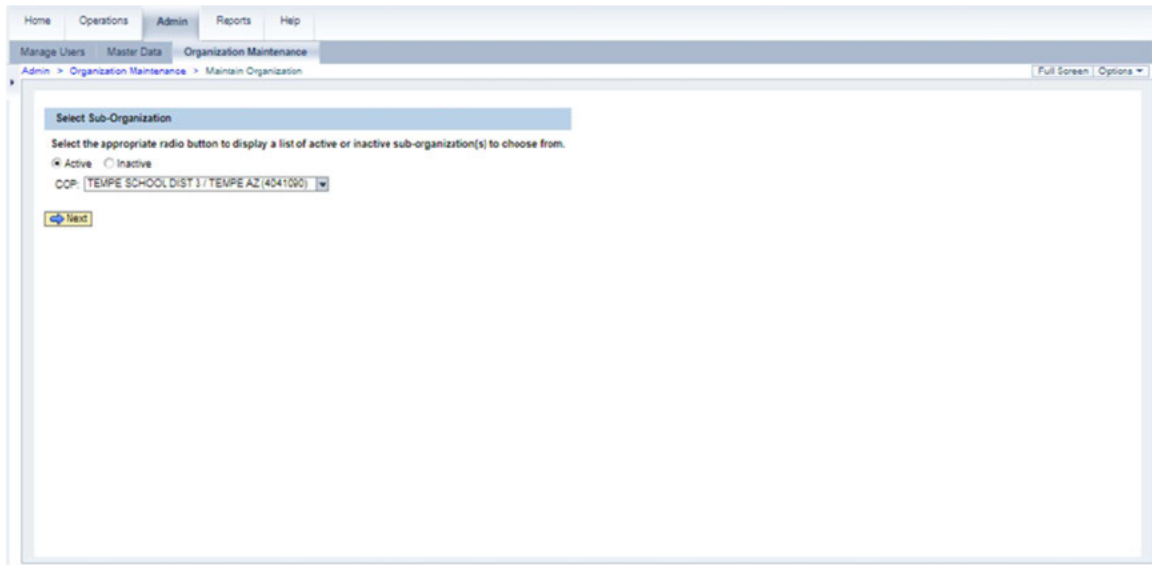
2. Click  (the **Hide Navigator** button) to minimize the Portal menu. Note that this can be done with any transaction in WBSCM.


Image: Maintain Organization Screen



3. Click [Update Co-op Organization](#) (the **Update Co-op Organization** link).

Image: Select Sub-Organization Screen

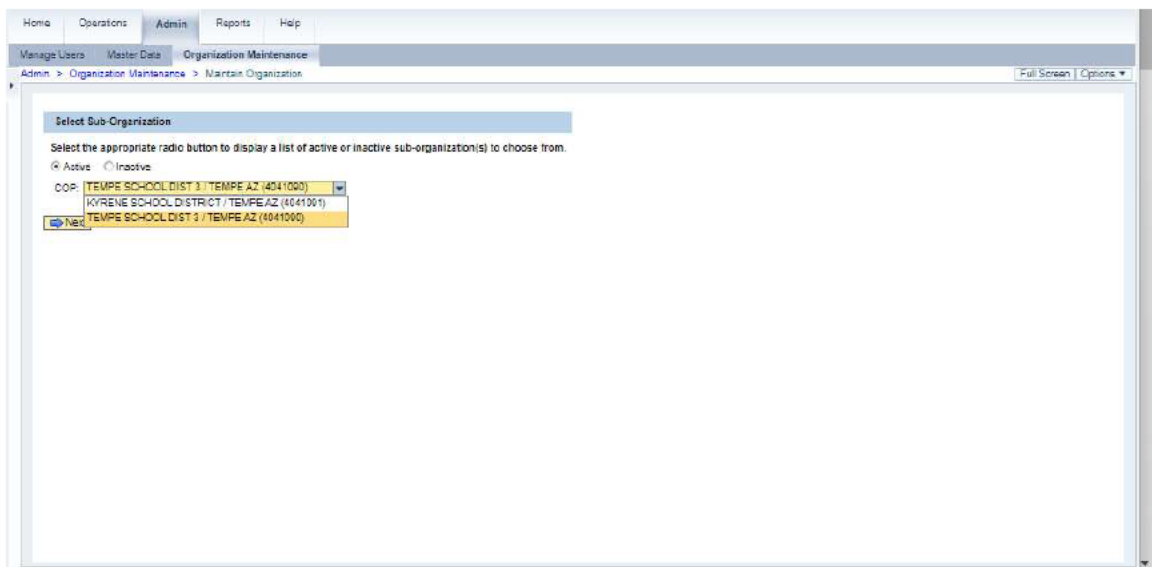


4. Click  (the **COP** drop-down).



(Note) WBSCM defaults to display active Co-op Organizations in the drop-down menu when **Active** (the **Active** radio button) is selected. To display inactive Co-Op Organizations in the drop-down menu, select **Inactive** (the **Inactive** radio button).

Image: Select Sub-Organization Screen



5. Select the appropriate Co-op Organization from the drop-down list. In this example, **TEMPE SCHOOL DIST 3 / TEMPE AZ (4041090)** (the **Tempe School Dist 3 / Tempe AZ (4041090)** option) is selected.

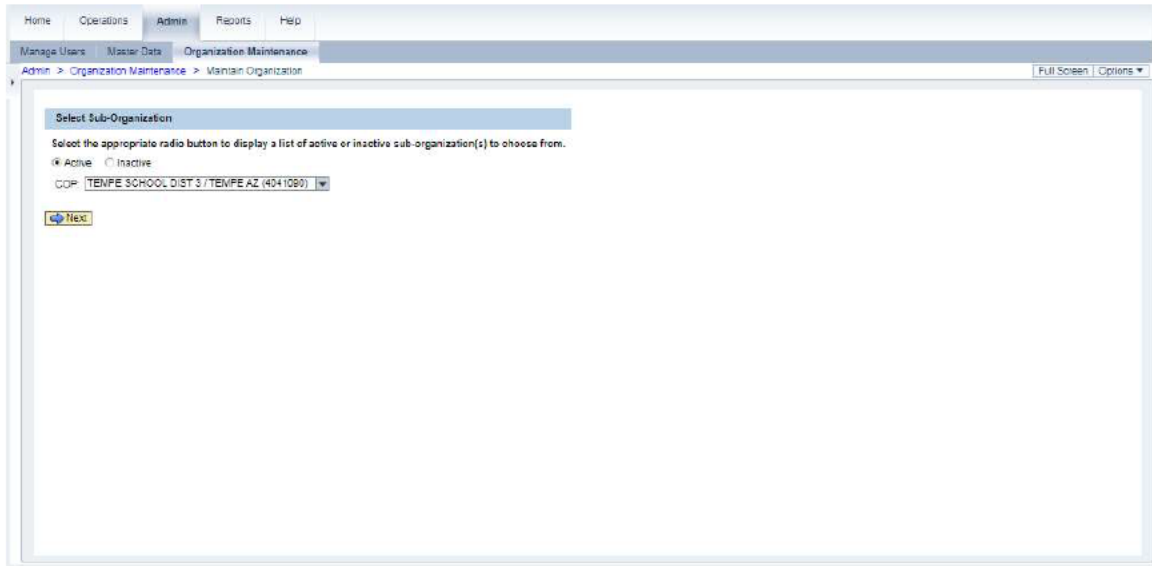


(Note) Only one Co-op Organization can be modified at a time.



(Note) The available Co-op Organizations are listed in alphabetical order by name.

Image: Select Sub-Organization Screen

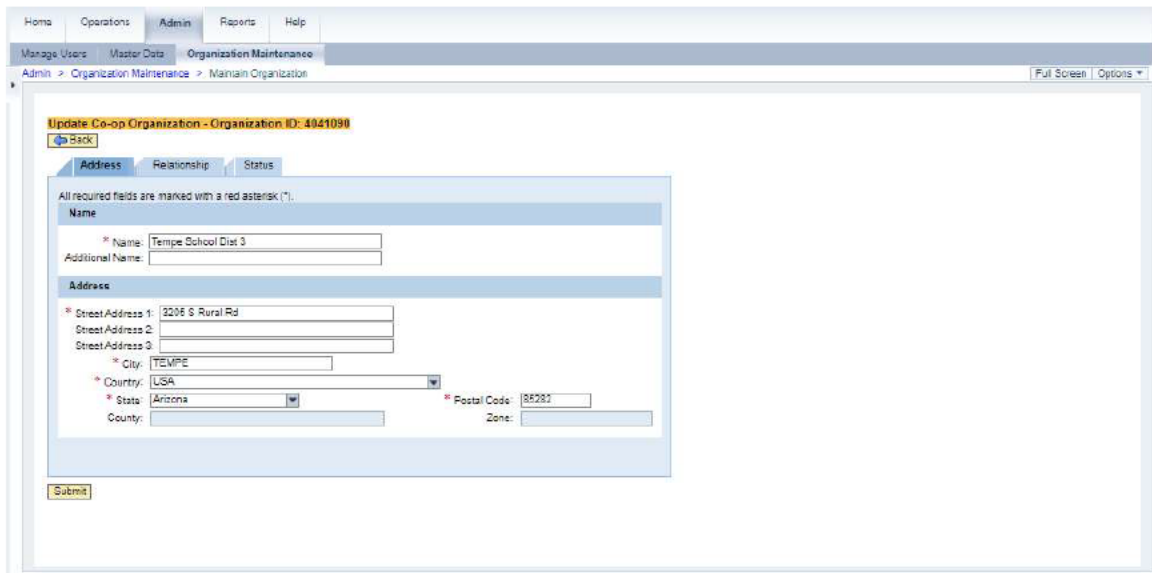


6. Click (the **Next** button).

7. Perform one of the following:

If	Then
The user needs to update an existing Co-op Organization	Go to Step 8.
The user needs to activate/inactivate an existing Co-op Organization	Go to Step 15.
The user needs to submit the updates	Go to Step 19.

Image: Update Co-op Organization (Address) Screen



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





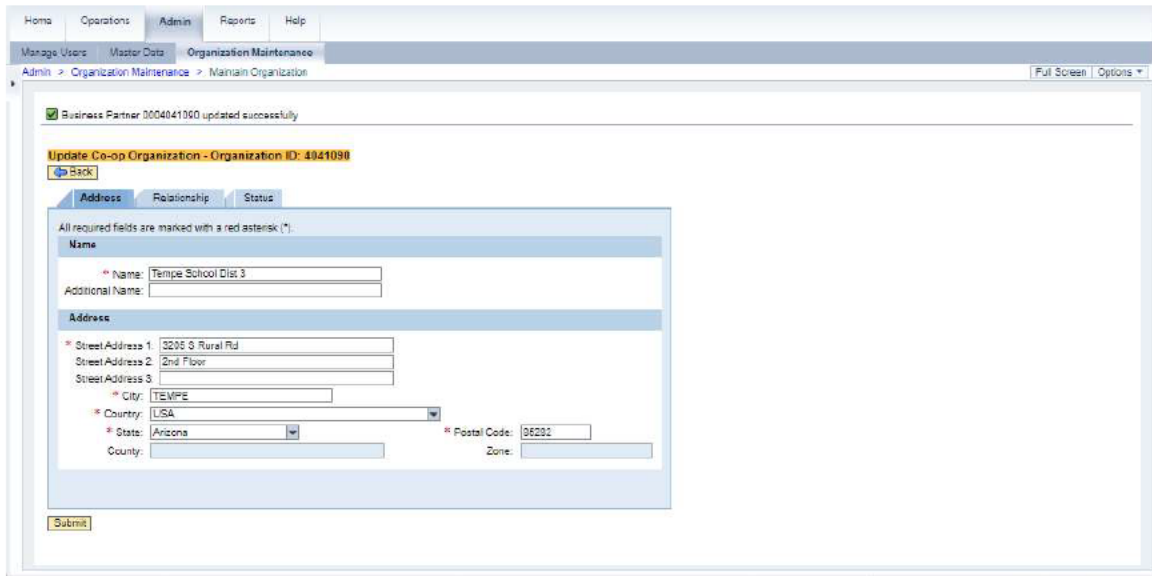
Field	R/O/C	Description
Name	R	Person's or organization's name. Example: Tempe School Dist 3
Street Address 1	R	A free text field in which to enter the street address of the user or organization. Example: 3205 S Rural Rd
Street Address 2	O	A free text field in which to enter additional street address information. Example: 2nd Floor
City	R	City where the user or organization is located. Example: Tempe
Country	R	Country code that represents country name. Example: USA  (Note) Click  (the Country drop-down) to display a list of countries.
State	R	The abbreviation or name of United States territory, district or state. Example: Arizona  (Note) Click  (the State drop-down) to display a list of states and territories.
Postal Code	R	A zip code. Example: 85282

Image: Update Co-op Organization (Address) Screen

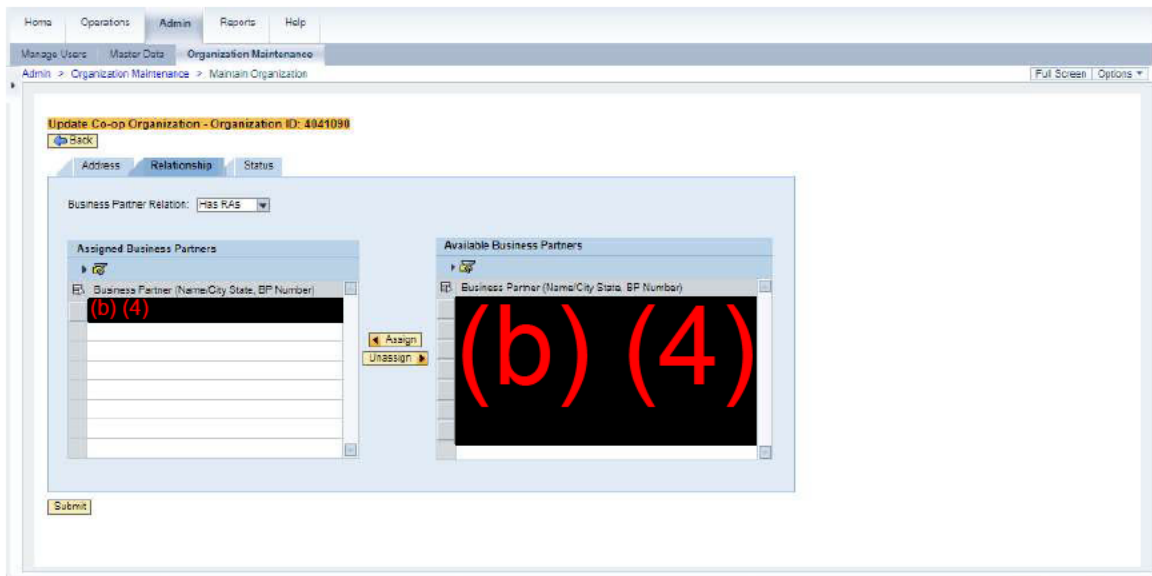


9. Click **Relationship** (the **Relationship** tab) to review or change the business partner relationships for this Co-op Organization.



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

Image: Update Co-op Organization (Relationship) Screen




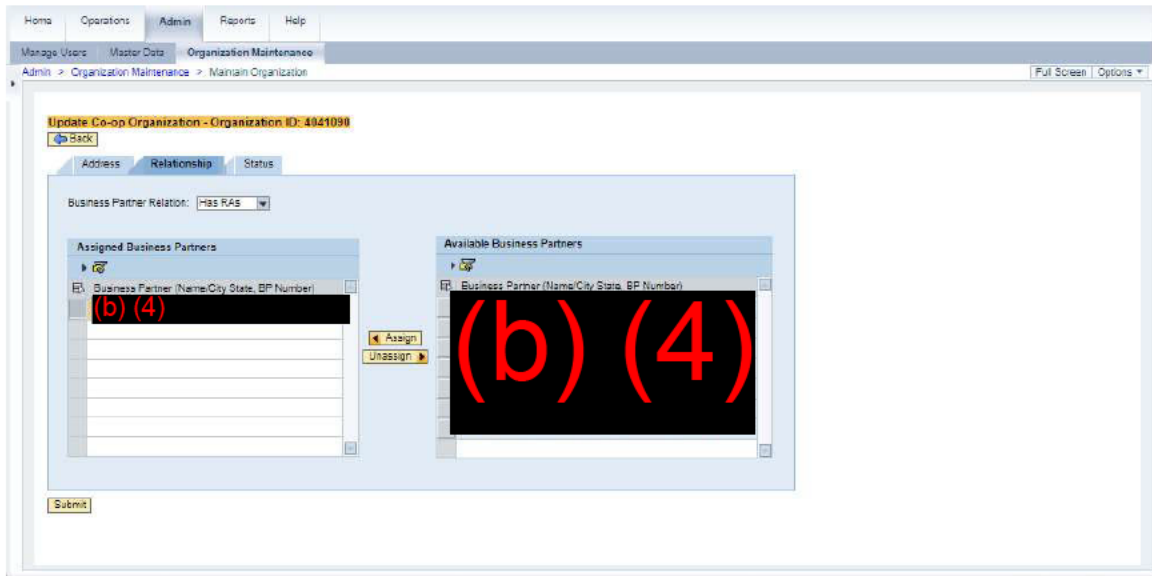
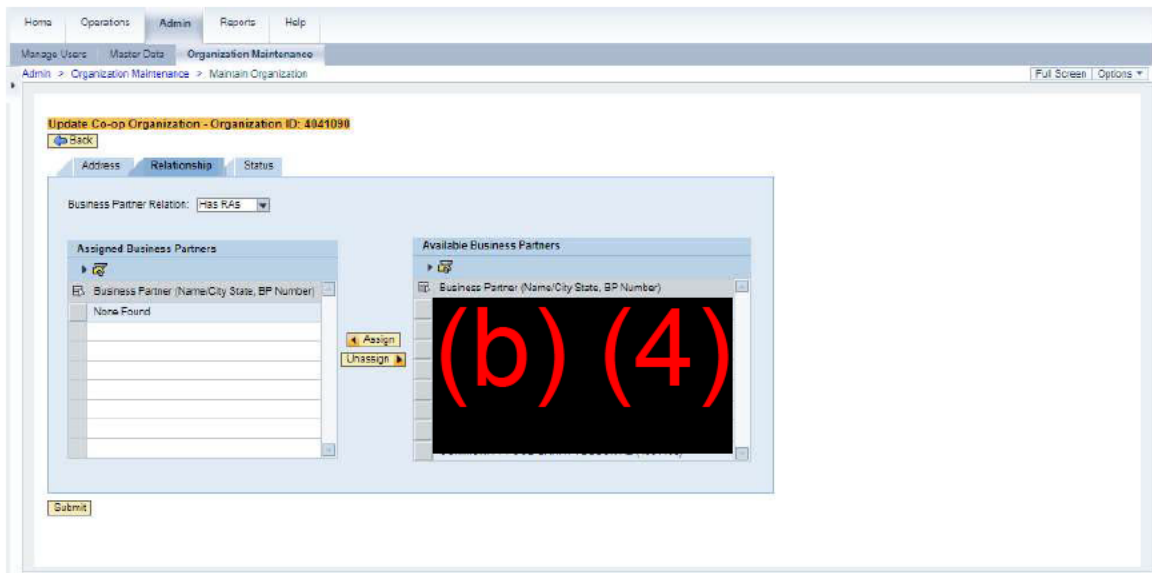
10. Click  (the **Select** button) to select the business partner being unassigned. In this example, **Community Food Bank** is selected.

Image: Update Co-op Organization (Relationship) Screen



11. Click **Unassign** (the **Unassign** button) to unassign the selected business partner from the Co-op Organization.

Image: Update Co-op Organization (Relationship) Screen



12. Click **Select** (the **Select** button) to select the business partner being assigned. In this example, (b) (4) is selected.



(Note) The business partners are listed in alphabetical order. Use the vertical scrollbar to locate 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.

- If the business partners are listed in non-consecutive rows, hold down the **Ctrl** key while clicking each selection button.

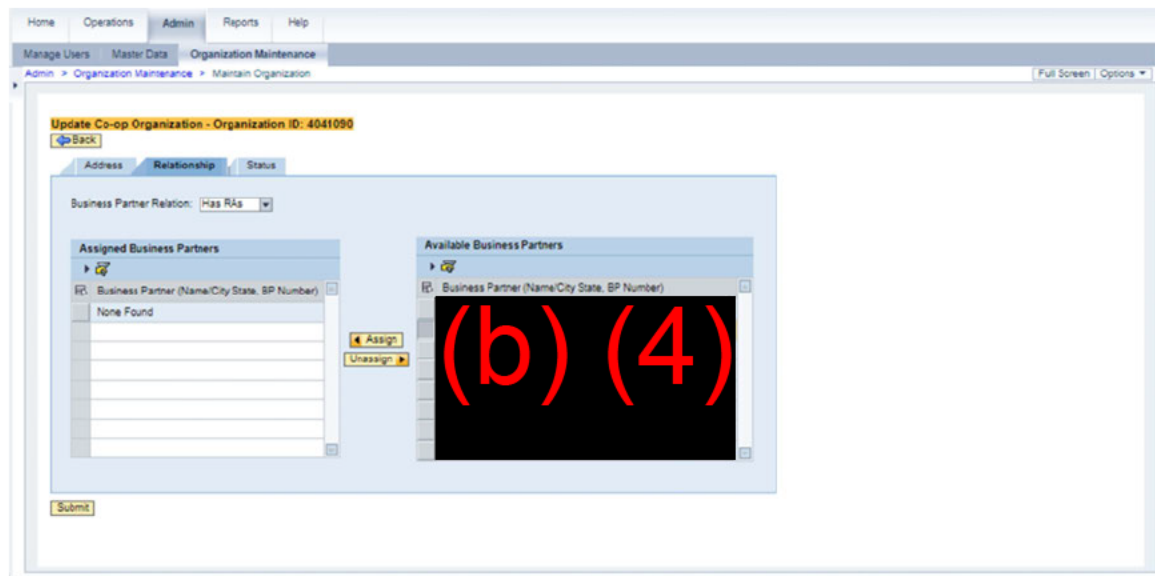


(Note) To filter the list of Business Partners click on the column **Business Partner**



(**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 filter select the (**All**) option.

Image: Update Co-op Organization (Relationship) Screen




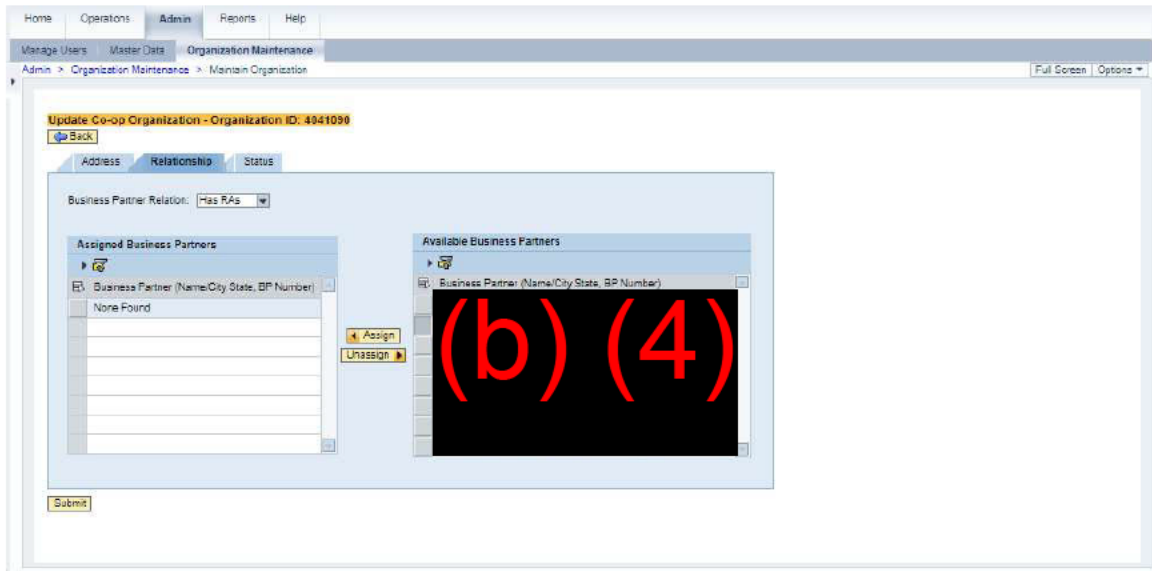
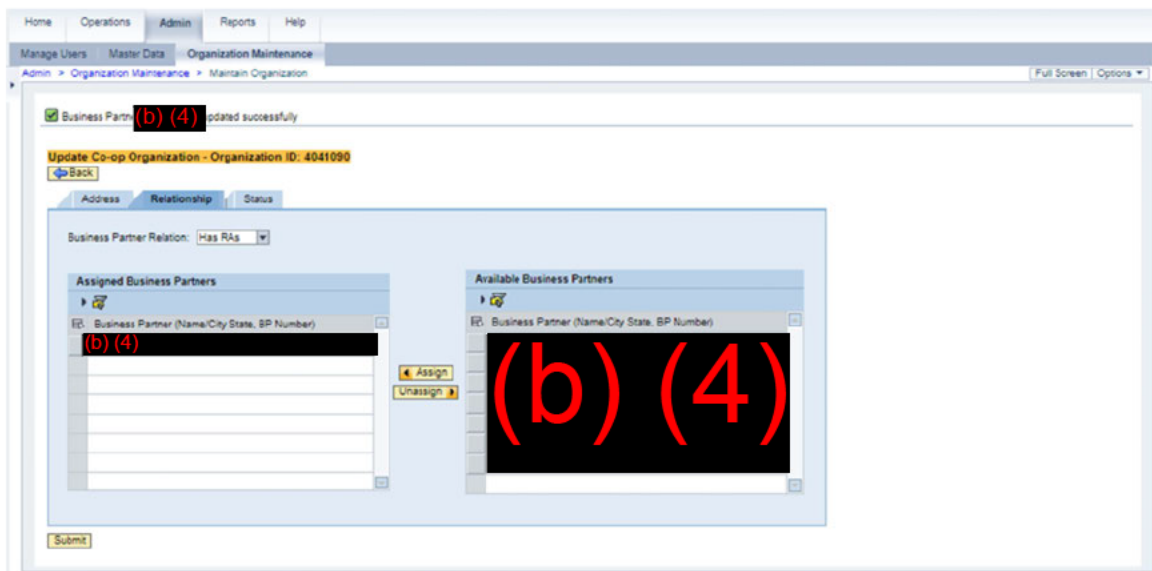
13. Click  (the **Assign** button) to assign the selected RA to the Co-op Organization.

Image: Update Co-op Organization (Relationship) Screen



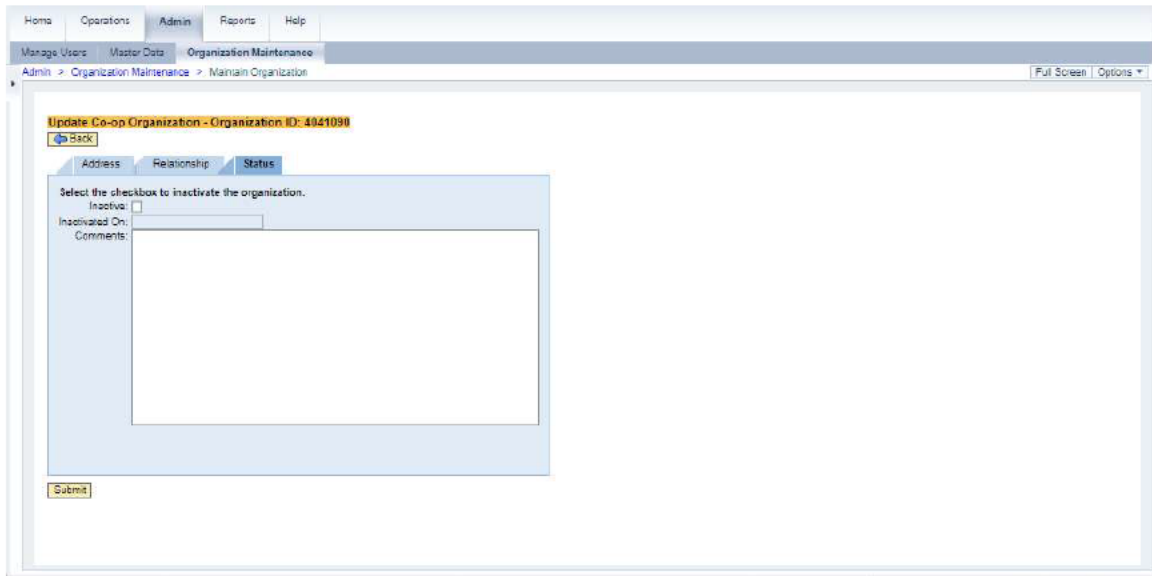
14. Return to Step 7.

Image: Update Co-op Organization (Relationship) Screen



15. Click **Status** (the **Status** tab) to activate or inactivate a Co-op Organization.

Image: Update Co-op Organization (Status) Screen

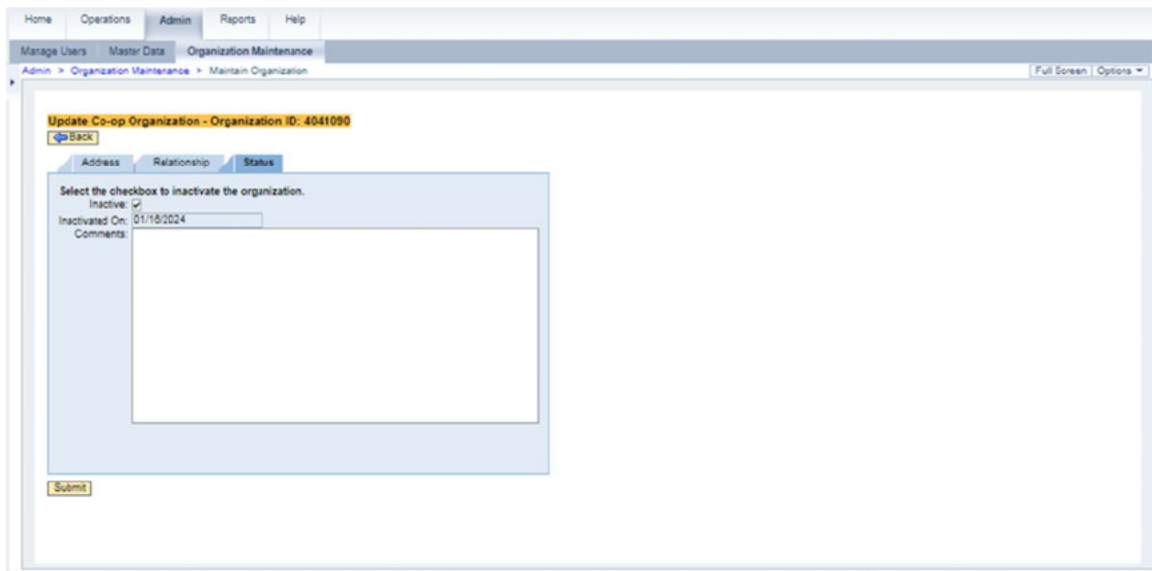


16. If necessary, click (the **Inactive** checkbox) to inactivate the Co-op Organization.



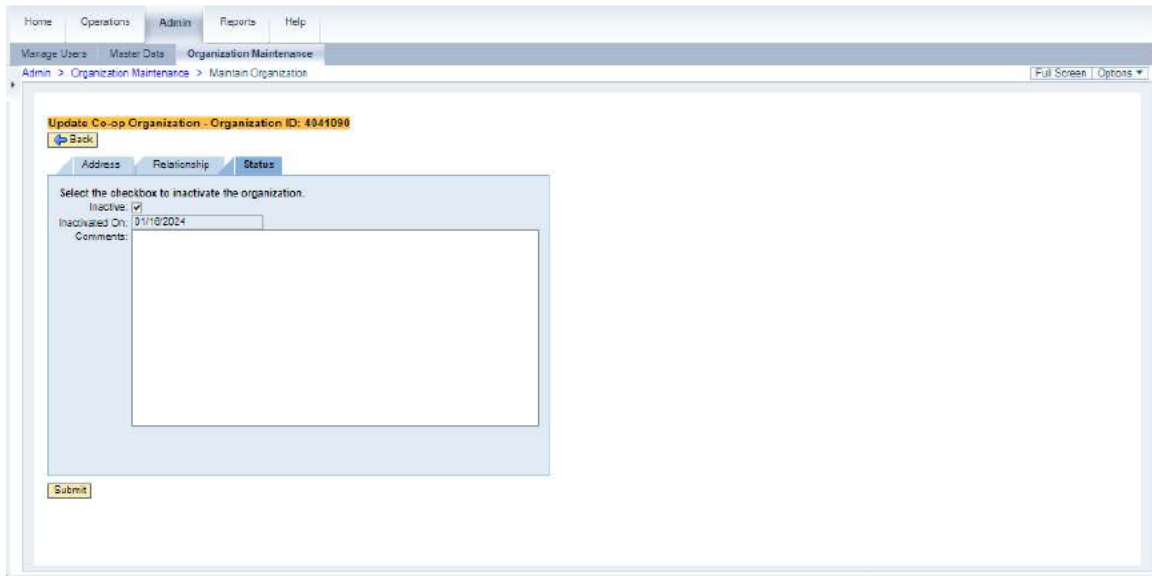
(Note) If (the **Inactive** checkbox) defaults as selected, deselecting it reactivates the Co-op Organization and the **Inactivated On** date clears.

Image: Update Co-op Organization (Status) Screen



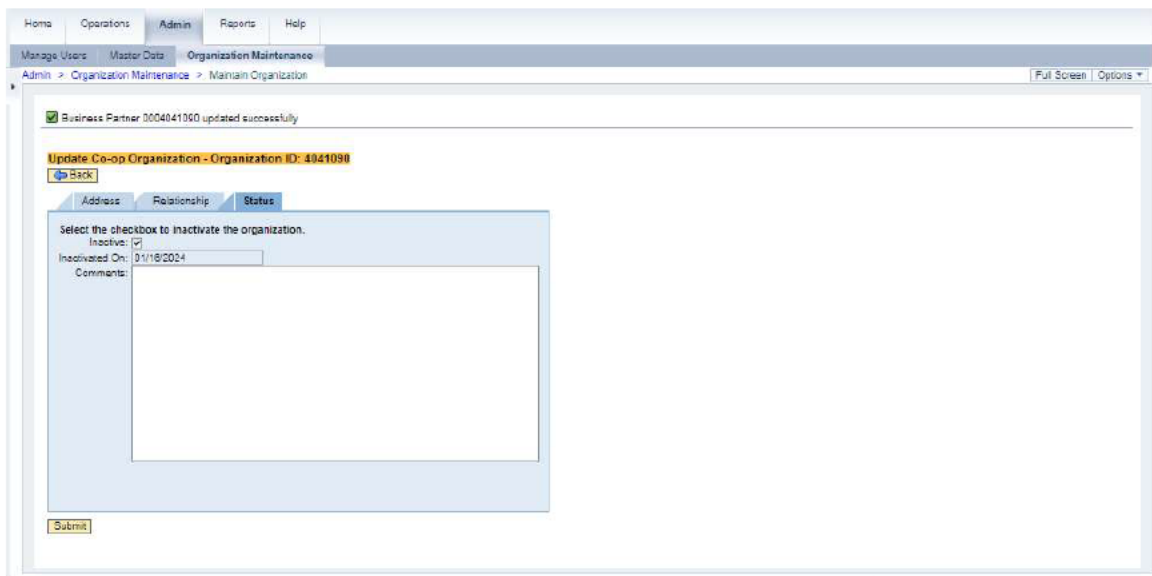
17. If necessary, enter business reasons for active/inactive changes in the **Comments** field. For this example, no comments are entered.
18. Return to Step 7.

Image: Update Co-op Organization (Status) Screen



19. Click **Submit** (the **Submit** button) to save the changes.

Image: Update Co-op Organization (Status) Screen



20. The transaction is complete.



RESULT

An existing Co-Op Organization has been reviewed and updated as needed, including:

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



PROCESS OVERVIEW

Purpose

Domestic recipient organizations (or USDA on behalf of a recipient) use this procedure to modify a recently entered eInvoice (eINV) shipment receipt for a purchase order or sales order. The shipment receipt, also known as the Goods Receipt (GR), is the method by which the recipient confirms that materials that were requested in WBSCM have been delivered. Recipients can modify the quantity or other information for a recently entered shipment. Same-day modifications do not require USDA approval; changes after 24 hours of initial entry require USDA review before they are applied.

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

The following additional work instructions allow recipients to enter domestic shipment receipts in specific circumstances:

- [Enter Domestic Shipment Receipt](#) - used when the recipient wishes to enter shipment receipts manually.
- [Enter Multi-Food Shipment Receipt](#) - used for multi-food shipment, when the recipient wishes to enter shipment receipts manually.
- [Upload Domestic Shipment Receipt](#) - used to upload shipment receipts for any PO using a CSV or XML file. This functionality cannot be used for Multi-ASN PO Line Items.
- [Cancel Shipment Receipt](#) - used when an ASN does not exist (BOL # field is not populated) for a line item.

Process Trigger

Perform this procedure when the recipient needs to modify a received shipment receipt.

Prerequisites

- The PO or sales order must exist in WBSCM.
- eINV must be enabled for one or more line item(s) on the PO.
- A receipt was previously submitted.
- Recipients can only view and modify receipts within 7 days after initial receipt. After 7 days, the receipt line will not be visible and the recipient will need to contact the WBSCM Service Desk to enter a ticket for modifications at WBSCM.ServiceDesk@CACI.com or call (877) WBSCM-4U or (877) 927-2648, 8AM to 6PM ET Mon - Fri, excluding holidays.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab → **Order Processing** tab → **Shipment Receipts** folder → **Enter Shipment Receipt** link to go to the *Enter Shipment Receipt* screen.

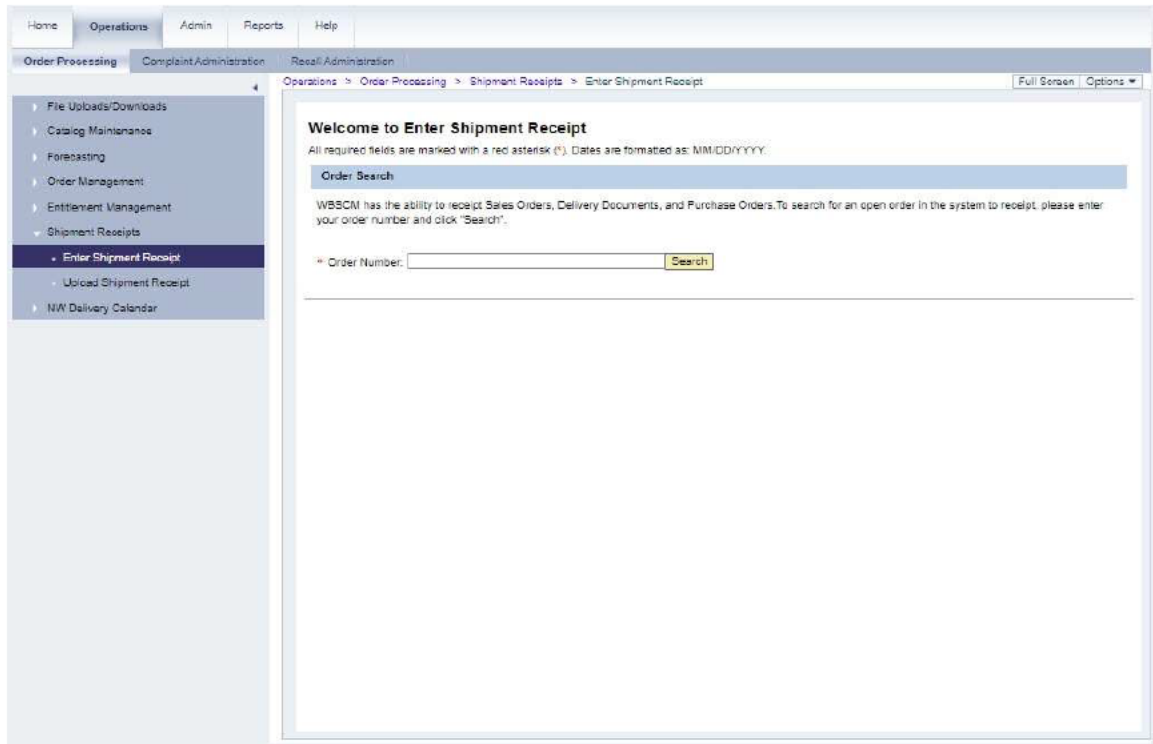
Tips and Tricks

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

PROCEDURE

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

Image: Enter Shipment Receipt Screen




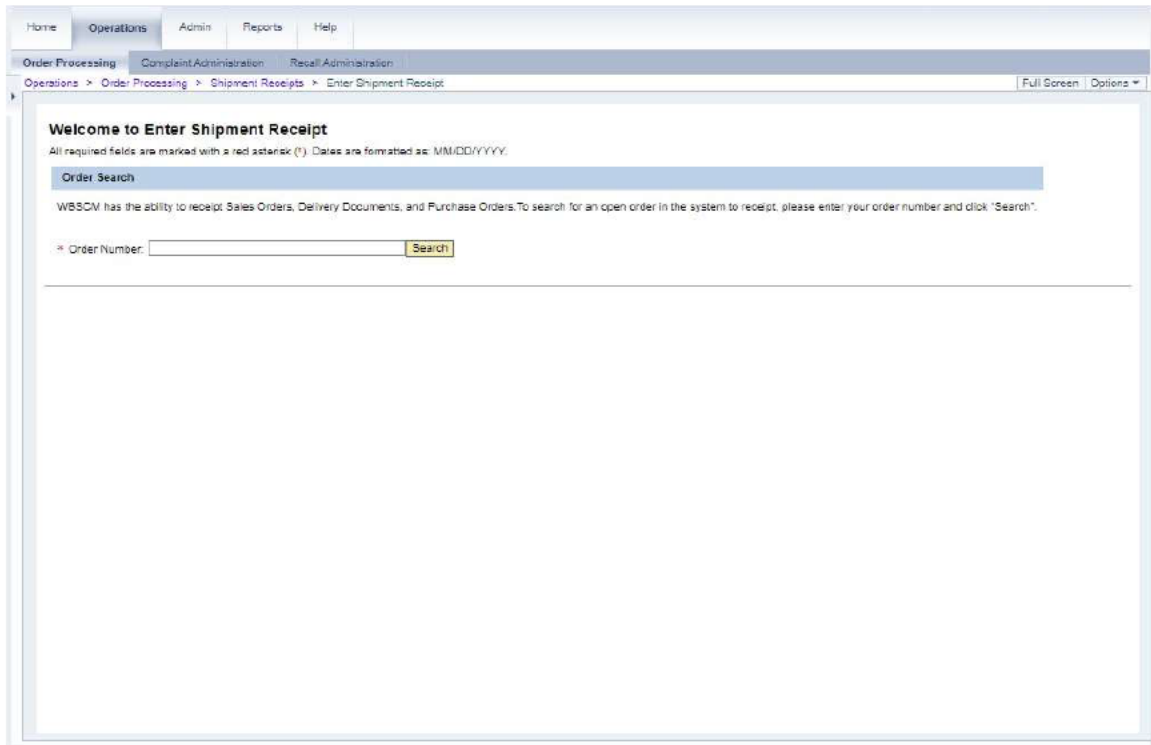
2. Click  (the **Hide Navigator** arrow) to minimize the Portal menu. Note that this can be done with any transaction in WBSM.

Image: Enter Shipment Receipt Screen



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


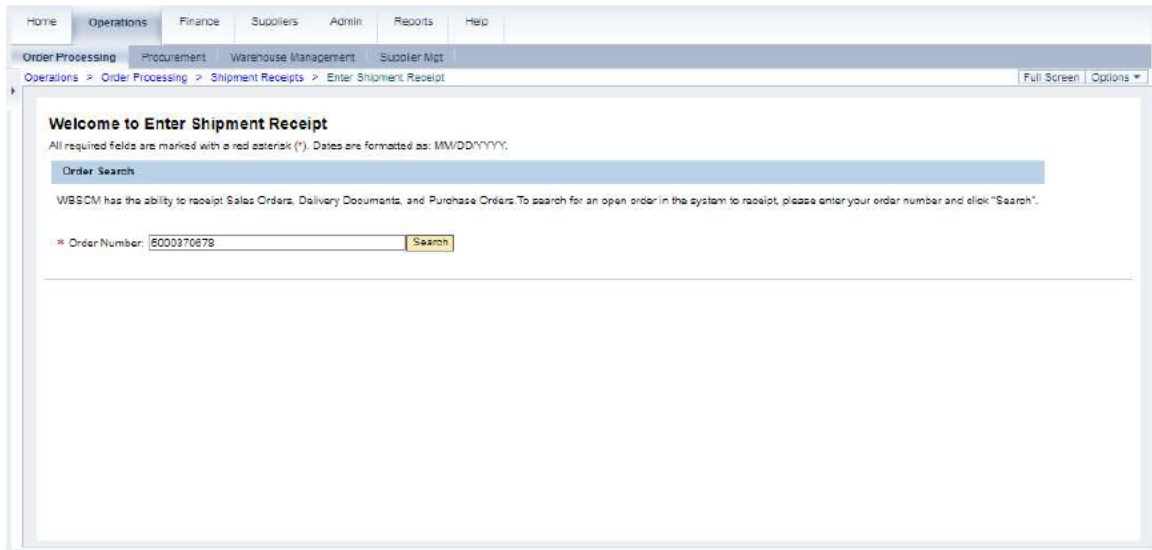
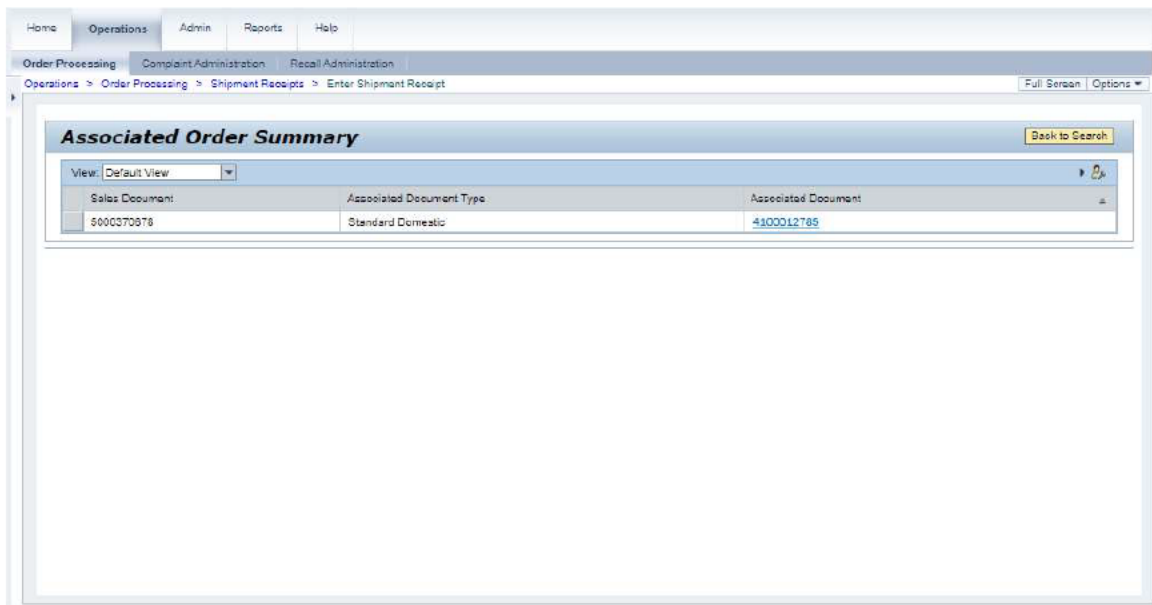
Field	R/O/C	Description
Order Number:	R	<p>This can be a sales order number, purchase order number, or delivery document number.</p> <p>Example: 5000370678</p> <p> (Note) For modification, the user can enter a sales order or a purchase order. In this example, a purchase order number is entered. When the modification to a shipment receipt is for product to a national warehouse, enter the purchase order number to complete the shipment receipt.</p>

Image: Enter Shipment Receipt Screen



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

Image: Associated Order Summary Screen



- Click the applicable purchase order number in the **Associated Document** column to continue. In this example, [4100012785](#) (the **4100012875** link) is selected.



(Note) Recipients are only able to see their own PO lines. USDA users can see all lines.

- Perform one of the following:

If	Then
No PO lines are displayed or the desired receipt is no longer viewable on the list of PO lines because	The receipt cannot be modified using this process. A GR reversal and/or re-entry of the receipt may be

If	Then
the seven-day threshold has passed.	required. Contact the WBSM Service Desk for assistance.
The PO line(s) to be modified are displayed.	Go to Step 7.

Image: Enter Shipment Receipt Screen

Select	Further Actions	Receipt Status	Sales Doc	Item	Pur. Dec.	Item	Material	Material Description	ASN Number	Signed by	Date Received
<input type="checkbox"/>	<input type="checkbox"/>	Recpt Processed	5000370966	100	4100012785	9	100166	BEEF ROAST ROUND FRZ CTN-38-42 LB	6100030995	Jane Doe	12/25/2018
<input type="checkbox"/>	<input type="checkbox"/>	Ready to Receipt	5000370966	100			100166	BEEF ROAST ROUND FRZ CTN-38-42 LB	6100030996	Jane Doe	12/25/2018
<input type="checkbox"/>	<input type="checkbox"/>	Recpt Processed	5000370871	100		14	100166	BEEF ROAST ROUND FRZ CTN-38-42 LB		t	11/25/2018
<input type="checkbox"/>	<input type="checkbox"/>	Recpt Processed	5000370872	100		15	100166	BEEF ROAST ROUND FRZ CTN-38-42 LB		TT	12/05/2018
<input type="checkbox"/>	<input type="checkbox"/>	Ready to Receipt	5000370933	100		58	100166	BEEF ROAST ROUND FRZ CTN-38-42 LB	6100027553		
<input type="checkbox"/>	<input type="checkbox"/>	Ready to Receipt	5000370934	100		59	100166	BEEF ROAST ROUND FRZ CTN-38-42 LB	6100027553		

7. Click (the **Check** box) in the **Further Actions** column to select the shipment receipt line item being modified.



(Note) Only previously receipted line items (**Recpt Processed** status) can be modified.



(Note) If the receipt does not appear in the list or the checkbox in the **Further Actions** column is not available, a GR reversal and/or re-entry of the receipt may be required. Contact the WBSM Helpdesk for assistance.

Image: Enter Shipment Receipt Screen

Home Operations Admin Reports Help

Order Processing

Operations > Order Processing > Shipment Receipts > Enter Shipment Receipt

Back to Summary Back to Search

Receipt Header

Order Number: 4100012785 Entered By: ORDERMA... Railroad/BOL:

Signed By: Date Received:

Comments:

Receipt All

View: eINV_VIEW

Select	Further Actions	Receipt Status	Sales Doc.	Item	Pur. Dec.	Item #	Material	Material Description	ASN Number	Signed by	Date Received
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Recpt Processed	5000370996	100	4100012785	9	100166	BEEF ROAST ROUND FRZ CTN-38-42 LB	6100030995	Jane Doe	12/25/2018
<input type="checkbox"/>	<input type="checkbox"/>	Ready to Receipt	5000370956	100			100166	BEEF ROAST ROUND FRZ CTN-38-42 LB	6100030996	Jane Doe	12/25/2018
<input type="checkbox"/>	<input type="checkbox"/>	Recpt Processed	5000370671	100		14	100166	BEEF ROAST ROUND FRZ CTN-38-42 LB		J	11/25/2018
<input type="checkbox"/>	<input type="checkbox"/>	Recpt Processed	5000370672	100		15	100166	BEEF ROAST ROUND FRZ CTN-38-42 LB		TT	12/05/2018
<input type="checkbox"/>	<input type="checkbox"/>	Ready to Receipt	5000370633	100		58	100166	BEEF ROAST ROUND FRZ CTN-38-42 LB	6100027553		
<input type="checkbox"/>	<input type="checkbox"/>	Ready to Receipt	5000370934	100		59	100166	BEEF ROAST ROUND FRZ CTN-38-42 LB	6100027553		

Submit Receipt Modify Receipt Cancel Receipt

8. Click **Modify Receipt** (the **Modify Receipt** button) to modify the receipt.



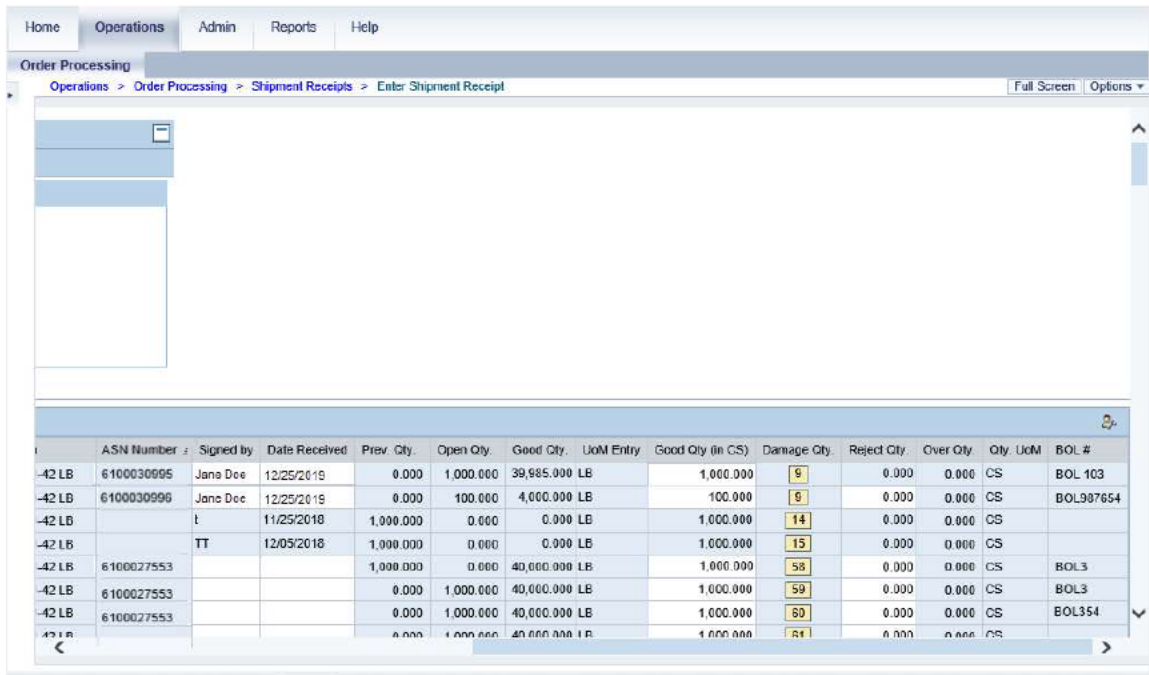
(Note) The line item status codes for submitted receipts are:

- **Processing Recpt** - The receipt was submitted and is processing in WBSCM. Receipts with the **Processing Recpt** status cannot be modified until processing is complete.
- **Pending Review** - The submitted receipt will be reviewed by USDA. This may reflect a difference in quantity between recipient and vendor or a modification after the initial day of entry. Receipts with the **Pending Review** status cannot be modified until review is complete.
- **Recpt Processed** - The receipt for delivery by vendor to the initial destination has been updated in WBSCM.
 - For deliveries directly to the customer, the destination is the **Ship-To**.
 - For deliveries with additional transportation services (e.g., Offshore), the initial destination is where the vendor transfers materials to the transportation provider (e.g., Port).
- **Recpt 2 Processed** - For deliveries that included additional transportation services (e.g., Offshore), the receipt for delivery to final destination has been updated in WBSCM.







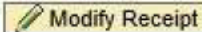
(Note) WBSCM will send an email notification to the vendor when a receipt is entered with over, short, damaged (O/S/D), or late materials/commodities.


Image: Enter Shipment Receipt Screen



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

Field	R/O/C	Description
Signed By	R	The name of the individual that signed for the receipt. Example: John Doe
Date Received	R	The date the materials were received. Example: 02/25/2019
Good Qty.	C	The amount of materials received in good condition, equal to or less than the ordered amount, in pounds (LB). <div style="display: flex; flex-direction: column; gap: 10px;"> <div> (Note) This field is used for receipting materials reported in pounds. When receipting variable weight items, this field is automatically calculated once the modified Good Qty (in CS) is applied. </div> <div> (Note) When modifying this value, enter the total weight (including quantities shipped separately) and not an incremental change. For example, to change a receipt from 100 lbs. to 150 </div> </div>

Field	R/O/C	Description
		lbs., enter 150 (not 50).
Good Qty (in CS)	C	<p>The amount of materials received in good condition, in cases (CS). The Good Qty (in CS) is not required when receipting in pounds.</p> <p>Example: 100.000</p> <p> (Note) When receipting material in pounds, the Good Qty (in CS) field is not entered.</p> <p> (Note) This field is auto-populated based on the corresponding ASN quantity and can be updated. However, for orders with a missing ASN, the field will be blank.</p> <p> (Note) When modifying this value, enter the full quantity (including quantities shipped separately) and not an incremental change. For example, to change a receipt from 10 cases to 15 cases, enter 15 (not 5).</p>
Over Qty	O	<p>The amount of materials receipted for a PO line as Good Qty or Good Qty (in CS) that exceeds the ordered amount.</p> <p> (Note) This field is auto-populated when the amount entered in Good Qty or Good Qty (in CS) is over the expected delivery quantity when  (the Modify Receipt button) is clicked.</p> <ul style="list-style-type: none"> • Items that are receipted <u>over</u> the PO line ASN quantity appear in red. • Quantities that are receipted <u>under</u> the Good Qty or Good Qty (in CS) amount are included in the Open Qty total for that line.
Previous Qty	O	The amount of materials that were previously receipted on the line item.

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

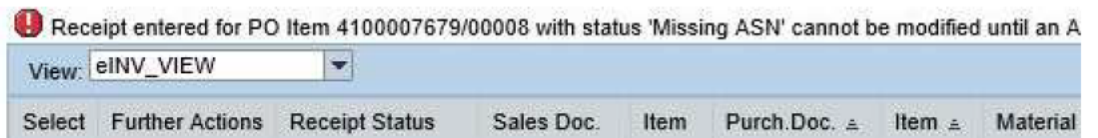


(Note) Before entering values in the **Good Qty** field, always check the values in the **Previous Qty** and **Open Qty** fields.

For **Domestic Direct Ship Orders**, users can enter receipts against orders containing LB, CS, and/or variable weight materials/commodities.



(Note) If the user attempts to modify a receipt that does not have an ASN submitted yet, it will generate the following error message: *The selected line item cannot be modified at this time. Receipt entered for PO Item 4100XXXX/000xxx with status 'Missing ASN' cannot be modified until an ASN is entered by the Vendor.*



In this case, cancel the receipt by clicking the **Cancel Receipt** button and re-enter the receipt. The user can also wait for the vendor to submit an ASN. When the receipt is entered without an ASN, a notification email is sent automatically to the vendor to remind them to submit an ASN.

Once the ASN is available, the user should be able to make modifications. If the receipt is no longer available for review, contact the WBSCM Service Desk. USDA will perform any changes outside the modification timeframe.

Image: Enter Shipment Receipt Screen

	ASN Number	Signed by	Date Received	Prev. Qty.	Open Qty.	Good Qty.	UoM Entry	Good Qty (in CS)	Damage Qty.	Reject Qty.	Over Qty.	Qty. UoM	BOL #
-42 LB	6100030995	John Doe	10/18/2023	0.000	1,000.000	39,985.000	LB	100.000	9	0.000	0.000	CS	BOL 103
-42 LB	6100030996	Jane Doe	12/25/2019	0.000	100.000	4,000.000	LB	100.000	9	0.000	0.000	CS	BOL987654
-42 LB		t	11/25/2018	1,000.000	0.000	0.000	LB	1,000.000	14	0.000	0.000	CS	
-42 LB		TT	12/05/2010	1,000.000	0.000	0.000	LB	1,000.000	15	0.000	0.000	CS	
-42 LB	6100027553			1,000.000	0.000	40,000.000	LB	1,000.000	58	0.000	0.000	CS	BOL3
-42 LB	6100027553			0.000	1,000.000	40,000.000	LB	1,000.000	59	0.000	0.000	CS	BOL3
-42 LB	6100027553			0.000	1,000.000	40,000.000	LB	1,000.000	60	0.000	0.000	CS	BOL354
-42 LB				0.000	1,000.000	40,000.000	LB	1,000.000	61	0.000	0.000	CS	

10. If necessary, click (the **Left** arrow) on the horizontal scrollbar when the updates are complete and the user is ready to submit the modified receipt.

Image: Enter Shipment Receipt Screen

Receipt Header

Order Number: 4100012785 Entered By: ORDERMA... Railcar/BOL:

Signed By: Date Received:

Comments:

View: eINV_VIEW

Select	Further Actions	Receipt Status	Sales Doc.	Item	Pur. Doc.	Item	Material	Material Description	ASN Number	Signed by	Date Received
<input type="checkbox"/>		Receipt Processed	5000370666	100	4100012785	9	100166	BEEF ROAST ROUND FRZ CTN-38-42 LB	6100030995	John Doe	10/18/2023
<input type="checkbox"/>	<input type="checkbox"/>	Ready to Receipt	5000370666	100			100166	BEEF ROAST ROUND FRZ CTN-38-42 LB	6100030996	Jane Doe	12/25/2019
<input type="checkbox"/>	<input type="checkbox"/>	Receipt Processed	5000370671	100		14	100166	BEEF ROAST ROUND FRZ CTN-38-42 LB		t	11/25/2018
<input type="checkbox"/>	<input type="checkbox"/>	Receipt Processed	5000370672	100		15	100166	BEEF ROAST ROUND FRZ CTN-38-42 LB		TT	12/05/2010
<input type="checkbox"/>	<input type="checkbox"/>	Ready to Receipt	5000370633	100		58	100166	BEEF ROAST ROUND FRZ CTN-38-42 LB	6100027553		
<input type="checkbox"/>	<input type="checkbox"/>	Ready to Receipt	5000370934	100		59	100166	BEEF ROAST ROUND FRZ CTN-38-42 LB	6100027553		

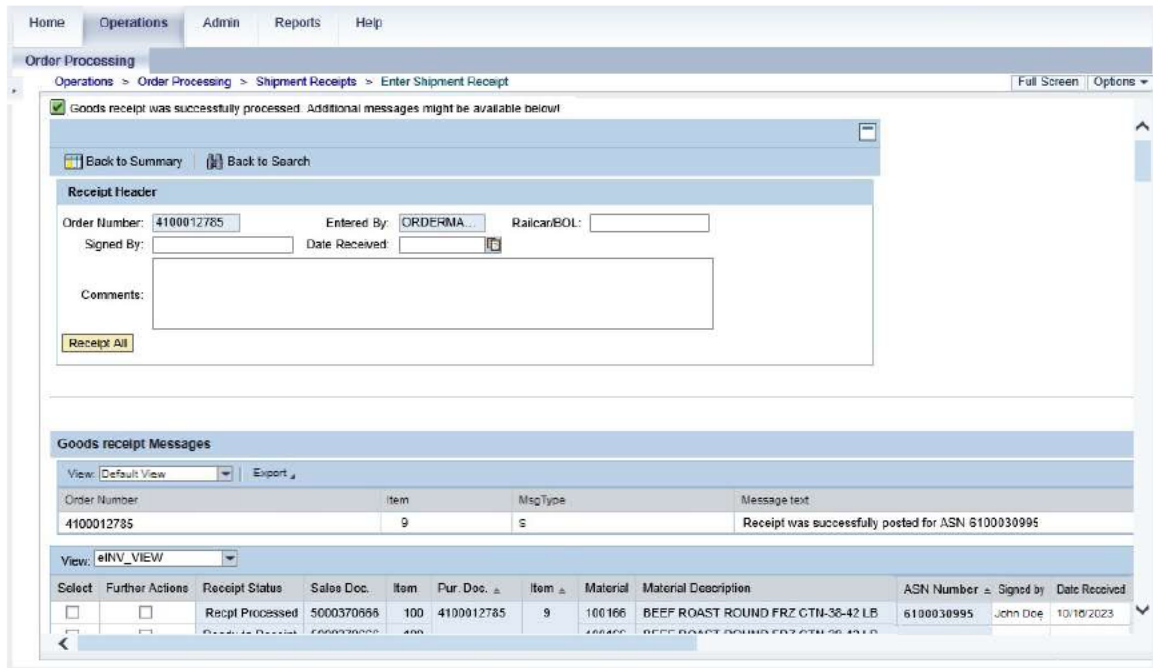
11. Click (the **Submit Receipt** button) to submit the modified receipt to USDA.



(Note) WBSCM will send an email notification to the vendor when a receipt is entered with over,

short, damaged (O/S/D), or late materials/commodities or if there was no ASN at the time the receipt was submitted.

Image: Enter Shipment Receipt Screen



12. Review the confirmation message at the top of the screen.



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

- **S** indicates the receipt was successfully submitted.
- **E** indicates an error. Based on the type of error received, instructions are displayed such as **Please retry Good Receipt for the line item** or **Please contact the WBSCM Helpdesk to complete Good Receipt for the item**.

13. The transaction is complete.



Work Instruction
Modify Domestic Shipment Receipt

RESULT

A shipment receipt for a purchase order line item was modified in WBSCM. Optional and required information was reviewed and changed on a shipment receipt, possibly including:

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



PROCESS OVERVIEW

Purpose

The purpose of this transaction is to modify a Domestic Ship-to (DSH) Organization in WBSCM. A Domestic Ship-to Organization is a physical address where a customer would like goods to be shipped.

Process Trigger

Use this transaction to modify the address or relationships for a domestic ship-to organization.

Prerequisites

- Domestic ship-to organization must exist in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Admin** tab → **Organization Maintenance** tab → **Maintain Organization** link → **Maintain Ship-to Organization** link to go to the *Maintain Ship-To Organization* screen.

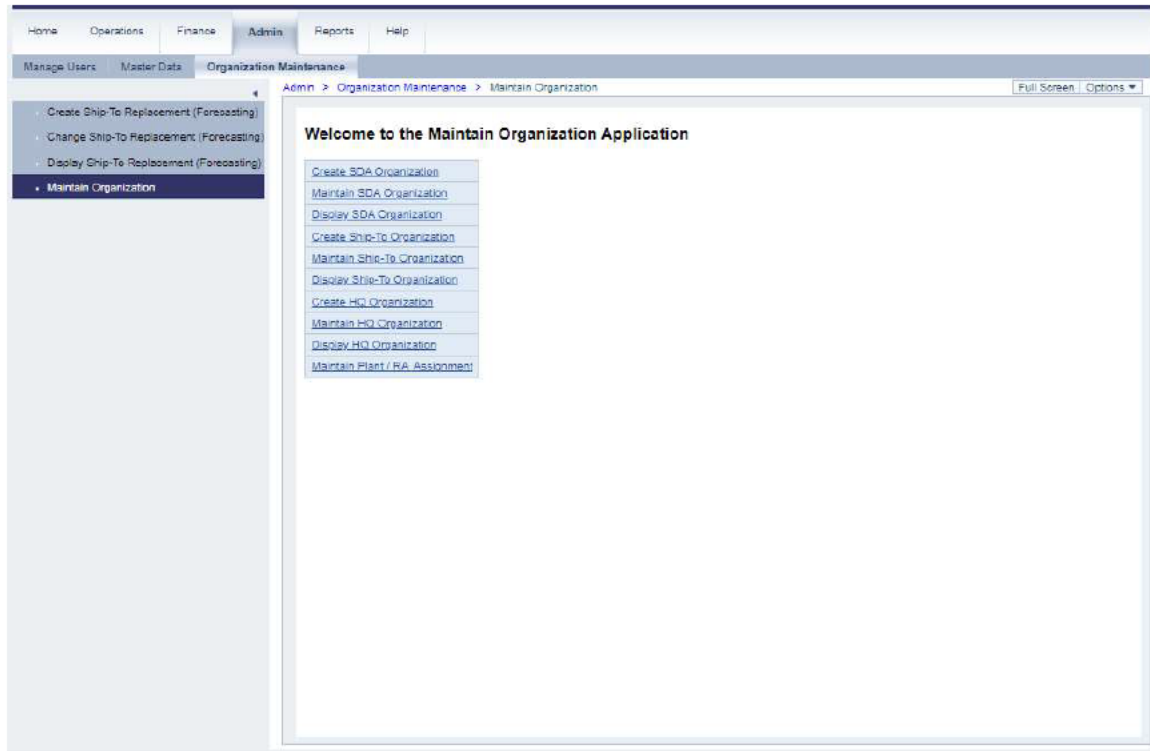
Tips and Tricks

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

PROCEDURE

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

Image: Maintain Organization Screen




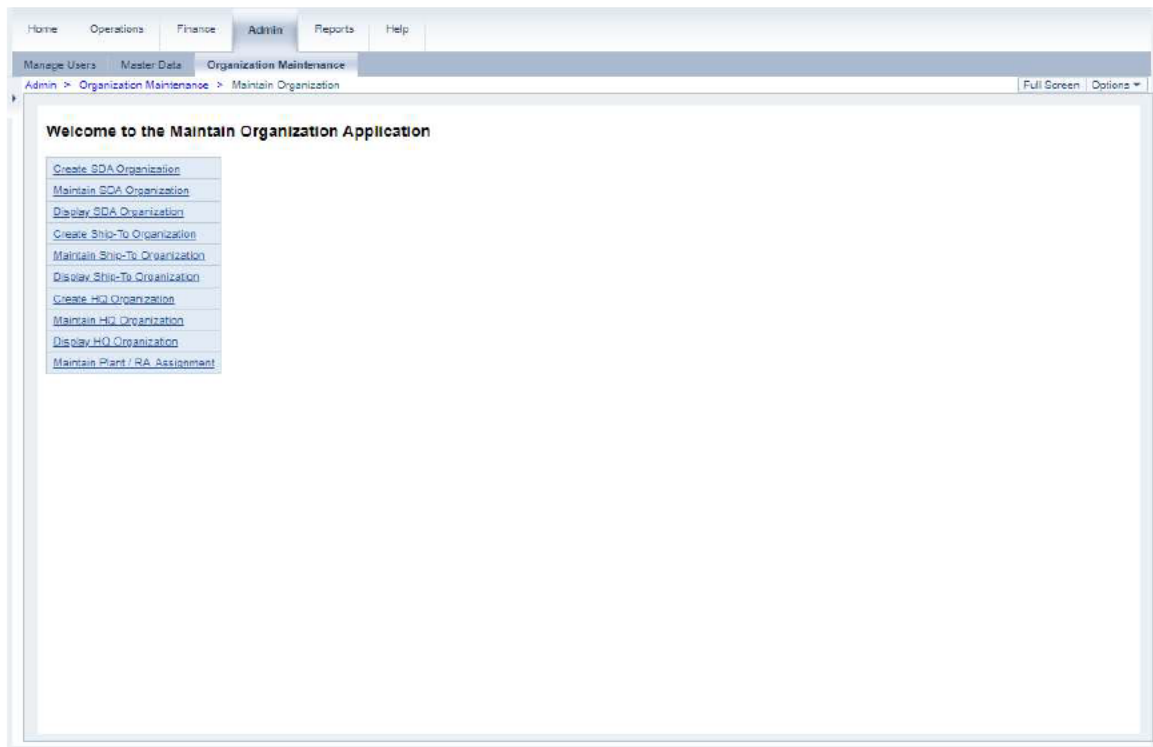
2. Click  (the **Hide Navigator** button) to hide the Portal menu. Note this can be done with any transaction in WBSCM.

Image: Maintain Organization Screen

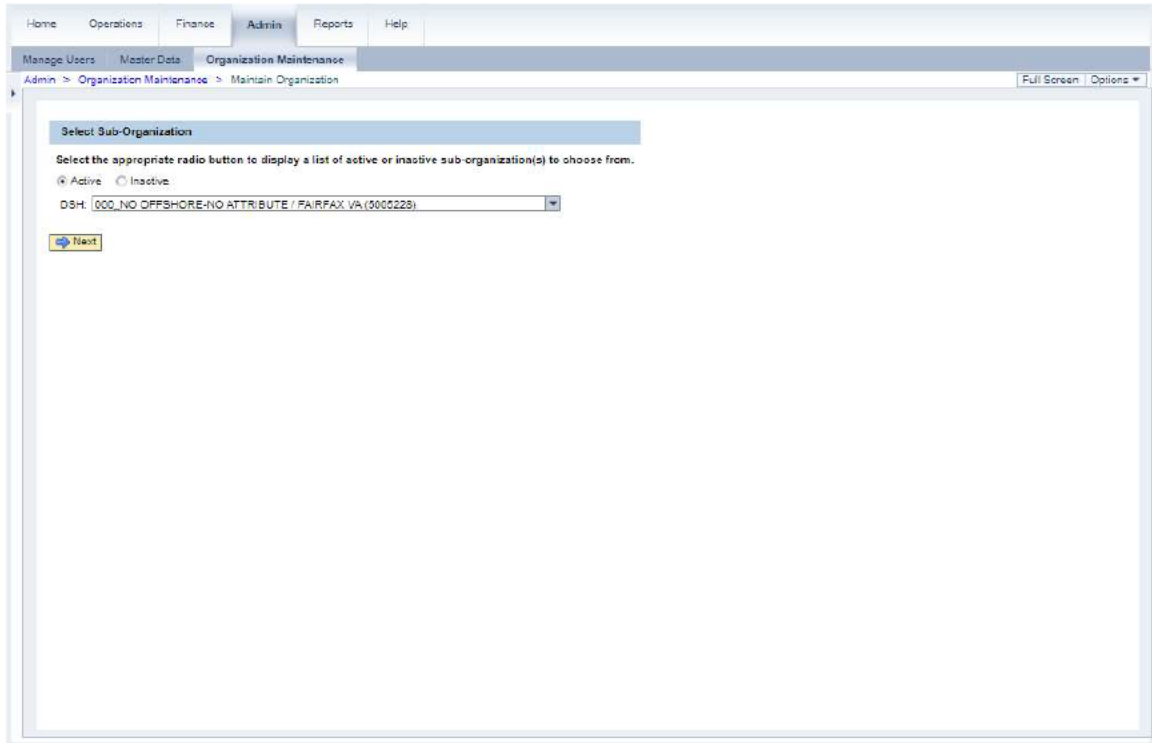



3. Click [Maintain Ship-To Organization](#) (the **Maintain Ship-To Organization** link) to update.



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

Image: Select Sub-Organization Screen



4. Click  (the **DSH** drop-down) to display the DSH list of options.




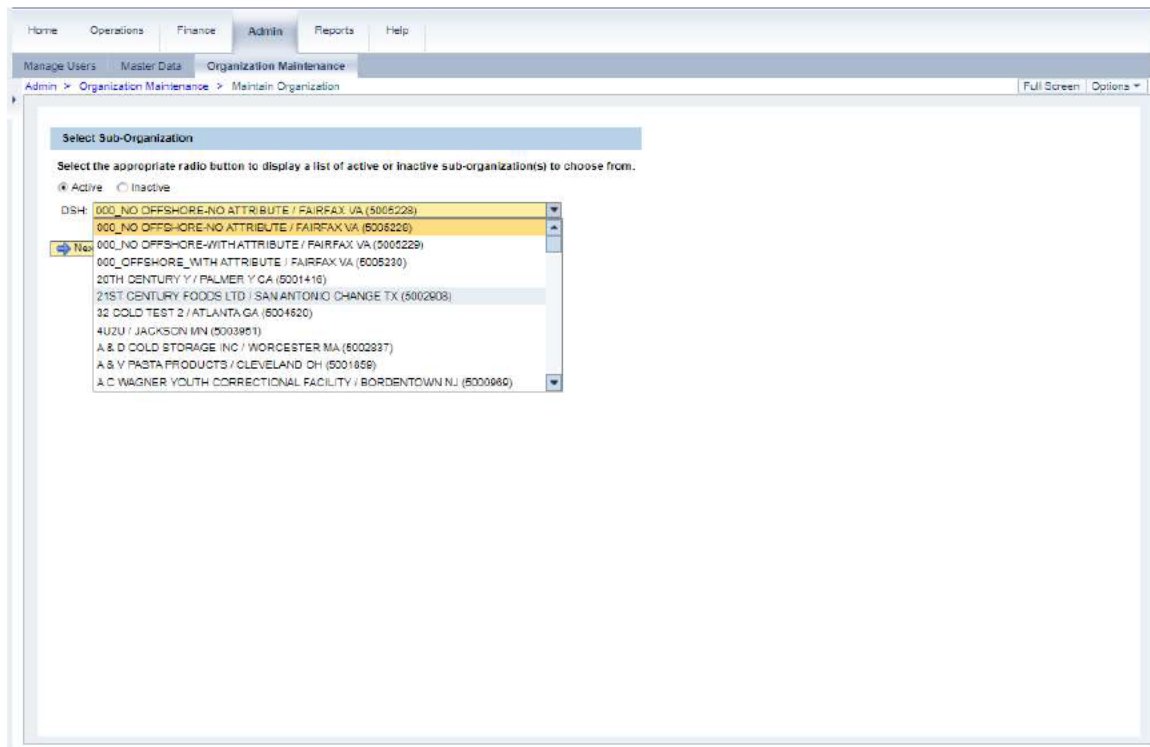
(Note) WBSCM defaults to display active Ship-To Organizations in the drop-down when **Active** (the **Active** radio button) is selected. If the user needs to display inactive Ship-To Organizations, click **Inactive** (the **Inactive** radio button) prior to clicking  (the **DSH** drop-down).

Image: Select Sub-Organization Screen



5. Select the appropriate Ship-To Organization from the list. In this example, **21ST CENTURY FOODS LTD / SAN ANTONIO CHANGE TX (5002908)** (the **21ST CENTURY FOODS LTD / SAN ANTONIO CHANGE TX (5002908)**) is selected.

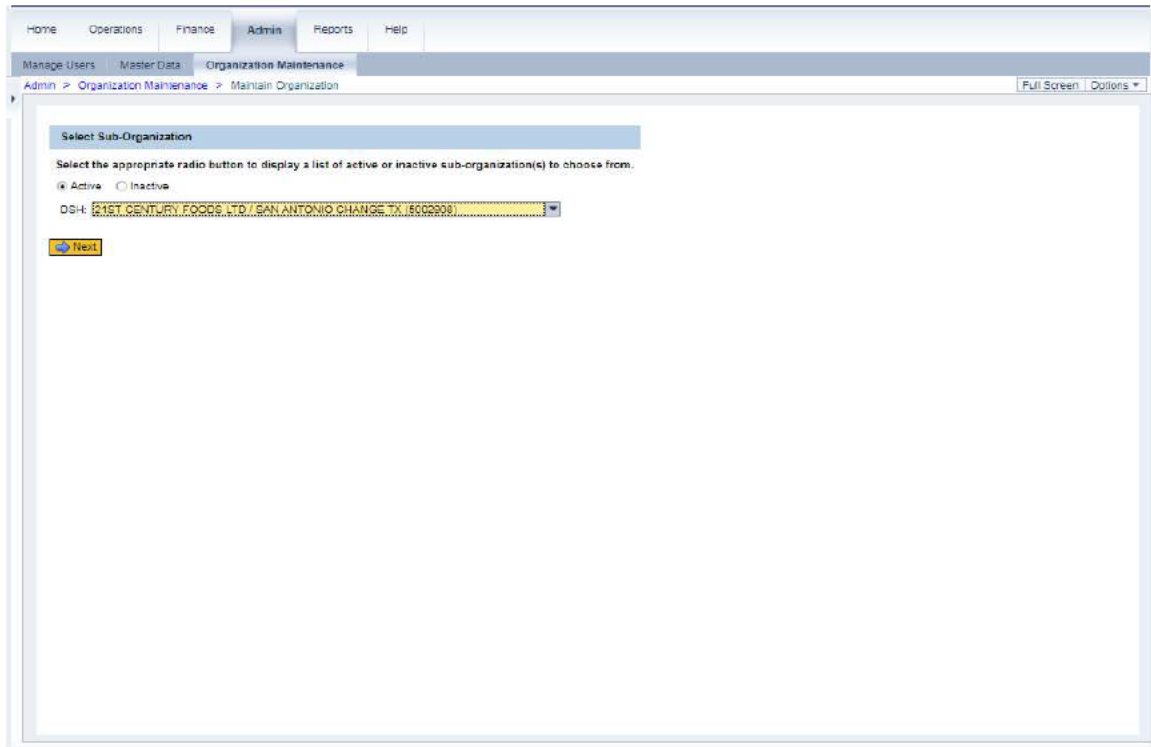



(Note) Only one Ship-To Organization can be modified at a time.



(Note) The available DSHs 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 Ship-To Organizations that start with that letter.

Image: Select Sub-Organization Screen

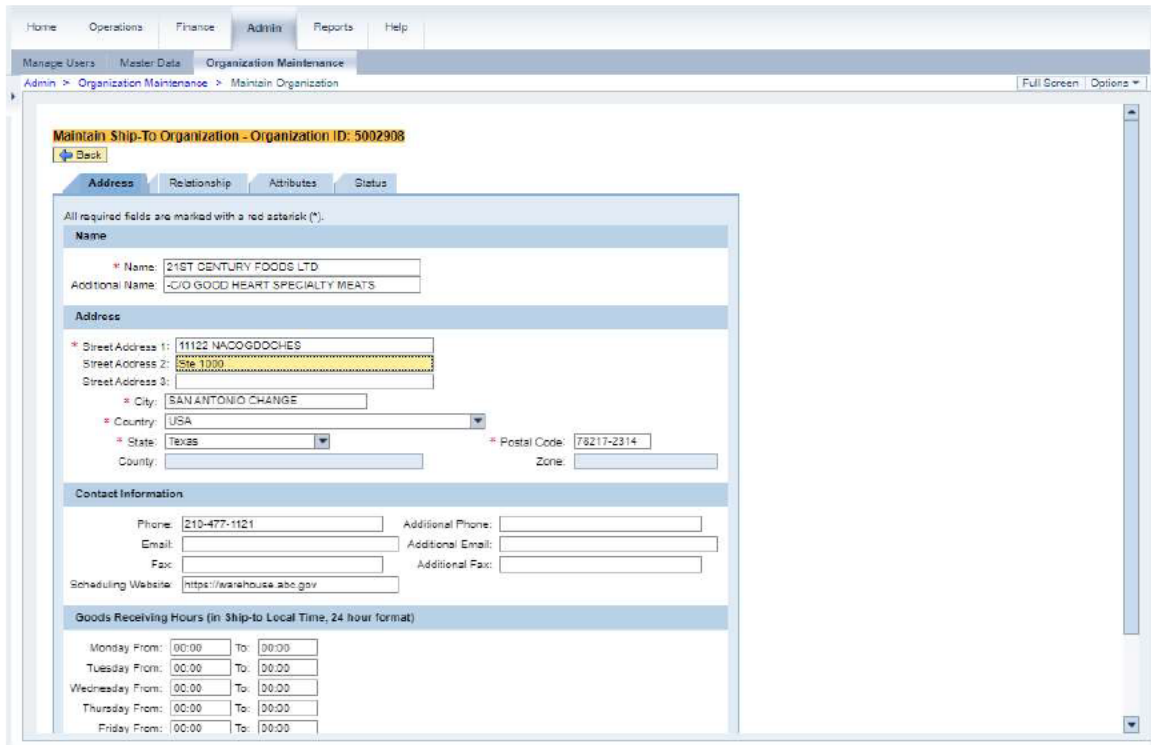


6. Click  (the **Next** button) to open the record for the selected Ship-To Organization.

7. Perform one of the following:

If	Then
The user needs to update an existing Ship-To Organization	Go to step 8
The user needs to activate/deactivate an existing Ship-To Organization	Go to step 14
The user needs to submit the changes	Go the step 16

Image: Maintain Ship-To Organization (Address) Screen



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

Field	R/O/C	Description
Name	R	Person's or company's name. Example: 21ST CENTURY FOODS LTD
Additional Name	O	Text to identify additional name. Example: -C/O GOOD HEART SPECIALTY MEATS
Street Address	R	A free text field in which to enter the street address of the user or organization. Example: 11122 NACOGDOCHES
Street Address 2	O	 Example: Ste 1000



Work Instruction
Modify Domestic Ship-to Organization





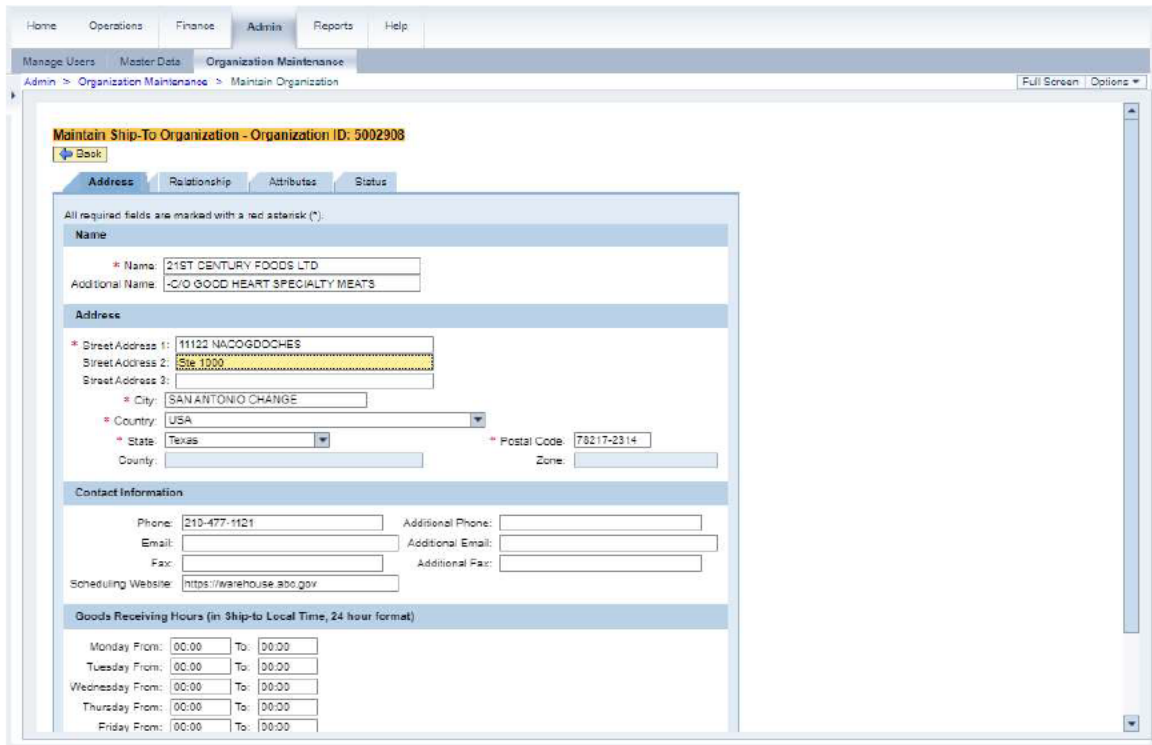
Field	R/O/C	Description
Street Address 3	O	
City	R	City where the user or company is located. Example: SAN ANTONIO
Country	R	Country code that represents country name. Example: USA  (Note) Click  (the Country drop-down) to display a list of countries.
State	R	The abbreviation or name of United States territory, district or state. Example: Texas  (Note) Click  (the State drop-down) to display a list of states and territories.
Postal Code	R	A zip code. Example: 78217-2314
Phone	O	Example: 210-477-1121

Image: Maintain Ship-To Organization (Address) Screen



The screenshot displays the 'Maintain Ship-To Organization' interface for Organization ID 5002908. The 'Address' tab is selected, showing the following details:

- Name:** 21ST CENTURY FOODS LTD (with asterisk indicating required). Additional Name: C/O GOOD HEART SPECIALTY MEATS.
- Address:** Street Address 1: 11122 NACOGDOCHES (with asterisk). Street Address 2: Ste 1000. Street Address 3: (empty). City: SAN ANTONIO CHANGE. Country: USA. State: Texas. Postal Code: 78217-2314. County and Zone: (empty).
- Contact Information:** Phone: 210-477-1121. Additional Phone: (empty). Email: (empty). Additional Email: (empty). Fax: (empty). Additional Fax: (empty). Scheduling Website: https://warehouse.abc.gov.
- Goods Receiving Hours (in Ship-to Local Time, 24 hour format):** Monday From: 00:00 To: 00:00. Tuesday From: 00:00 To: 00:00. Wednesday From: 00:00 To: 00:00. Thursday From: 00:00 To: 00:00. Friday From: 00:00 To: 00:00.

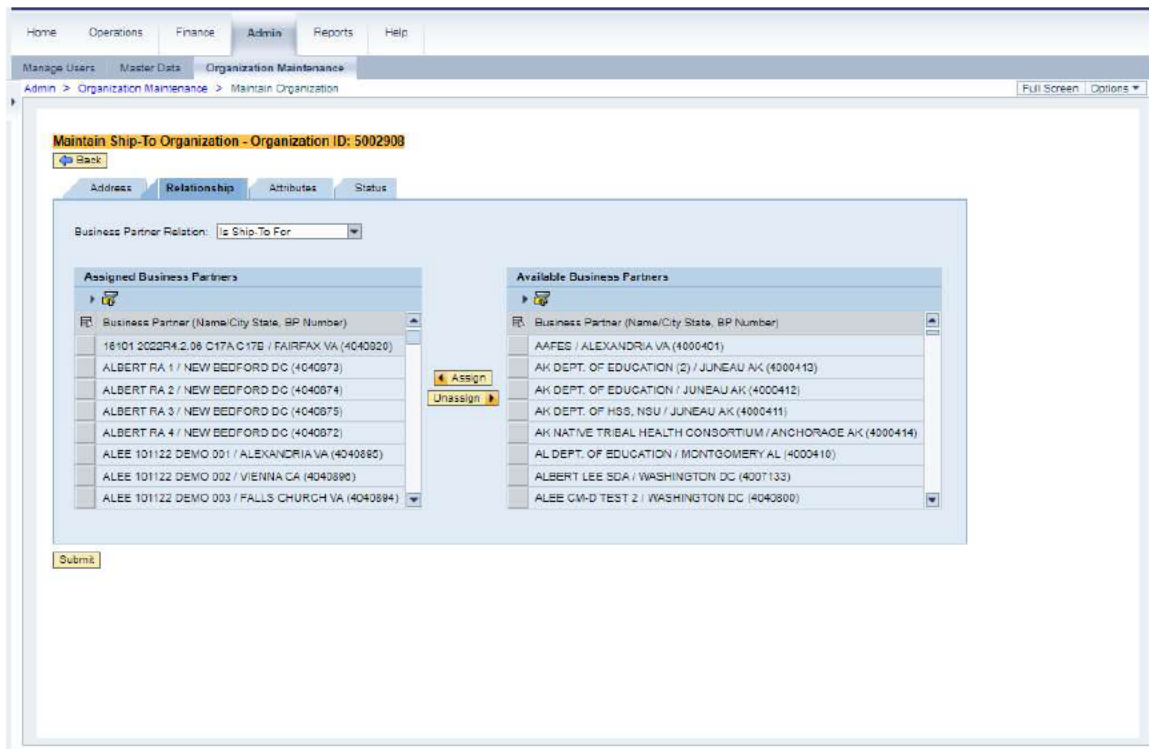
9. Click **Relationship** (the **Relationship** tab) to review and modify a relationship between the Ship-To Organization and the business partners.



(Note) The **Relationship** tab is where the user links the sold-to and ship-to organizations together. Linking them together will aid in the order management process. When an Order Manager creates a sales order for a particular non-profit / sold-to organization, he or she will see any ship-to organizations linked to that non-profit. The Order Manager can easily select a ship-to location from the options instead of re-entering this location every time an order is created.

A ship-to organization may have multiple sold-to organizations linked to it. For example, if the ship-to location is a state warehouse, common storage location, or processing center, it may do business with multiple sold-to parties.

Image: Maintain Ship-To Organization (Relationship) Screen



10. Select the appropriate business partner from the *Assigned Business Partner* section. In this example, **16101 2022R4.2.06 C17A C17B / FAIRFAX VA (4040820)** is selected.



(Note) If necessary, select organizations from the *Available Business Partners* section and click the **Assign** button to create the linkage between the sold-to party that is selected and the ship-to party that is created or modified.



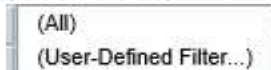
(Note) The business partners are listed in alphabetical order. Use the vertical scrollbar to find the appropriate business partners.

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.
- If the business partners are listed in non-consecutive rows, hold down the **Ctrl** key while clicking each selection button.

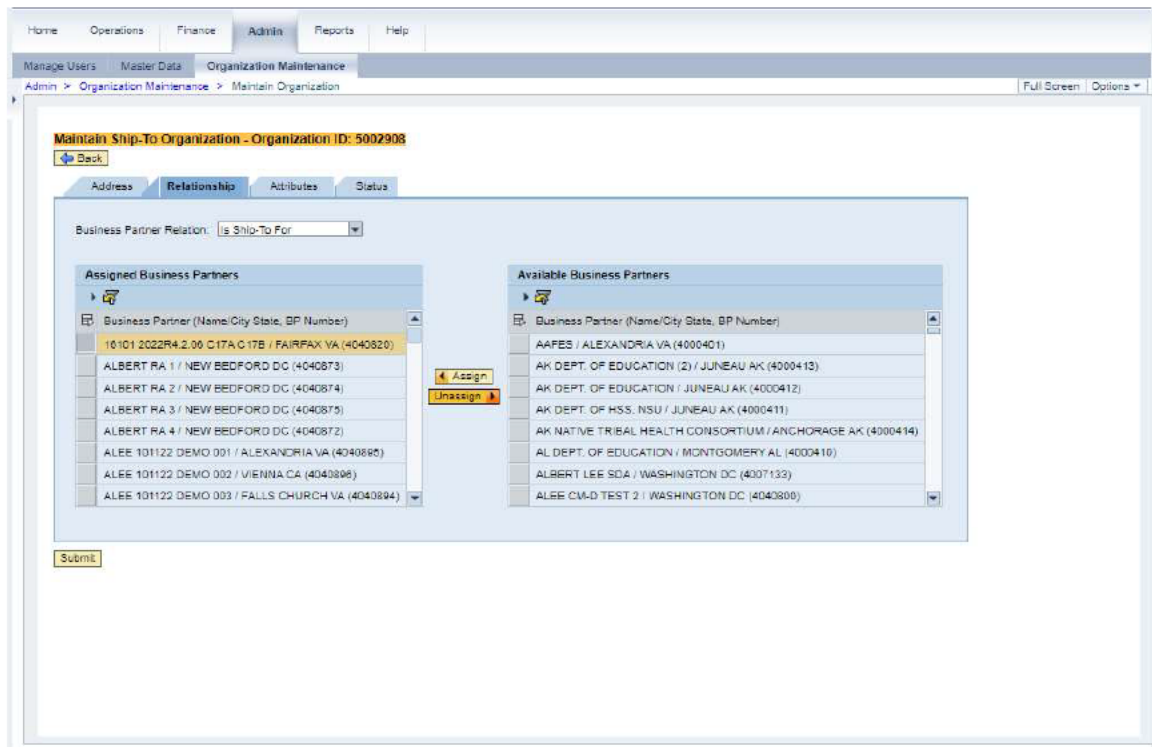


(Note) To filter the list of Business Partners, click on the column **Business Partner**



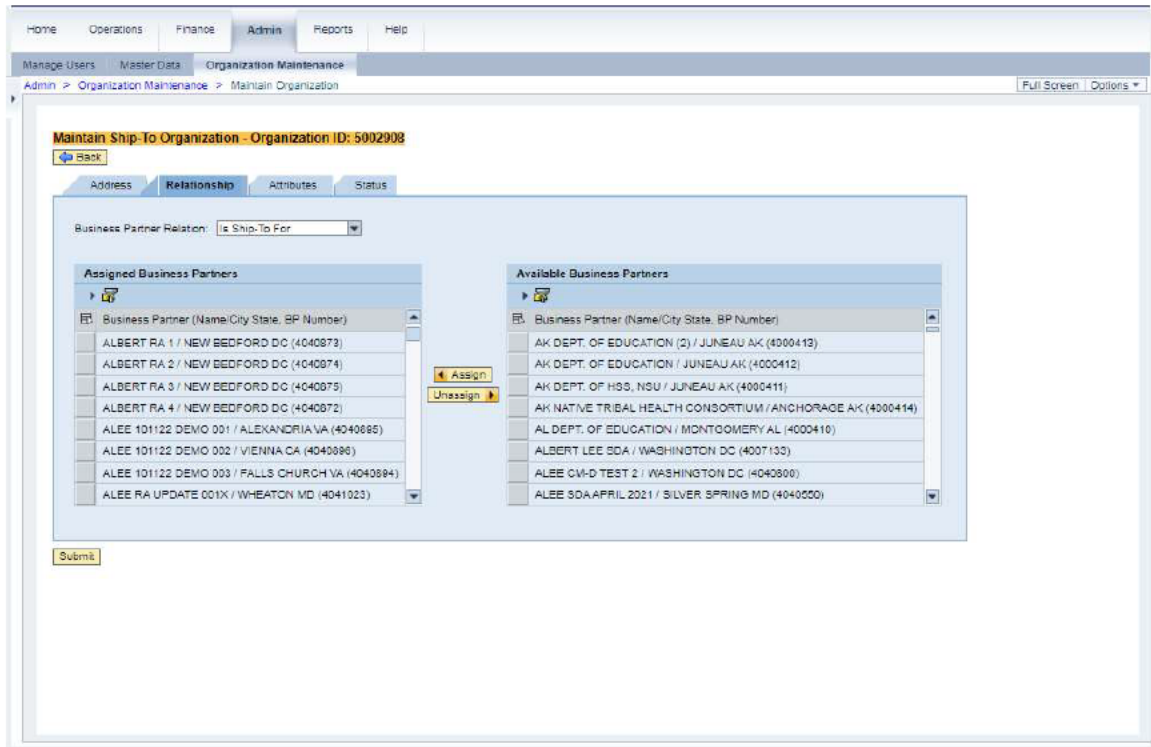
(Name/City/State, BP Number) field. Select **(User-Defined Filter...)** (the **User-Defined Filter...** option) and enter required criteria. Use "*" (the **Asterisk** symbol) at the beginning and at the end of a search term (e.g. "Craven" or "5001716") to search for a business partner that contains the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

Image: Maintain Ship-To Organization (Relationship) Screen



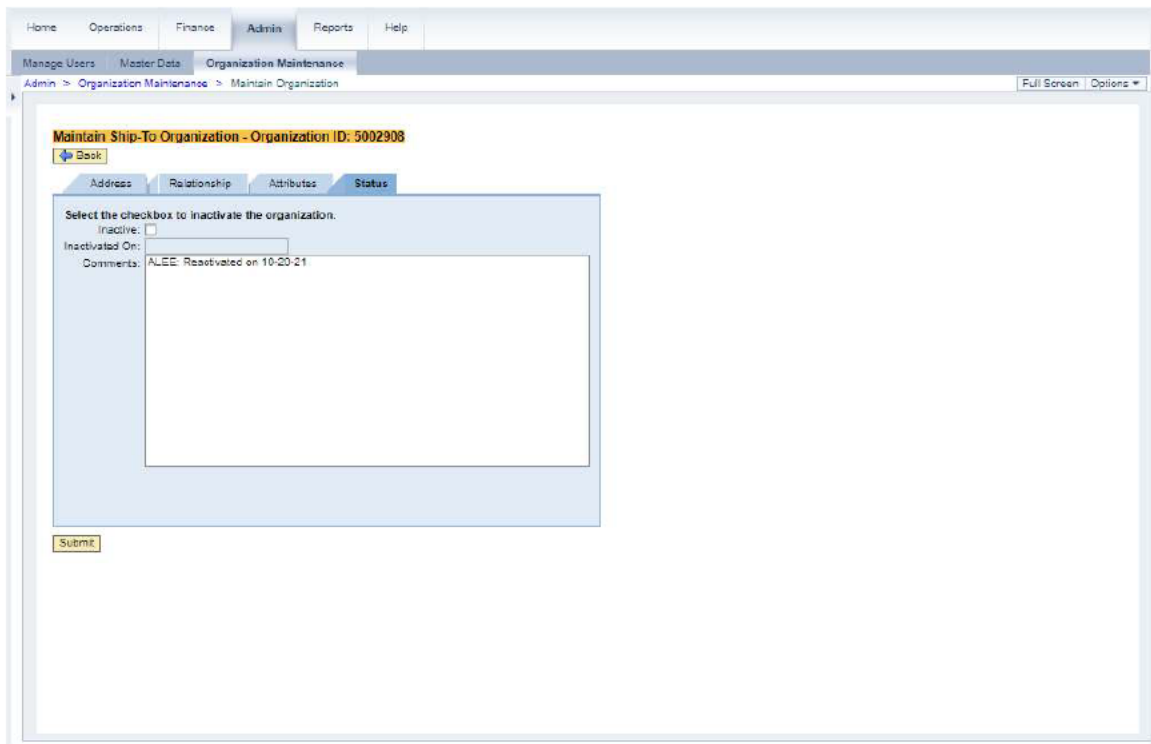
11. Click **Unassign** (the **Unassign** button) to remove a relationship between the Ship-To Organization and the selected business partner.
12. Return to Step 7 .

Image: Maintain Ship-To Organization (Relationship) Screen



- If necessary, click **Status** (the **Status** tab) to activate or inactivate a Ship-To Organization.

Image: Maintain Ship-To Organization (Status) Screen



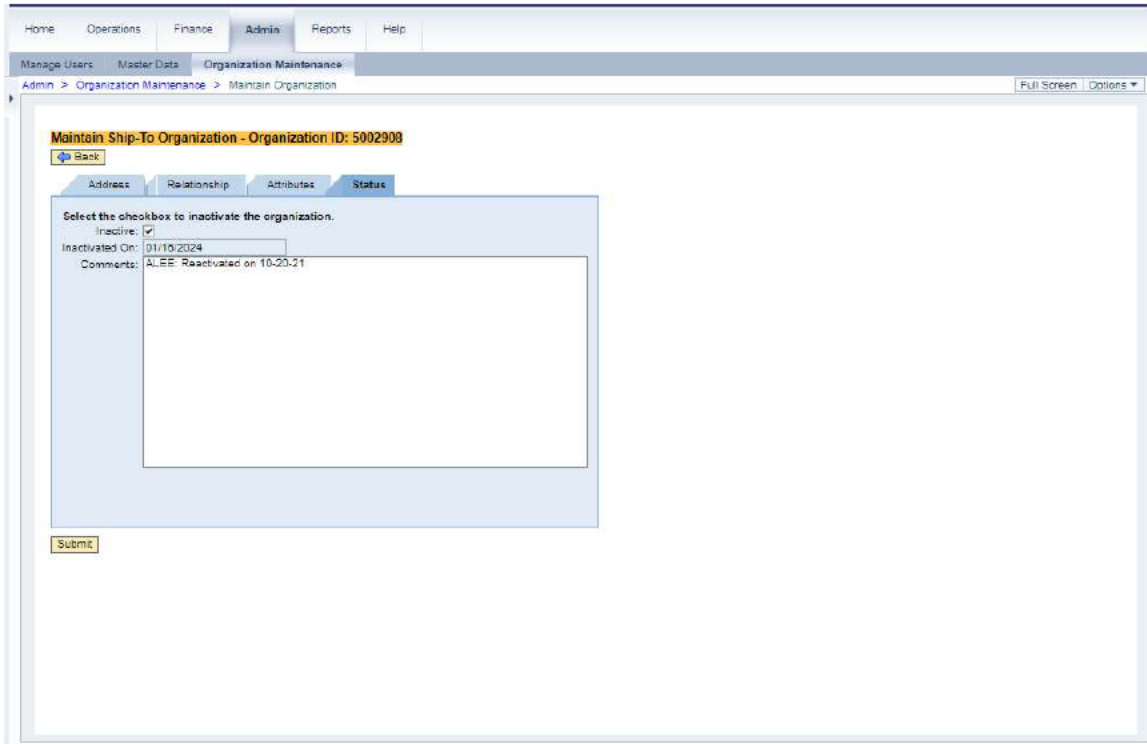
14. If necessary, click (the **Inactive** checkbox) to select to inactivate the existing Ship-To Organization.



(Note) If (the **Inactive** checkbox) is selected, deselecting it will make the Ship-To Organization active. The date from the **Inactivated On** field will be cleared automatically, as the organization is not inactive anymore.

15. Return to Step 7.

Image: Maintain Ship-To Organization (Status) Screen

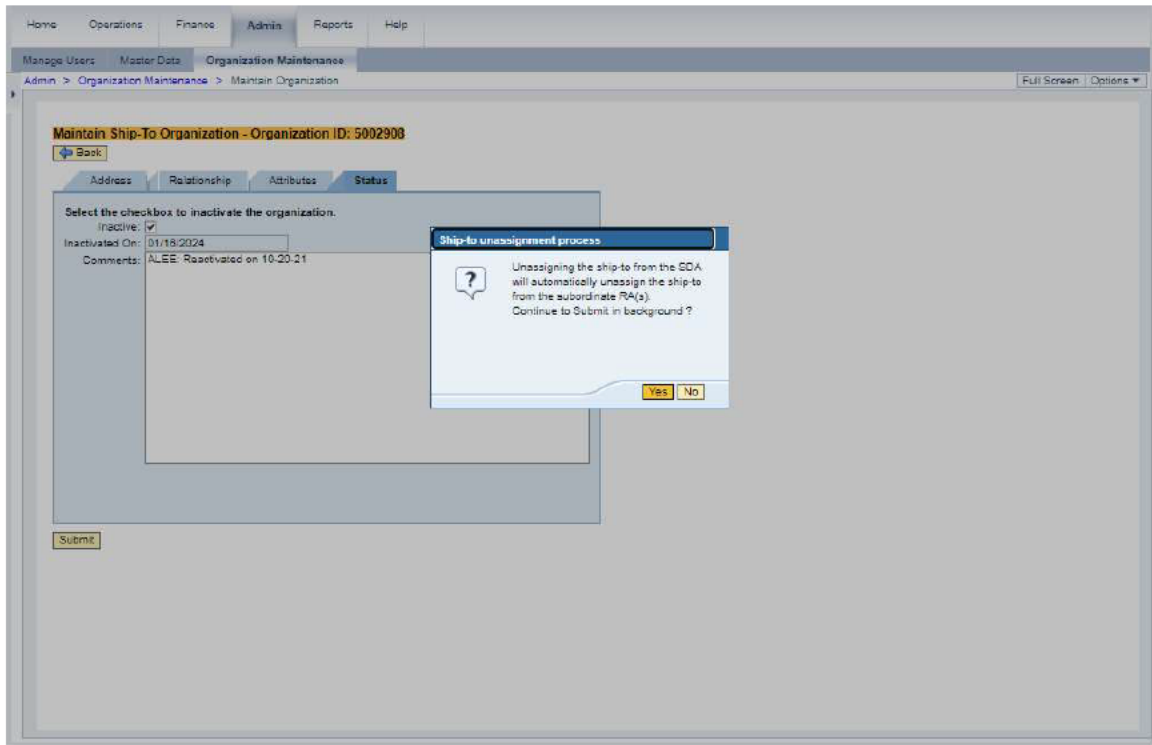


16. Click (the **Submit** button) to save the modifications.



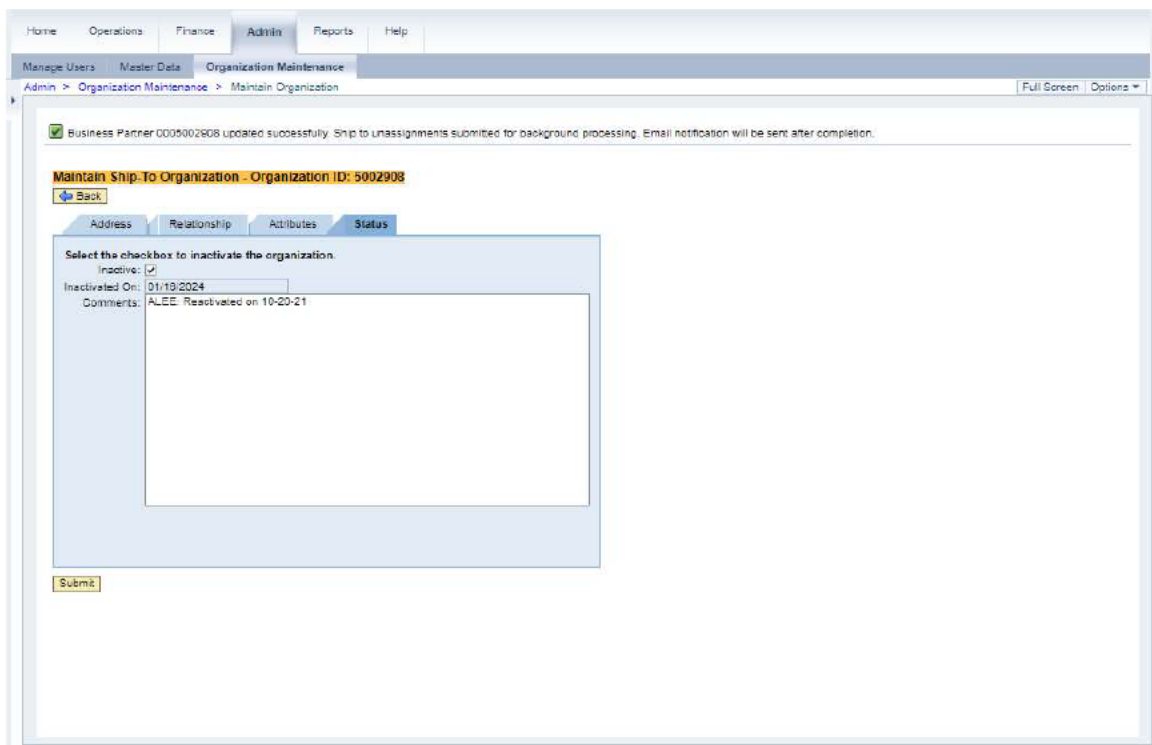
(Note) Prior to submitting the Domestic Ship-to Organization, the user may toggle between the *Address*, *Relationship*, and *Status* tabs without losing unsaved changes.

Image: Ship-to unassigned process Pop-Up Screen



17. Click **Yes** (the Yes button) to confirm the message.

Image: Maintain Ship-To Organization (Status) Screen





18. The transaction is complete.



Work Instruction
Modify Domestic Ship-to Organization

RESULT

An existing Domestic Ship-To Organization has been reviewed and updated as applicable, including:

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