



PROCESS OVERVIEW

Purpose

The NW Org Admin has the ability to see their warehouses' inventory as it is documented in WBSCM. This includes inventory that was increased due to a receipt or increment, decreased due to a decrement, scrap, or Post Goods Issue (PGI), and inventory that has been blocked or transferred. Administering the National Warehouse to WBSCM Inventory Interface is a transaction that allows you to view inventory discrepancies and upload the appropriate inventory document to account for any discrepancies or inaccuracies between the inventory documented in WBSCM and the inventory physically on the shelves of your warehouse.

Process Trigger

Perform this transaction to show inventory since the last Post Goods Issue (or BOL upload) and last time since NW receipted.

Prerequisites

- Inventory file to be uploaded must exist in the correct XML format.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab → **Warehouse Management** tab → **File Uploads/Downloads** folder → **Upload National Warehouse Inventory** link → **Upload National Warehouse Inventory** link to go to the *Upload National Warehouse Inventory* 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.

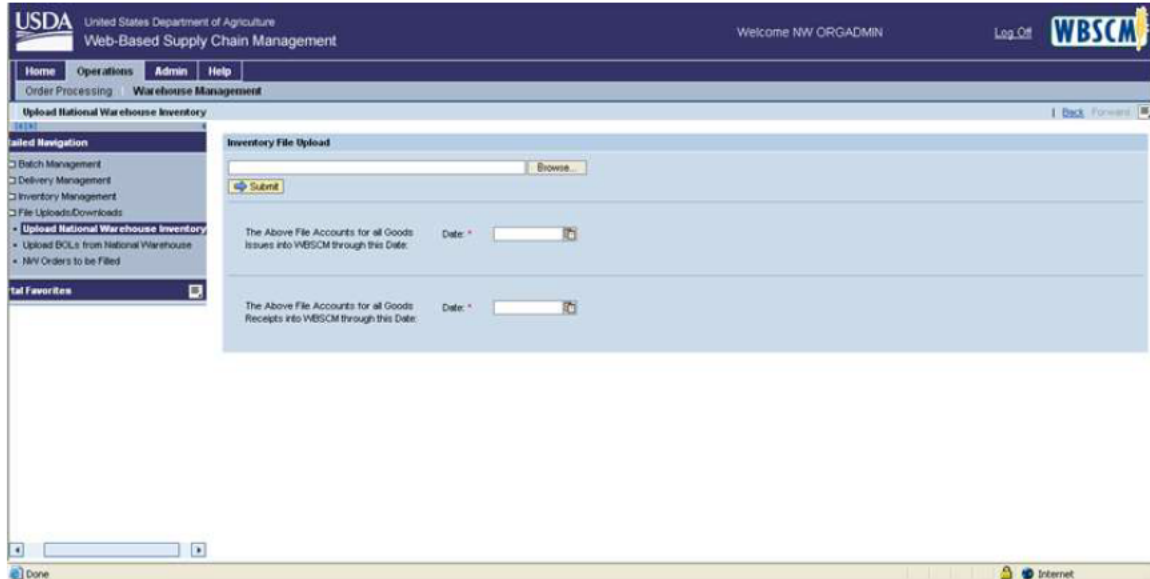
Reminders

- 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 → **Warehouse Management** tab → **File Uploads/Downloads** folder → **Upload National Warehouse Inventory** link → **Upload National Warehouse Inventory**

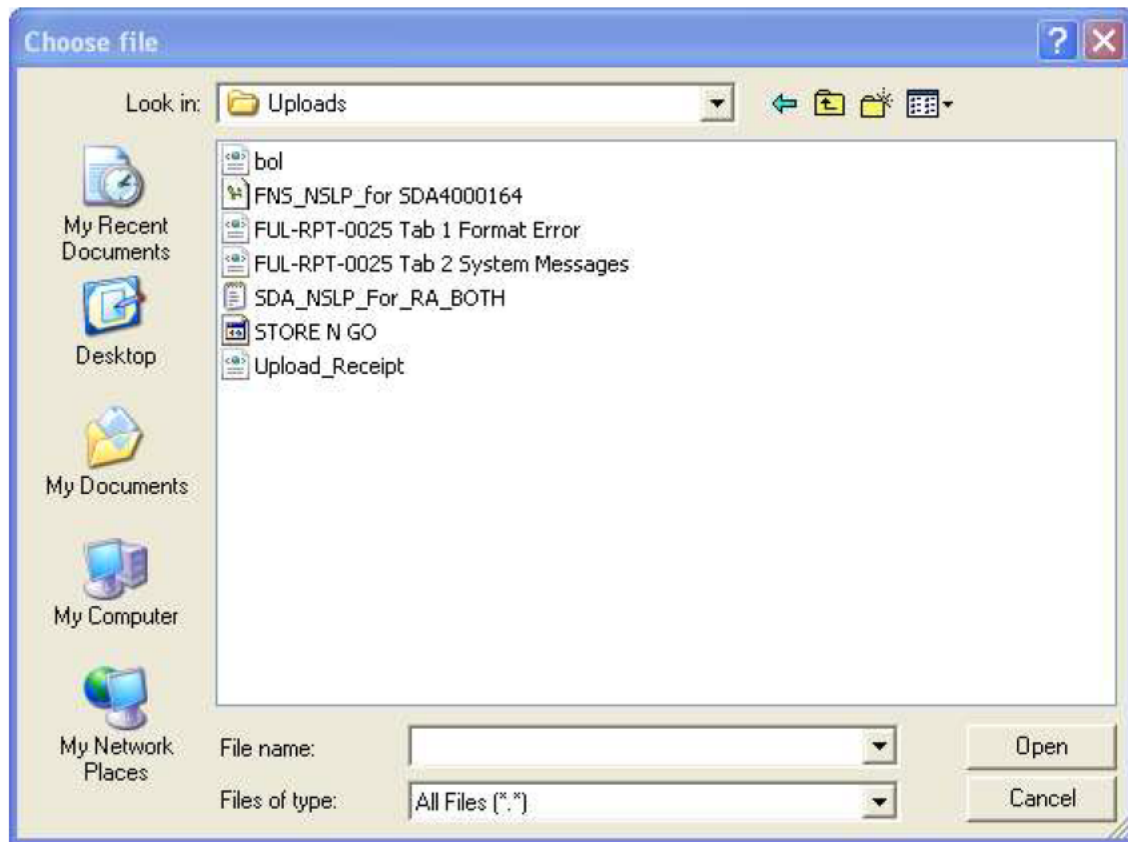
Upload National Warehouse Inventory Screen



The screenshot shows the 'Upload National Warehouse Inventory' screen within the WBSCM portal. The page header includes the USDA logo, 'United States Department of Agriculture', 'Web-Based Supply Chain Management', and a user greeting 'Welcome NW ORGADMIN'. The navigation menu shows 'Operations' selected, with 'Warehouse Management' as the current page. The main content area is titled 'Inventory File Upload' and features a 'Browse...' button for file selection and a 'Submit' button. Below the file upload section, there are two identical text prompts: 'The Above File Accounts for all Goods Issues into WBSCM through this Date:' followed by a date selection field. The left sidebar contains a 'Selected Navigation' menu with 'Upload National Warehouse Inventory' highlighted. The bottom of the screen shows a Windows taskbar with the 'Done' button and an 'Internet' icon.

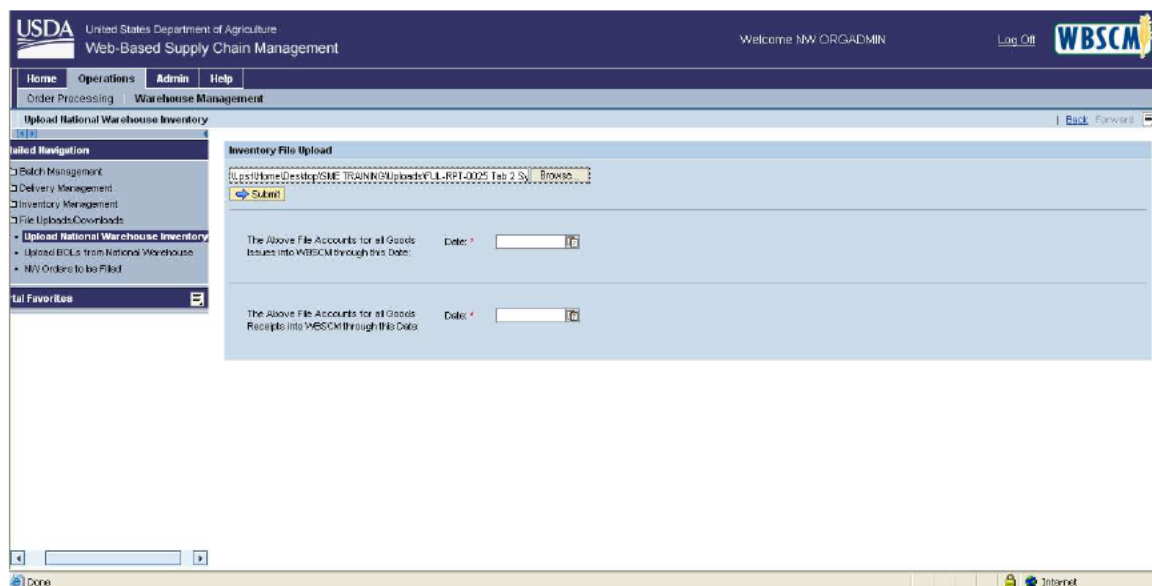
2. Click  (the **Browse** button).

Choose file Pop-up



3. Navigate to the folder on your hard drive to find the XML file. Double-click the file. In this case, we double-clicked **FUL-RPT-0025 Tab 2 System Messages** (the **FUL-RPT-0025 Tab 2 System Messages** file) to upload this XML file.

Upload National Warehouse Inventory Screen





Work Instruction Reconcile NW to WBSCM Inventory Interface

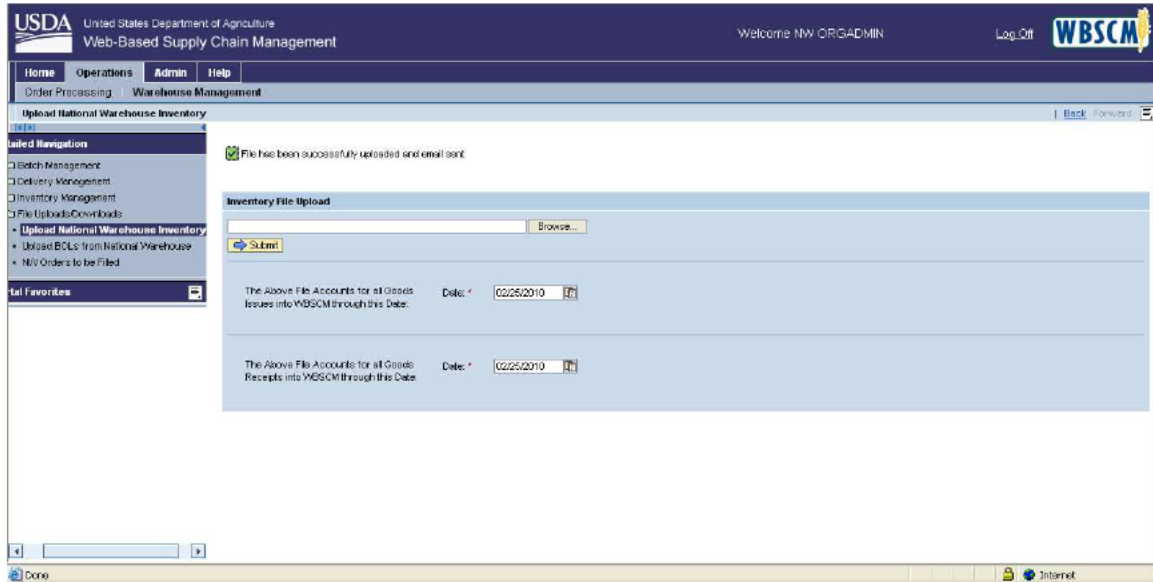
4. As required, complete/review the following fields:

Field	R/O/C	Description
Date: *	R	The file you uploaded that should account for all goods issues/receipts done in WBSCM through this particular date. Example: 02/25/2010
Date: *	R	The file you uploaded that should account for all goods issues/receipts done in WBSCM through this particular date. Example: 02/25/2010

Upload National Warehouse Inventory Screen

5. Click  (the **Submit** button) to submit your entries.

Upload National Warehouse Inventory Screen



- View the confirmation message.



(Note) A confirmation message displays, indicating that the file has been successfully uploaded and an email was sent. Have the relevant users log in to access the Inventory Balance Report. A link in the email will direct them to the below report.

Microsoft Excel - InventoryBalanceRpt_Plant2000-3 Screen

Plant	Program	Product	Product Description	Batch	WBSCM C	Nat Whse	Differenc	Unit	CF	M	System Message
2000	1000	100160	PORK, CKD BREADED		0	4071250	-4071250	LB			Missing Batch Number
2000	1000	100004	CHEESE CH TEST		296580	0	296580	LB			Program/Product/Batch Number combo not in NW
2000	1000	100305	PEARS BO	435843	252000	0	252000	LB			Program/Product/Batch Number combo not in NW
2000	1000	100491	PASTA, SP CONV_MF		240000	0	240000	LB			Program/Product/Batch Number combo not in NW
2000	1000	100686		1234	0	121905	-121905	BAG			Product Code not found in WBSCM
2000	1000	100686		NOTNWB	0	121905	-121905	LB			Product Code not found in WBSCM
2000	1000	100336	BEANS GR	435838	121800	0	121800	LB			Program/Product/Batch Number combo not in NW
2000	2000	100376	POTATOES	379860	95000	0	95000	LB			Program/Product/Batch Number combo not in NW
2000	2000	100225	MIXED FRI	378180	83475	0	83475	LB			Program/Product/Batch Number combo not in NW
2000	1000	100283	PINEAPPLE	379720	67860	0	67860	LB			Program/Product/Batch Number combo not in NW
2000	1000	100138	BEEF CAN	377620	64440	0	64440	LB			Program/Product/Batch Number combo not in NW
2000	1000	100277	APPLE JUH	379580	63750	0	63750	LB			Program/Product/Batch Number combo not in NW
2000	2000	100277	APPLE JUH	379440	63750	0	63750	LB			Program/Product/Batch Number combo not in NW
2000	2000	100103	CHICKEN C	377060	57800	0	57800	LB			Program/Product/Batch Number combo not in NW
2000	1000	100103	CHICKEN C	376920	57120	0	57120	LB			Program/Product/Batch Number combo not in NW
2000	1000	100239	PEARS HA	378880	51350	0	51350	LB			Program/Product/Batch Number combo not in NW
2000	2000	100239	PEARS HA	378740	51350	0	51350	LB			Program/Product/Batch Number combo not in NW
2000	1000	100229	APRICOTS	378600	48600	0	48600	LB			Program/Product/Batch Number combo not in NW
2000	1000	100227	CRANBERR	378320	48000	0	48000	LB			Program/Product/Batch Number combo not in NW
2000	2000	100224	MIXED FRI	378040	45000	0	45000	LB			Program/Product/Batch Number combo not in NW
2000	2000	100260	BLACKBER	379160	45000	0	45000	LB			Program/Product/Batch Number combo not in NW
2000	1000	100224	MIXED FRI	377900	44504.99	0	44504.99	LB			Program/Product/Batch Number combo not in NW
2000	1000	100148	ONION HA	426260	40347	0	40347	LB			Program/Product/Batch Number combo not in NW

- You have completed this transaction.



Work Instruction
Reconcile NW to WBSCM Inventory Interface

RESULT

The transaction has been successfully completed.



PROCESS OVERVIEW

Purpose

Use this procedure to allow State Distribution Agencies (SDAs) and Indian Tribal Organizations (ITOs) to redistribute order quantities to Recipient Agencies (RAs). SDAs and ITOs can redistribute requisitions, sales orders, and re-donated orders. SDAs can also cancel previously created redistributions.

Process Trigger

Perform this procedure when the SDA/ITO needs to redistribute order quantities from one Sold-To Party to another.

Prerequisites

- Order must exist in WBSCM
- Sold-To Parties are known and exist in WBSCM

Portal Path

Follow the Portal path below to complete this transaction:

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

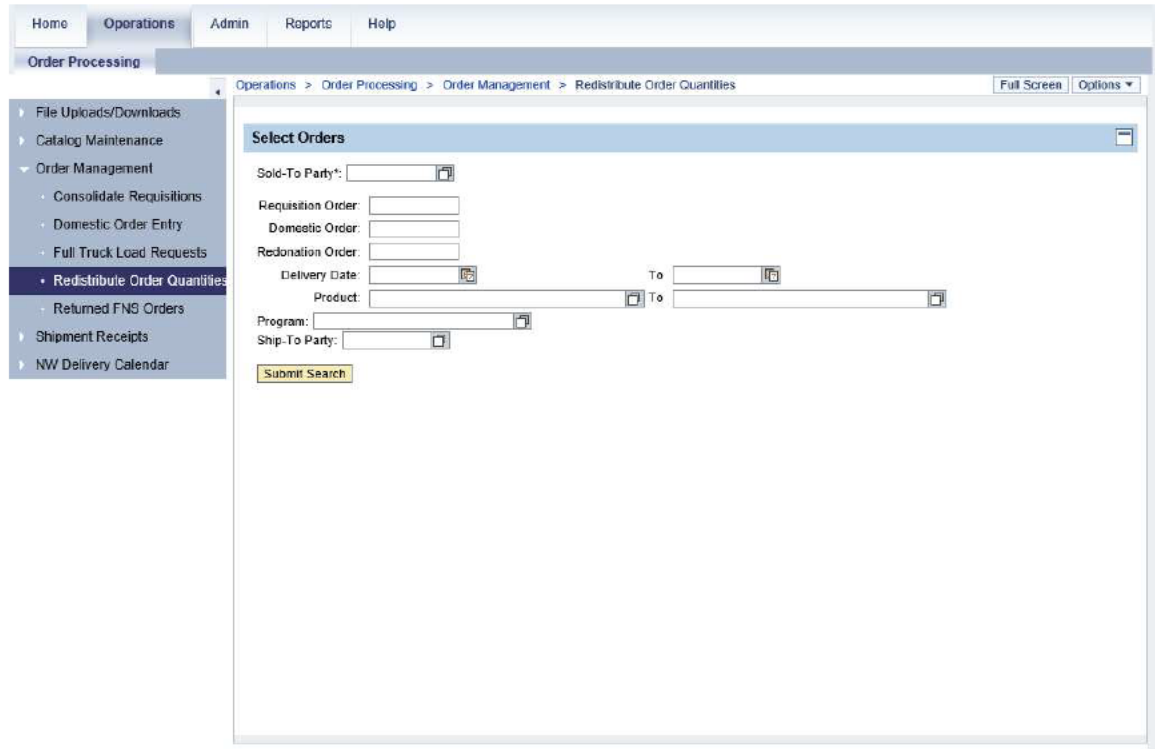
Tips and Tricks


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

PROCEDURE

1. Start the transaction using the Portal path: **Operations** tab → **Order Processing** tab → **Order Management** folder → **Redistribute Order Quantities** screen.

Redistribute Order Quantities Screen





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

Select Orders



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

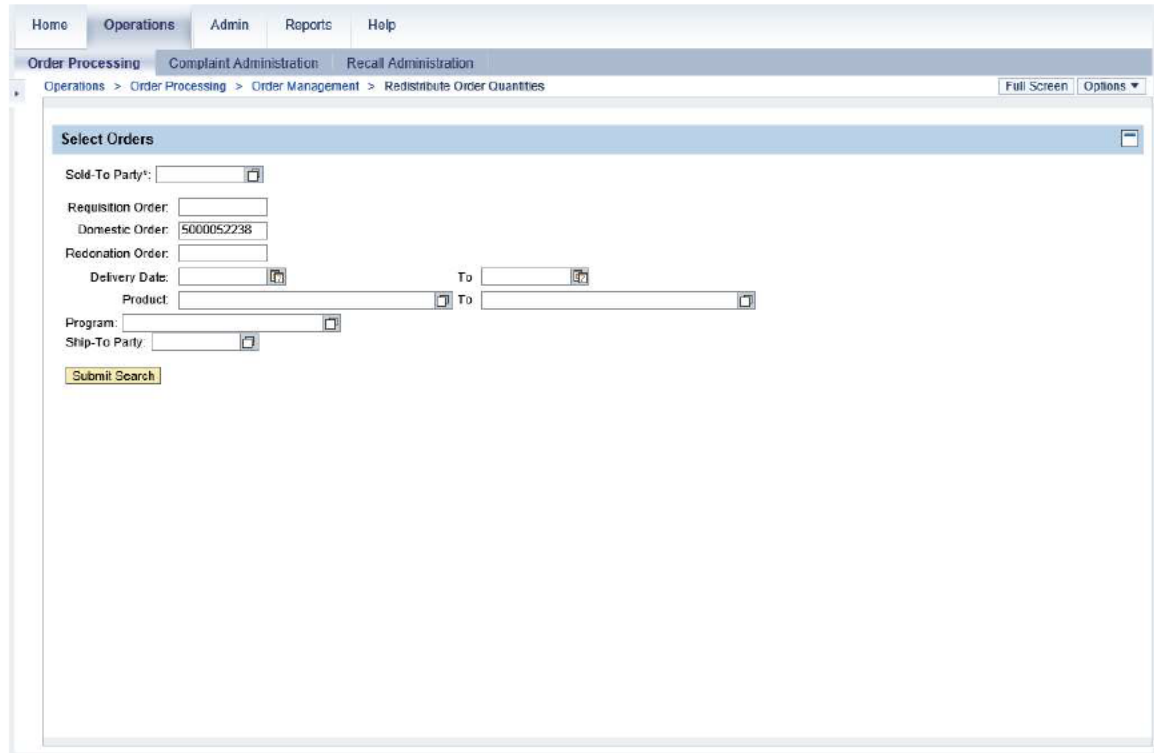
Field	R/O/C	Description
Sold-To Party*:	O	A unique identifying number associated with a particular customer in WBSCM. If the sold-to party number is unknown, use the search functionality to search for it.
Requisition Order:	O	Unique identifying number associated with a requisition order in WBSCM.
Domestic Order:	O	Unique identifying number associated with a sales order in WBSCM. Example: 5000033828
Redonation Order:	O	Unique identifying number associated with a redonation order in WBSCM.
Delivery Date:	O	The date when the commodity or commodities are either requested to be delivered to the customer or were delivered to the customer.  (Note) In this example, the requested date is the date the customer requests delivery. 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC
Product:	O	Food commodity being ordered.
Program:	O	Acronym to identify a USDA food distribution program.  (Note) Some examples of programs are NSLP, TEFAP, SFSP, CACFP, NSIP. 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC

Field	R/O/C	Description
Ship-To Party:	O	Unique identifying number associated with a person or company that receives the goods.



(Note) In this example, the *Domestic Order*: number is used as the search criteria.


Redistribute Order Quantities Screen



- Click **Submit Search** (the **Submit Search** button) to locate orders based on the search criteria. In this example, a redonation order is located by searching for the domestic order number.



(Note) The following error message displays if both the domestic order number and redonation order number are used in the search:

 Please enter either Domestic Order or Redonation Order, not both

Redistribute Order Quantities Screen

5. Perform one of the following:

If	Then
A requisition has not been created	Click Create Req (the Create Req link).
A requisition already exists and the user needs to redistribute order quantities	Go to Step 6.
A requisition already exists and the user needs to cancel the redistribution order	Go to Step 12.



(Note) Only Redonated Orders or Sales Orders that do not have requisitions require this action. In most cases, the requisition has already been created and the Requisition Number displays in the same line as the Redonation Order field.



(Note) There are four options to sort the Sales / Redistribution Order results. Sort options retain the relationship between the ZREQ (requisition) document and any ZRE (redistribution) documents associated with the requisition.

- Sorted by ZREQ # - ZREQ Item # (Default view)
- Sorted by ZREQ Order Qty
- Sorted by ZREQ Open Qty
- Sorted by ZREQ Sold to (BP#)



Work Instruction Redistribute Order Quantities

Redistribute Order Quantities Screen

Home Operations Admin Reports Help

Order Processing Complaint Administration Recall Administration

Operations > Order Processing > Order Management > Redistribute Order Quantities Full Screen Options

View: Re-Distribute Orders

Sales/ Redon. Order	Item	Requisition #	Redist. Doc #	Doc. type	Item	Material	Material Description	Order Qty	UoM	Redist. Qty	Open Qty	Sold To	So
5000052238	100	1000040141		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	116.000	CS	14.000	104.000	8011127	UP
			1900001471	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	4.000	CS	0.000	0.000	8011037	Co
			1900001460	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	8.000	CS	0.000	0.000	8011036	RA
			1900001447	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	2.000	CS	0.000	0.000	8011036	RA
5000052238	200	1000040142		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	184.000	CS	0.000	184.000	8011128	UP
5000052238	100	1000040143		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	72.000	CS	0.000	72.000	8011129	UP
5000052238	200	1000040144		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	131.000	CS	10.000	121.000	8011130	UP
			1900001477	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	6.000	CS	0.000	0.000	8011037	Co
			1900001473	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	2.000	CS	0.000	0.000	8011033	RA
			1900001437	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	2.000	CS	0.000	0.000	8011134	UP

Sort options

Sorted by ZREQ # - ZREQ Item # (Default view)

Sorted by ZREQ Order Qty

Sorted by ZREQ Open Qty



Sorted by ZREQ Sold to (BP#)

[Back to Search](#) [Refresh the Screen](#) [Cancel Redist.](#)

- Click the requisition number in the **Requisition #** column to select the line item for redistribution. In this example, [1000040141](#) (the **1000040141** requisition number link) is used to begin redistribution.

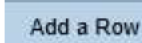

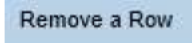

Redistribute Order Quantities Screen

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

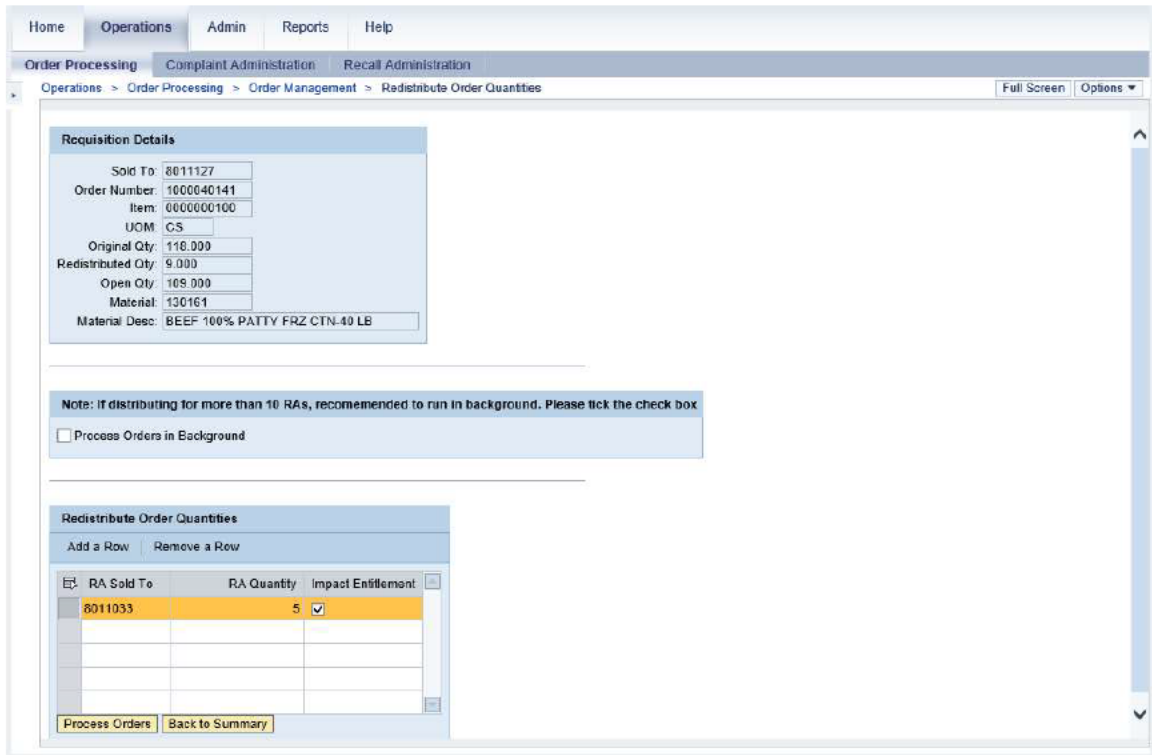
Field	R/O/C	Description
RA Sold To	R	This is the Recipient Agency (RA) sold-to party number. The order quantities will be redistributed to this RA. Example: 8011033  (Note) Use the search functionality to view the RA sold-to number.
RA Quantity	R	Recipient Agency (RA) Quantity indicates the quantity of orders being redistributed. Example: 5  (Note) In this example, 5 cases will be redistributed from SDA 8011127 to RA 8011033. Users will receive an error if attempting to redistribute order quantities in excess of the open quantity on the requisition.

8. Perform any of the following:

If	Then
The redistribution impacts the entitlements of both business partners	Select <input type="checkbox"/> (the Impact Entitlement check box).

If	Then										
<p>The order quantities need to be distributed to more than one RA</p>	<ol style="list-style-type: none"> 1. Click  (the Add a Row button). 2. Complete the RA Sold-to field with the RA Sold-to number. 3. Complete the RA Quantity field with the redistribution quantity. 4. Select <input type="checkbox"/> (the Impact Entitlement check box) if appropriate. 										
<p>The user needs to remove an RA from the list</p>	<ol style="list-style-type: none"> 1. Click  (the Selection box) for the RA line item to be removed. 2. Click  (the Remove a Row button). 										
<p>There are more than 10 RAs on the list</p>	<p>Select <input type="checkbox"/> (the Process Orders in Background check box).</p> <p> (Note) While the background task is running, the SDA can navigate to another screen or log out of WBSCM. The SDA Order Manager will receive an email notification with a list of the redistribution orders and credits created at completion of the background task as well as any errors generated during the process, if applicable.</p> <p>Approximate processing time for the background job is based on the number of RAs an SDA is redistributing quantities to, as follows:</p> <table border="1"> <thead> <tr> <th># RAs</th> <th>Approximate Processing Time</th> </tr> </thead> <tbody> <tr> <td>10</td> <td>2-3 minutes</td> </tr> <tr> <td>20</td> <td>4-6 minutes</td> </tr> <tr> <td>40</td> <td>8-12 minutes</td> </tr> <tr> <td>80</td> <td>16-24 minutes</td> </tr> </tbody> </table>	# RAs	Approximate Processing Time	10	2-3 minutes	20	4-6 minutes	40	8-12 minutes	80	16-24 minutes
# RAs	Approximate Processing Time										
10	2-3 minutes										
20	4-6 minutes										
40	8-12 minutes										
80	16-24 minutes										

Redistribute Order Quantities Screen



Home Operations Admin Reports Help

Order Processing Complaint Administration Recall Administration

Operations > Order Processing > Order Management > Redistribute Order Quantities Full Screen Options

Requisition Details

Sold To: 8011127
 Order Number: 1000040141
 Item: 0000000100
 UOM: CS
 Original Qty: 118.000
 Redistributed Qty: 9.000
 Open Qty: 109.000
 Material: 130161
 Material Desc: BEEF 100% PATTY FRZ CTN.40 LB

Note: If distributing for more than 10 RAs, recommended to run in background. Please tick the check box

Process Orders in Background

Redistribute Order Quantities

Add a Row Remove a Row

RA Sold To	RA Quantity	Impact Entitlement
8011033	5	<input checked="" type="checkbox"/>

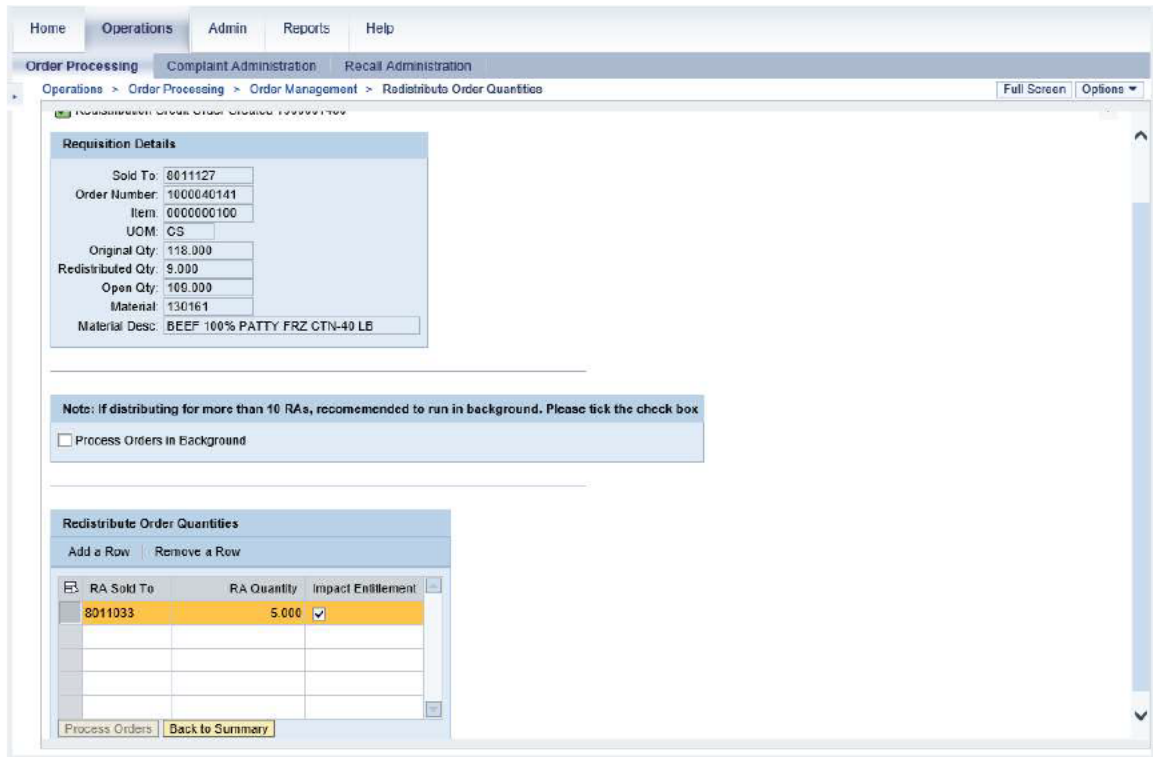
Process Orders Back to Summary

9. Click **Process Orders** (the **Process Orders** button) to redistribute the order quantities.



(Note) Review any messages at the top of the screen.

Redistribute Order Quantities Screen



10. Click **Back to Summary** (the **Back to Summary** button) to return to the list of requisitions under the specified Sold-To.




(Note) A redistribution order and redistribution credit order have been created. Redistribution order numbers begin with 19XXXXXXXX. The redistribution order is created for the recipient RA and the redistribution credit is created for the SDA or RA donor, who redistributed order quantities.

11. Perform one of the following:

If	Then
The user needs to cancel a redistribution order	Go to Step 12.
The user is finished redistributing order quantities	Go to Step 16.

Redistribute Order Quantities Screen



Sales/Recon. Order	Item	Requisition #	Redist. Doc #	Doc. type	Item	Material	Material Description	Order Qty	UoM	Redist. Qty	Open Qty	Sold To	So
5000052238	100	1000040141		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	118.000	CS	14.000	164.000	8011127	UP
			1900001481	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	5.000	CS	0.000	0.000	8011033	RA
			1900001479	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	5.000	CS	0.000	0.000	8011033	RA
			1900001471	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	4.900	CS	0.000	0.000	8011037	Do
5000052238	200	1000040142		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	184.000	CS	0.000	184.000	8011128	UP
5000052238	100	1000040143		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	72.000	CS	0.000	72.000	8011129	UP
5000052238	200	1000040144		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	131.000	CS	2.000	129.000	8011130	UP
			1900001437	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	2.900	CS	0.000	0.000	8011134	UP
5000052238	100	1000040145		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	112.000	CS	0.000	112.000	8011131	UP
5000052238	200	1000040146		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	164.000	CS	0.000	164.000	8011031	De

12. To cancel a redistribution order, click  (the **Selection** box) beside the redistribution order to be canceled. In this example, redistribution order # 1900001481 will be canceled.



(Note) A line item was created with the Transaction Type ZRE (Redistribution Order).

13. Perform one of the following:

If	Then
The user needs to select multiple redistribution orders	<ol style="list-style-type: none"> 1. Hold down the Ctrl key 2. Click the selection boxes to select individual redistribution orders (ZRE) to cancel.
The user needs to select all redistribution orders	<ol style="list-style-type: none"> 1. Click  (the Select All icon).
The user needs to select most redistribution orders	<ol style="list-style-type: none"> 1. Click  (the Select All icon). 2. Hold down the CTRL key. 3. Click the requisitions (ZREQ) to de-select.

Redistribute Order Quantities Screen

Home | Operations | Admin | Reports | Help

Order Processing | Complaint Administration | Recall Administration

Operations > Order Processing > Order Management > Redistribute Order Quantities

View: Re-Distribute Orders

Sales/Redon. Order	Item	Requisition #	Redist. Doc #	Doc. type	Item	Material	Material Description	Order Qty	UoM	Redist. Qty	Open Qty	Sold To	So
5000052238	100	1000040141		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	118.000	CS	14.000	104.000	8011127	UP
			1900001431	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	5.000	CS	0.000	0.000	8011033	RA
			1900001479	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	5.000	CS	0.000	0.000	8011033	RA
			1900001471	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	4.000	CS	0.000	0.000	8011037	Co
5000052238	200	1000040142		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	164.000	CS	0.000	164.000	8011120	UP
5000052238	100	1000040143		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	72.000	CS	0.000	72.000	8011129	UP
5000052238	200	1000040144		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	131.000	CS	2.000	129.000	8011130	UP
			1900001437	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	2.000	CS	0.000	0.000	8011134	UP
5000052238	100	1000040145		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	112.000	CS	0.000	112.000	8011131	UP
5000052238	200	1000040146		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	184.000	CS	0.000	184.000	8011031	De

Sort options

- Sorted by ZREQ # - ZREQ Item # (Default view)
- Sorted by ZREQ Order Qty
- Sorted by ZREQ Open Qty
- Sorted by ZREQ Sold to (BP#)

Back to Search | Refresh the Screen | Cancel Redist.

14. Click **Cancel Redist.** (the **Cancel Redist.** button) to cancel the redistribution order.



(Note) The Redistribution Documents are automatically canceled when the corresponding Sales Requisition Line Items are canceled.

Redistribute Order Quantities Pop-up

View: Re-Distribute Orders

Sales/Redon. Order	Item	Requisition #	Redist. Doc #	Doc. type	Item	Material	Material Description	Order Qty	UoM	Redist. Qty	Open Qty	Sold To	So
5000052238	100	1000040141		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	118.000	CS	14.000	104.000	801127	UP
			1900001431	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	5.000	CS	0.000	0.000	8011033	RA
								5.000	CS	0.000	0.000	8011033	RA
								4.000	CS	0.000	0.000	8011037	Co
5000052238	200	1000040142						184.000	CS	0.000	184.000	8011128	UP
5000052238	100	1000040143						72.000	CS	0.000	72.000	8011129	UP
5000052238	200	1000040144						131.000	CS	2.000	129.000	8011130	UP
								2.000	CS	0.000	0.000	8011134	UP
5000052238	100	1000040145						112.000	CS	0.000	112.000	8011131	UP
5000052238	200	1000040146						184.000	CS	0.000	184.000	8011031	De

Sort options

- Sorted by ZREQ # - ZREQ Item # (Default view)
- Sorted by ZREQ Order Qty
- Sorted by ZREQ Open Qty
- Sorted by ZREQ Sold to (BP#)

Back to Search Refresh the Screen Cancel Redist.

15. Click **Yes** (the **Yes** button) to confirm the cancelation.



(Note) A confirmation message indicating that the redistribution credit order (ZRCR) and redistribution order (ZRE) were canceled is displayed at the top of the screen. The canceled quantity has been added back to the original requisition' open quantity , and is available to be redistributed to another RA as needed.



Work Instruction Redistribute Order Quantities

Redistribute Order Quantities Screen

Home Operations Admin Reports Help

Order Processing Complaint Administration Recall Administration

Operations > Order Processing > Order Management > Redistribute Order Quantities Full Screen Options

Cancelled Redist Credit Order: 1900001480
 Cancelled Redist Order: 1900001481

View: Re-Distribute Orders

Sales/ Redon. Order	Item	Requisition #	Redist. Doc #	Doc. type	Item	Material	Material Description	Order Qty	UoM	Redist. Qty	Open Qty	Sold To	So
5000052238	100	1000040141		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	118.000	CS	9.000	109.000	8011127	UP
			1900001479	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	5.000	CS	0.000	0.000	8011033	RA
			1900001471	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	4.000	CS	0.000	0.000	8011037	Co
5000052238	200	1000040142		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	164.000	CS	0.000	164.000	8011128	UP
5000052238	100	1000040143		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	72.000	CS	0.000	72.000	8011129	UP
5000052238	200	1000040144		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	131.000	CS	2.000	129.000	8011130	UP
			1900001437	ZRE	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	2.000	CS	0.000	0.000	8011134	UP
5000052238	100	1000040145		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	112.000	CS	0.000	112.000	8011131	UP
5000052238	200	1000040146		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	164.000	CS	0.000	164.000	8011031	De
5000052238	100	1000040147		ZREQ	100	130161	BEEF 100% PATTY FRZ CTN-40 LB	98.000	CS	0.000	98.000	8011131	UP

Sort options

- Sorted by ZREQ # - ZREQ Item # (Default view)
- Sorted by ZREQ Order Qty
- Sorted by ZREQ Open Qty
- Sorted by ZREQ Sold to (BP#)

[Back to Search](#) [Refresh the Screen](#) [Cancel Redist](#)

16. The transaction is complete.



Work Instruction
Redistribute Order Quantities

RESULT

The order quantities have been redistributed by the SDA from one RA to another. A redistribution order was canceled.



Work Instruction Remove Delivery Block from Price Support Order (Non-Federal Customers)

PROCESS OVERVIEW

Purpose

The purpose of this transaction is for an Order Manager to remove the Delivery Block from a Price Support Order. Prior to creating this type of order, the Price Support Specialist must block the specified quantity of the specified commodity within the warehouse by performing a goods movement 344 (refer to appropriate work instruction). The Order Manager must then create the sales order with a delivery block. After receiving payment from the customer, the Price Support Specialist may remove the block on stock by performing a goods movement 343 (refer to appropriate work instruction) and the Order Manager may remove the delivery block from the Order. The Price Support Specialist will notify the warehouse about the sale. The warehouse personnel will pick the goods and prepare them for shipment. The Price Support Specialist will then create a delivery document and post goods issue the commodities. Note that this process applies only for sales to non-federal customers; sales to federal customers utilize a slightly different process. In this particular work instruction, we will only cover the steps the Order Manager must perform to remove delivery block from a Price Support Order.

Process Trigger

Use this procedure when you are working with a non-federal customer and would like to remove the delivery block on a price support order.

Prerequisites

- Order Manager must know Price Support Order.
- Delivery Block must exist on the Price Support Order.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab → **Order Processing** tab → **Order Management** folder → **Maintain Sales Documents** link to go to the *Maintain Sales Documents* screen.

Tips and Tricks

- 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.




Work Instruction Remove Delivery Block from Price Support Order (Non-Federal Customers)

PROCEDURE

1. Start the transaction using the following Portal path: **Operations tab → Order Processing tab → Order Management folder → Maintain Sales Documents**

Maintain Sales Documents Screen

The screenshot displays the 'Maintain Sales Documents' screen in the WBSCM portal. The page header includes the USDA logo, 'United States Department of Agriculture', 'Web-Based Supply Chain Management', and 'Welcome FSA OrderManager'. The navigation menu shows 'Operations', 'Finance', 'Admin', 'Reports', and 'Help'. The 'Order Processing' tab is selected, and the 'Maintain Sales Documents' folder is active. The search criteria section includes fields for Sales Order ID, Sold-To Party Name, Sales Order Type, Product ID, and Create Date. The result list table has columns for Sales Order ID, Sold-To Party, Ship-To Party, Transaction Type, Status, and Created On.

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



Work Instruction Remove Delivery Block from Price Support Order (Non-Federal Customers)

Search: Sales Orders Screen

The screenshot shows the 'Search: Sales Orders' interface. The search criteria are as follows:

Field	Operator	Value
Sales Order ID	is	5000033639
Sold-To Party Name	is	
Sales Order Type	is	
Product ID	is	
Create Date	is	Today

Maximum Number of Results: 100

Buttons: Search, Clear, Save Search As, Save

Result List Table:

Sales Order ID	Sold-To Party	Ship-To Party	Transaction Type	Status	Created On
----------------	---------------	---------------	------------------	--------	------------

3. Enter search criteria. In this case we entered the **Sales Order ID** and changed the **Create Date** to Today.

Click  (the Search button) to search for the Sales Order.



Work Instruction Remove Delivery Block from Price Support Order (Non-Federal Customers)

USDA United States Department of Agriculture
Web-Based Supply Chain Management

Welcome FSA OrderManager Log Off WBSM

Home Operations Finance Admin Reports Help

Order Processing Procurement Warehouse Management Supplier Mgt

Maintain Sales Documents

Search: Sales Orders

Archive Search

Search Criteria

Sales Order ID is 5000033639

Sold-To Party Name is

Sales Order Type is

Product ID is

Create Date is Today

Maximum Number of Results 100

Search Clear Save Search As Save

Result List: 1 Sales Order Found

Sales Order ID	Sold-To Party	Ship-To Party	Transaction Type	Status	Created On
5000033639	(b) (4)		SO - PS Sales	Contains Errors ...	02/19/2013 09:19:59

- Click **5000033639** (the 5000033639 ID number) to open the Sales Order.

Maintain Sales Documents Screen

USDA United States Department of Agriculture
Web-Based Supply Chain Management

Welcome FSA OrderManager Log Off WBSM

Home Operations Finance Admin Reports Help

Order Processing Procurement Warehouse Management Supplier Mgt

SO - PS Sales: 5000033639 (b) (4)

SO - PS Sales: 5000033639 (b) (4)

Details An error has occurred in the system (b) (6) while copying the document

General Data

Type SO - PS Sales

Order ID 5000033639

Sold-To Party (b) (4)

Sold-To Party Address (b) (4)

External Reference

Dates

Posting Date 02/19/2013

Request Deliv. Date 02/19/2013

Value

Net Value 200.00 USD

Gross Value 0.00 USD

Items Edit List

Actions	Item No.	Product ID	Product	Qty	Unit	Status	Req. Deliv. Date	Plant	Item Category	Higher-Lvl Item
	100	130306	BEANS GREEN C...	10.000	CS	In Process	02/19/2013	(b) (4)	Sale of PS Item	

Price Totals Edit List

Price Element	Price and Currency	Per	End Value	Currency
USDA Receivable		20.00 USD	1 CS	200.00 USD

Shipping

Status

Organizational Data Edit

Sales Sales Org. Unit FNS 1000

Service Food and Nutrition Service

Service Org. Unit

- Click (the Edit button) under the Items window. This will display a subsequent screen where you can remove the Delivery Block.



Work Instruction Remove Delivery Block from Price Support Order (Non-Federal Customers)

Maintain Sales Documents Screen

The screenshot shows the 'Maintain Sales Documents Screen' for a Price Support Order (SO - PS Sales Item: 100, BEANS GREEN CAN-24/300). The 'Shipping' window is expanded, showing fields for Ship-To Party, Ship-To Party Address, Delivery Priority, Delivery Status (Not delivered), and Div. Block Reason (Check down payment). A dropdown menu is open for the Div. Block Reason field, displaying a list of reasons: Credit limit, Political reasons, Bottleneck material, Export papers missing, Check free of ch. div, and No printing. A yellow error message at the top states: 'Details An error has occurred in the system (b) (6) while copying the document'. The 'Schedule Lines' table shows one line with a quantity of 10.000 CS, requested on 02/19/2013.

- Click  (the **Dropdown** button) in the **Div. Block Reason** field under the **Shipping** window.

Maintain Sales Documents Screen

This screenshot is identical to the previous one, but the dropdown menu for the 'Div. Block Reason' field is now fully open, showing the list of reasons: Credit limit, Political reasons, Bottleneck material, Export papers missing, Check free of ch. div, and No printing. The 'Div. Block Reason' field currently displays 'Check down payment'.




Work Instruction Remove Delivery Block from Price Support Order (Non-Federal Customers)

- From the Dropdown list, change the Delivery Block Reason from **Check down payment** to **(b) (6)** (the **Blank** option).

Maintain Sales Documents Screen

The screenshot displays the 'Maintain Sales Documents Screen' for a sales order. The header shows 'USDA United States Department of Agriculture' and 'Web-Based Supply Chain Management'. The main content area is titled 'SO - PS Sales Item: 100, BEANS GREEN CAN-24/300'. A yellow error message states: 'Details An error has occurred in the system (b) (6) while copying the document'. Below this, the 'Details' section shows product information: Product ID 130306, Product BEANS GREEN CAN-24/300, Quantity 10.000 CS, and Status In Process. The 'Shipping and Billing' section shows Request Deliv. Date 02/19/2013, Delivery Status Not delivered, Total Qty. Delivered 0.000, and Total Qty. Billed 0.000. The 'Shipping' section shows Ship-To Party (b) (4), Ship-To Party Address (b) (4), Delivery Priority, and Delivery Status Not delivered. The 'Div. Block Reason' dropdown menu is visible. The 'Schedule Lines' section shows a table with columns: Actions, Date Requested, Qty Requested, Unit, Date Confirmed, Qty Confirmed, and Unit. The table contains one row: 02/19/2013, 10.000, CS.

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



Work Instruction Remove Delivery Block from Price Support Order (Non-Federal Customers)

Maintain Sales Documents Screen

USDA United States Department of Agriculture
Web-Based Supply Chain Management

Welcome FSA OrderManager Log Off WBCSM

Home Operations Finance Admin Reports Help
Order Processing Procurement Warehouse Management Supplier Mgt

SO - PS Sales Item: 100, BEANS GREEN CAN-24300

SO - PS Sales: 5000033639 (b) (4)

Save Cancel New Create Follow-Up Trigger Output More

Details An error has occurred in the system (b) (6) while copying the document

Sales Order Details Edit

General Data		Dates	
Type	SO - PS Sales	Posting Date	02/19/2013
Order ID	5000033639	Request. Deliv. Date	02/19/2013
Sold-To Party	(b) (4)	Value	
Sold-To Party Address		Net Value	200.00 USD
External Reference		Gross Value	0.00 USD

Items Edit List

Actions	Item No.	Product ID	Product	Qty	Unit	Status	Req. Deliv. Date	Plant	Item Category	Higher-Lvl Item
	100	130306	BEANS GREEN C...	10.000	CS	In Process	02/19/2013	(b) (4)	Sale of PS Item	

Price Totals Edit List

Price Element	Price and Currency	Per	End Value	Currency
USDA Receivable	20.00 USD	1 CS	200.00	USD

Shipping

Status

9. Click Save (the **Save** button) to save your sales order.

Maintain Sales Documents Screen

USDA United States Department of Agriculture
Web-Based Supply Chain Management

Welcome FSA OrderManager Log Off WBCSM

Home Operations Finance Admin Reports Help
Order Processing Procurement Warehouse Management Supplier Mgt

SO - PS Sales Item: 100, BEANS GREEN CAN-24300

SO - PS Sales: 5000033639 (b) (4)

Save Cancel New Create Follow-Up Trigger Output More

Sales Order Details Edit

General Data		Dates	
Type	SO - PS Sales	Posting Date	02/19/2013
Order ID	5000033639	Request. Deliv. Date	02/19/2013
Sold-To Party	(b) (4)	Value	
Sold-To Party Address		Net Value	200.00 USD
External Reference		Gross Value	0.00 USD

Items Edit List

Actions	Item No.	Product ID	Product	Qty	Unit	Status	Req. Deliv. Date	Plant	Item Category	Higher-Lvl Item
	100	130306	BEANS GREEN C...	10.000	CS	In Process	02/19/2013	(b) (4)	Sale of PS Item	

Price Totals Edit List

Price Element	Price and Currency	Per	End Value	Currency
USDA Receivable	20.00 USD	1 CS	200.00	USD

Shipping

Status

Organizational Data Edit

Sales	Service
Sales Org. Unit FNS 1000	Food and Nutrition Service
Service Org. Unit	

10. You have completed this transaction.



Work Instruction
Remove Delivery Block from Price Support Order
(Non-Federal Customers)



(Note) A confirmation message displays at the top of the screen: "SO - PS Sales: 5000033639,
(b) (4) [REDACTED]"



Work Instruction
Remove Delivery Block from Price Support Order
(Non-Federal Customers)

RESULT

The transaction has been successfully completed.



PROCESS OVERVIEW

Purpose

The purpose of this transaction is to return or decline domestic requisitions. Order Managers from State Distributing Agencies (SDAs), Co-ops and Indian Tribal Organizations (ITOs) receive domestic requisitions from their Recipient Agencies (RAs). They are tasked with consolidating these requisitions along with any requisitions they create in order to make Sales Orders with full truckloads.

An SDA, Co-op, or ITO should return a requisition if there is a change that the Sold-To Party (RA) should make. This feature returns the requisition to the RA with the **Returned by Co-Op** or **Returned by SDA** status.

An SDA, Co-op, or ITO should decline a requisition if it was entered incorrectly, duplicate requisitions were accidentally created, or there is not enough demand to place a sales order for that commodity and delivery date. This feature will cancel the requisition.

Process Trigger

Perform this transaction to return or decline domestic requisitions.

Prerequisites

- Domestic requisitions with a status of **Ready for Approval** must exist in WBSCM.
- Requisitions must be from an RA/Co-op or SDA/ITO as part of the user's SDA/ITO organization.

Portal Path

Follow the Portal path below to complete this transaction:

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

Tips and Tricks

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

PROCEDURE

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

Image: Consolidate Requisitions Screen









The screenshot shows the 'Consolidate Requisitions' screen in the WBSCM portal. The top navigation bar includes 'Home', 'Operations', 'Admin', 'Reports', and 'Help'. The 'Operations' tab is active, and the breadcrumb trail is 'Operations > Order Processing > Order Management > Consolidate Requisitions'. A left-hand navigation menu is expanded, showing 'Consolidate Requisitions' as the selected item. The main content area is titled 'Welcome to Consolidate Requisitions' and includes instructions: 'All required fields are marked with a red asterisk (*). Dates are formatted as MM/DD/YYYY.' Below this is a section 'Selections for Consolidation' with a text box explaining that users should select ordered product/material to review and consolidate requisitions. The form contains several fields: '* Ordered Product' (required), 'Program', 'Sold-To Party', 'Ship-To Party', and 'Ship-To Delivery Date'. Each of these fields has a 'To' field next to it, indicating a range selection. There are also 'Submit' and 'Clear' buttons at the bottom of the form.

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


Image: Consolidate Requisitions Screen

This screenshot shows the same 'Consolidate Requisitions' screen as the previous one, but with the left-hand navigation menu minimized. The breadcrumb trail and the main content area are identical. The 'Hide Navigator' arrow icon is visible in the top left corner of the page header area.

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

Field	R/O/C	Description
Ordered Product:	R	The material number of the product that has been requested to be ordered. Example: 100207
Program:	O	Acronym used to identify a USDA food distribution program. Example: NSLP  (Note) Click 1EA42E9629D548D187FD88222 DE5565B61DAE25139534354BB63324 476A7D0BC  (the Advanced Options button) to enter or exclude multiple selections.
Sold-To Party:	O	Unique identifying number associated with a particular customer in WBSCM.  (Note) Users can enter a Sold-To Party or a range of Sold-To Parties. Click  (the Advanced Options button) to enter or exclude multiple selections.
Ship-To Party:	O	Unique identifying number associated with a person or company that receives the materials or commodities. Example: 5001600  (Note) Users can enter a Sold-To Party or a range of Sold-To Parties. Click  (the Advanced Options button) to enter or exclude multiple selections.
Ship-To Delivery Date:	O	The date upon which the delivery is expected to be completed.  (Note) Users can enter a Ship-To Delivery Date or a range of Ship-To Delivery Dates. Click  (the Advanced Options button) to enter or exclude multiple selections.



(Note) The user can use  (the **Matchcode** icon) in each field to select the appropriate values.



(Note) The user can search by a range of data for the **Sold-To Party**, **Ship-To Party**, and

Ship-To Delivery Date fields by entering values in these fields and the corresponding **To** fields for each one. For example, entering **11/01/2023** in the **Ship-To Delivery Date** field and **11/30/2023** in the corresponding **To** field will return all results that meet all the other filtering requirements and fall into the specified **Ship-To Delivery Date** range.




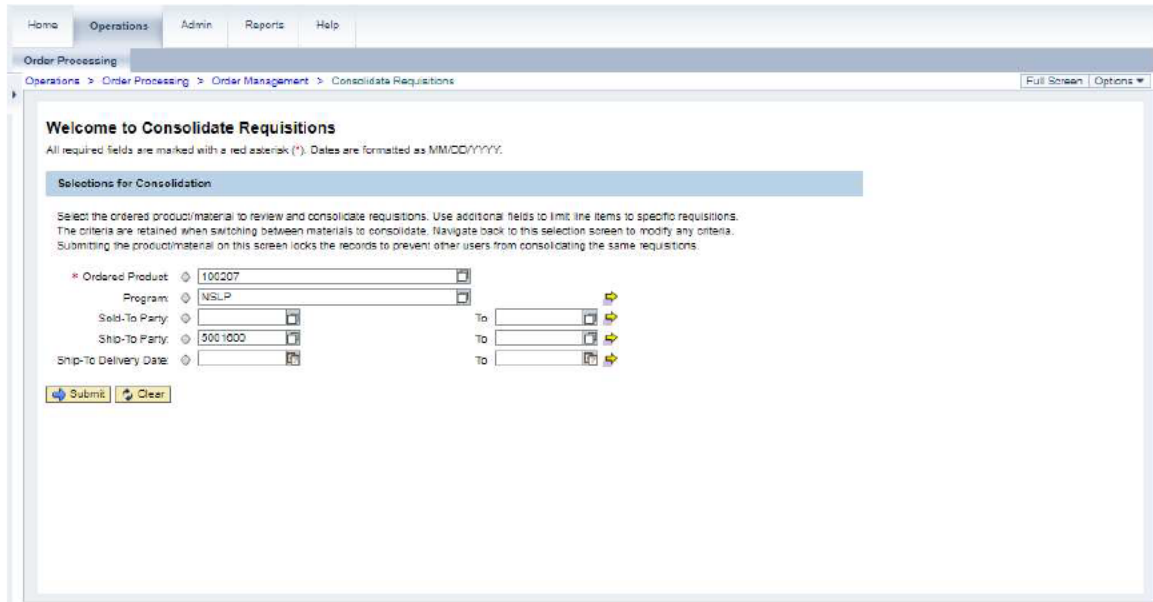
(Note) The user can enter a list of data to search by for the **Program**, **Sold-To Party**, **Ship-To Party**, and **Ship-To Delivery Date** fields by clicking  (the **Advanced Options** button) and entering their list of data in the table that appears in the pop-up screen.

Image: Consolidate Requisitions Screen



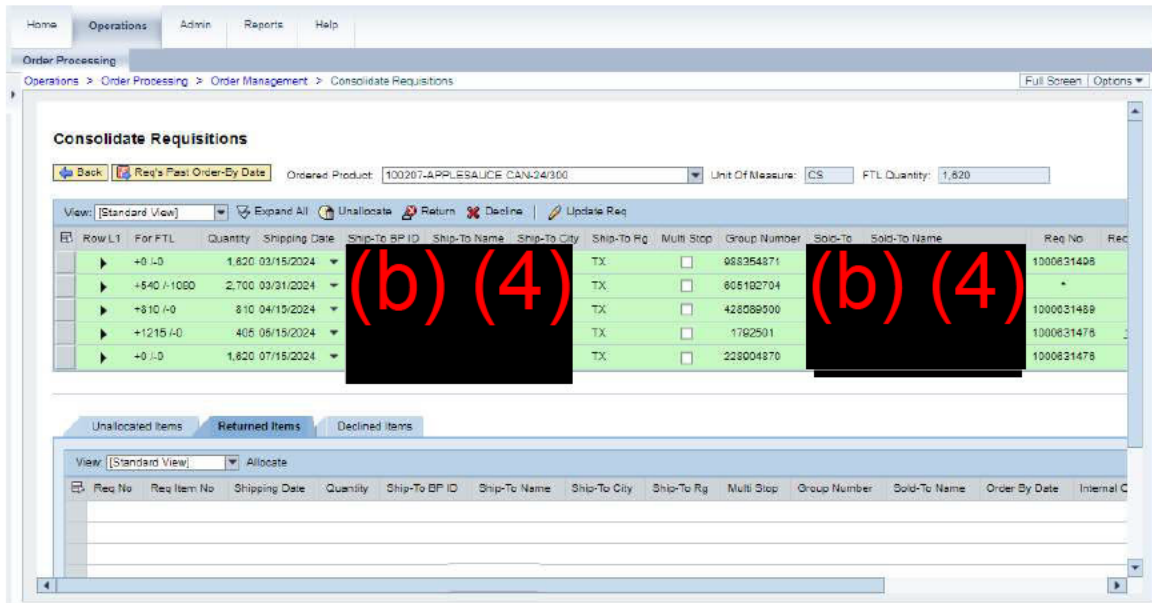
4. Click  (the **Submit** button).



(Note) When the user submits the selected Product/Material, WBSCM automatically locks the associated records. This prevents multiple users from consolidating the shipments at the same time until the Product/Material is unlocked. To unlock the Product/Material, perform one of the following:

- Log out of WBSCM using the **Log off** button
- Switch from one material to another
- Click on a different link/iView in WBSCM.

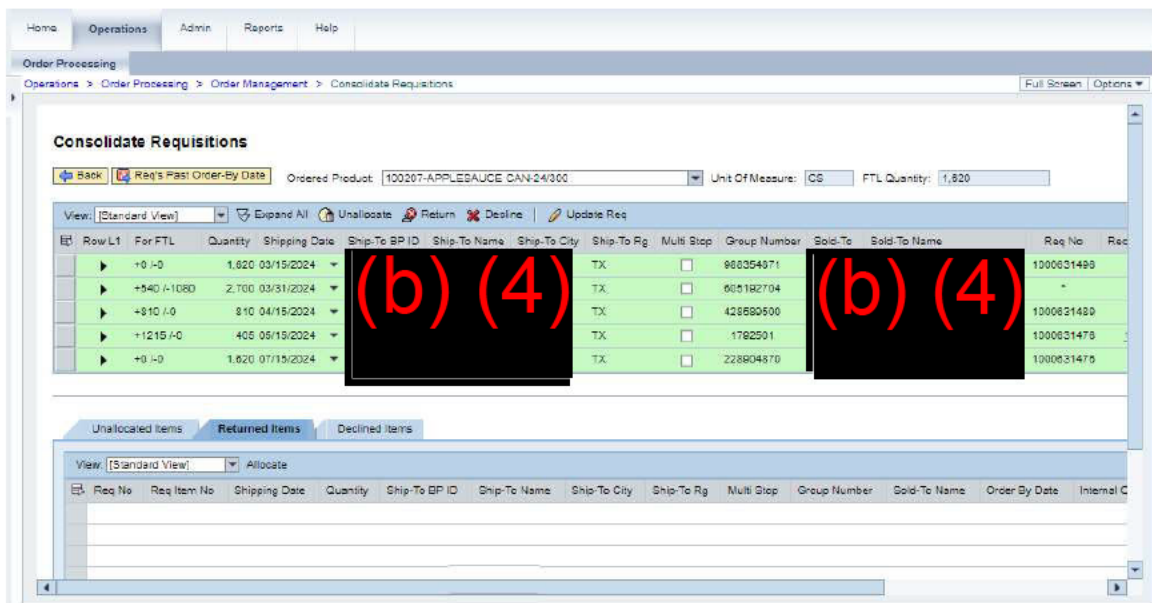
Image: Consolidate Requisitions Screen



5. Perform one of the following:

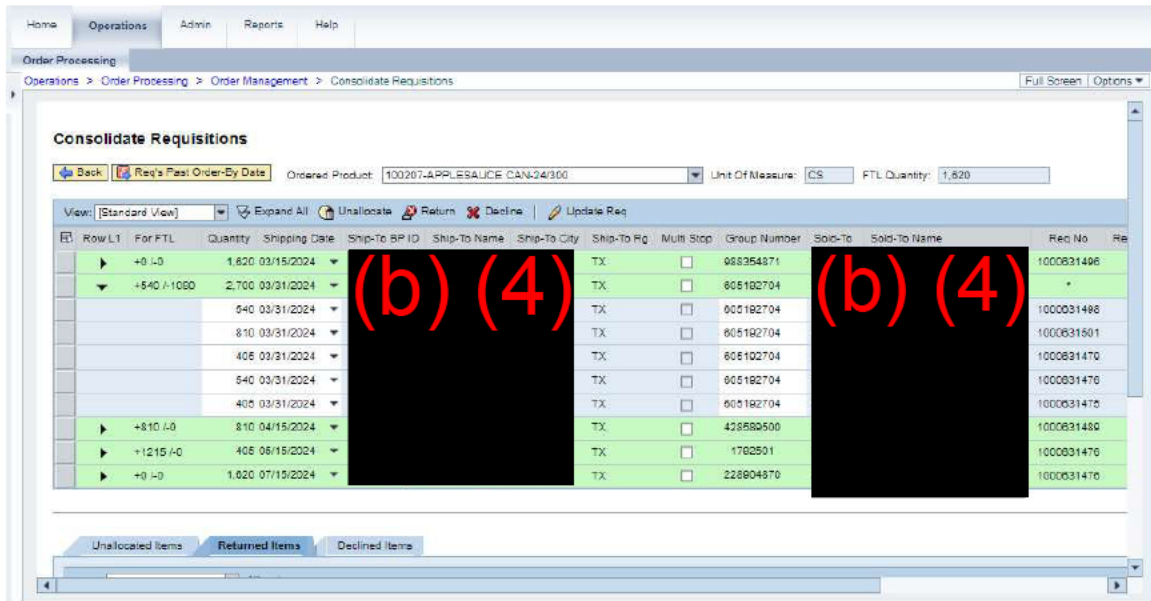
If	Then
The user wants to return a requisition	Go to Step 6
The user wants to decline a requisition	Go to Step 10
The user wants to update the requisitions to complete the Return and Decline transactions.	Go to Step 14


Image: Consolidate Requisitions Screen



6. Click  (the **Arrow** button) on the appropriate line to expand the proposed order to be worked.


Image: Consolidate Requisitions Screen



- Click  (the **Select** button) next to the requisition or proposed order to be returned. In this example, the line item for **Req No 1000631498** is selected.

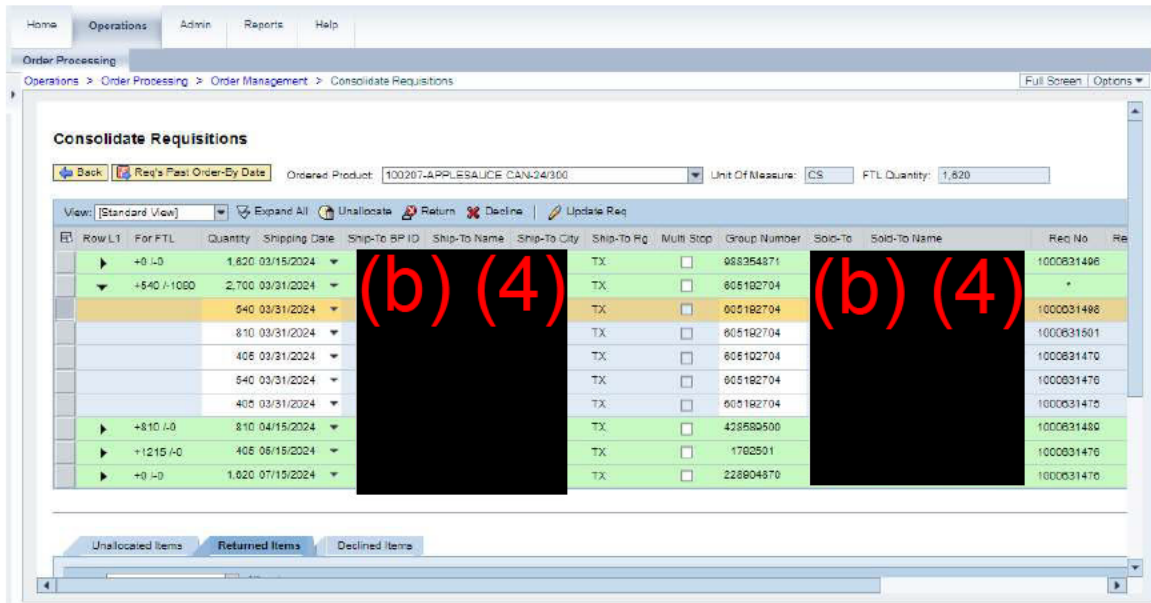


(Note) When selecting an aggregated grouping of requisitions (green line), all the requisitions within the grouping (white lines) will automatically be selected as well.

If all the line items on the screen need to be selected, click  (the **Table Selection Menu** button) and click the **Select All** option. The user can also select the **Deselect All** option to deselect all line items.

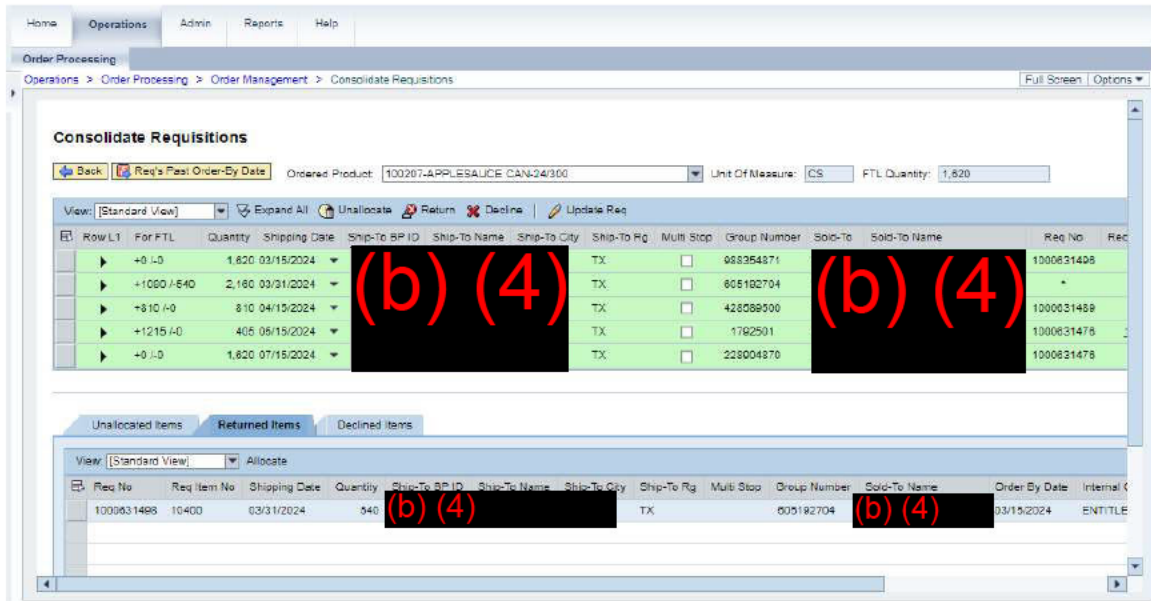
If multiple consecutive rows need to be selected, the user can hold down the *Shift* key and select the beginning and end row **Select** buttons. To select non-consecutive rows, the user can hold down the *Ctrl* key and select individual **Select** buttons.

Image: Consolidate Requisitions Screen



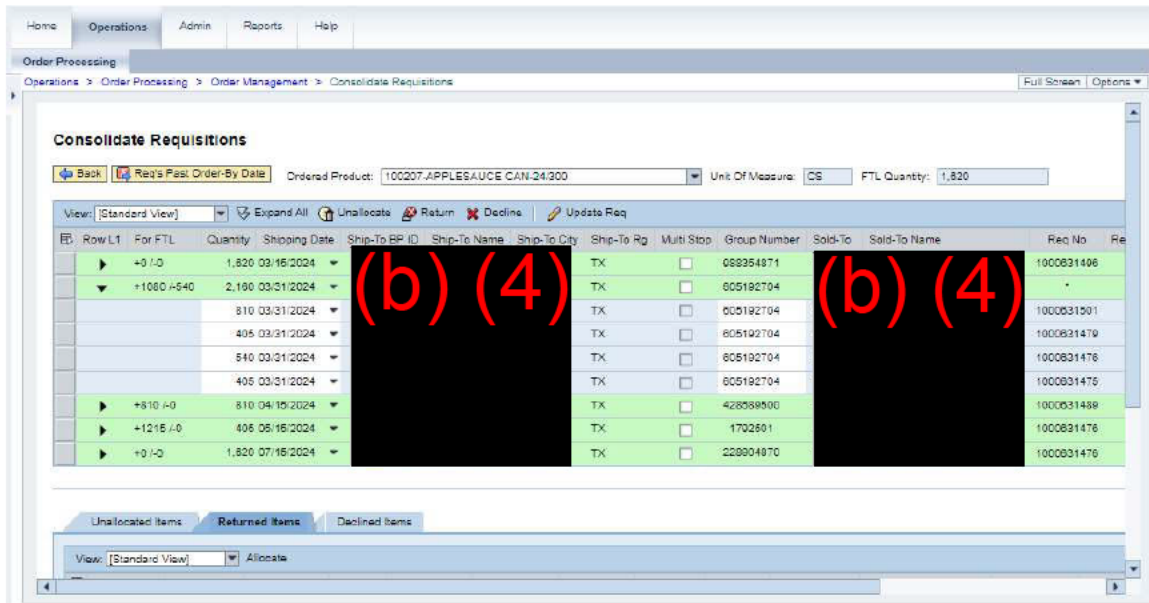
8. Click (the **Return** button) to move the requisition to the **Returned Items** tab in the workbench.
9. Return to Step 5.


Image: Consolidate Requisitions Screen



10. Click (the **Arrow** button) in the appropriate line to expand the proposed order to be worked.


Image: Consolidate Requisitions Screen



11. Click  (the **Select** button) next to the requisition, or proposed order to be declined. In this example, the line item for **Req No 1000631501** is selected.

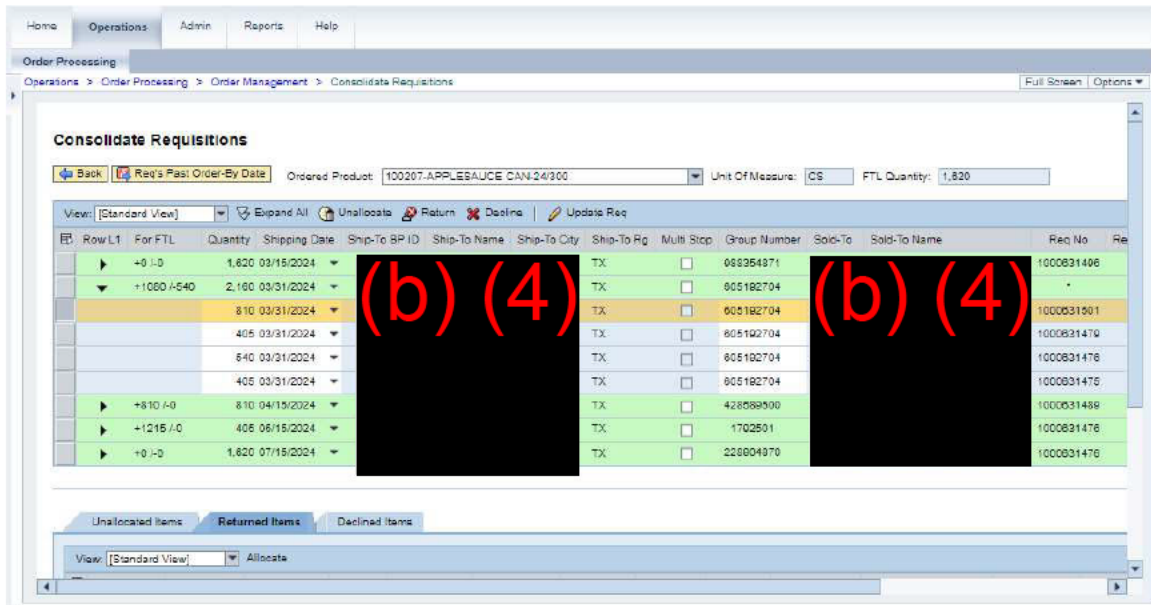


(Note) When selecting an aggregated grouping of requisitions (green line), all the requisitions within the grouping (white lines) will automatically be selected as well.

If all the line items on the screen need to be selected, click  (the **Table Selection Menu** button) and click the **Select All** option. The user can also select the **Deselect All** option to deselect all line items.

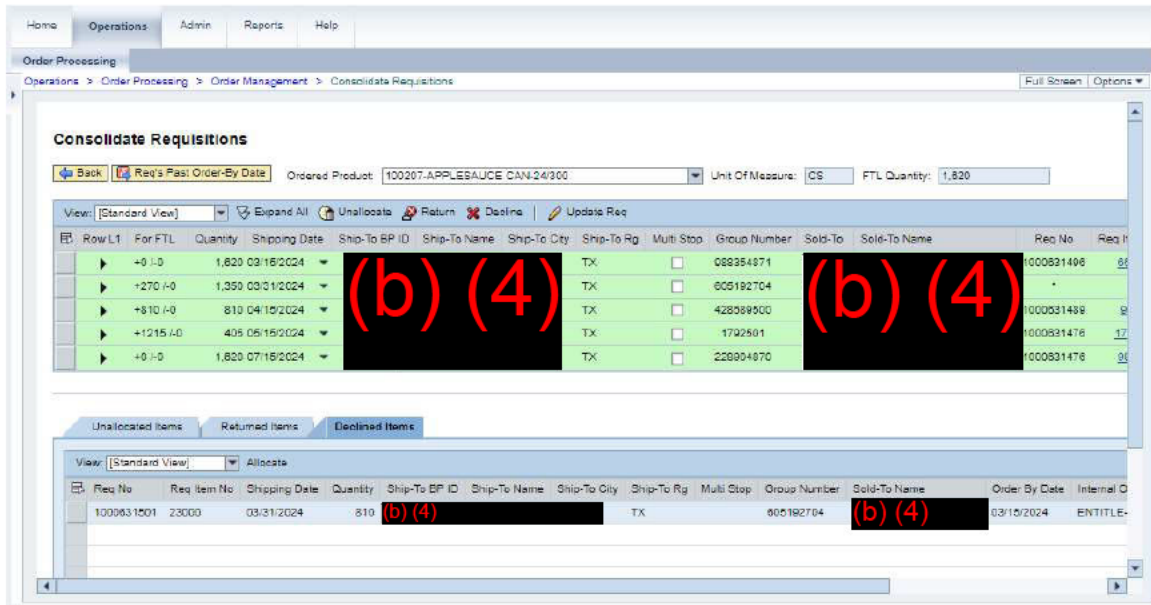
If multiple consecutive rows need to be selected, the user can hold down the *Shift* key and select the beginning and end row **Select** buttons. To select non-consecutive rows, the user can hold down the *Ctrl* key and select individual **Select** buttons.

Image: Consolidate Requisitions Screen



12. Click (the **Decline** button) to move the requisition to the **Declined Items** tab in the workbench.
13. Return to Step 5.

Image: Consolidate Requisitions Screen



14. Click (the **Update Req** button) to update the entire workbench.

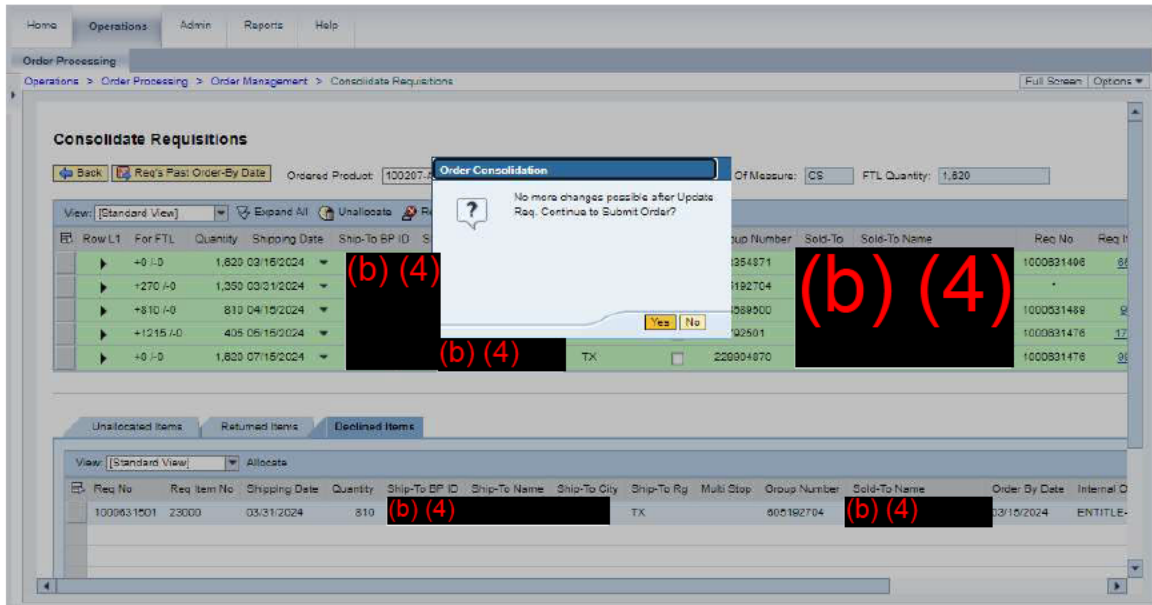


(Note) Neither returned nor declined line items need to be highlighted for the update to occur.



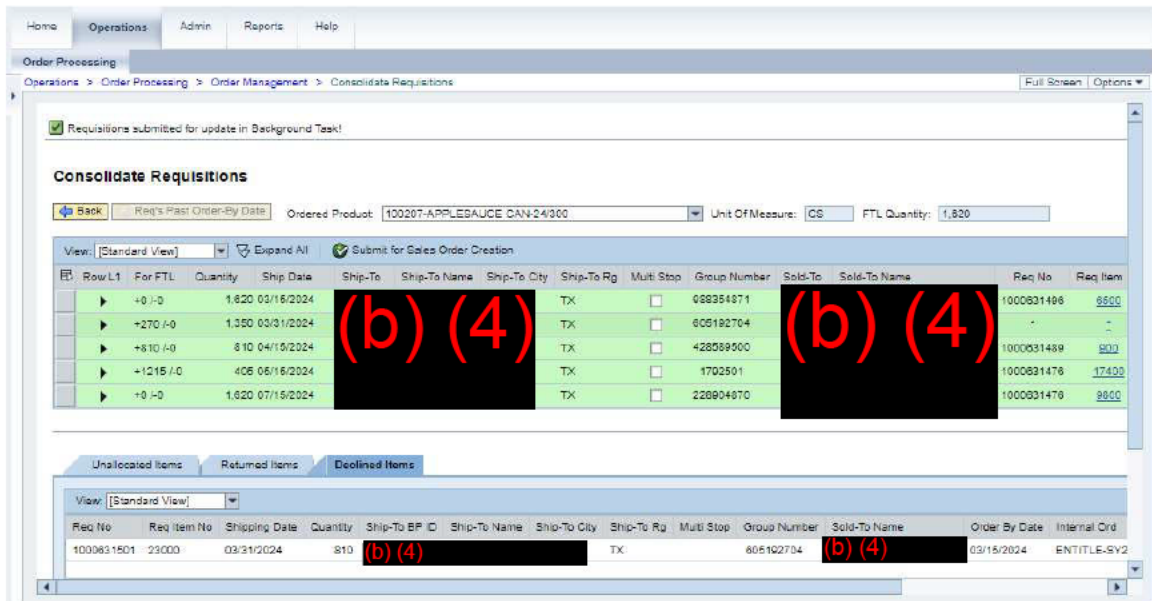
(Note) After clicking the **Update Req** button, the user will no longer be able to make changes to the proposed order unless they exit and reenter the workbench without submitting the entries for order creation. The user is not required to submit requisitions for order creation at this time, but the changes will be retained.

Image: Order Consolidation Pop-Up Screen



- Click **Yes** (the Yes button) to confirm the requisition return.

Image: Consolidate Requisitions Screen



- Review the confirmation message and ensure no errors exist updating the requisition lines.



(Note) A returned requisition will be sent back to the RA with the status **Returned by Co-Op/Returned by SDA**. A returned requisition is still located in the **Returned Items** tab, but it can no longer be selected for changes. Once you leave the Consolidation Work Bench, the returned items will no longer display.



(Note) A declined requisition will be cancelled and the status of the requisition will change to **Cancelled**. A declined requisition is still located in the **Declined Items** tab, but it can no longer be selected for changes.

17. The transaction is complete.



Work Instruction
Return or Decline a Domestic Requisition

RESULT

Domestic requisitions have been returned or declined.



PROCESS OVERVIEW

Purpose

The Order Status Report summarizes the life cycle of an order from initial entry through receipt. In addition to the current order status, this report provides details about the order, including the expected delivery date and the type and quantity of item(s) ordered. State Distributing Agencies (SDAs) and Indian Tribal Organizations (ITOs) may use this information to coordinate deliveries with processors or other partners. The status code are described in the [Sales Order and Complaint Statuses](#) job aid.

Process Trigger

This report is intended for FNS Order Managers, SDAs/ITOs, and Ship-Tos to review delivery dates, approval statuses, and other order details.

Prerequisites

- Orders must exist in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Reports** tab → **Order Processing** folder → **Order Status Report** link

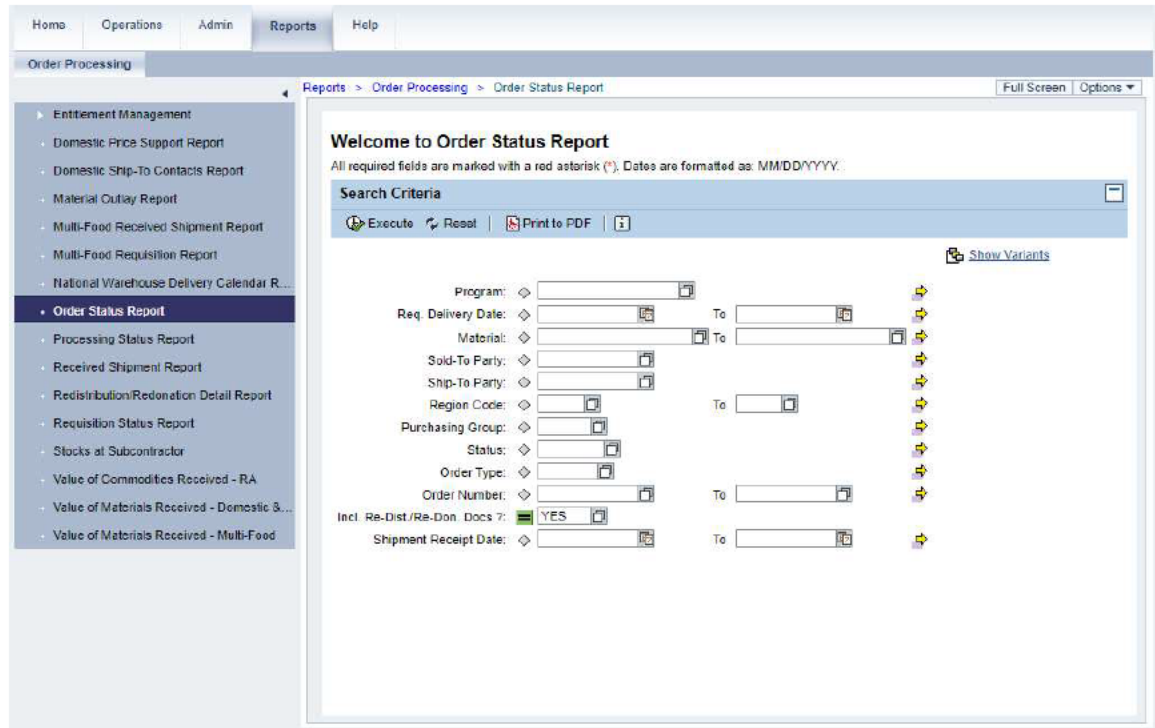
Tips and Tricks

- 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.
- Refer to the [Reporting Navigation Job Aid](#) for tips for using WBSCM reports.

PROCEDURE

1. Start the transaction using the following Portal path: **Reports tab → Order Processing folder → Order Status Report link.**


Image: Order Status Report Screen



The screenshot shows the 'Order Status Report' screen in the WBCSCM portal. The navigation menu on the left includes 'Entitlement Management', 'Domestic Price Support Report', 'Domestic Ship-To Contacts Report', 'Material Outlay Report', 'Multi-Food Received Shipment Report', 'Multi-Food Requisition Report', 'National Warehouse Delivery Calendar R...', 'Order Status Report' (selected), 'Processing Status Report', 'Received Shipment Report', 'Redistribution/Redonation Detail Report', 'Requisition Status Report', 'Stocks at Subcontractor', 'Value of Commodities Received - RA', 'Value of Materials Received - Domestic S...', and 'Value of Materials Received - Multi-Food'. The main content area is titled 'Welcome to Order Status Report' and includes a 'Search Criteria' section with the following fields:

- Program: [Dropdown]
- Req. Delivery Date: [Date] To [Date]
- Material: [Dropdown] To [Dropdown]
- Sold-To Party: [Dropdown]
- Ship-To Party: [Dropdown]
- Region Code: [Dropdown] To [Dropdown]
- Purchasing Group: [Dropdown]
- Status: [Dropdown]
- Order Type: [Dropdown]
- Order Number: [Dropdown] To [Dropdown]
- Incl. Re-Dist./Re-Don. Docs?: YES
- Shipment Receipt Date: [Date] To [Date]

Buttons for 'Execute', 'Reset', 'Print to PDF', and 'Show Variants' are also present.

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

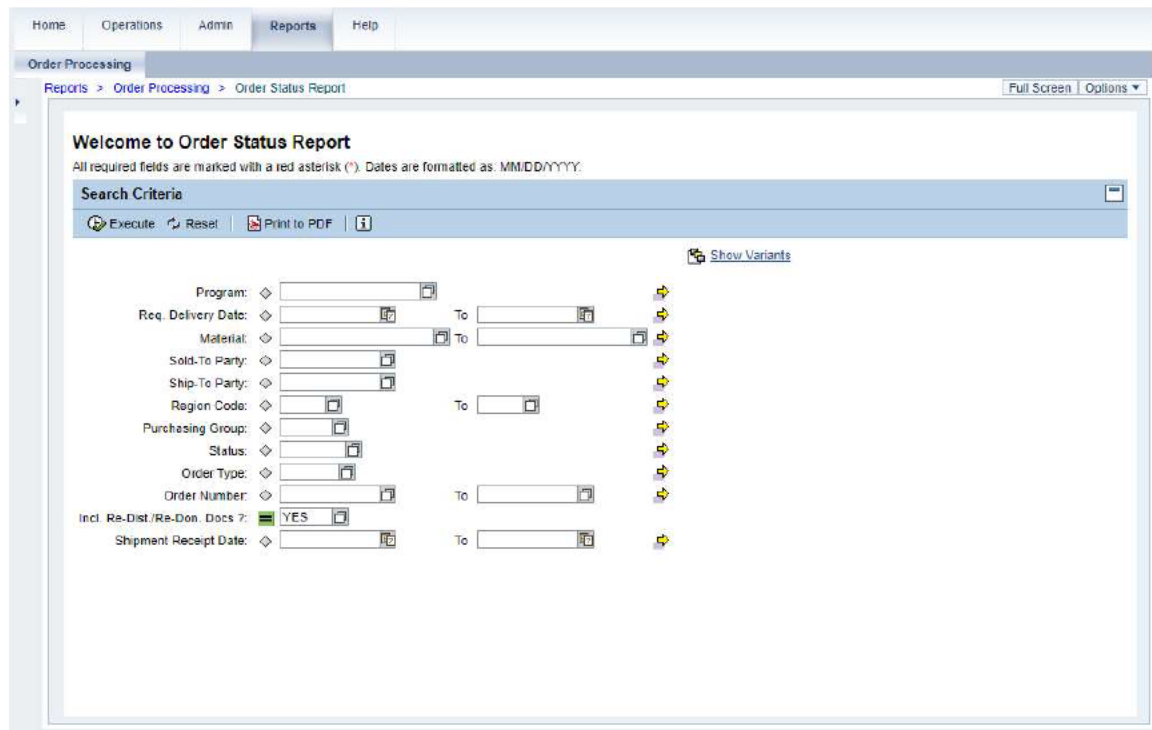


(Note) A value must be entered in at least one of the following selection fields: **Req. Delivery Date**, **Shipment Receipt Date**, or **Order Number**. Additional search criteria can be used to narrow the results.






(Note) Use the **To** field to indicate the upper value of a range when needed. For example, to search for orders with a requested delivery date between March 1, 2021 and January 24, 2022, enter "03/01/2021" in the **Req. Delivery Date** field and "01/24/2022" in the adjacent **To** field.

Image: Order Status Report Screen



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

Field	R/O/C	Description
Program:	O	Acronym used to identify a USDA food distribution program. Example: CSFP
Req. Delivery Date:	O	Date requested by customer for delivery of ordered goods or services. Example: 03/01/2021
Material:	O	Unique six-digit number representing a specific material/commodity in WBSCM. Example: 130603
Sold-To Party:	O	Unique identifying name associated with a particular customer in WBSCM. Example: 8004967

Field	R/O/C	Description
Ship-To Party:	O	<p>Unique identifying number associated with a person or company that receives the goods.</p> <p>Example: 8011355</p>
Region Code:	O	<p>A number corresponding to one of the seven regions where FNS delivers orders.</p> <p>Example: 03</p>
Purchasing Group:	O	<p>Buyer or group of buyers responsible for purchasing activities. Also signifies a group of specialists who purchase similar items.</p> <p>Example: 120</p>
Status:	O	<p>The code for status of the document.</p> <p>Example: Approved by SDA</p> <p> (Note) For more information, refer to the job aid, Sales Order and Complaint Statuses.</p>
Order Type:	O	<p>A classification code for the type of order document. Type of orders include domestic/international sales order, entitlement credit/debit, and re-donation.</p> <p>Example: ZDOM</p> <p> (Note) For more information, refer to the job aid, Domestic Order Code Definitions.</p>
Order Number:	O	<p>This can be a sales order number, purchase order number, or delivery document number. When entering this number, the recipient ensures that they are receipting against the correct order. In the case of inbound to warehouse receipts, only enter a purchase order number in this field.</p> <p>Example: 5000050408</p> <p> (Note) In this work instruction the Order Number refers to a sales order.</p>



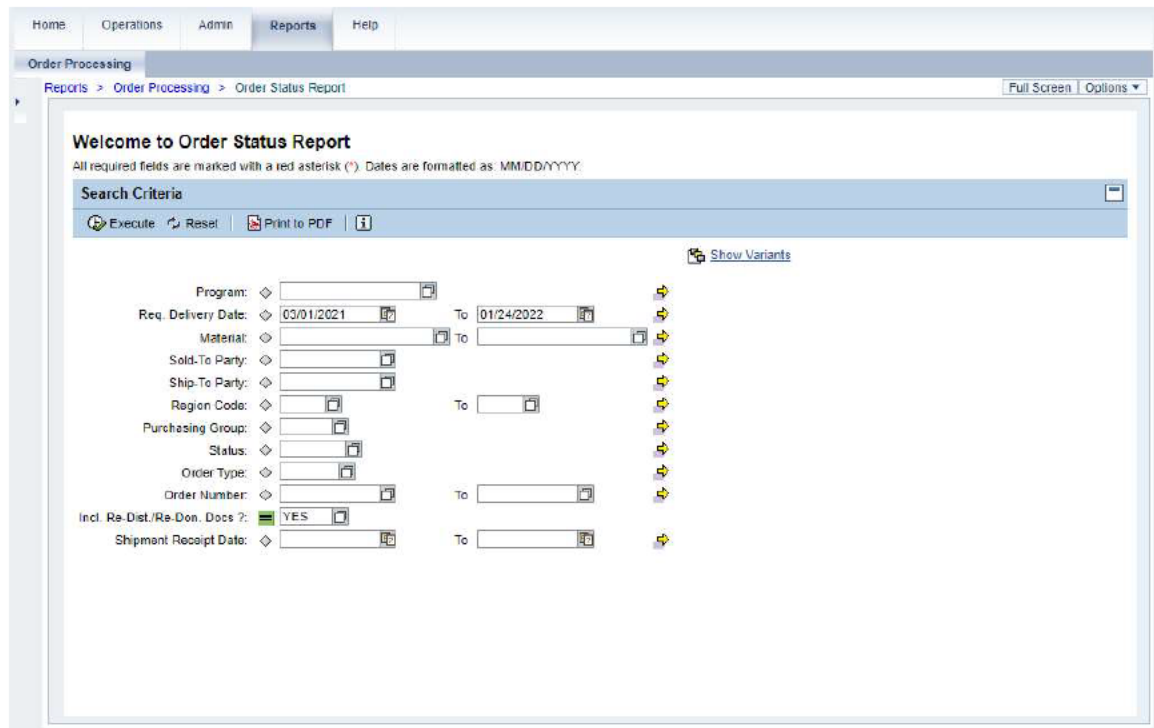
Field	R/O/C	Description
Incl. Re-Dist./Re-Don. Docs ?:	O	<p>Including re-distribution or re-donation documents.</p> <p>Example: YES</p>  <p>The report automatically includes the Re-Distribution/Re-Donation documents. Change the field value to NO to omit these documents from the report.</p>
Shipment Receipt Date:	O	<p>The date the shipment is received.</p> <p>Example: 01/15/2022</p>  <p>(Note) Users need to limit date ranges to within one year.</p>

Image: Order Status Report Screen




4. Click  (the **Execute** button) to generate the report.

Image: Order Status Report

The screenshot shows a web application interface for 'Order Processing' with a sub-menu 'Order Status Report'. The main content area displays a table titled 'Order Status Report' with the following columns: Sold-To Name, Material, Material Desc., Status Text, Requested Del. Date, Requested Qty., Sales Unit, and Cost / LB. The first row shows a redacted 'Sold-To Name' (b) (4), Material '100004', and 'CHEESE CHED WHT CUTS-4/10 LB' with a status of 'On Invitation' and a quantity of 940.000.


Sold-To Name	Material	Material Desc.	Status Text	Requested Del. Date	Requested Qty.	Sales Unit	Cost / LB
(b) (4)	100004	CHEESE CHED WHT CUTS-4/10 LB	On Invitation	07/15/2021	940.000	CS	7.21
		CHEESE CHED WHT CUTS-4/10 LB	On Invitation	07/15/2021	940.000	CS	7.21
		CHEESE CHED WHT CUTS-4/10 LB	On Invitation	07/15/2021	940.000	CS	7.21
		CHEESE CHED WHT CUTS-4/10 LB	On Invitation	07/15/2021	940.000	CS	7.21
		CHEESE CHED WHT CUTS-4/10 LB	On Invitation	07/15/2021	940.000	CS	7.21
		CHEESE CHED WHT CUTS-4/10 LB	On Invitation	07/15/2021	940.000	CS	7.21
		CHEESE CHED WHT CUTS-4/10 LB	On Invitation	07/15/2021	940.000	CS	7.21
		CHEESE CHED WHT CUTS-4/10 LB	On Invitation	07/15/2021	940.000	CS	7.21
		CHEESE CHED WHT CUTS-4/10 LB	On Invitation	07/15/2021	940.000	CS	7.21
		CHEESE CHED WHT CUTS-4/10 LB	On Invitation	07/15/2021	940.000	CS	7.21
		CHEESE CHED WHT CUTS-4/10 LB	On Invitation	07/15/2021	940.000	CS	7.21
		CHEESE CHED WHT CUTS-4/10 LB	On Invitation	07/15/2021	940.000	CS	7.21
		CHEESE CHED WHT CUTS-4/10 LB	On Invitation	07/15/2021	940.000	CS	7.21
		CHEESE CHED WHT CUTS-4/10 LB	On Invitation	07/15/2021	940.000	CS	7.21
		CHEESE CHED WHT CUTS-4/10 LB	On Invitation	07/15/2021	940.000	CS	7.21

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

Field	R/O/C	Description
Sold-To Name	O	Unique identifying name associated with a particular customer in WBSCM. Example: (b) (4)
Material	O	Unique six-digit number representing a specific material/commodity in WBSCM. Example: 100004
Material Desc.	O	Text containing up to 40 characters that describes the material/commodity in detail. Example: CHEESE CHED WHT CUTS-4/10 LB
Status Text	O	Description of the approval level for the item reviewed. Example: On Invitation  (Note) For orders that have been received with a missing ASN, the field will display the status of Order



Work Instruction
Review Order Status Report

Field	R/O/C	Description
		<p>Received.</p> <p> (Note) The most common order statuses are listed below. For more information refer to the job aid, Sales Order and Complaint Statuses.</p> <ul style="list-style-type: none">• Approved by SDA - SDA has applied the RA's requisition in a consolidated sales order.• Approved by SpAgency - FNS has approved the consolidated sales order from the SDA.• On Invitation - Sales Order is currently on a solicitation to be purchased. No changes can be made until purchase.• Purchased - Purchase Order (contract) has been created.• Cancelled - Order was cancelled. Entitlement returned to customer account.• Order Received - Order has been delivered to distributor.
Requested Del. Date	O	Date requested by customer for delivery of ordered materials or commodities. Example: 07/15/2021
Requested Qty.	O	Number of sales units of material requested by the customer. Example: 940,000
Sales Unit	O	Unit of measure upon which the price is typically based. Example: CS
Cost / LB	O	Cost of material or commodity measured in pounds. Example: 7.21
Net Dollar Value	O	Dollar amount of the line item. Example: 24,281.69






Work Instruction
Review Order Status Report

Field	R/O/C	Description
Program	O	Acronym used to identify a USDA food distribution program. Example: NSLP
Entit/Bonus Indicator	O	Indicates whether the document is Entitlement or Bonus order and the program year. Example: BONUS-SY17
Ship-To Party	O	Unique identifying number associated with a person or company that receives the goods. Example: 8101252
Ship-To Name	O	Unique identifying number associated with a person or company that receives the goods. Example: (b) (4)
Ship-To City	O	The city to which the item is shipped. Example: (b) (4)
Ship-To State	O	The state to which the materials or commodities are shipped. Example: HI
Sales Order #	O	Unique identifying number associated with a sales order in WBSCM. Example: 5000051561
SO Item #	O	The item number identified on the Sales Order. Example: 100
Allocation # / Corr.	O	Unique number to group line items into Full Truck Loads (FTL) for creating multi-stop deliveries. Example: 0913892820



Work Instruction
Review Order Status Report


Field	R/O/C	Description
		 (Note) For more information, refer to the work instruction, Consolidation for a Multi-Stop Domestic Sales Order .
Purch. Requisition #	O	Document used to request materials and services. Purchase requisitions are converted to purchase orders so materials can be procured externally. Example: 1000039427
PR Item #	O	The line item on the purchase requisition referring to the material/commodity. Example: 100
PR Qty.	O	Total quantity on the purchase requisition. Example: 16,994.590
PR Base UoM	O	The base unit of measure for the items on the purchase requisition. Example: LB
Purchase Order #	O	Unique number identifying the Purchase Order. Example: 4100008660
PO Line Item	O	The line item on the purchase order referring to the materials/commodity order line item. Example: 10
PO Qty.	O	Total quantity on the purchase order. Example: 38,000

Field	R/O/C	Description
PO Base UoM	O	Base unit of measure on the purchase order. Example: LB
Vendor #	O	Business partner number assigned by WBSCM when a vendor's master records are created. Example: 1200030
Vendor Name	O	Business partner that provides materials or services. Example: Imperial Freezer Services
Purchasing Group	O	Buyer or group of buyers responsible for purchasing activities. Also signifies a group of specialists who purchase similar items. Example: 130
ASN #	O	A unique number assigned to an Advanced Shipment Notification (ASN) when it is created. Example: 6100015132
ASN Qty	O	Quantity on the Advanced Shipment Notification. Example: 39,950.000  (Note) The ASN Qty. field displays the updated quantity if the vendor has updated the ASN. For multiple ASNs, each quantity is separated by a semicolon.
Var. Wt. Material?	O	Indicator that one package for the item may have a different weight for the same material. Example: Yes
Date Received	O	The date the materials were received. Example: 11/03/2021  (Note) This date reflects the most recent goods receipt date.



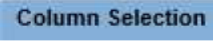

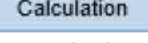







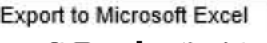


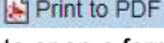


Work Instruction
Review Order Status Report

Field	R/O/C	Description
Good Qty. (in CS)	O	The amount of material/commodity received in good condition, ready for use entered in cases. This field is only used when the material is a variable weight. Example: 940.000
Good Qty.	O	The amount of materials/commodities received in good condition, equal to or less than the ordered amount, in pounds (LB). Example: 39,950.000
Over Qty.	O	The amount of materials/commodities received for a PO line as Good Qty or Good Qty (in CS) that exceeds the ordered amount. Example: 0.00
Damage Qty.	O	Total quantity of materials/commodities damaged due to transport, unloading, or improper storage. Example: 0.00
Received Qty UoM	O	The unit of measure of the received items. Example: LB
Mult. Rcpts exist?	O	Report output indicating multiple receipt status. Example: Yes
Statistical Rx.?	O	Statistical receipt refers to a non payment related receipt. Example: Yes
Order Type	O	A classification code for the type of order document. Type of orders include domestic/international sales order, entitlement credit/debit, and re-donation. Example: ZDOM

Field	R/O/C	Description
		 (Note) For more information, refer to the job aid, Domestic Order Code Definitions .
Doc. Type Descr.	O	Description of the document type key that identifies to which group of documents this document will be assigned. Example: SO - Domestic
SO Item Category	O	A classification that distinguishes between different types of items and determines how the system processes the item. Example: ZTDS

6. Perform any of the following, as needed:

If	Then
The user needs to include the fields relevant to processing order modifications and order returns from SDAs to FNS	<ol style="list-style-type: none"> Click  (the View: dropdown arrow) to display alternative views for this report. Select the following view: SO_SDA_MODIFICATION_REQUEST.
The user needs to customize the report output	<ol style="list-style-type: none"> Use  (the Open Settings Dialog icon) to display the Settings dialog. Select  (the Column Selection tab) to add/remove columns and change the sequence of the displayed columns. Select  (the Sort tab) to sort the results by specified field and direction. Select  (the Calculation tab) to insert a calculated value based on available report fields. Select  (the Filter tab) to apply filter(s) to your report. Click  (the Apply button) to generate the results. As necessary, click  (the Save as... button) to save your selections as a new View. In the save prompt window,

If	Then
	<p>enter a descriptive name.</p> <p>7. Click  (the OK button) to go back to the previous screen.</p>
The user needs to export the report	<ol style="list-style-type: none">1. Select  (the Export button).2. Click  (the Export to Microsoft Excel option) to open the report data in Excel or a compatible application.3. Click  (the Arrow button) in the dialog box.4. Click  (the Open option) in the dialog box.5. Review and modify the report as needed.6. As necessary, save the Excel spreadsheet for later reference.7. Close Excel.
The user needs to print to PDF	<ol style="list-style-type: none">1. Select  (the Print to PDF button) to open a formatted print-ready document.2. Click  (the Arrow button) in the dialog box.3. Click  (the Open option) in the dialog box.4. Review, print, and save the PDF output as needed.5. Close the PDF document.
7. The transaction is complete.	



Work Instruction
Review Order Status Report

RESULT

The Order Status Report for the selected criteria, such as order number, delivery date, or receipt date, has been displayed and reviewed. As applicable, the report may also have been customized and/or exported to Excel or PDF format.



PROCESS OVERVIEW

Purpose

The Processing Status Report provides a summary of demand forecasts for bulk materials, including those created by converting sales orders. This report is used for tracking allocations of materials against those forecasts throughout the processing lifecycle. In addition to the forecast summary, this report provides the expected delivery date and the type and quantity of item(s) ordered. Processor HQs, State Distributing Agencies (SDAs), and Indian Tribal Organizations (ITOs) can use this information to coordinate deliveries with Processors or other partners.

Process Trigger

This report is intended for FNS, AMS, SDAs/ITOs, Processors, and Processor HQs to review delivery dates, approval statuses, and other forecast and allocation details.

Prerequisites

- Forecasts must exist in WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Reports** tab → **Order Processing** folder → **Processing Status Report** link.

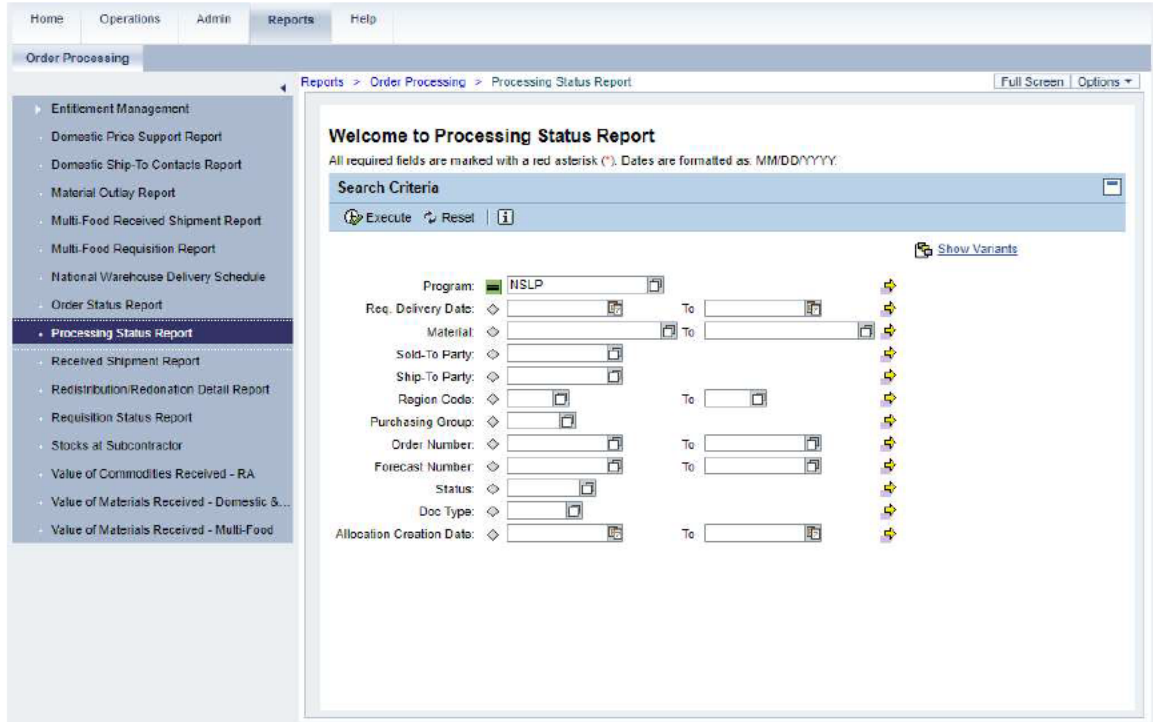
Tips and Tricks

- 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.
- Refer to the [Reporting Navigation Job Aid](#) for tips for using WBSCM reports


PROCEDURE

1. Start the transaction using the following path: **Reports** tab → **Order Processing** folder → **Processing Status Report** link.

Image: Processing Status Report Screen



The screenshot shows the 'Processing Status Report' screen. The left-hand navigation pane lists various reports, with 'Processing Status Report' highlighted. The main content area is titled 'Welcome to Processing Status Report' and includes a 'Search Criteria' section. Below this, there are several search fields with dropdown arrows and 'To' fields for range selection. The fields are: Program (set to 'NSLP'), Req. Delivery Date, Material, Sold-To Party, Ship-To Party, Region Code, Purchasing Group, Order Number, Forecast Number, Status, Doc Type, and Allocation Creation Date. A 'Show Variants' button is located in the top right of the search area.

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

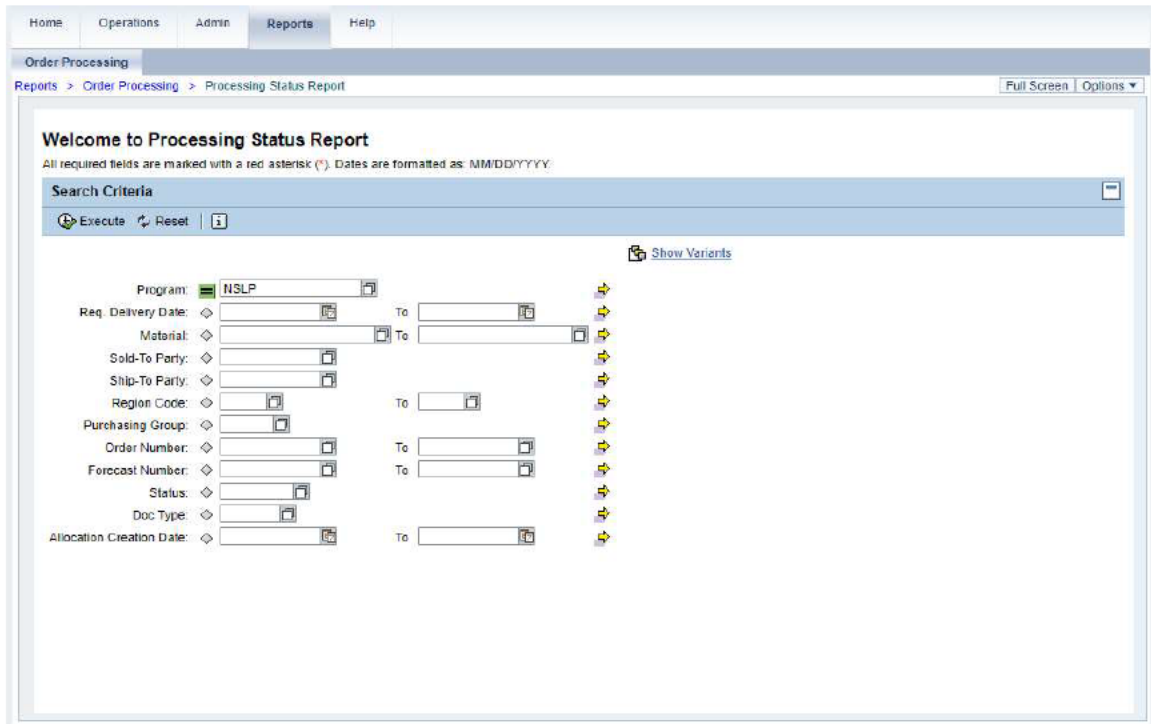


(Note) A value must be entered in at least one of the following selection fields: **Req. Delivery Date**, **Order Number**, **Forecast Number**, or **Allocation Creation Date**. Additional search criteria can be used to narrow the results.






(Note) Use the **To** field to indicate the upper value of a range when needed. For example, to search for orders with a requested delivery date between January 1, 2021, and January 1, of 2022, enter **01/01/2021** in the **Req. Delivery Date** field and **01/01/2022** in the adjacent **To** field.

Image: Processing Status Report Screen



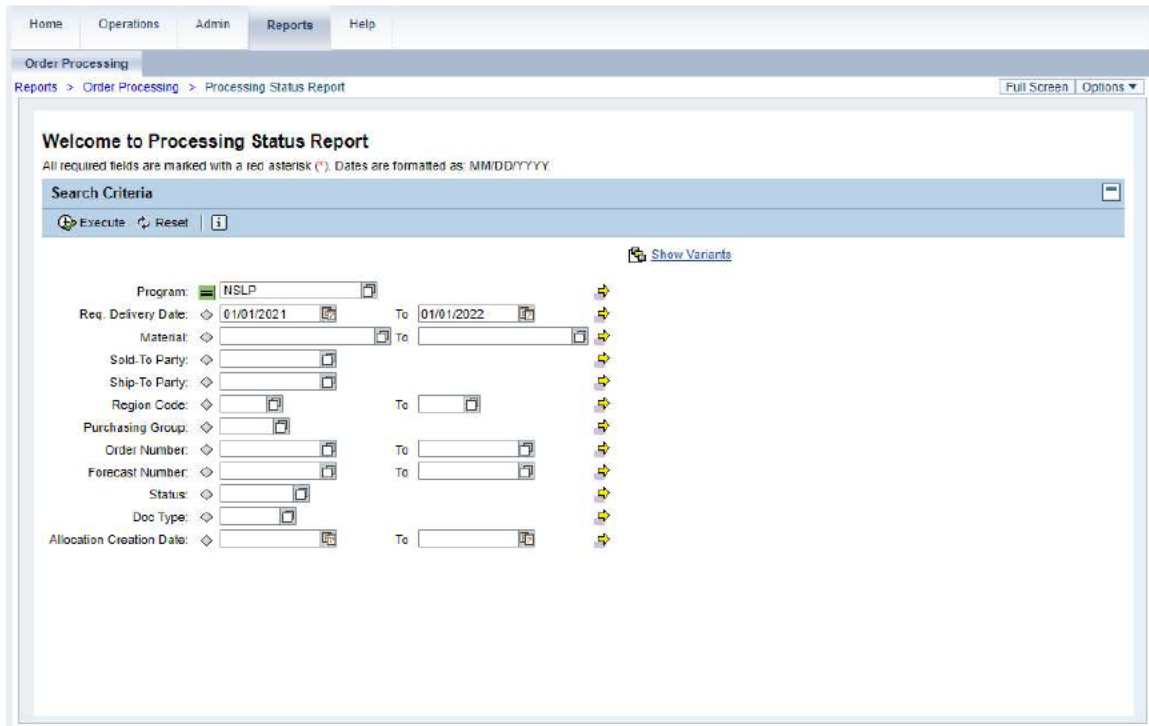
3. As required, complete/review the following fields:

Field	R/O/C	Description
Program:	O	Acronym to identify a USDA food distribution program. Example: NSLP
Material:	O	Unique six-digit number representing a specific material/commodity in WBSCM.
Sold-To Party:	O	Unique identifying number associated with a particular customer in WBSCM.
Ship-To Party:	O	Unique identifying number associated with a person or company that receives the materials or commodities.

Field	R/O/C	Description
Region Code:	O	Code assigned within WBSCM that defines a specific region.
Purchasing Group:	O	Buyer or group of buyers responsible for purchasing activities. Also signifies a group of specialists who purchase similar items.
Req. Delivery Date:	O	Date requested by customer for delivery of ordered materials or commodities. Example: 01/01/2021
Order Number:	O	This can be a sales order number, purchase order number, or delivery document number.  (Note) In this work instruction, the Order Number refers to a sales order number that was converted into a forecast.
Forecast Number:	O	A unique document number which specifies the Forecast details.
Status:	O	The code for status of the document.  (Note) The order statuses are listed below. <ul style="list-style-type: none"> • Purchased (PURC) - No allocations have been created against the forecast. • Cancelled (CANC) - Forecast was cancelled. Entitlement returned to customer account. • Order Received (OREC) - Allocation(s) has been created by the Processor against the forecast.
Doc. Type:	O	Key that identifies to which group of documents this document will be assigned.  (Note) The document types are listed below. <ul style="list-style-type: none"> • Customer Forecast (ZPFR) • Proc Transfer (ZPPA) • Proc Transfer-Credit (ZPPR)

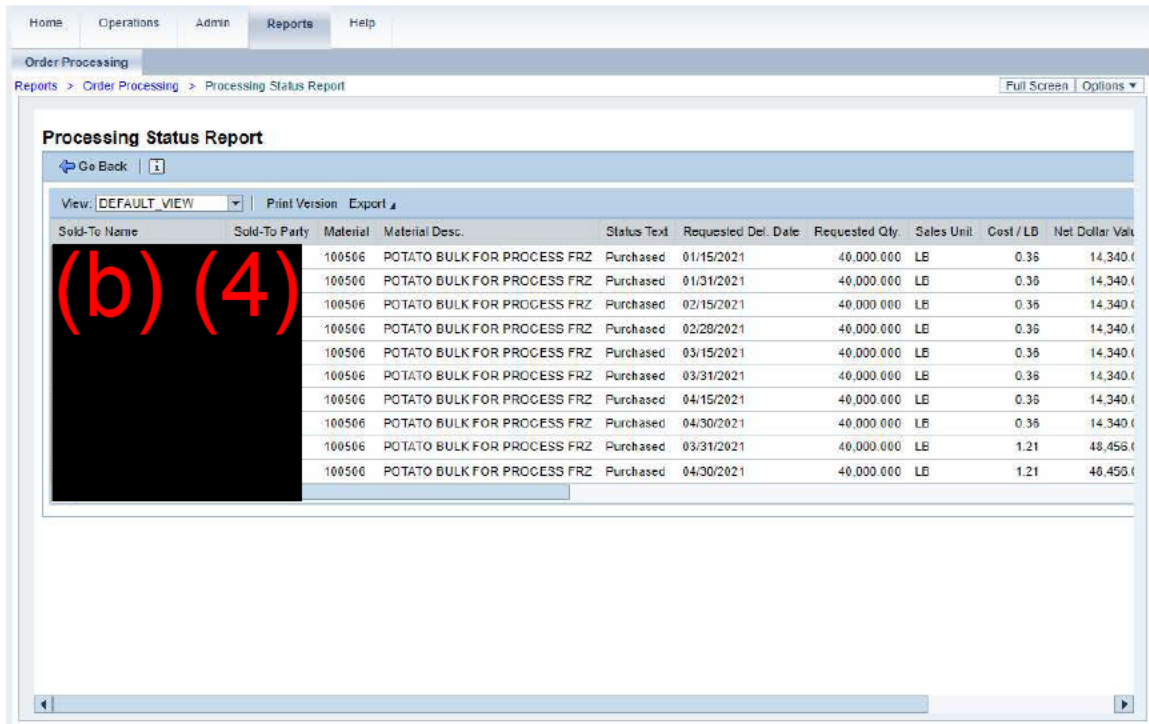
Field	R/O/C	Description
Allocation Creation Date:	O	The date when a Processor allocates a quantity against a forecast.

Image: Processing Status Report Screen



4. Click  **Execute** (the **Execute** button) to generate the report.

Image: Processing Status Report Screen




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

Field	R/O/C	Description
Sold-To Name	O	Unique identifying number associated with a particular customer in WBSCM. Example: (b) (4)
Sold-To Party	O	Unique identifying number associated with a particular customer in WBSCM. Example: (b) (4)
Material	O	Unique six-digit number representing a specific material/commodity in WBSCM. Example: 100506
Material Desc.	O	Text containing up to 40 characters that describes the material/commodity in detail. Example: POTATO BULK FOR PROCESS FRZ





Work Instruction
Review Processing Status Report

Field	R/O/C	Description
Status Text	O	The code for status of the document. Example: Purchased  (Note)The only forecast statuses are listed below. <ul style="list-style-type: none">• Purchased (PURC) - No allocations have been created against the forecast.• Cancelled (CANC) - Forecast was cancelled. Entitlement returned to customer account.• Order Received (OREC) - Allocation(s) has been created by the Processor against the forecast.
Requested Del. Date	O	Date requested by customer for delivery of ordered materials or commodities. Example: 01/15/2021
Requested Qty.	O	Quantity requested by the customer. Example: 40,000.000
Sales Unit	O	Unit of measure upon which the price is typically based. Example: LB
Cost/LB	O	Cost of material or commodity measured in pounds. Example: 0.36
Net Dollar Value	O	Dollar amount of the line item. Example: 48,228.00
Program	O	Acronym to identify a USDA food distribution program. Example: NSLP





Work Instruction
Review Processing Status Report

Field	R/O/C	Description
Entit/Bonus Indicator	O	Indicates whether the document is Entitlement or Bonus order and the program year. Example: ENTITLE-SY21
Ship-To Party	O	Unique identifying number associated with a person or company that receives the materials or commodities. Example: 5002260  (Note) In this work instruction, the Ship-To Party refers to the Processor.
Ship-To Name	O	Unique identifying number associated with a person or company that receives the materials or commodities. Example: (b) (4)  (Note) In this work instruction, the Ship-To Name refers to the Processor.
Ship-To City	O	The city to which the materials or commodities are shipped. Example: (b) (4)
Ship-To State	O	The state to which the materials or commodities are shipped. Example: ME
Forecast #	O	A unique document number which specifies the Forecast. Example: 3000000005
Forecast Item #	O	A unique number identifying the forecasted item. Example: 100
Allocation #	O	A unique document which represents the allocation by a Processor. Example: 7000000015




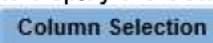

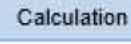




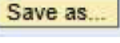

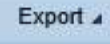
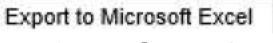


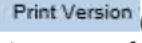


Work Instruction
Review Processing Status Report

Field	R/O/C	Description
Allocation Item #	O	The identification number of the item on the allocation document. Example: 10
Allocation Qty.	O	The amount allocated by the Processor for the state. Example: 40,000.000  (Note) The allocation quantity may not always match the Requested Qty.
Allocation UoM	O	Unit of Measure used for the allocation. Example: LB
Allocation Created On	O	The date when a Processor allocates a quantity against a forecast. Example: 08/26/2020
Allocation Created By	O	The user ID of the person who created the allocation. Example: PROCESSH0001
Var. Wt. Material?	O	Indicator that one package for the item may have a different weight for the same material. Example: No
Order Type	C	A classification in WBSCM whose value differentiates order lines according to their purpose. Example: ZPFR
Doc. Type. Desc.	O	Description of the document type key that identifies to which group of documents this document will be assigned. Example: Customer Forecast

Field	R/O/C	Description
Forecast Item Cat.	O	<p>The item category for the forecasted item.</p> <p>Example: ZPFE</p> <p> (Note) The item categories include:</p> <ul style="list-style-type: none"> • ZPFE - Allocation with entitlement consumption • ZPFX - Allocation without entitlement consumption • ZPPE - Reallocation with entitlement consumption • ZPPX - Reallocation without entitlement consumption
Sales Order #	O	<p>Unique identifying number associated with a sales order in WBSCM.</p> <p>Example: 5000375633</p>
SO Item #	O	<p>The item number identified on the Sales Order.</p> <p>Example: 100</p>

6. Perform any of the following, as needed:

If	Then
The user needs to view the report by breakdown of Ship-to parties	<ol style="list-style-type: none"> 1. Click  (the View: dropdown arrow) to display alternative views for this report. 2. Select the MAT_OUTLAY view.
The user needs to view the report by orders that have been received	<ol style="list-style-type: none"> 1. Click  (the View: dropdown arrow) to display alternative views for this report. 2. Select the RECEIVED_SHIPMENT view.
The user needs to customize the report output	<ol style="list-style-type: none"> 1. Use  (the Open Settings Dialog icon) to display the Settings dialog. Select  (the Column Selection tab) to add/remove columns and change the sequence of the displayed columns. 2. Select  (the Sort tab) to sort the results by specified field and direction. 3. Select  (the Calculation tab) to insert a calculated value based on

If	Then
	<p>available report fields.</p> <ol style="list-style-type: none">4. Select  (the Filter tab) to apply a filter(s) to your report.5. Click  (the Apply button) to generate the results.6. As necessary, click  (the Save as... button) to save your selections as a new View. In the save prompt window, enter a descriptive name.7. Click  (the OK button) to go back to the previous screen.
The user needs to export the report	<ol style="list-style-type: none">1. Select  (the Export button).2. Click  (the Export to Microsoft Excel button) to open the report data in Excel or a compatible application.3. Click  (the Arrow button) in the dialog box.4. Click  (the Open option) in the dialog box.5. Review and modify the report as needed.6. As necessary, save the Excel spreadsheet for later reference.7. Close Excel.
The user needs to print to PDF	<ol style="list-style-type: none">1. Select  (the Print Version button) to open a formatted print-ready document.2. Click  (the Arrow button) in the dialog box.3. Click  (the Open option) in the dialog box.4. Review, print, and save the PDF output as needed.5. Close the PDF document.
7. The transaction is complete.	



Work Instruction
Review Processing Status Report

RESULT

The Processing Status Report for the selected criteria has been displayed and reviewed. As applicable, the report may also have been customized and/or exported to Excel or PDF format.



PROCESS OVERVIEW

Purpose

The Requisition Status Report lists all requisitions created by RA Order Managers or by SDA Order Managers on behalf of their RAs. The report provides order information and status for each line item and related documents (sales order, purchase order, etc.). This report can be used to monitor activity on requisitions through the order life cycle. Status codes and their description are described in the [Sales Order and Complaint Statuses](#) job aid.

FNS Order Managers can view all requisitions in the system. SDA and USAID Order Managers can view only requisitions that they or their RAs created. RAs can view only their own requisitions.

Frequent execution of the Requisition Status Report for an organization's plants and/or warehouses, allows users to monitor material statuses, and delivery schedules.

Process Trigger

Use this report to review delivery dates, approval status, and other details for requisitions.

Prerequisites

- Requisitions must exist in WBSCM

Portal Path

Follow the Portal path below to complete this transaction:

- Select **Reports** tab → **Order Processing** folder → **Requisition Status Report** link to go to the *Requisition Status Report (Selection)* screen..

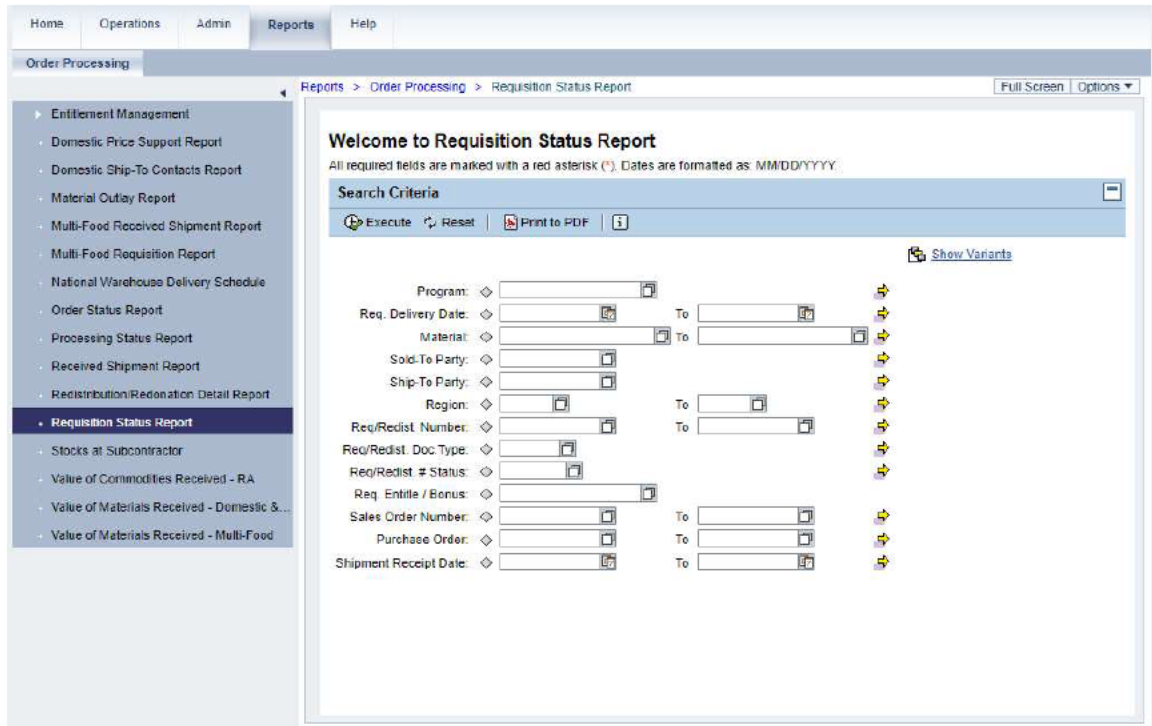
Tips and Tricks

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

PROCEDURE

1. Start the transaction using the following Portal path: Select **Reports** tab → **Order Processing** folder → **Requisition Status Report** link.

Image: Requisition Status Report Screen



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

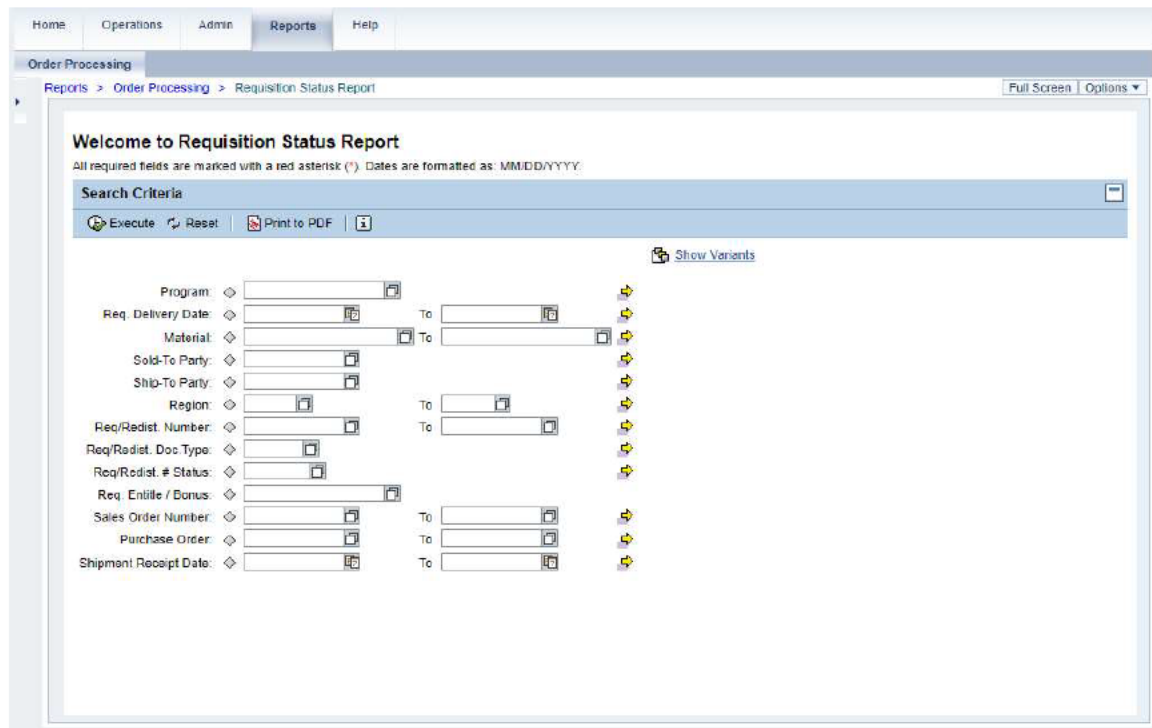


(Note) At least one value must be entered in one of the following selection fields: **Req. Delivery Date**, **Requisition Number**, **Sales Order Number**, **Purchase Order Number**, or **Shipment Receipt Date**. Additional search criteria can be used to narrow the results.



(Note) Use the **To** field to indicate the upper value of a range when needed. For example, to search for orders with a requested delivery date between March 1, 2021 and January 24, 2022, enter "03/01/2021" in the **Req. Delivery Date** field and "01/24/2022" in the adjacent **To** field.

Image: Requisition Status Report Screen



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

Field	R/O/C	Description
Program:	O	Acronym used to identify a USDA food distribution program. Example: NSLP - National School Lunch Program
Req. Delivery Date:	O	Date requested by customer for delivery of ordered goods or services. Example: 01/24/2022
Sold-To Party:	O	Unique identifying name associated with a particular customer in WBSCM. Example: 8004967
Ship-to Party:	O	Unique identifying number associated with a person or company that receives the goods. Example: 1030631



Work Instruction
Review Requisition Status Report



Field	R/O/C	Description
Region:	O	In the U.S., state in which the vendor or customer resides. Example: VA
Req / Redist. Number:	O	The Requisition or redistribution number for the associated order. Example: 1000039427
Req / Redist. Doc. Type:	O	A classification that distinguishes between different types of requisition or redistribution document types. Example: ZREQ  (Note) For more information, refer to the job aid, Domestic Order Code Definitions
Req / Redist. # Status:	O	Code for the current status of order. Example: E0001  (Note) For more information, refer to the job aid, Sales Order and Complaint Statuses .
Req. Entitle / Bonus:	O	Indicates the type of funds. Example: All
Sales Order Number:	O	Unique identifying number associated with a sales order in WBSCM. Example: 5000050962
Purchase Order:	O	Unique number identifying the Purchase Order. Example: 4100008931
Shipment Receipt Date:	O	The date the shipment is received. Example: 05/05/2021


Image: Requisition Status Report Screen

4. Click **Execute** (the **Execute** button) to generate the report.

Image: Requisition Status Report Screen

Req/Redist. Doc. Type	Req/Redist. Order #	Req/Redist. Item #	Req/Redist. Status	Sold-To Party	Sold-To Name	RA ID	Ship-To Party
ZREQ	4	100	Draft	4000578	(b) (4)		
	1000258987		Approved by SDA		(b) (4)		
	1000258470		Approved by SDA		(b) (4)		
	1000259483		Approved by SDA		(b) (4)		
	1000258484		Approved by SDA		(b) (4)		
	1000260012		Approved by SDA		(b) (4)		
	1000260436		Approved by SDA		(b) (4)		
	1000262696		Approved by SDA		(b) (4)		
	1000262667		Approved by SDA		(b) (4)		
	1000262668		Approved by SDA		(b) (4)		
	1000262669		Approved by SDA		(b) (4)		
	1000262769		Approved by SDA		(b) (4)		
	1000262770		Approved by SDA		(b) (4)		
	1000262771		Approved by SDA		(b) (4)		
	1000262772		Approved by SDA		(b) (4)		

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

Field	R/O/C	Description
Req/Redist. Doc.Type	O	A classification that distinguishes between different types of requisition document types. Example: ZREQ
Req/Redist. Order #	R	Requisition or redistribution order number. Example: 1000258987
Req/Redist. Item #	O	The item number identified on the requisition or redistribution order number. Example: 100
Req/Redist. Status	O	The approval process stage for the line item on the requisition or the redistribution. Example: Approved by SDA  (Note) For more information, refer to the job aid, Sales Order and Complaint Statuses .
Sold-To Party	O	Unique identifying name associated with a particular customer in WBSCM. Example: (b) (4)
Sold-To Name	O	Unique identifying name associated with a particular customer in WBSCM. Example: (b) (4)
RA ID	O	Unique identifier assigned to a particular RA by the SDA. Example: (b) (4)
Ship-to party	O	Unique identifying number associated with a person or company that receives the goods. Example: (b) (4)






Work Instruction
Review Requisition Status Report

Field	R/O/C	Description
Ship-to Name	O	Unique identifying number associated with a person or company that receives the goods. Example: (b) (4)
Material	O	Unique six-digit number representing a specific material/commodity in WBSCM. Example: 130530
Material Desc.	O	Text containing up to 40 characters that describes the material/commodity in detail. Example: CEREAL CORN FLKS -SUBST
Product hierarchy	O	Alphanumeric character string for grouping materials by combining various characteristics used for valuation and pricing purposes. Example: CEREAL/CORN AND RICE/BOX
Requested Del. Date	O	Date requested by customer for delivery of ordered materials or commodities. Example: 01/24/2022
Program	O	Acronym used to identify a USDA food distribution program. Example: CSFP
Entitlement/Bonus Ind	O	Indicates whether the document is Entitlement or Bonus order and the program year. Example: ENTITLE-CY16
Requested Qty.	O	Number of sales units of material requested by the customer. Example: 250.000


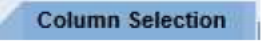
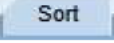
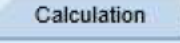
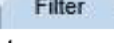





Work Instruction
Review Requisition Status Report

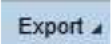





Field	R/O/C	Description
Sales Unit	O	Unit of measure upon which the price is typically based. Example: CS
Net Dollar Value	O	Dollar amount of the line item. Example: 4,289.96
Sales Order #	O	Unique identifying number associated with a sales order in WBSCM. Example: 5000050706
Sales Order Item #	O	The item number identified on the Sales Order. Example: 600
Sales Order Status	O	The approval process stage for the line item on the sales order. Example: Approved by SDA  (Note) For orders that have been receipted with a missing ASN, the Sales Order Status field will display the status of Order Received .  (Note) The most common order statuses are listed below. For more information refer to the job aid, Sales Order and Complaint Statuses . <ul style="list-style-type: none">• Approved by SDA - SDA has applied the RA's requisition in a consolidated sales order.• Approved by SpAgency - FNS has approved the consolidated sales order from the SDA.• On Invitation - Sales Order is currently on a solicitation to be purchased. No changes can be made until purchased.• Purchased - Purchase Order (contract) has been created.• Cancelled - Order was cancelled. Entitlement returned to customer account.• Order Received - Order has

Field	R/O/C	Description
		been delivered to distributor.
Purchase Order #	O	Unique number identifying the Purchase Order. Example: 4100008939
PO Item #	O	Line item on the Purchase Order. Example: 2
Date Received	O	The date the materials were received. Example: 05/09/2021  (Note) This date reflects the most recent goods receipt date.

6. Perform any of the following, as needed:

If	Then
The user needs to customize the report output	<ol style="list-style-type: none"> 1. Use  (the Open Settings Dialog icon) to display the Settings dialog. 2. Select  (the Column Selection tab) to add/remove columns and change the sequence of the displayed columns. 3. Select  (the Sort tab) to sort the results by specified field and direction. 4. Select  (the Calculation tab) to insert a calculated value based on available report fields. 5. Select  (the Filter tab) to apply filter(s) to your report. 6. Click  (the Apply button) to generate the results. 7. As necessary, click  (the Save as... button) to save your selections as a new View. In the save prompt window, enter a descriptive name. 8. Click  (the OK button) to go back to



If	Then
The user needs to export the report	<p>the previous screen.</p> <ol style="list-style-type: none">1. Select  (the Export button).2. Click Export to Microsoft Excel (the Export to Microsoft Excel option) to open the report data in Excel or a compatible application.3. Click  (the Arrow button) in the dialog box.4. Click  (the Open option) in the dialog box.5. Review and modify the report as needed.6. As necessary, save the Excel spreadsheet for later reference.7. Close Excel.
The user needs to print to PDF	<ol style="list-style-type: none">1. Select  (the Print to PDF button).2. Click  (the Arrow button) in the dialog box.3. Click  (the Open option) in the dialog box.4. Review, print, and save the PDF output as needed.5. Close the PDF document.
7. The transaction is complete.	



Work Instruction
Review Requisition Status Report

RESULT

The Requisition Status Report for the selected criteria has been displayed and reviewed. As applicable, the report may also have been customized and/or exported to Excel or PDF format.



PROCESS OVERVIEW

Purpose

The purpose of this transaction is to set the entitlement thresholds or tolerance for a State Distribution Agency's (SDA's) Recipient Agencies (RAs). The SDA Org Admin is able to set the entitlement thresholds by going into the *Maintain Organization* screen. Entitlement threshold notification allows SDAs to be notified when RAs reach defined entitlement threshold percentage. Entitlement threshold stop order allows SDAs to ensure that RAs do not enter orders in WBSCM beyond the defined threshold percentages defined for the Program.

Process Trigger

Perform this transaction to set notification and stop order percentage thresholds.

Prerequisites

- Sold - To Party must exist
- Sold - To Party must be assigned under an entitlement program

Portal Path

Follow the Portal path below to complete this transaction:

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

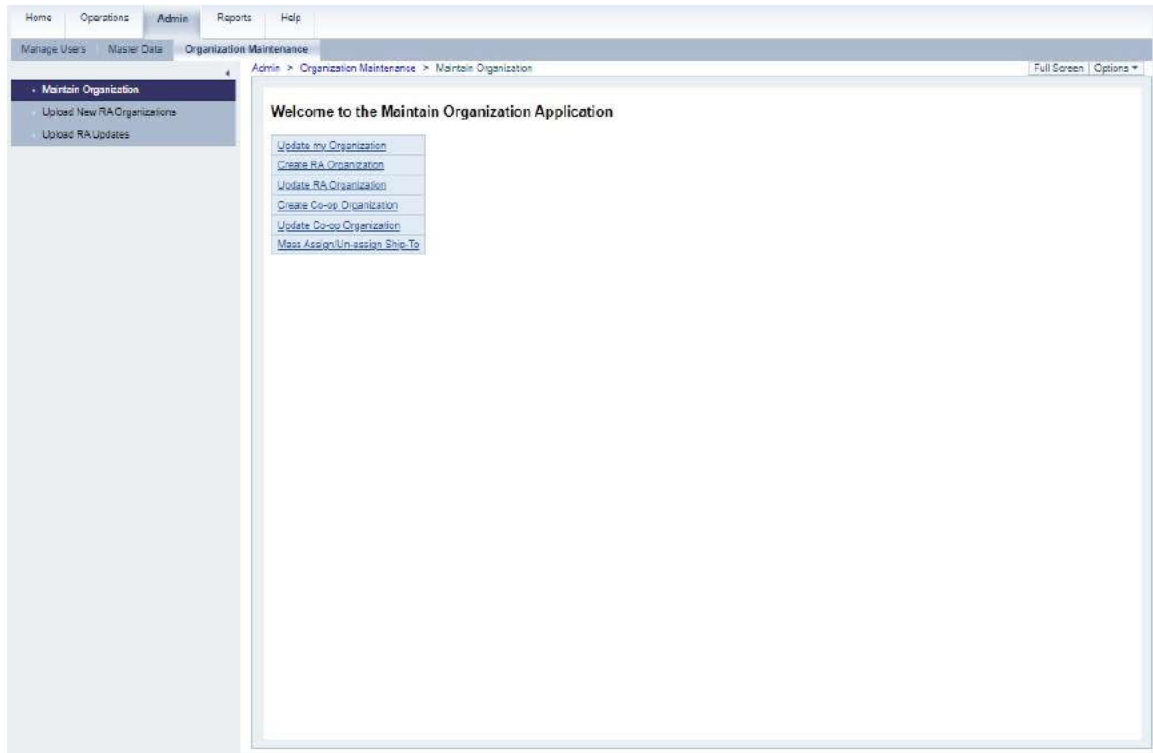
Tips and Tricks

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

PROCEDURE

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

Image: Maintain Organization Screen




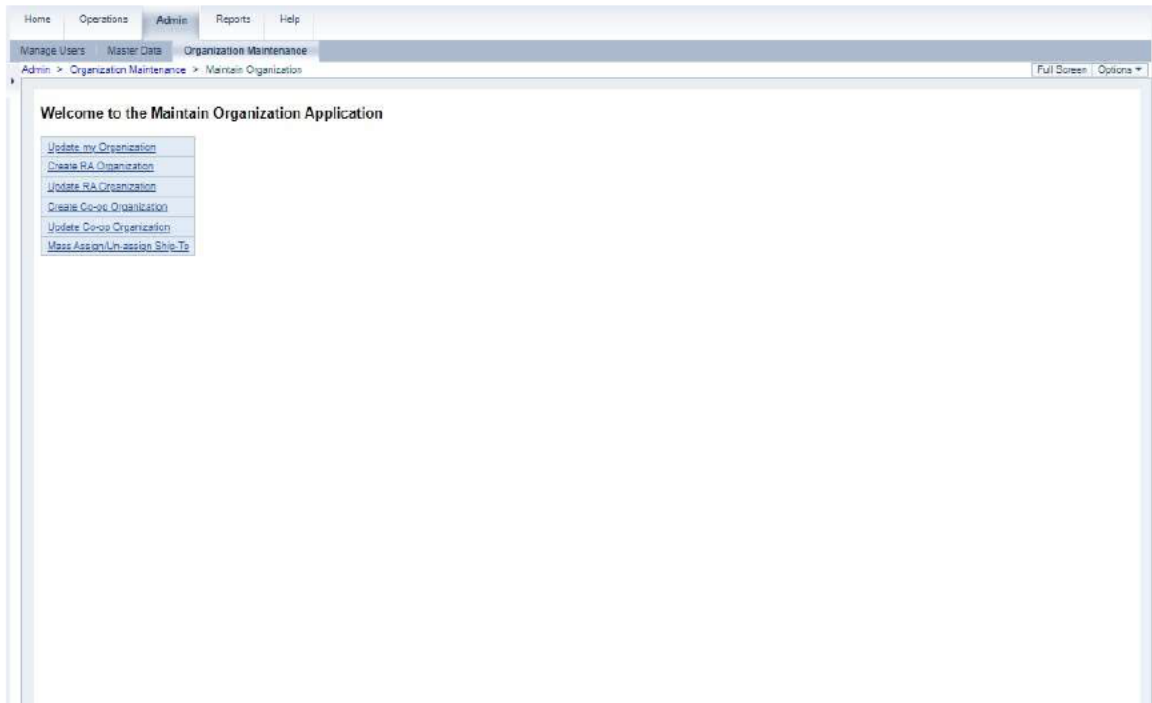
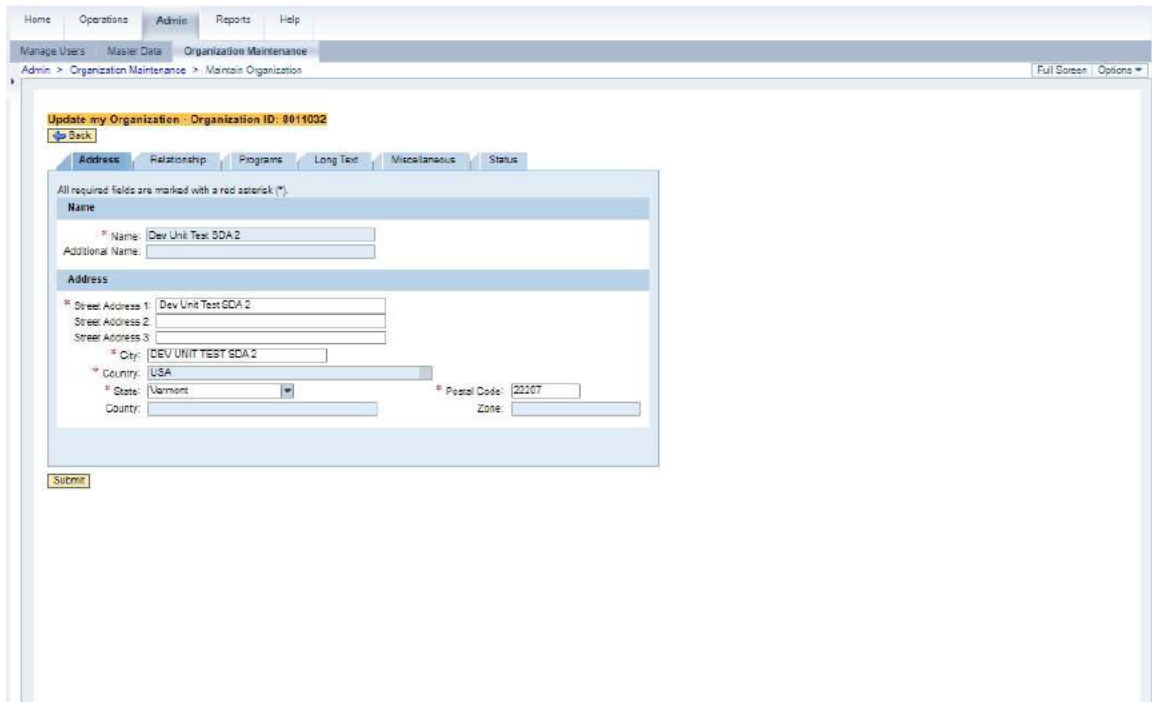
2. Click  (the **Hide Navigator** button) to minimize the Portal menu. Note that this can be done with any transaction in WBSCM.

Image: Maintain Organization Screen



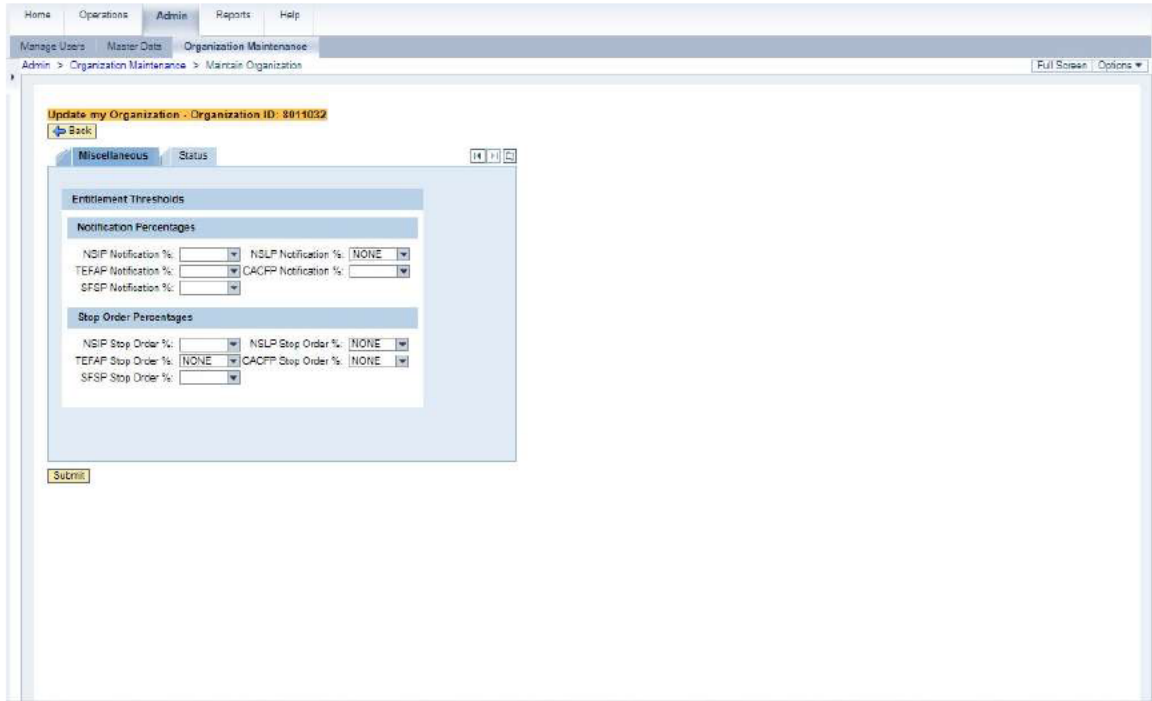
3. Click [Update my Organization](#) (the **Update my Organization** link).


Image: Update my Organization (Address) Screen



4. Click [Miscellaneous](#) (the **Miscellaneous** tab) to view the Entitlement Thresholds.

Image: Update my Organization (Miscellaneous) Screen

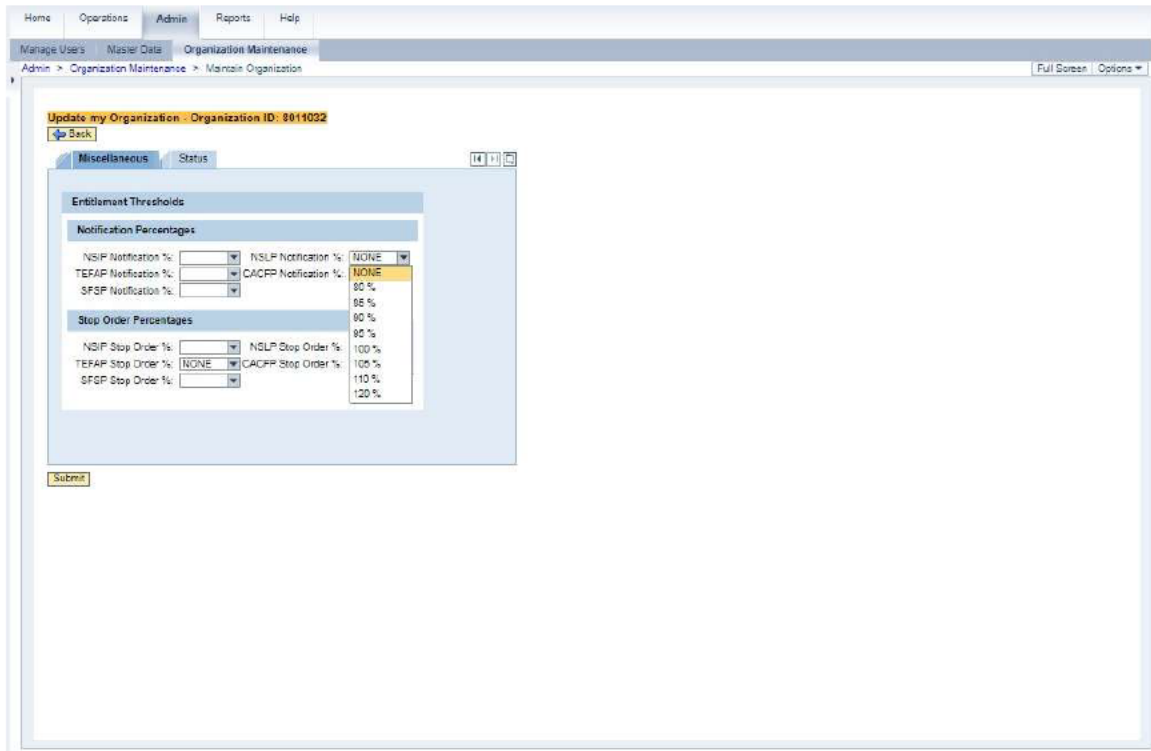


5. Click the appropriate field in the *Notification Percentages* section to set the notification percentage for the desired program. In this example,  (the **NSLP Notification %** drop-down) is selected.



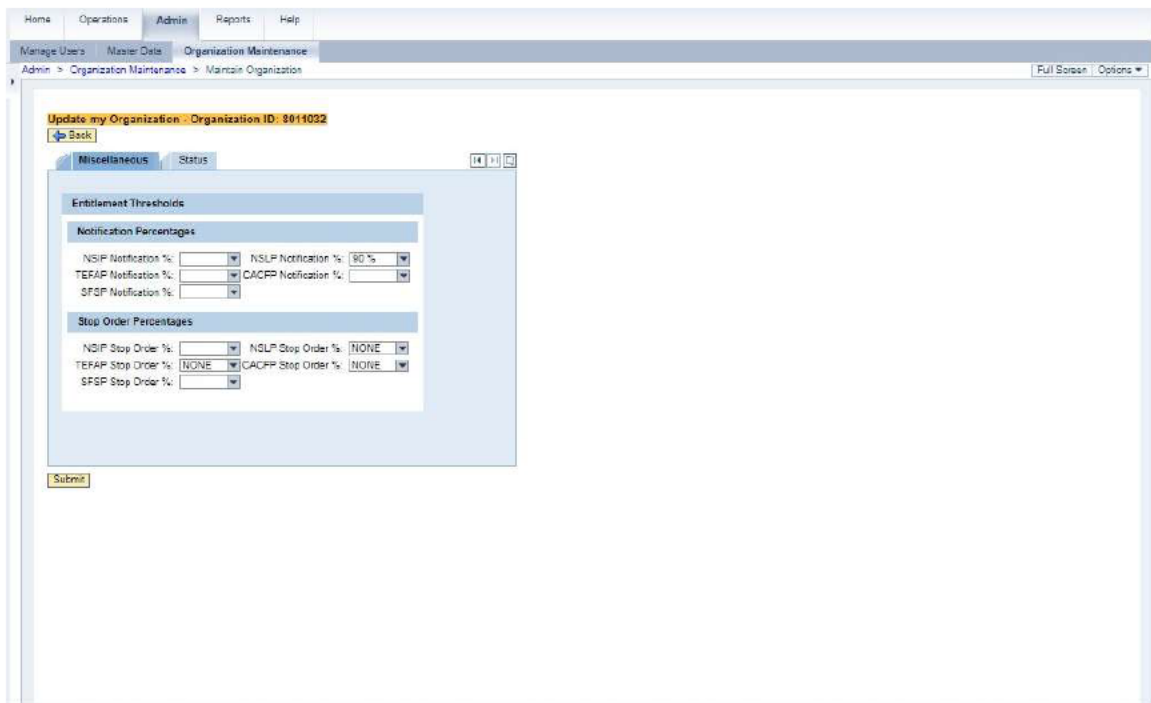
(Note) SDA order managers will receive a weekly email notification for each entitlement program with a consolidated list of all RAs who have exceeded the notification percentages threshold of their entitlement budget.

Image: Update my Organization (Miscellaneous) Screen



6. Select the appropriate notification percentage from the list. In this example, 90% (the 90% option) is selected.

Image: Update my Organization (Miscellaneous) Screen



7. Click the appropriate field in the *Stop Order Percentages* section to set the stop order percentage for the desired program. In this example, (the **NSLP Stop Order %** drop-down) is selected.



(Note) Once an RA has spent the stop order percentages threshold in their entitlement budget for a particular program, they will no longer be able to place orders. When attempting to submit a requisition for approval, a hard stop error message displays.

Image: Update my Organization (Miscellaneous) Screen

The screenshot shows a web application interface for updating an organization. The main content area is titled "Update my Organization - Organization ID: 8014032" and includes a "Back" button. The "Miscellaneous" tab is active, showing two sections: "Entitlement Thresholds" and "Stop Order Percentages".

Entitlement Thresholds

Notification Percentages

NSLP Notification %:	<input type="text"/>	NSLP Notification %:	60 %
TEFAP Notification %:	<input type="text"/>	CACFP Notification %:	<input type="text"/>
SFSP Notification %:	<input type="text"/>		

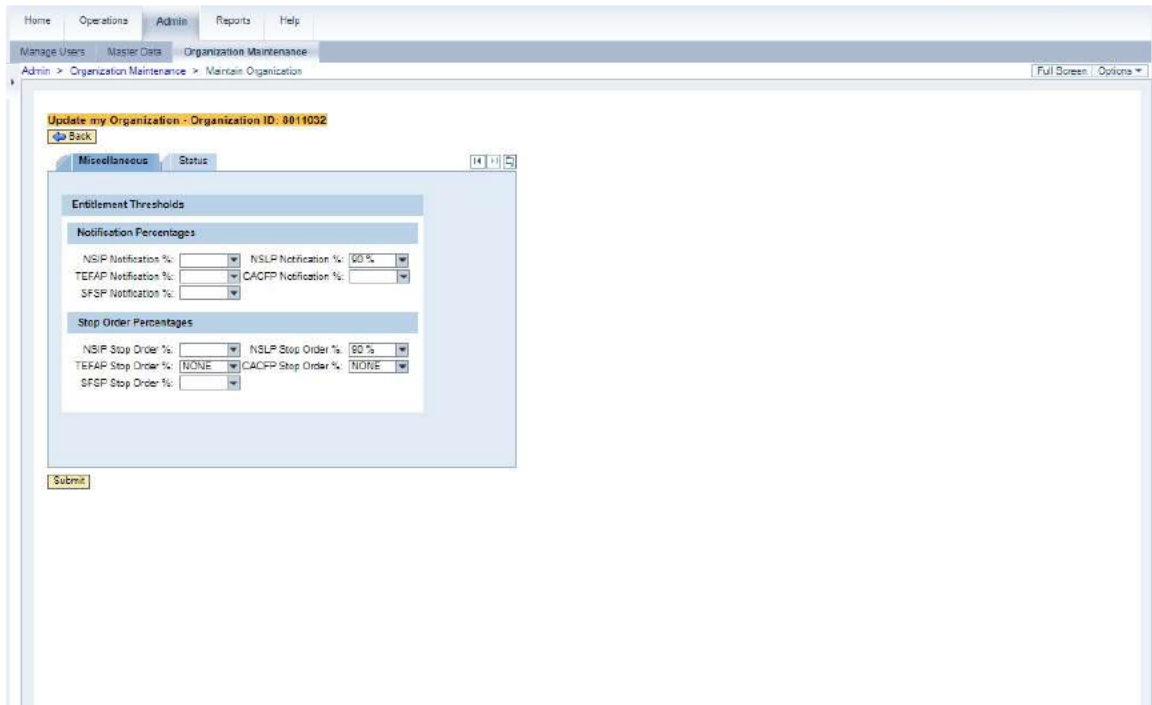
Stop Order Percentages

NSLP Stop Order %:	<input type="text"/>	NSLP Stop Order %:	NONE
TEFAP Stop Order %:	NONE	CACFP Stop Order %:	NONE
SFSP Stop Order %:	<input type="text"/>		

The NSLP Stop Order % dropdown menu is open, showing the following options: NONE, 80 %, 85 %, 90 %, 95 %, 100 %, 105 %, 110 %, and 120 %. The 90 % option is highlighted. A "Submit" button is located at the bottom left of the form area.

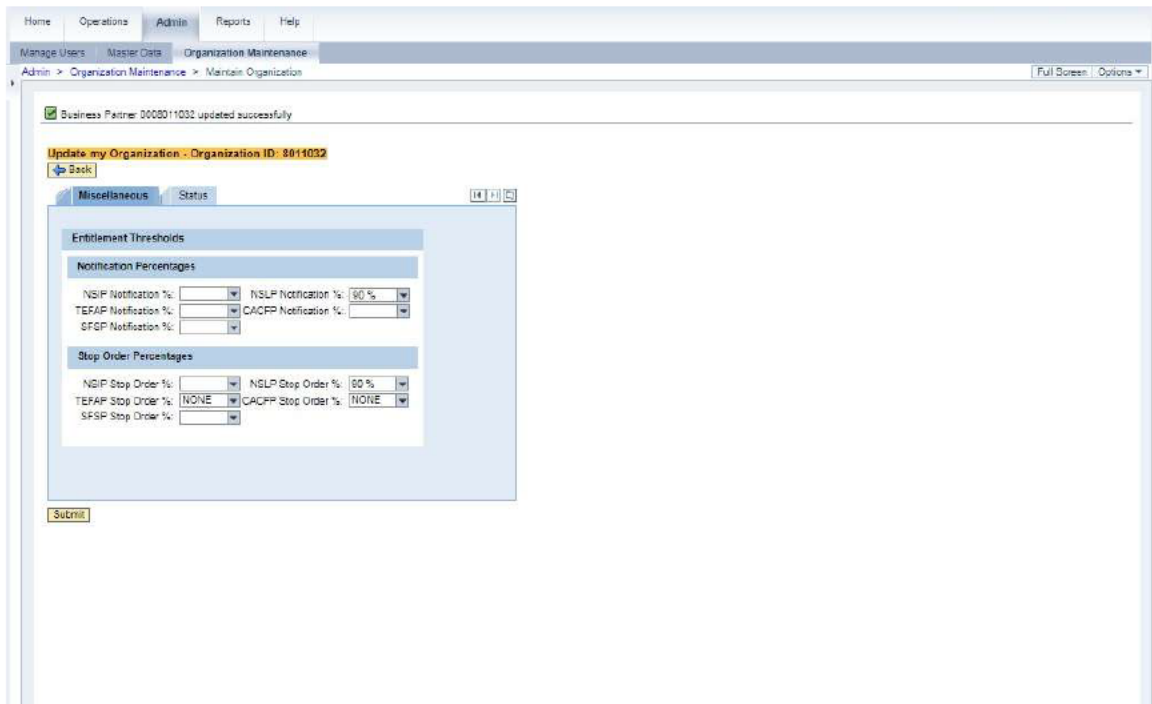
8. Select the appropriate stop order percentage from the drop-down list. In this example, (the **90%** option) is selected.

Image: Update my Organization (Miscellaneous) Screen



9. Click **Submit** (the **Submit** button) to save the selected notification and stop order percentages.

Image: Update my Organization (Miscellaneous) Screen



10. The transaction is complete.



Work Instruction
Set Entitlement Tolerance

RESULT

The user has successfully set the entitlement thresholds or tolerance for a program using the available notification and stop order percentages.