



## PROCESS OVERVIEW

### Purpose

The purpose of this transaction is for State Distributing Agencies (SDAs) and Indian Tribal Organizations (ITOs) who place multi-food orders in WBSCM to establish non-delivery dates (dates when they will not be able to receive deliveries from the national warehouse). Using this transaction, an SDA or ITO may also display their current delivery calendar including all delivery and non-delivery dates and times already established in WBSCM.

### Process Trigger

Use this procedure to display your warehouse delivery schedule and to set up non-delivery dates.

### Prerequisites

- None.

### Portal Path

Follow the Portal path below to complete this transaction:

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

### Tips and Tricks

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

### Reminders

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




## PROCEDURE

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

### Maintain National Warehouse Delivery Calendar Screen

The screenshot displays the 'Maintain National Warehouse Delivery Calendar' screen. The page header includes the USDA logo and 'Web-Based Supply Chain Management'. The navigation bar shows 'Home', 'Operations', 'Admin', 'Reports', and 'Help'. The left sidebar contains a 'Detailed Navigation' menu with 'Maintain National Warehouse Delivery Calendar' selected. The main content area features a form titled 'Selection/Source Delivery Calendar' with the following fields: Organization (0004000030 - KY Dept. of Agriculture), Ship-To Location ((D) (4)), Program, and Calendar Start Date. A 'Go' button is located below the form. The bottom of the page shows a status bar with 'Done', 'Trusted sites', and '100%'.

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



## Work Instruction Set NW Non-Delivery Dates

### Maintain National Warehouse Delivery Calendar Screen

The screenshot shows the 'Maintain National Warehouse Delivery Calendar' screen. The page header includes the USDA logo, 'United States Department of Agriculture', 'Web-Based Supply Chain Management', 'Welcome KY OrderManager', and 'Log Out'. The main content area is titled 'Maintain National Warehouse Delivery Calendar' and contains a form with the following fields:

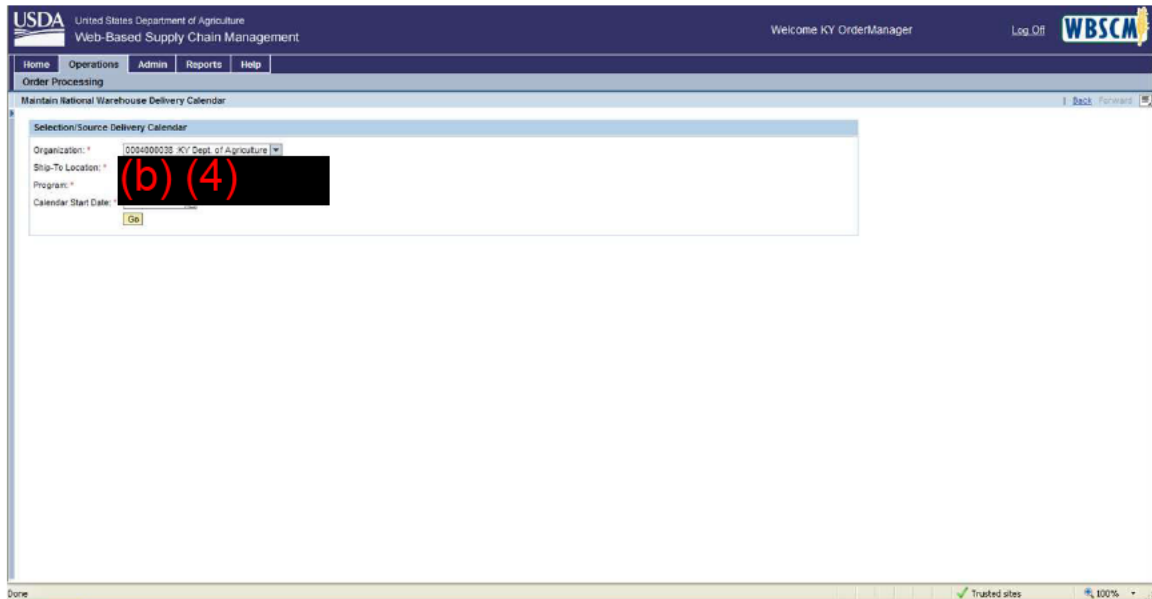
- Organization: \* 000400038 KY Dept. of Agriculture (dropdown menu)
- Ship-To Location: \* 000400038 KY Dept. of Agriculture (dropdown menu)
- Program: \* (text input field)
- Calendar Start Date: \* (date picker)


A 'Go' button is located below the form. The browser status bar at the bottom shows 'Done', 'Trusted sites', and '100%' zoom level.


3. In the **Organization** field, click  (the **Dropdown** button) to select the name of your SDA/ITO.

For this example, we selected (the **000400038: KY Dept. of Agriculture** option) from the list to set up non-delivery dates for the Kentucky Department of Agriculture.

### Maintain National Warehouse Delivery Calendar Screen

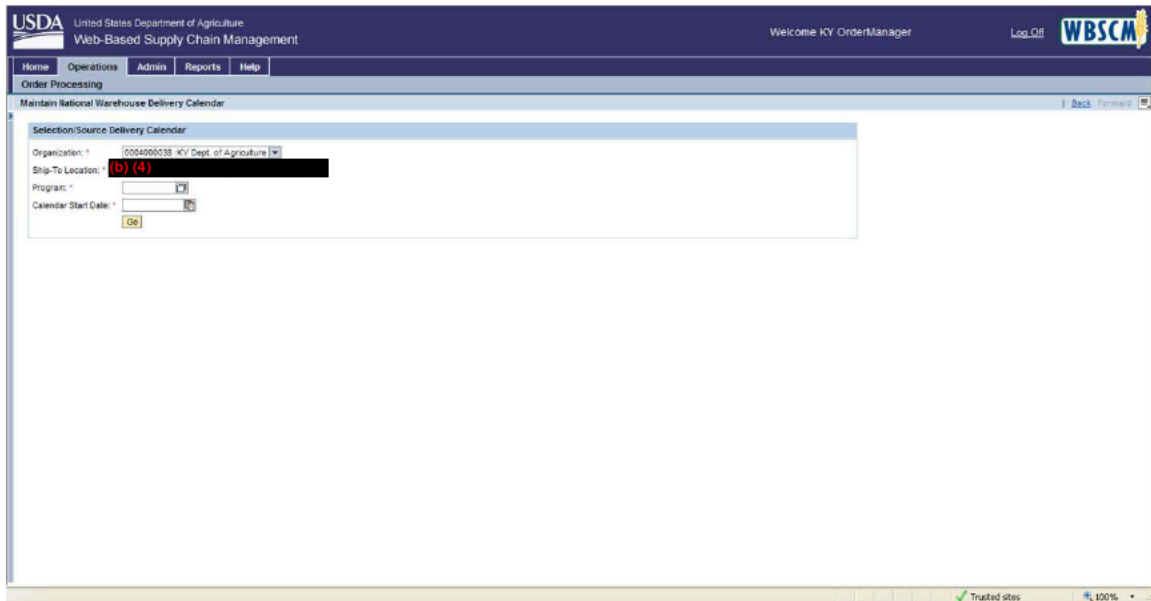


4. In the **Ship-To Location** field, click  (the **Dropdown** button) to select a ship-to location.

For this example, we selected the  option.



### Maintain National Warehouse Delivery Calendar Screen

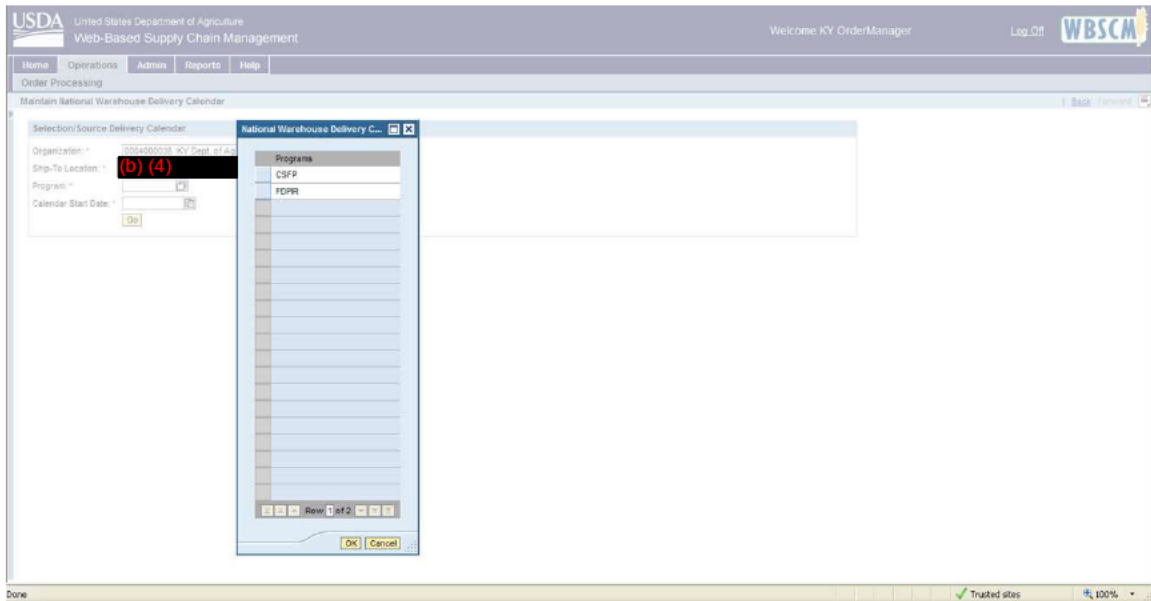



5. Click  (the **Matchcode** button) next to the **Program** field to select a program from a list of your associated programs.



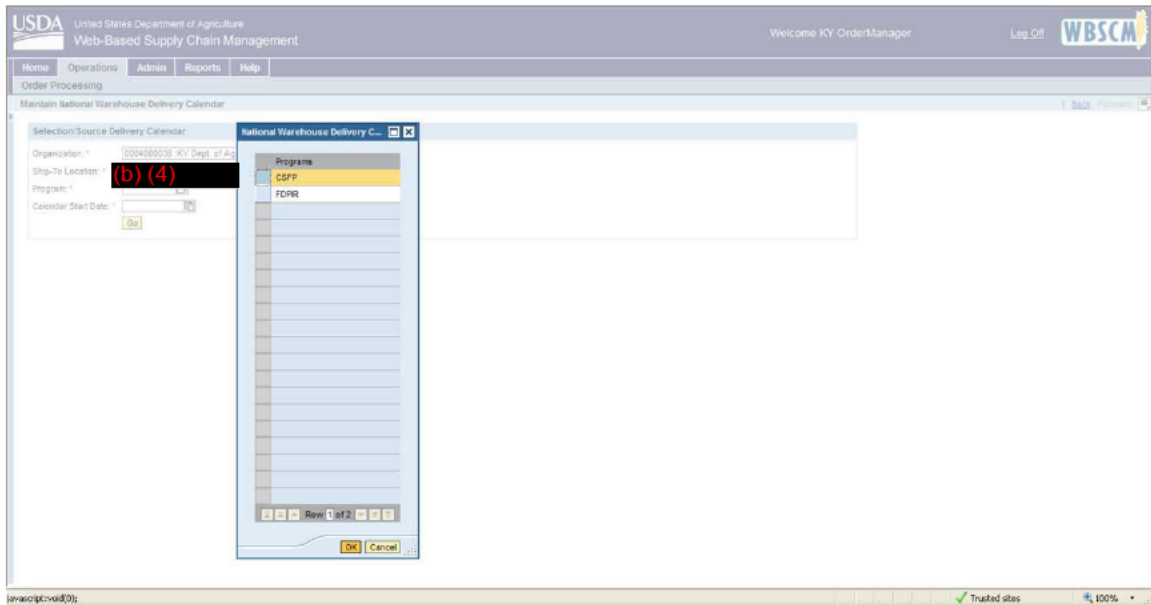
(Note) You can enter the program abbreviation directly into the field. For example, CSFP.


### Maintain National Warehouse Delivery Calendar Screen



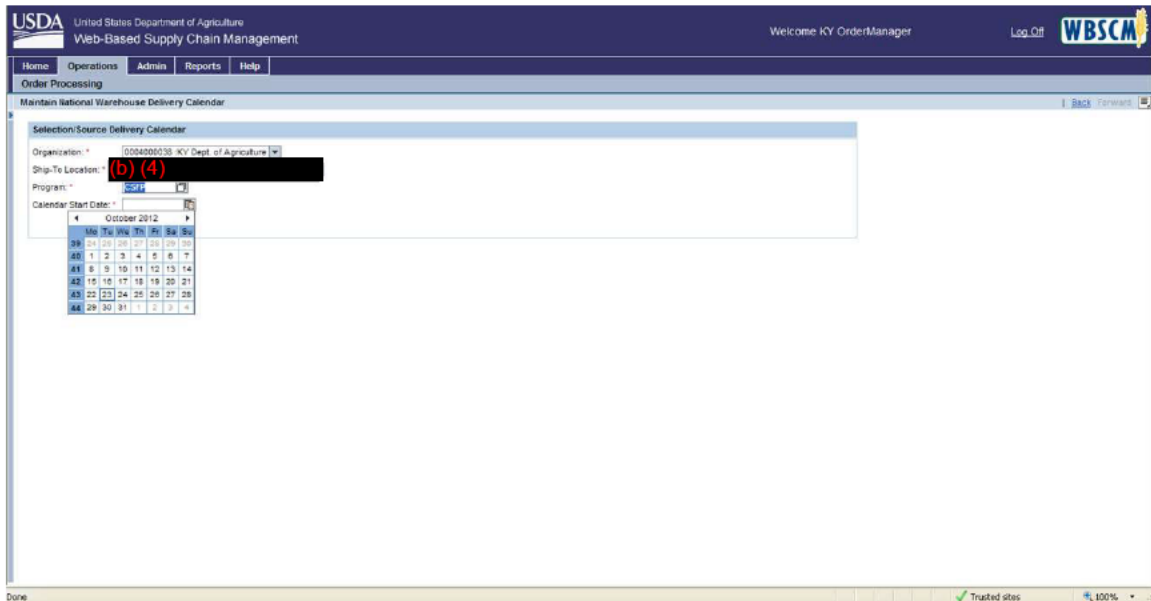
6. Click  (the **Blue Box**) next to the appropriate program option. In this case, we selected the **CSFP** option.

### Maintain National Warehouse Delivery Calendar Screen



7. Click  (the OK button) to select the highlighted program.

### Maintain National Warehouse Delivery Calendar Screen

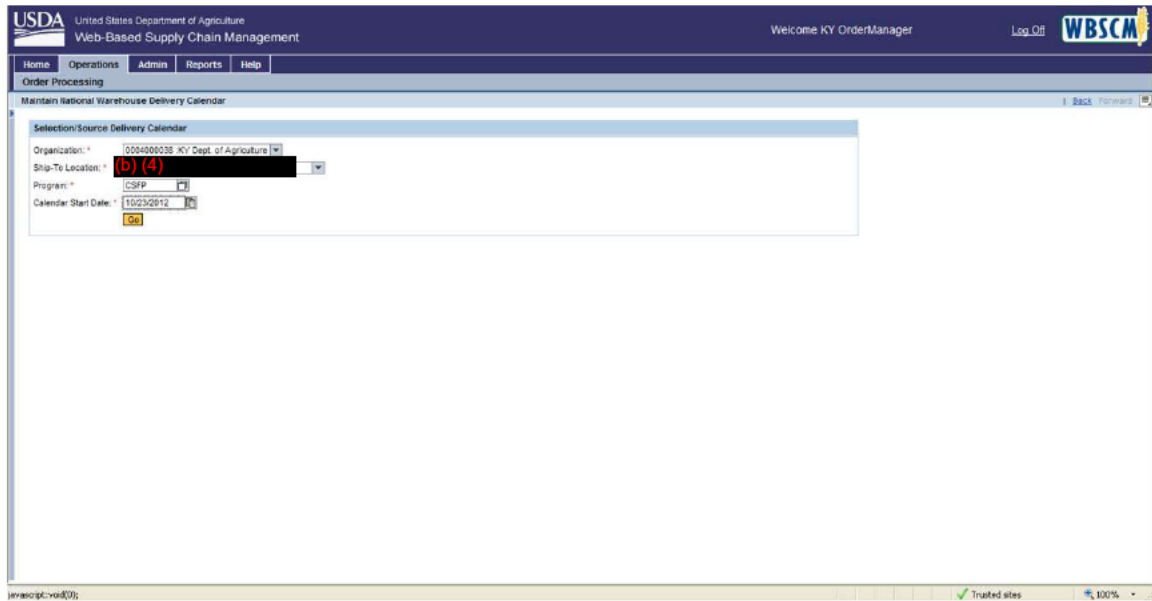


8. Click  (the **Calendar** button) next to the **Calendar Start Date** field to select the date from the calendar.



(Note) You can enter the date directly in the **Calendar Start Date** field.

## Maintain National Warehouse Delivery Calendar Screen



The screenshot displays the 'Maintain National Warehouse Delivery Calendar' screen. At the top, the USDA logo and 'Web-Based Supply Chain Management' are visible. The page title is 'Maintain National Warehouse Delivery Calendar'. Below the title, there is a search criteria form with the following fields:

- Organization: 000400038 KY Dept of Agriculture
- Ship-To Location: (b) (4)
- Program: LCRP
- Calendar Start Date: 10/25/2012

A yellow 'Go' button is located below the form. The browser's address bar shows 'javascript:void(0);' and the status bar indicates 'Trusted sites' and '100%' zoom.

9. Click **Go** (the **Go** button) to display a calendar that corresponds to the Organization, Ship To Location, Program, and Calendar Start Date listed in your criteria.



# Work Instruction Set NW Non-Delivery Dates

## Maintain National Warehouse Delivery Calendar Screen

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

Welcome KY Order/Manager Log Off WBSCM

Home Operations Admin Reports Help

Order Processing

Maintain National Warehouse Delivery Calendar

Selection/Source Delivery Calendar

Organization \* [Organization Name]  
Ship-To Location \* (b) (4)  
Program \* [Program Name]  
Calendar Start Date \* [Date] [Go]

Repeat On

Day of Week: [Day] Frequency: [01] Start Date: [Date] [Add]

Calendar

Previous Year Next Year

Date functions:  
Non-Delivery Dates

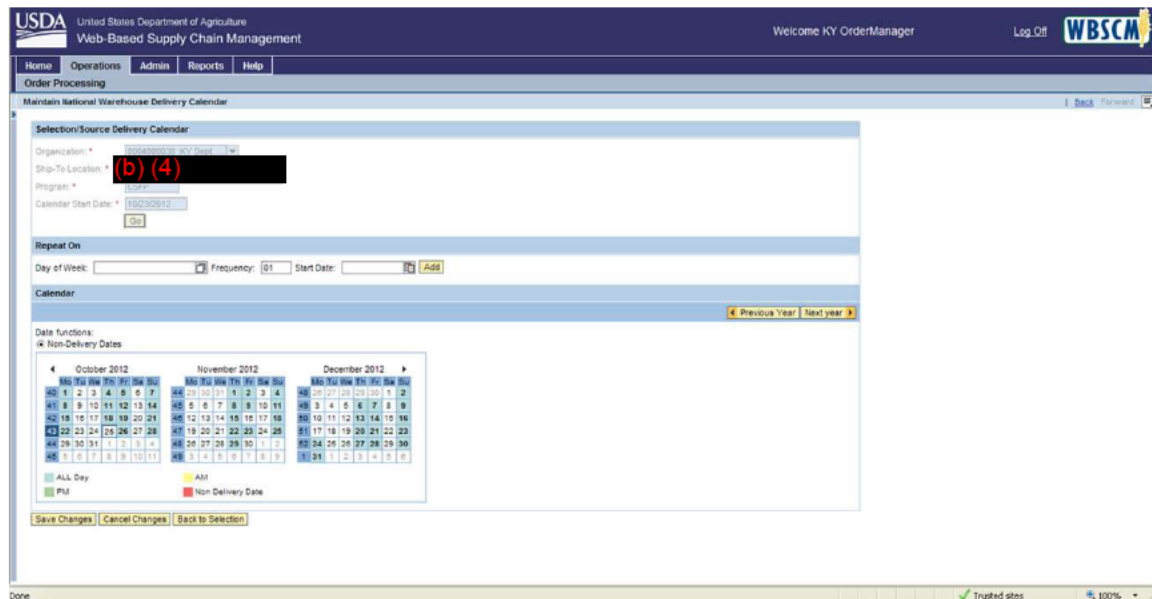
October 2012							November 2012							December 2012						
Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su
30	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10
11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31


ALL Day AM PM Non-Delivery Date

Save Changes Cancel Changes Back to Selection

10. Scroll to the bottom of the screen. You will be able to see the current delivery calendar. Dates when you can receive deliveries at any time during the day are indicated in light blue. Dates when you can receive AM deliveries are indicated in yellow. Dates when you can receive PM deliveries are indicated in green. Non-Delivery Dates are indicated in red.

### Maintain National Warehouse Delivery Calendar Screen

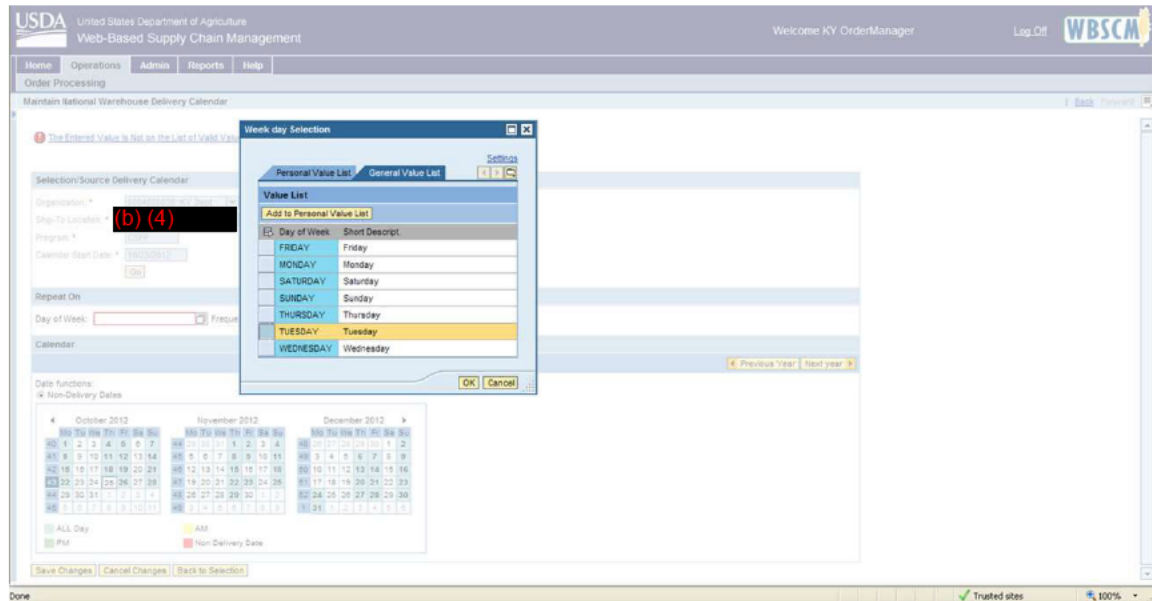



- Click  (the **Matchcode** button) next to the **Day of the Week** field to select a non-delivery day of the week or enter the day directly into the field.

As required, complete/review the following fields:

Field	R/O/C	Description
Day of the Week:	R	Day of week when you do not want to receive deliveries. This could be a recurring date (i.e. I do not want to receive deliveries on any Tuesday in the winter) or one-time dates (i.e. I do not want to receive deliveries on Tuesday, the 30th of October).  Example: Tuesday

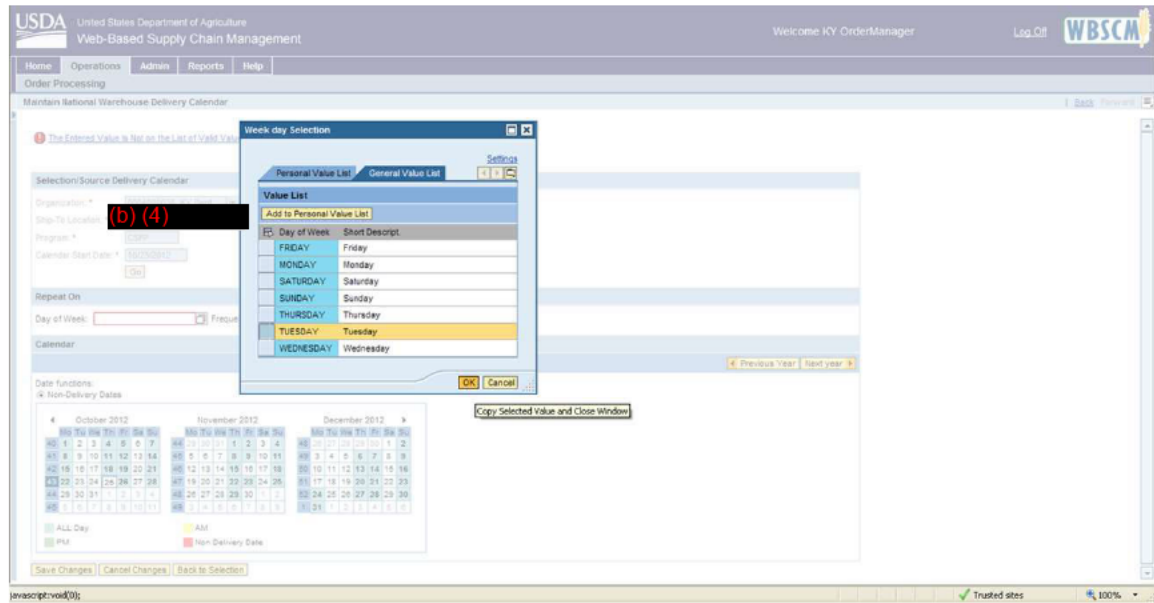
## Maintain National Warehouse Delivery Calendar Screen



- Click  (the **Blue Box**) next to the appropriate day option. In this case, we selected the **Tuesday** option.




## Maintain National Warehouse Delivery Calendar Screen



13. Click  (the OK button) to select the highlighted day.

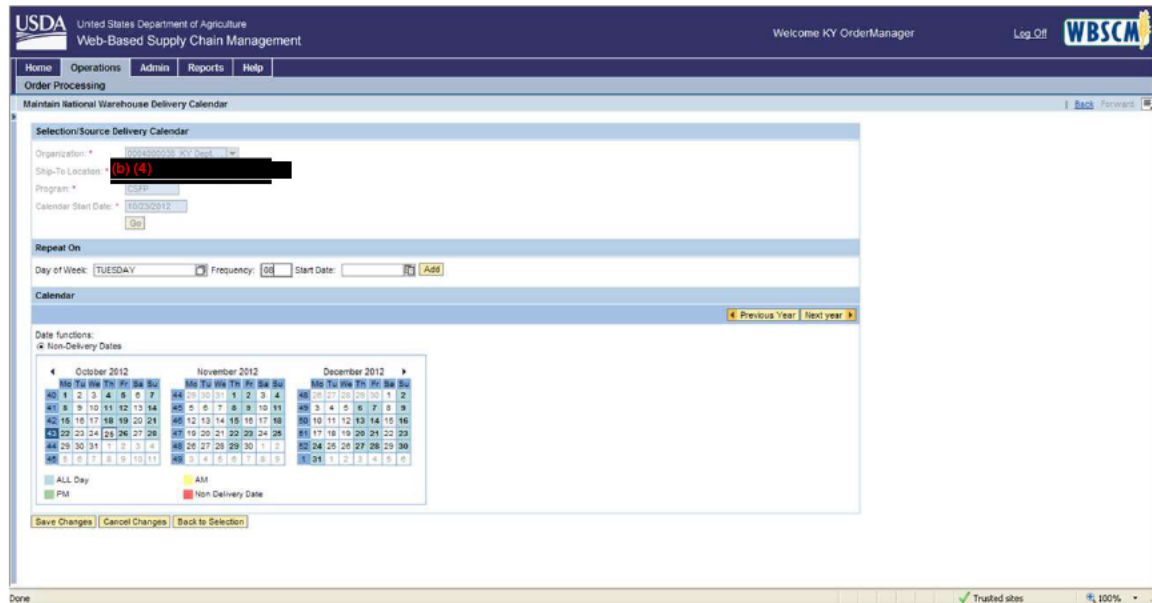
## Maintain National Warehouse Delivery Calendar Screen

14. Click  (the **Frequency** text box) to enter the frequency. In this case, we entered 08 in the text box.

As required, complete/review the following fields:

Field	R/O/C	Description
Frequency	R	Frequency of Tuesdays when you do not wish to receive deliveries. For example, we entered 8 in this field, which will block off the next 8 Tuesdays, so that we do not receive deliveries on those dates.  Example: 8

**Maintain National Warehouse Delivery Calendar Screen**



15. Click  (the **Start Date** text box) to enter the start date or click the calendar icon to select a date from the calendar. In this case, we entered 10/23/12.

As required, complete/review the following fields:

Field	R/O/C	Description
Start Date	R	Date when the non-delivery dates should start. By entering 10/23/2012 in this field, we have indicated that the eight Tuesdays following 10/23/2012 will be blocked out as non-delivery dates.  Example: 10/23/2012

## Maintain National Warehouse Delivery Calendar Screen

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

Welcome KY OrderManager Log Out WBSCM

Home Operations Admin Reports Help

Order Processing

Maintain National Warehouse Delivery Calendar

Selection/Source Delivery Calendar

Organization: \* [Redacted]  
Ship-To Location: (b) (4)  
Program: \* [Redacted]  
Calendar Start Date: \* 10/23/12

Repeat On

Day of Week: TUESDAY Frequency: 06 Start Date: 10/23/12 Add

Calendar

Previous Year Next year

Date functions:  
Non-Delivery Dates

October 2012							November 2012							December 2012						
Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21
22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11
12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	

Legend: ALL Day (Green), PM (Red), AM (Yellow), Non Delivery Date (Red)

Save Changes Cancel Changes Back to Selection

16. Click **Add** (the **Add** button) to add the new non-delivery dates to the calendar.

## Maintain National Warehouse Delivery Calendar Screen

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

Welcome KY OrderManager Log Out WBSCM

Home Operations Admin Reports Help

Order Processing

Maintain National Warehouse Delivery Calendar

Selection/Source Delivery Calendar

Organization: \* [Organization Name]  
Ship-To Location: (b) (4)  
Program: \* [Program Name]  
Calendar Start Date: \* 10/23/2012  
Go

Repeat On

Day of Week: TUESDAY Frequency: 08 Start Date: 10/23/2012 Add

Calendar

Previous Year Next year

Date Functions:  
Non-Delivery Dates

October 2012							November 2012							December 2012						
Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su
30	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	
10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	
30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	
19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	
8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	
28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	

ALL Day AM PM Non Delivery Date

Save Changes Cancel Changes Back to Selection

17. After adding any non-delivery dates click **Save Changes** (the **Save Changes** button) to save your changes.



(Note) The non-delivery dates are indicated in red.



# Work Instruction Set NW Non-Delivery Dates

## Maintain National Warehouse Delivery Calendar Screen

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

Welcome KY OrderManager Log Off WBCSM

Home Operations Admin Reports Help

Order Processing

Maintain National Warehouse Delivery Calendar

Changes Saved Successfully

Selection: Source Delivery Calendar

Organization \* [Redacted]  
Ship-To Location \* (b) (4)  
Program \* [Redacted]  
Calendar Start Date \* 10/23/2012

Repeat On

Day of Week: TUESDAY Frequency: 08 Start Date: 10/23/2012 Add

Calendar

Date functions:  
Non-Delivery Dates

October 2012 November 2012 December 2012

Legend:  
ALL Day  
PM  
AM  
Non-Delivery Date

Save Changes Cancel Changes Back to Selection

Done Trusted sites 100%

18. Confirmation Message Displays.

## Maintain National Warehouse Delivery Calendar Screen

19. You can select individual non-delivery dates by clicking the dates directly on the calendar. The day will turn orange to identify that it has been selected. If you select multiple dates on the calendar this way, the previously selected date will change back to its initial status color.

In this case we clicked (the 29th day).



(Note) Refresh the calendar when finished to confirm your changes (Steps 20-23).







# Work Instruction Set NW Non-Delivery Dates

## Maintain National Warehouse Delivery Calendar Screen

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

Welcome KY User Log Off WBSCM

Home Operations Admin Reports Help  
Order Processing Complaint Administration Recall Administration

Maintain National Warehouse Delivery Calendar

Selection/Source Delivery Calendar

Organization: (b) (4)  
Ship-To Locality: [Redacted]  
Program: USFP  
Calendar Start Date: 10/23/2012

Repeat On  
Day of Week: [ ] Frequency: 01 Start Date: [ ] Add

Calendar  
Previous Year Next year

Date functions:  
Non-Delivery Dates

October 2012							November 2012							December 2012						
Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su
40	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10
11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31

Legend:  
ALL Day  
PM  
AM  
Non-Delivery Date

Save Changes Cancel Changes Back to Selection

21. Click **Back to Selection** (the **Back to Selection** link).



# Work Instruction Set NW Non-Delivery Dates

## Maintain National Warehouse Delivery Calendar Screen

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

Welcome KY User Log Off WBSCM

Home Operations Admin Reports Help  
Order Processing Complaint Administration Recall Administration

Maintain National Warehouse Delivery Calendar

Selection/Source Delivery Calendar

Organization: 104200030 KY Dept. of Agriculture  
Ship-To Location: (b) (4)  
Program: CSFP  
Calendar Start Date: 10/23/2012

Go

22. Click **Go** (the **Go** link) to refresh the calendar.

## Maintain National Warehouse Delivery Calendar Screen

- 23.** Notice that the **29th** and the **30th** are both indicted as non-delivery dates. The **30th** will change from orange to red when the next non-delivery date is selected.

You have completed this transaction.



Use the same process to remove non-delivery dates. (Click the non-delivery date and it will turn orange. Save your changes and refresh the calendar. The date will change to white, which signifies no status.)



Work Instruction  
Set NW Non-Delivery Dates

**RESULT**

The transaction has been successfully completed.



## PROCESS OVERVIEW

### Purpose

The purpose of this transaction is for SDA/ITO Recall Specialists to fill out and submit the Recall Survey Response Form on behalf of their RAs and Ship-Tos. This form is generated in WBSCM to account for all inventory that is being recalled. This procedure describes the steps to access and submit findings for a recall. SDA/ITOs should communicate all recall information with their RAs and Ship-Tos.

### Process Trigger

Use this transaction to display, complete, modify, or submit a response form on behalf of the organization and suborganizations in WBSCM.

### Prerequisites

- Recall case must exist in WBSCM.
- Current date must be before the response deadline.
- SDA/ITO accessing the form must be assigned to the recall case.
- Recall Specialists and Recall Contacts have at least 2 Recall Communication Methods set up in their User Profile.

### Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab → **Recall Administration** folder → **Access Recall Survey Response Form** link to go to the *Access Recall Survey Response Form* screen.

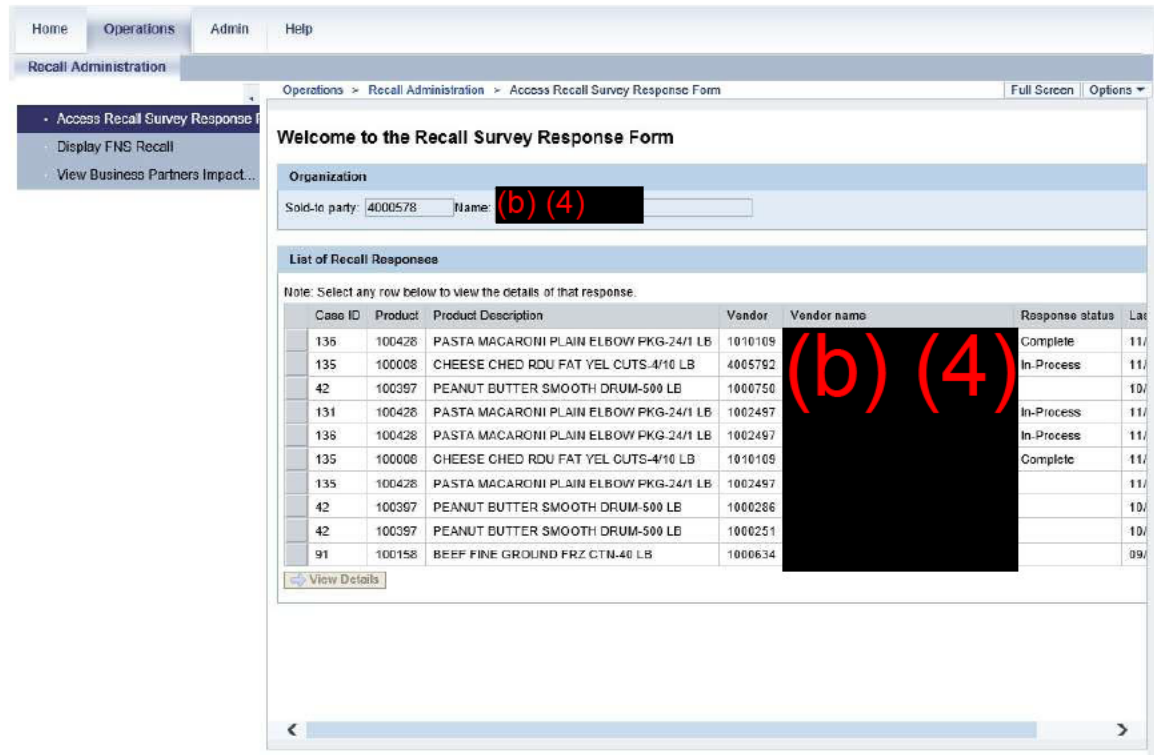
### Tips and Tricks

- 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 following Portal path: **Operations** tab → **Recall Administration** folder → **Access Recall Survey Response Form** link.

**Image: Access Recall Survey Response Screen**



Home Operations Admin Help

Recall Administration

Operations > Recall Administration > Access Recall Survey Response Form Full Screen Options

• Access Recall Survey Response Form  
• Display FNS Recall  
• View Business Partners Impact...

**Welcome to the Recall Survey Response Form**

Organization


Sold-to party: 4000578 Name: (b) (4)

**List of Recall Responses**

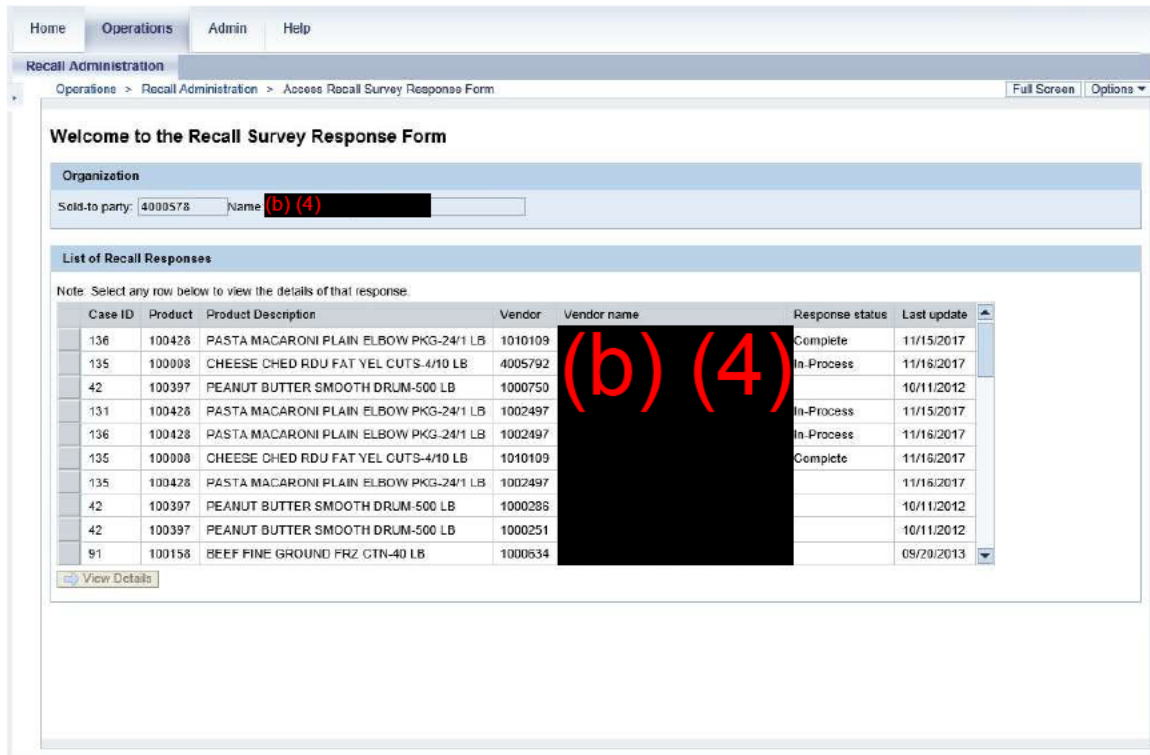
Note: Select any row below to view the details of that response.

Case ID	Product	Product Description	Vendor	Vendor name	Response status	Last
135	100428	PASTA MACARONI PLAIN ELBOW PKG-24/1 LB	1010109	(b) (4)	Complete	11/
135	100008	CHEESE CHED RDU FAT YEL CUTS-4/10 LB	4005792	(b) (4)	In-Process	11/
42	100397	PEANUT BUTTER SMOOTH DRUM-500 LB	1000750	(b) (4)		10/
131	100428	PASTA MACARONI PLAIN ELBOW PKG-24/1 LB	1002497	(b) (4)	In-Process	11/
138	100428	PASTA MACARONI PLAIN ELBOW PKG-24/1 LB	1002497	(b) (4)	In-Process	11/
135	100008	CHEESE CHED RDU FAT YEL CUTS-4/10 LB	1010109	(b) (4)	Complete	11/
135	100428	PASTA MACARONI PLAIN ELBOW PKG-24/1 LB	1002497	(b) (4)		11/
42	100397	PEANUT BUTTER SMOOTH DRUM-500 LB	1000286	(b) (4)		10/
42	100397	PEANUT BUTTER SMOOTH DRUM-500 LB	1000251	(b) (4)		10/
91	100158	BEEF FINE GROUND FRZ CTN-40 LB	1000634	(b) (4)		09/

View Details

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

**Image: Access Recall Survey Response Screen**



Home Operations Admin Help

Recall Administration

Operations > Recall Administration > Access Recall Survey Response Form Full Screen Options

**Welcome to the Recall Survey Response Form**

**Organization**


Sold-to party: 4000578 Name: (b) (4)

**List of Recall Responses**

Note: Select any row below to view the details of that response.

Case ID	Product	Product Description	Vendor	Vendor name	Response status	Last update
136	100428	PASTA MACARONI PLAIN ELBOW PKG-24/1 LB	1010109	(b) (4)	Complete	11/15/2017
135	100008	CHEESE CHED RDU FAT YEL CUTS-4/10 LB	4005792	(b) (4)	In-Process	11/16/2017
42	100397	PEANUT BUTTER SMOOTH DRUM-500 LB	1000750	(b) (4)		10/11/2012
131	100428	PASTA MACARONI PLAIN ELBOW PKG-24/1 LB	1002497	(b) (4)	In-Process	11/15/2017
136	100428	PASTA MACARONI PLAIN ELBOW PKG-24/1 LB	1002497	(b) (4)	In-Process	11/16/2017
135	100008	CHEESE CHED RDU FAT YEL CUTS-4/10 LB	1010109	(b) (4)	Complete	11/16/2017
135	100428	PASTA MACARONI PLAIN ELBOW PKG-24/1 LB	1002497	(b) (4)		11/16/2017
42	100397	PEANUT BUTTER SMOOTH DRUM-500 LB	1000288	(b) (4)		10/11/2012
42	100397	PEANUT BUTTER SMOOTH DRUM-500 LB	1000251	(b) (4)		10/11/2012
91	100158	BEEF FINE GROUND FRZ CTN-40 LB	1000634	(b) (4)		09/20/2013

[View Details](#)

3. SDA/ITO Recall Specialists use the *Access Recall Survey Response Form* screen to select recall response forms assigned to their organization by an FNS Recall Specialist. Click  (the Vertical scrollbar) to display additional cases as necessary.



(Note) To ensure the recall is properly communicated, Recall Specialists and Recall Contacts must have at least 2 Recall Communication Methods set up in their User Profiles. Recall Communication Methods may only be set up by the Recall Specialist or Recall Contact on their own profile. For more information on how to configure Recall Communication Methods, refer to the [Maintain User Profile](#) work instruction.



(Note) In the *List of Recall Responses* section, **Response Status** refers to the status of the response form, which may be one of the following:

- **Open (or blank)** - Forms that have not been started.
- **In-Process** - Forms that have been saved but not yet submitted by a Recall Specialist. These forms can be accessed and modified by the assigned Recall Specialist at any time. Forms in this stage have not been submitted to the USDA.
- **Completed** - Forms that have been saved and submitted to the USDA, and can be modified only by an FNS Recall Specialist.



Work Instruction  
Submit Recall Survey Response Form

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

Field	R/O/C	Description
Case ID	R	A unique identifying number associated with the Hold or Recall case.  <b>Example:</b> 91
Product	R	Substance or commodity that is bought or sold on a commercial basis, or is used, consumed, or created in production; a product can also be a service. Also, a number identifying a material master record.  <b>Example:</b> 100158
Product Description	R	Information used to characterize a material.  <b>Example:</b> (b) (4) - Ground Beef -100158 4/10 lb Chubs
Vendor	R	Business partner that provides materials or services.  <b>Example:</b> 1000634
Vendor name	R	Business partner that provides materials or services.  <b>Example:</b> (b) (4)
Response status	R	Status of the Recall Survey Response form.
Last update	R	Most recent date for update.  <b>Example:</b> 09/20/2016



## Image: Access Recall Survey Response Screen

Home Operations Admin Help

Recall Administration

Operations > Recall Administration > Access Recall Survey Response Form Full Screen Options

Welcome to the Recall Survey Response Form

Organization

Sold-to party: 4000576 Name: (b) (4)

List of Recall Responses

Note: Select any row below to view the details of that response.

Case ID	Product	Product Description	Vendor	Vendor name	Response status	Last update
135	100000	CHEESE CHED RDU FAT YEL CUTS-4/10 LB	1010109	(b) (4)	Complete	11/16/2017
135	100428	PASTA MACARONI PLAIN ELBOW PKG-24/1 LB	1002497	(b) (4)		11/16/2017
42	100397	PEANUT BUTTER SMOOTH DRUM-500 LB	1000288	(b) (4)		10/11/2012
42	100397	PEANUT BUTTER SMOOTH DRUM-500 LB	1000251	(b) (4)		10/11/2012
91	100158	BEEF FINE GROUND FRZ CTN-40 LB	1000634	(b) (4)		09/20/2013
112	100340	CORN FRZ CTN-30 LB	1000550	(b) (4)	Complete	06/06/2016
112	100351	BEANS GREEN FRZ CTN-30 LB	1000550	(b) (4)	Complete	06/06/2016
122	100000	CHEESE CHED RDU FAT YEL CUTS-4/10 LB	4005792	(b) (4)	Complete	08/22/2017
103	100496	RICE US#1 MEDIUM GRAIN BAG-25 LB	1010109	(b) (4)		11/13/2017
137	100496	RICE US#1 MEDIUM GRAIN BAG-25 LB	1002497	(b) (4)		11/14/2017

[View Details](#)

- Click  (the **Selection** box) next to **Case ID "91"** to display the *Access Recall Survey Response Form*.



(Note) The *Response Header* section identifies the product, vendor, and other details about the recall. The Recall Specialist enters disposition quantities for the recalled product and related information in the *Product Inventory / Disposition* section.

**Image: Access Recall Survey Response Form Screen**

Home | Operations | Admin | Help

Recall Administration

Operations > Recall Administration > Access Recall Survey Response Form

Full Screen | Options

**Welcome to the Recall Survey Response Form**

Organization

Sold-to party: 4000578 Name: (b) (4)

**List of Recall Responses**

Note: Select any row below to view the details of that response.

Case ID	Product	Product Description	Vendor	Vendor name	Response status	Last update
135	100008	CHEESE CHED RDU FAT YEL CUTS-4/10 LB	1010109	(b) (4)	Complete	11/16/2017
135	100428	PASTA MACARONI PLAIN ELBOW PKG-24/1 LB	1002497	(b) (4)		11/16/2017
42	100397	PEANUT BUTTER SMOOTH DRUM-500 LB	1000286	(b) (4)		10/11/2012
42	100397	PEANUT BUTTER SMOOTH DRUM-500 LB	1000251	(b) (4)		10/11/2012
91	100158	BEEF FINE GROUND FRZ CTN-40 LB	1000634	(b) (4)		09/20/2013
112	100346	CORN FRZ CTN-30 LB	1000550	(b) (4)	Complete	06/06/2016
112	100351	BEANS GREEN FRZ CTN-30 LB	1000550	(b) (4)	Complete	06/06/2016
122	100008	CHEESE CHED RDU FAT YEL CUTS-4/10 LB	4005792	(b) (4)	Complete	06/22/2017
133	100496	RICE US#1 MEDIUM GRAIN BAG-25 LB	1010109	(b) (4)		11/13/2017
137	100496	RICE US#1 MEDIUM GRAIN BAG-25 LB	1002497	(b) (4)		11/14/2017

[View Details](#)

6. Click [View Details](#) (the View Details button).

**Image: USDA Recall Response**

Home | Operations | Admin | Help

Recall Administration

Operations > Recall Administration > Access Recall Survey Response Form

Full Screen | Options

**Recall Survey Response Form: Inventory and Disposition Details**

Response Header

[Back](#) [Save](#) [Submit to USDA](#)

Case: 91 (b) (4) round Beef-100158 4/10 lb Chubs

Sold To Organization: 4000578 (b) (4)

Product: 100158 BEEF FINE GROUND FRZ CTN-40 LB

Vendor: 1000634 (b) (4)

Response Status:

Response Last Updated: 09/20/2013

Response Deadline: 09/30/2013

**Product Inventory and Disposition**

Unit of Measure: CS

Quantity of products received: 2,000.000

Quantity served prior to recall: 0.000

Quantity on hand: 2,000.000

Quantity on hold or returned to vendor: 0.000

Quantity re-denied: 0.000

Quantity destroyed: 0.000

Quantity unaccounted for: 2,000.000

Disposition documentation on file:

Comment for unaccounted product:

Number of illnesses or injuries: 0

Description of illness or injury:



Work Instruction  
Submit Recall Survey Response Form

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

Field	R/O/C	Description
Product	R	Substance or commodity that is bought or sold on a commercial basis, or is used, consumed, or created in production; a product can also be a service. Also, a number identifying a material master record.  <b>Example:</b> 100158
Product Description	R	Information used to characterize a material.  <b>Example:</b> (b) (4) Ground Beef - 100158 4/10 lb Chubs
Response Status:	R	Status of the Recall Survey Response form.
Response Deadline:	R	Designated deadline for SDA to provide a completed Recall Survey Response form.  <b>Example:</b> 09/30/2013
Unit Of Measure:	R	Unit by which quantities are to be measured.  <b>Example:</b> CS
Quantity of products received:	R	Number of items received by RA/Ship-to.  <b>Example:</b> 2,000.00
Quantity served prior to recall:	O	Quantity of product that was served prior to the recall being issued.  <b>Example:</b> 100
Quantity on hand:	R	Quantity of product that is currently on hand based on the most recent inventory count.  <b>Example:</b> 2,000.00

Field	R/O/C	Description
Quantity on hold or returned to vendor:	○	Quantity of product that is currently on hold or has been returned to the vendor.  <b>Example:</b> 50
Quantity re-donated:	○	Quantity of product that has been or will be re-donated to another organization.  <b>Example:</b> 20
Quantity destroyed:	○	Quantity of product that has been or will be destroyed.  <b>Example:</b> 10

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



If	Then
A record of the quantities being destroyed is on file	Click <input type="checkbox"/> (the <b>Destruction documentation on file</b> checkbox).
There is no record of the quantities being destroyed on file	Go to Step 10.



(Note) The Recall Specialist enters disposition quantities for the recalled product in the *Product Inventory / Disposition* section.

**Image: Access Recall Survey Response Form Screen**

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

Field	R/O/C	Description
Comment for unaccounted product:	C	Free form text field to enter a comment for any unaccounted product.   (Note) The Recall Specialist must enter a comment in the <b>Comment for unaccounted for product</b> field for all unaccounted for product that is or will be destroyed.
Number of illnesses or injuries:	O	The number of people who reported illnesses or injuries related to the consumption of the product being recalled.  <b>Example:</b> 2
Description of illness or injury:	C	Free text field used to summarize the symptoms that were experienced by the people who reported illnesses and injuries.   (Note) If the recall caused any illnesses or injuries, the Recall Specialist must include the number of injuries in the <b>Number of illness or injuries</b> field and a description of the injuries in the

Field	R/O/C	Description
		Description of illness or injury field.

10. Perform one of the following:

If	Then
The form will be completed later and the user needs to save progress without submitting to USDA	Go to Step 11.
The form is complete and needs to be submitted to the USDA	Go to Step 12.



(Note) Note the three buttons in the *Response Header* section: each button can be used as follows:

- **Back** - Returns to the previous screen without saving. Does not save any changes to the form. When reviewing a previously submitted form, the Back button may be the only available option in the toolbar.
- **Save** - Saves progress on the form and changes the status to "In-Process". FNS will be able to view the responses; however the SDA/ITO Recall Specialist can make changes to the form as needed.
- **Submit to USDA** - Submits the form to USDA for review and changes the status to "Complete". At this stage, the SDA/ITO Recall Specialist can no longer edit responses, but an FNS Recall Specialist can make changes as needed.

11. Click  Save (the **Save** button) to save the entries.



(Note) After clicking the **Save** button, the status changes to "In-Process" and a message displays "Response Saved / Updated".

**Image: Access Recall Survey Response Form Screen**

**Recall Survey Response Form: Inventory and Disposition Details**

**Response Header**

Back Save Submit to USDA

Case: 81 (b) (4) Ground Beef -100158 4/10 lb Chubs  
 Sold To Organization: 4000578 (b) (4)  
 Product: 100158 BEEF FINE GROUND FRZ CTN-40 LB  
 Vendor: 1000634 (b) (4)  
 Response Status:  
 Response Last Updated: 07/24/2018  
 Response Deadline: 06/30/2013

**Product Inventory and Disposition**

Unit of Measure:	CS
Quantity of products received:	2,000,000
Quantity served prior to recall:	100,000
Quantity on hand:	1,900,000
Quantity on hold or returned to vendor:	50,000
Quantity re-donated:	20,000
Quantity destroyed:	10,000
Quantity unaccounted for:	1,820,000

Destruction documentation on file:   
 10 CASES LOST IN WARE-HOUSE, 100 CASES BEING DESTROYED.  
 Comment for unaccounted product:

12. Click (the **Submit to USDA** button) to submit the form to FNS.



(Note) After clicking the **Submit to USDA** button, the status changes to "Complete" and a message displays "Response Submitted to USDA". Once submitted, the SDA/ITO Recall Specialists will no longer be able to modify the form.

13. The transaction is complete.



Work Instruction  
Submit Recall Survey Response Form

**RESULT**

A response form associated with a recall case assigned to the organization has been submitted.





## PROCESS OVERVIEW

### Purpose

The purpose of this transaction is to upload a bill of lading (BOL) file into WBSCM. A BOL is a packing slip that accompanies the order when it ships. This slip documents the materials, batches, and quantities included in the shipment. National Warehouse users upload a BOL file to create delivery documents and process post goods issue (PGI) for Multi Food orders. Additionally, the uploaded BOL can be exported to a Microsoft Excel file for review.

### Process Trigger

Use this procedure to upload a BOL file into WBSCM.

### Prerequisites

- XML or TXT File for the BOL must exist on the user's workstation or shared drive.

### Portal Path

Follow the Portal path below to complete this transaction:

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

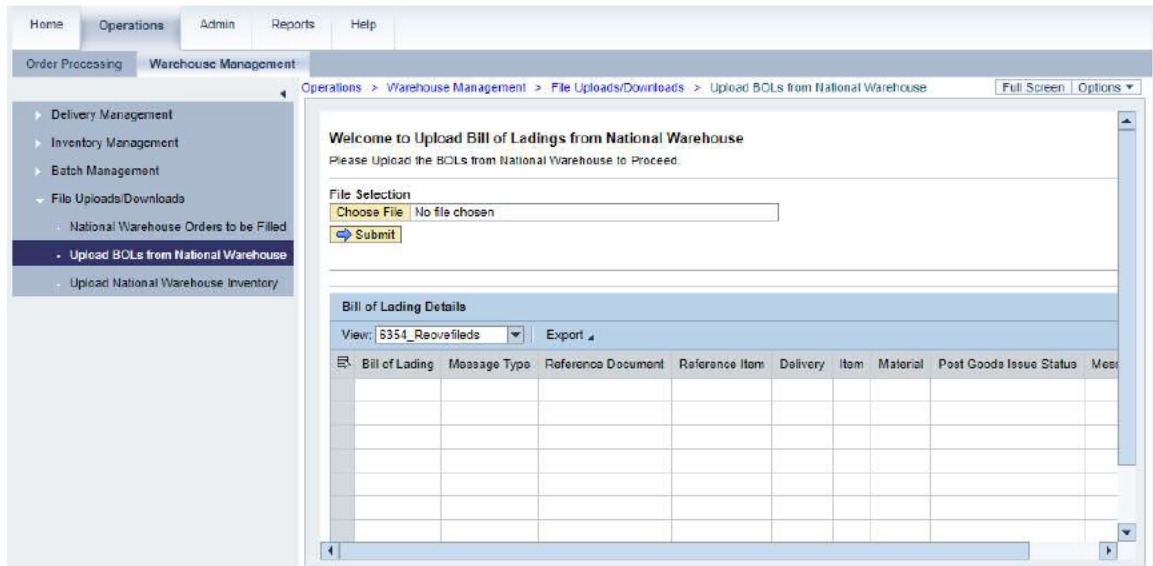
### Tips and Tricks


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

## PROCEDURE

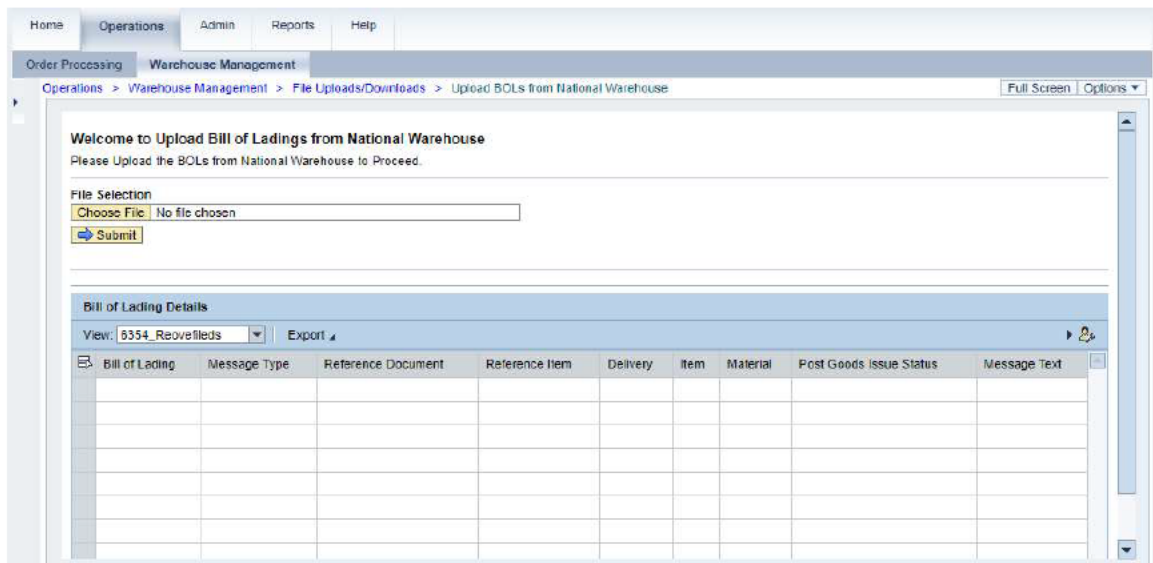
1. Start the transaction using the following Portal path: **Operations** tab → **Warehouse Management** tab → **File Uploads/Downloads** folder → **Upload BOLs from National Warehouse** link.

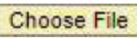
### Image: Upload BOLs from National Warehouse Screen



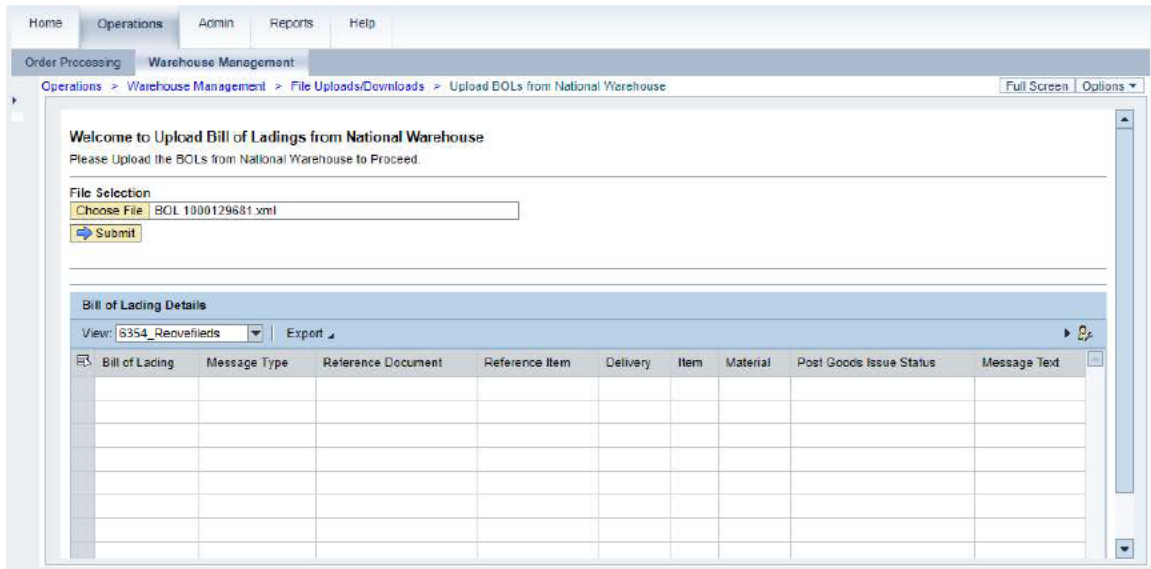
2. Click  (the **Hide Navigator** arrow) to minimize the Portal menu. Note that this can be done with any transaction in WBSCM.

### Image: Upload BOLs from National Warehouse Screen



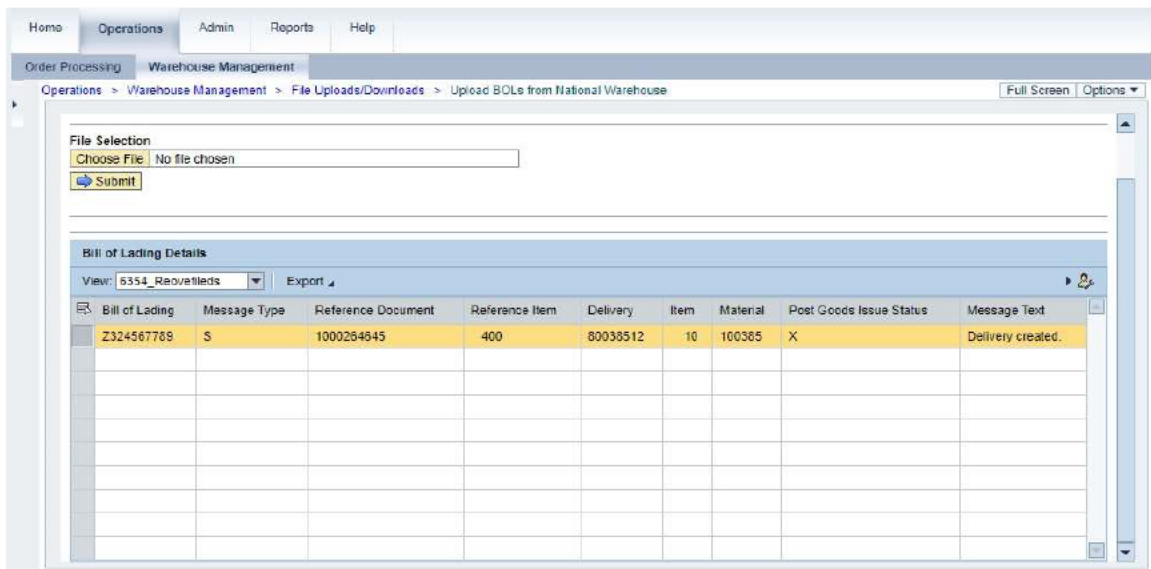
3. Click  (the **Choose File** button) to locate the BOL file to upload.
4. Locate and select the appropriate file to be uploaded. In this example, **BOL 1000129681.xml** was selected.

**Image: Upload BOLs from National Warehouse Screen**



5. Click  (the **Submit** button) to submit the upload.

**Image: Upload BOLs from National Warehouse Screen**



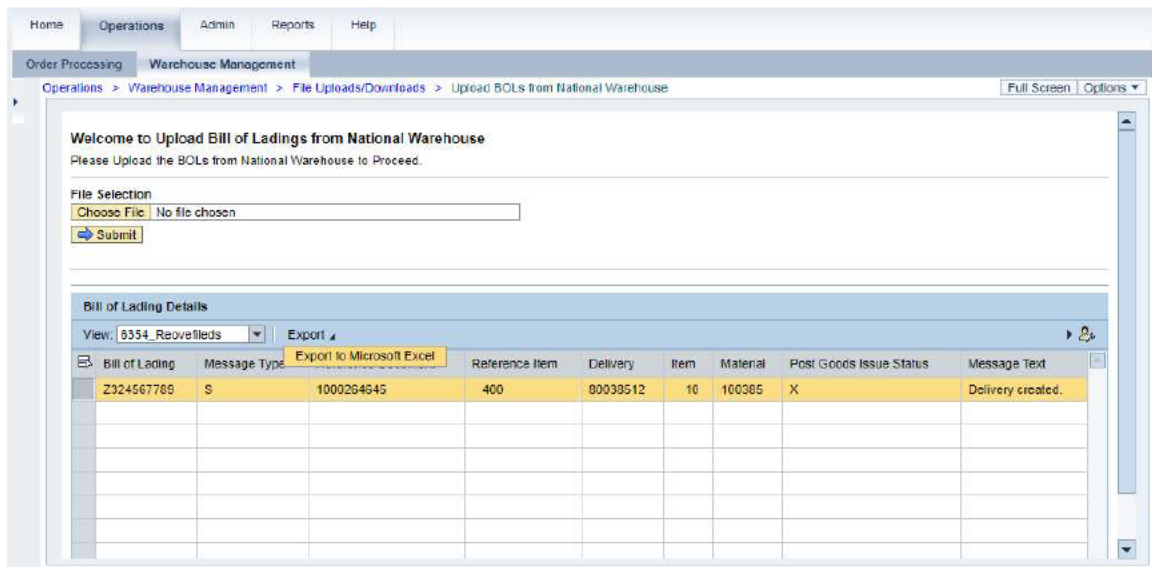
6. Review the uploaded BOL file in the results table.



(Note) No changes can be made directly in the table. To change the bill of lading information, National Warehouse will need to send a request to the Warehouse Manager (FNS) to reverse Post Goods Issues, so they can re-upload the BOL file with the correct information.

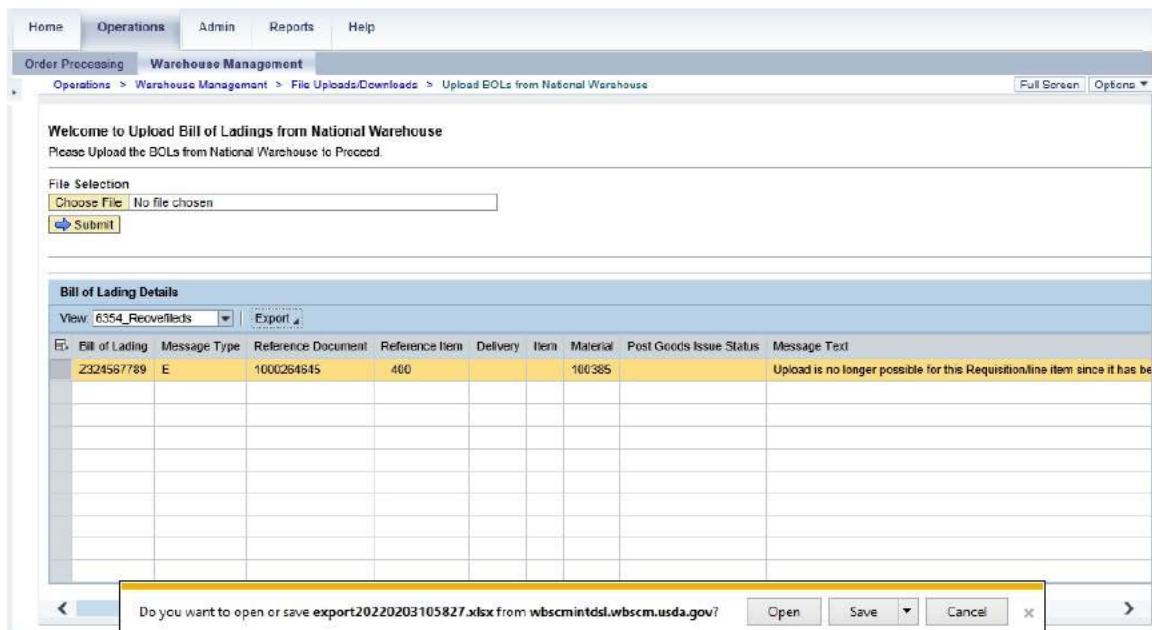
7. Click  (the **Export** button) to export the BOL information to a Microsoft Excel file.

## Image: Upload Bill Of Lading from National Warehouse Screen



8. Click **Export to Microsoft Excel** (the **Export to Microsoft Excel** option).

## Image: Upload BOLs from National Warehouse Screen



9. Click **Open** (the **Open** button).

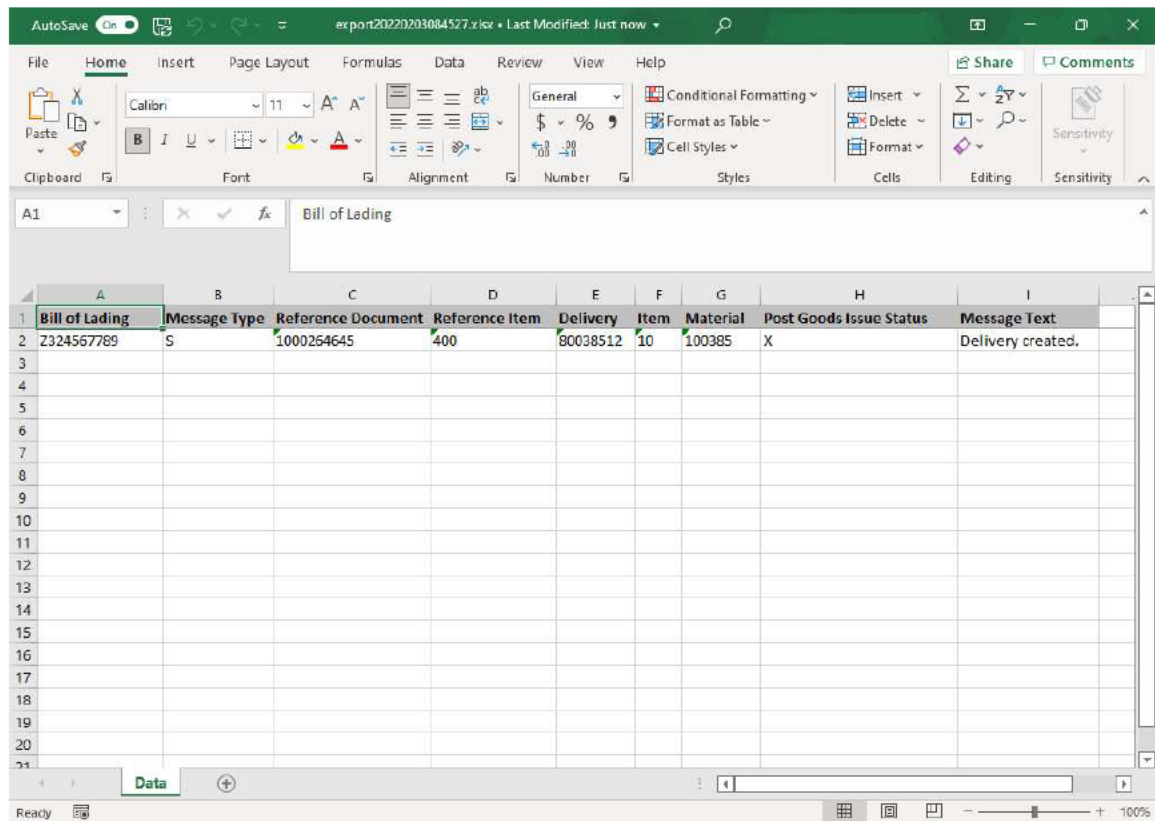



(Note) Export file download prompt may appear different based on the user's browser. To download in Chrome, refer to the Download/Export Document section in the [WBSM Portal Navigation](#) job aid.



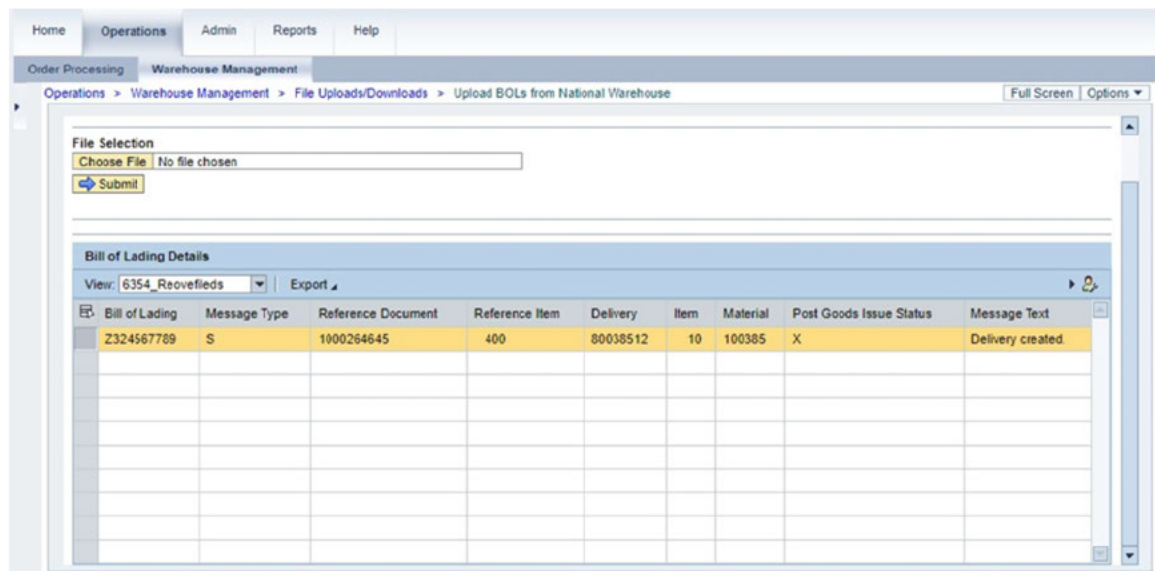
(Note) If a warning message appears, click **Yes** (the **Yes** button) to continue.

**Image: Microsoft Excel Screen**



10. Review or save the Excel file as appropriate.
11. Click  (the **Close** button) to return to the *Upload BOLs from National Warehouse* screen.

**Image: Upload BOLs from National Warehouse Screen**



12. The transaction is complete.



Work Instruction  
Upload Bill of Lading (BOL) for National Warehouses

**RESULT**

The user has successfully uploaded the Bill of Lading (BOL) file into WBSCM and reviewed the uploaded BOL information.





## PROCESS OVERVIEW

### Purpose

Domestic recipient organizations (or USDA on behalf of a recipient) use this procedure to upload a file with shipment receipt information for a purchase order, sales order, or delivery order in lieu of manually entering each line item in WBSCM. The shipment receipt, also known as the goods receipt (GR), is the method by which the recipient confirms that materials/commodities that were requested in WBSCM have been delivered. The shipment receipt contains:

- When the shipment was received
- Who signed for the receipt
- Good, over, short, or damaged (O/S/D) quantities

Timely entry of a shipment receipt is a critical step in WBSCM. Current [FNS policy](#) requires entry of shipment receipts within two calendar days of receiving a delivery.

Users can enter a shipment receipt in WBSCM two ways:

1. Use the *Upload Shipment Receipt* transaction to upload a shipment receipt from a comma separate value (CSV) or extensible markup language (XML) file.
2. Use the *Enter Shipment Receipt* transaction to create a shipment receipt manually.

This transaction is beneficial to the receiving organization as personnel often enter this data in other systems as well, and it is much easier to transfer the file than to redo the manual entry.

### Process Trigger

Perform this procedure when a recipient has received a direct shipment and needs to upload the shipment receipt to WBSCM.

### Prerequisites

- The PO or sales order must exist in WBSCM.
- The upload file in XML or CSV format must exist.

### Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab → **Order Processing** tab → **Shipment Receipts** folder → **Upload Shipment Receipts** link → *Upload Shipment Receipts* screen.

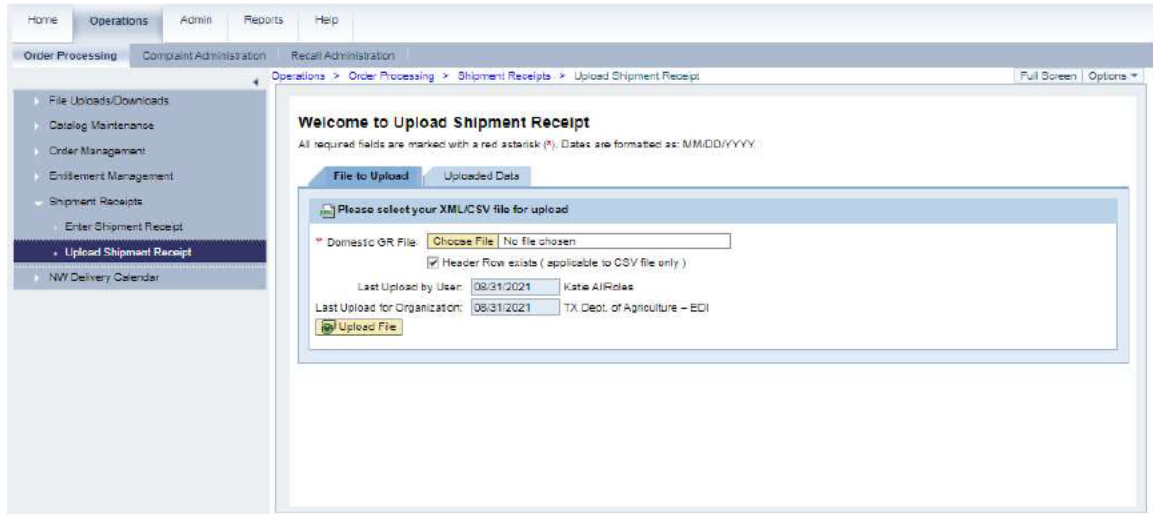
### Tips and Tricks


- 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.
- If the user needs to enter a shipment receipt directly into WBSCM instead of uploading, refer to the [Enter Domestic Shipment Receipt](#) work instruction.

## PROCEDURE

1. Start the transaction using this Portal path: **Operations** tab → **Order Processing** tab → **Shipment Receipts** folder → **Upload Shipment Receipts** link to open the *Upload Shipment Receipts* screen.

### Image: Upload Shipment Receipts Screen



2. Click  (the **Hide Navigator** arrow) to minimize the Portal menu. Note that this can be done with any transaction in WBSCM.
3. Navigate to the upload file and open.

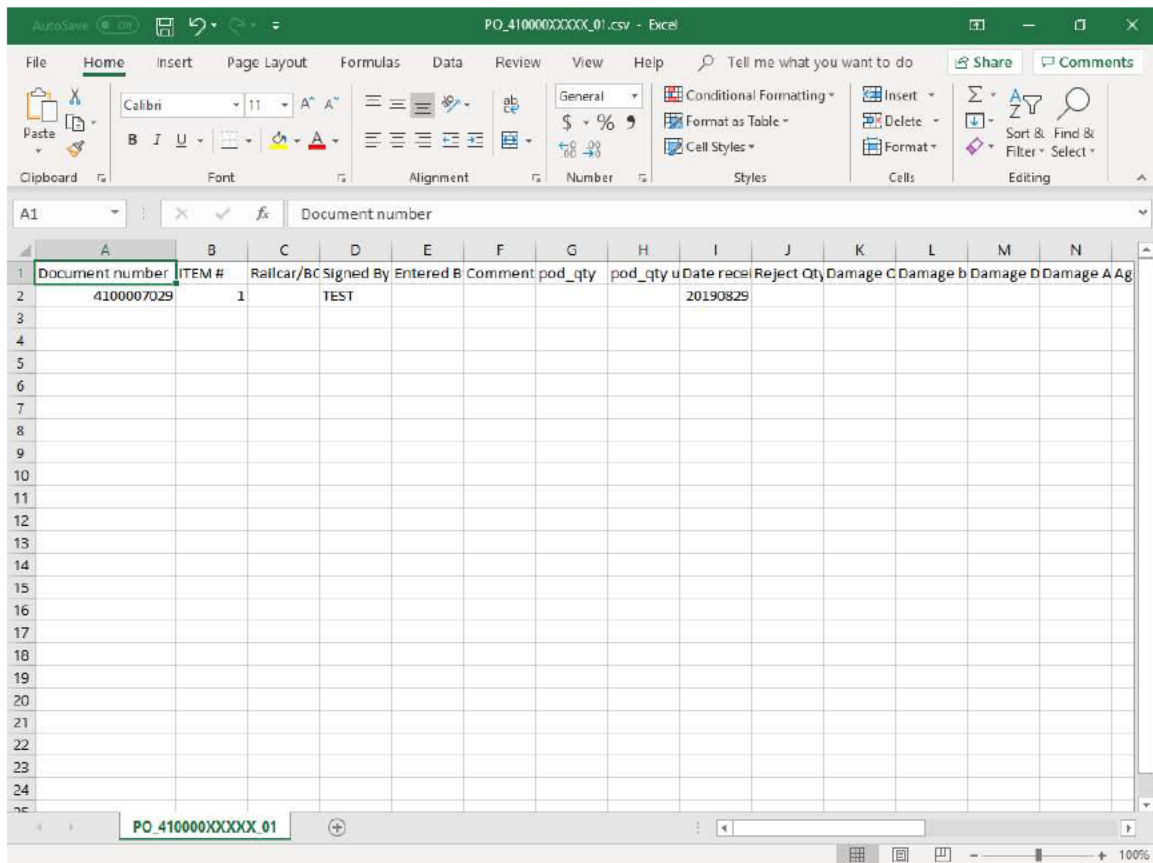


(Note) If the user requires a template to populate for the upload, refer to:

- [Upload Goods Receipt XML Template](#) is located at **WBSCM** → **Help** → **Job Aids** folder → **Fulfillments (JA)** → **Upload Goods Receipt SCM Template**.
  - This template is provided as a guide for the required fields that must be output from the users' system if an XML file will be uploaded into WBSCM.
  - The user should upload a new file with only new receipt data each time. (Do not resubmit the same receipts).
- [Upload Goods Receipt CSV Template](#) is located at **WBSCM** → **Help** → **Job Aids** folder → **Fulfillments (JA)** → **Upload Goods Receipt CSV Template**.
  - The user should upload a new file with only new receipt data each time. (Do not resubmit the same receipts).
  - The GR upload file has several columns that will not contain any information. All column headers that appear in the template are required for the upload: do not delete or change columns. No blank rows should be inserted between data sets.
  - **Note for AMS users only:** Specialists cannot upload a GR file for invoices that they will be approving. E-mail the completed GR upload file to another specialist for uploading. Make sure the file stays in CSV format.



**Image: Microsoft Excel (PO\_XXXXXXXXX\_XX.csv) Screen**



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Document number	ITEM #	Railcar/BC Signed By	Entered B	Comment	pod_qty	pod_qty u	Date recei	Reject Qty	Damage C	Damage b	Damage D	Damage A Ag	
2	4100007029	1	TEST					20190829						
3														
4														
5														
6														
7														
8														
9														
10														
11														
12														
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22														
23														
24														
25														

4. Populate the data and save the upload file, as described in the [file definition reference](#). Data entry is required for the following fields:

- **Document number**
- **ITEM #**
- **Signed By**
- **Date received**
- **Good Quantity (in PO UoM)** - items purchased by weight only
- **Good Quantity (in CS)** - items purchased by case and variable weight items



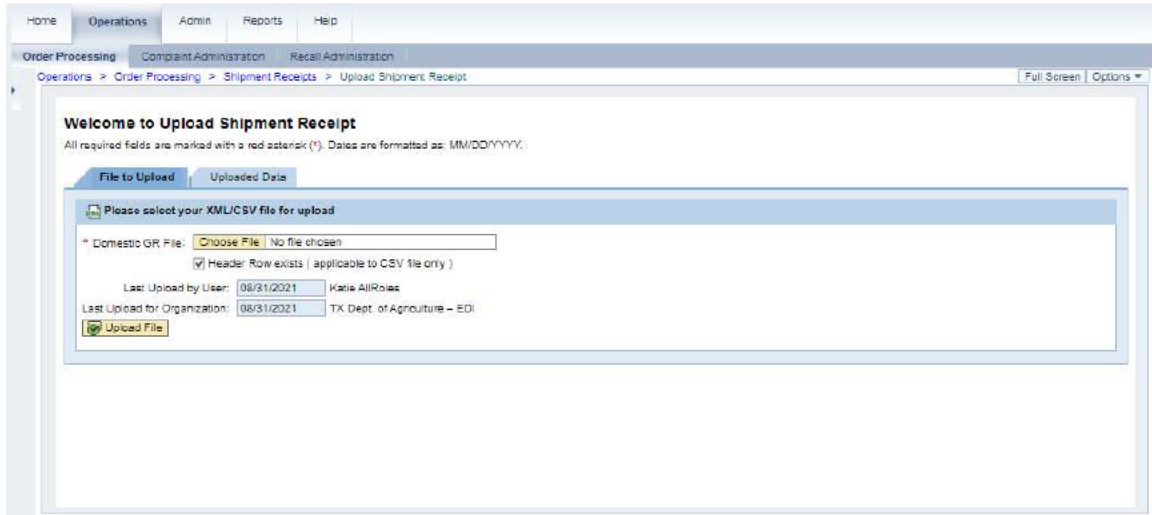
(Note) Before uploading a CSV or XML file, open the file to be sure all fields above are included and displayed in the proper order.



(Note) For variable weight items, the **Good Quantity (in LB)** will be calculated automatically in WBSCM based on the number of cases for eINV receipts. Any value entered in **Good Quantity (in PO UoM)** for variable weight items will be ignored during the upload.

For non-eINV receipts, both the **Good Quantity (in LB)** and the **Good Quantity** must be entered.

### Image: Upload Shipment Receipt Screen

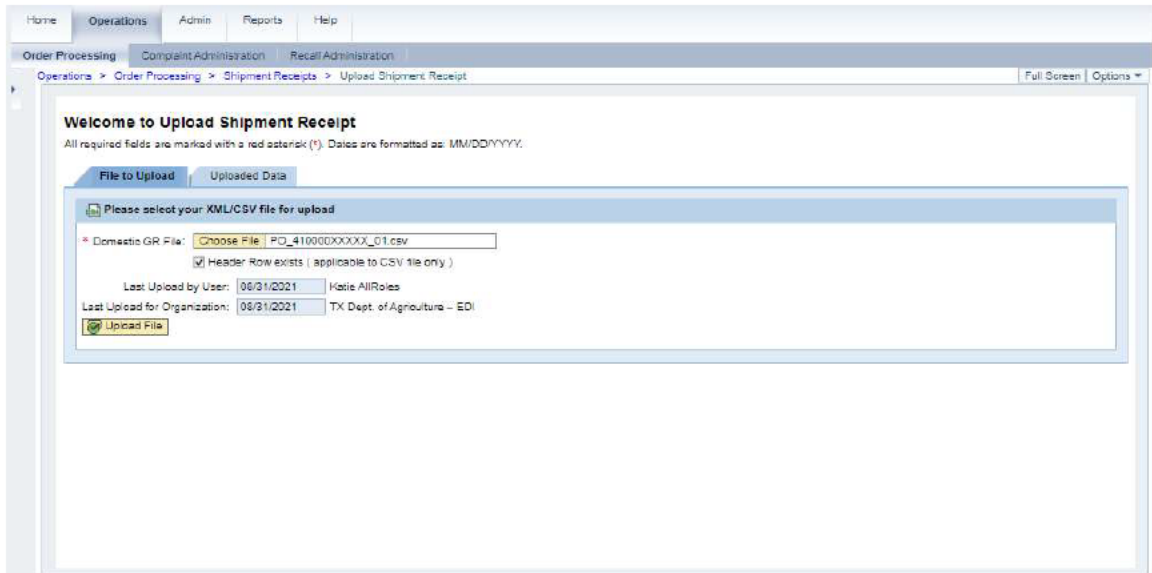


5. Click **Choose File** (the **Choose File** button) to locate the CSV or XML file to upload.
6. Locate and select the appropriate file to be uploaded. In this example, PO\_41000XXXXX\_01.csv upload file was selected.



(Note) Users have no restrictions on naming an upload file; however, a best practice recommendation is to name the file using the ten digit PO number, underscore, followed by the line item number.

### Image: Upload Shipment Receipt Screen

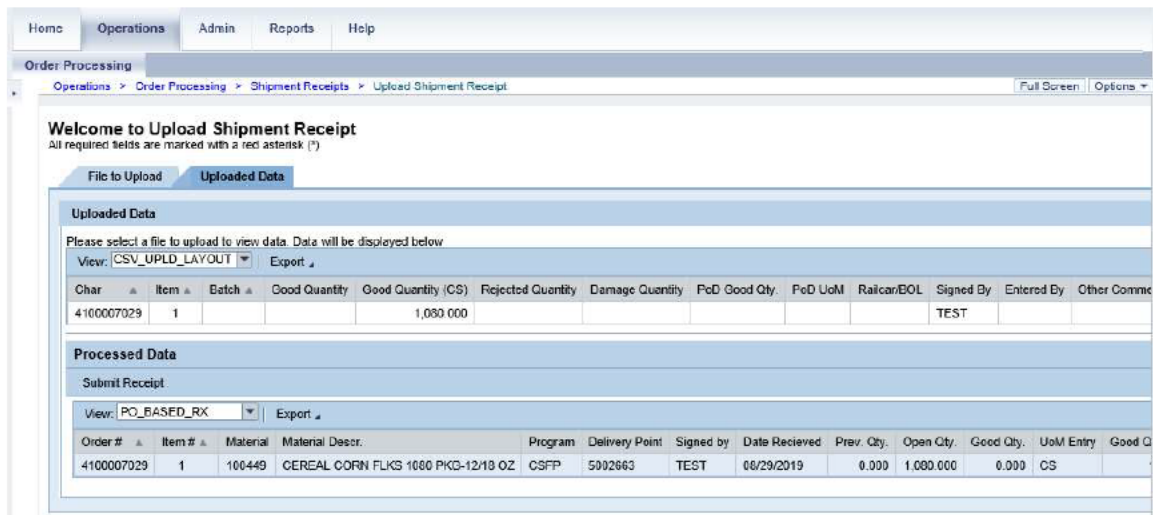


7. Click **Upload File** (the **Upload File** button) to upload the shipment receipt to WBSCM.



(Note) If the upload file contains a header row, and the upload file is in CSV format, check the **Header Row exists (applicable to CSV file only)** check box.

## Image: Upload Shipment Receipt Screen



Home | Operations | Admin | Reports | Help

Order Processing

Operations > Order Processing > Shipment Receipts > Upload Shipment Receipt

Welcome to Upload Shipment Receipt  
All required fields are marked with a red asterisk (\*)

File to Upload | **Uploaded Data**

Uploaded Data

Please select a file to upload to view data. Data will be displayed below

View: CSV\_UPLD\_LAYOUT | Export

Char	Item	Batch	Good Quantity	Good Quantity (CS)	Rejected Quantity	Damage Quantity	PoD Good Qty.	PoD UoM	Railcar/BOL	Signed By	Entered By	Other Comments
4100007029	1			1,080,000						TEST		

Processed Data

Submit Receipt

View: PO\_BASED\_RX | Export

Order #	Item #	Material	Material Descr.	Program	Delivery Point	Signed by	Date Received	Prev. Qty.	Open Qty.	Good Qty.	UoM Entry	Good Q
4100007029	1	100449	CEREAL CORN FLKS 1080 PKG-12/18 OZ	CSFP	5902663	TEST	06/29/2019	0.000	1,080,000	0.000	CS	

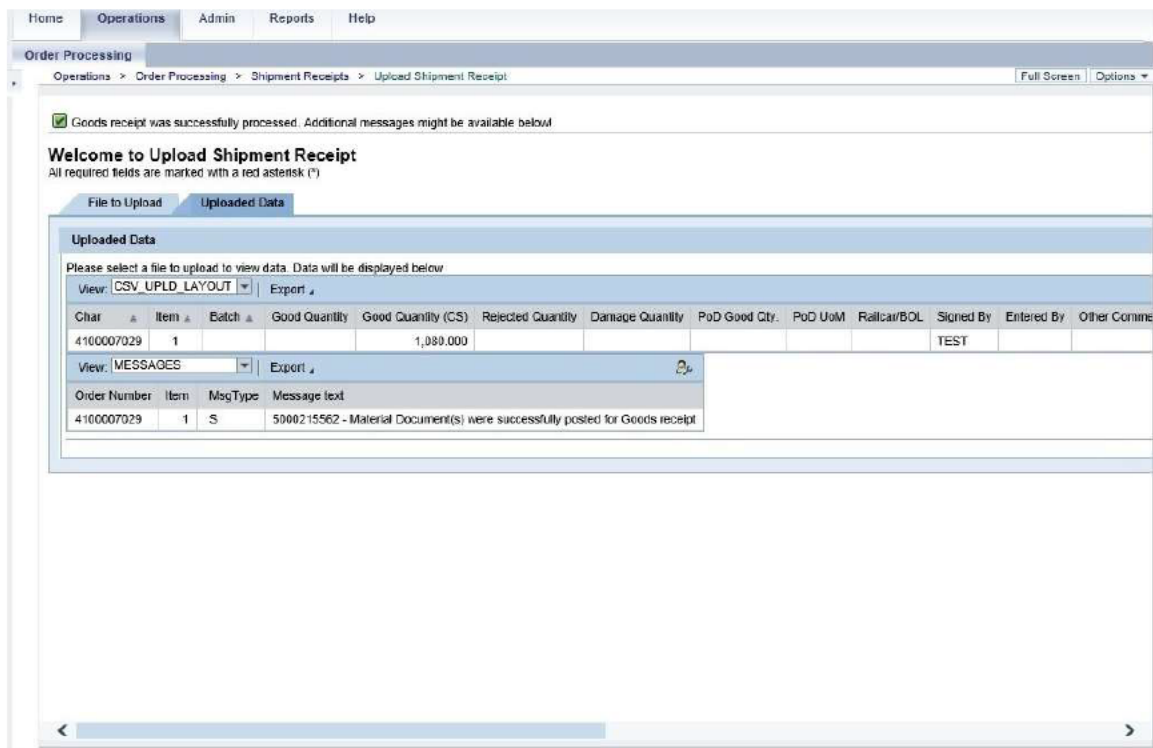
- Review the *Uploaded Data* tab to verify the uploaded data.



(Note) (Optional) Click **Export** (the **Export** button) in the *Uploaded Data* section to download an Excel file for reference and review prior to submitting the receipt to USDA.

- Click **Submit Receipt** (the **Submit Receipt** button) to submit the shipment receipt to USDA.

## Image: Enter Shipment Receipt (Goods receipt Messages) Screen



Home | Operations | Admin | Reports | Help

Order Processing

Operations > Order Processing > Shipment Receipts > Upload Shipment Receipt

Goods receipt was successfully processed. Additional messages might be available below

Welcome to Upload Shipment Receipt  
All required fields are marked with a red asterisk (\*)

File to Upload | **Uploaded Data**

Uploaded Data

Please select a file to upload to view data. Data will be displayed below

View: CSV\_UPLD\_LAYOUT | Export

Char	Item	Batch	Good Quantity	Good Quantity (CS)	Rejected Quantity	Damage Quantity	PoD Good Qty.	PoD UoM	Railcar/BOL	Signed By	Entered By	Other Comments
4100007029	1			1,080,000						TEST		

View: MESSAGES | Export

Order Number	Item	MsgType	Message text
4100007029	1	S	5000215562 - Material Document(s) were successfully posted for Goods receipt

- The transaction is complete.



Work Instruction  
Upload Domestic Shipment Receipts

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(Note) If an error occurred during an upload, an **E** is displayed in the **MsgType** column. Additional information regarding the error is provided in the **Message text** column. Review the information provided and make corrections if needed. For assistance, contact the WBSCM Helpdesk.



Work Instruction  
Upload Domestic Shipment Receipts

**RESULT**

A shipment receipt for a purchase order, sales order, or delivery order was uploaded to WBSCM.



## PROCESS OVERVIEW

### Purpose

The purpose of this transaction is to upload and store National Warehouse batch detail information in WBSCM, including a material's **Manufactured Date**, **Best If Used-by Date**, and quantities on hand. This information allows FNS to generate real-time inventory reports, by coupling it with existing National Warehouse inventory data in WBSCM. This transaction is performed by National Warehouse Org Admins and FNS Inventory Specialists.

### Process Trigger

Perform this transaction to upload batch details from the National Warehouse to WBSCM.

### Prerequisites

- Lot/Batch exists in WBSCM for the materials for which the upload transaction is being run.

### Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab → **Warehouse Management** tab → **File Uploads/Downloads** folder → **Upload National Warehouse Batch Details** link.

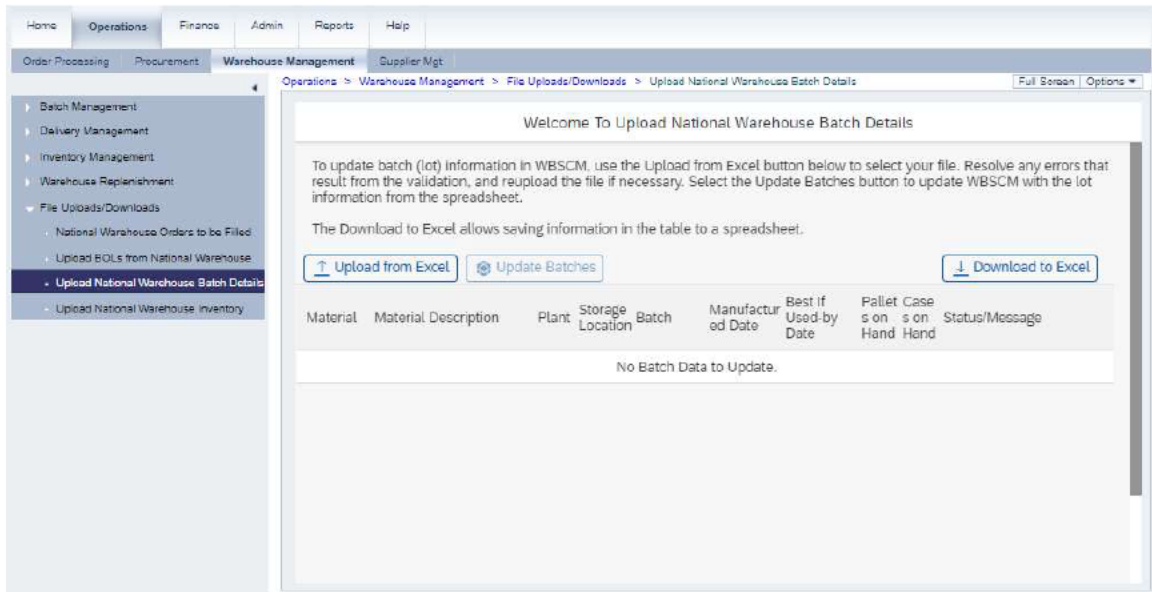
### Tips and Tricks

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

### PROCEDURE

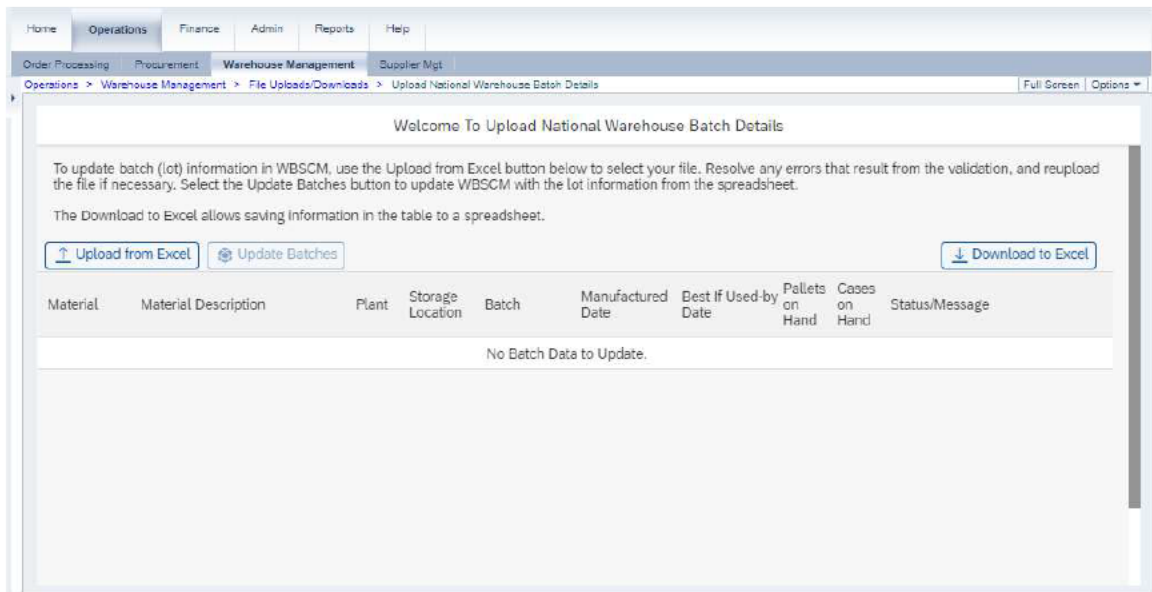
1. Start the transaction using the Portal path: **Operations** tab → **Warehouse Management** tab → **File Uploads/Downloads** folder → **Upload National Warehouse Batch Details** link.

#### Image: Upload National Warehouse Batch Details Screen



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

#### Image: Upload National Warehouse Batch Details Screen

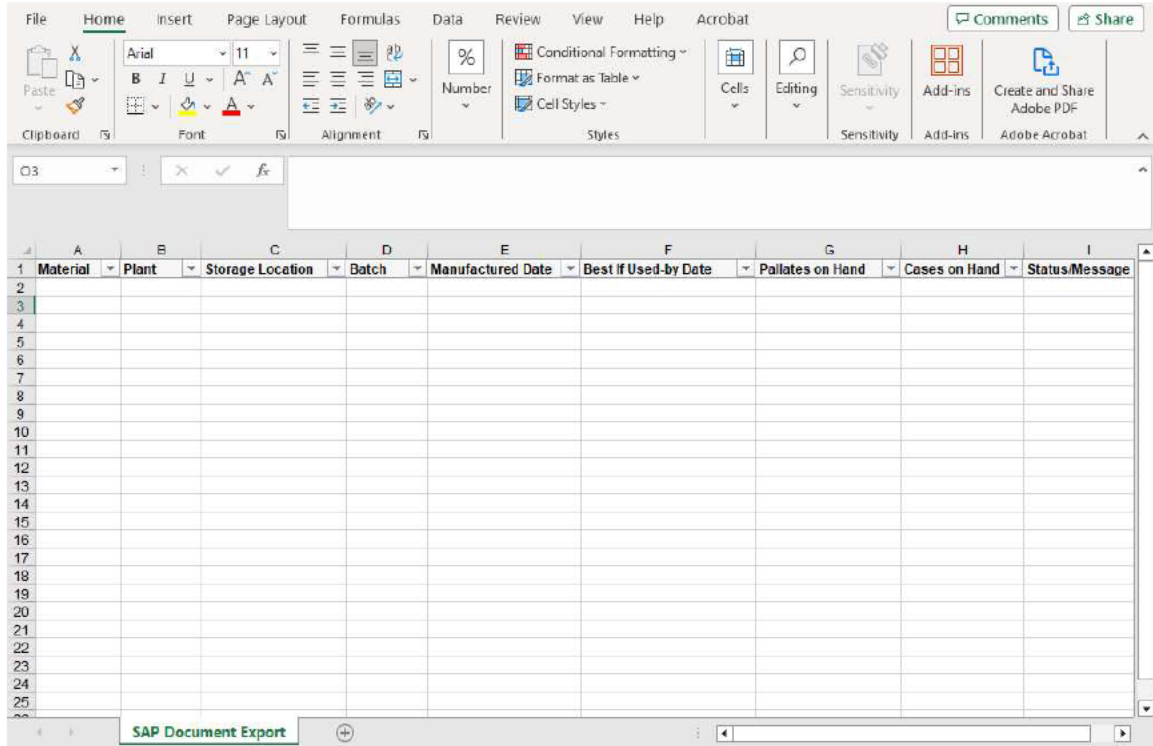


3. If necessary, click (the **Download to Excel** button) to download a blank copy of the **National Warehouse Batch Details Upload File** to complete for upload.



4. Open the **National Warehouse Batch Details Upload File** from where it is stored locally.



**Image: National Warehouse Batch Details Upload File**



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

Field	R/O/C	Description
Material	R	Unique six-digit number representing a specific material/commodity in WBSCM.  <b>Example:</b> 100001
Plant	R	Internal plant number that identifies the external warehouse or processor.  <b>Example:</b> 2300
Storage Location	R	The physical location within a plant where the material is stored. For National Warehouses, this is the commodity program such as CSFP.  <b>Example:</b> 2000



Field	R/O/C	Description
Batch	R	Also known as Lot, it is a number that uniquely assigns a material manufactured in a lot. The batch material is managed separately from other sets of the same material. Also, used to describe the running of multiple non-manual transactions in WBSCM.  <b>Example:</b> 0100755
Manufactured Date	R	The date on which the product was produced by the vendor.  <b>Example:</b> 11/18/2012   (Note) Use date format MM/DD/YYYY
Best If Used-by Date	R	The date before which the product shall be used.  <b>Example:</b> 11/18/2013   (Note) Use date format MM/DD/YYYY
Pallets on Hand	R	Pallet count in the warehouse.  <b>Example:</b> 5
Cases on Hand	R	Case count in the warehouse.  <b>Example:</b> 242



(Note) Complete the **National Warehouse Batch Details Upload File** with all necessary information.

**DO NOT** modify, delete, or rearrange the spreadsheet columns.

**Image: National Warehouse Batch Details Upload File**

	Material	Plant	Storage Location	Batch	Manufactured Date	Best if Used-by Date	Pallets on Hand	Cases on Hand	Status/Message
2	100001	2300	2000	0100755	11/18/2012	11/13/2013	5	242	
3	100001	2300	2000	0100783	11/21/2012	11/21/2013	1	20	
4	100001	2300	2000	0101266	1/3/2013	1/3/2014	20	1077	
5	100001	2300	2000	0105026	5/9/2013	5/9/2014	20	1098	
6	100001	2300	2000	0105065	5/11/2013	5/11/2014	21	1140	
7	100001	2300	2000	1100993	3/3/2013	3/3/2014	11	599	
8	100035	2300	1000	0100162	10/8/2012	10/8/2013	1	50	
9	100035	2300	1000	0100190	10/8/2012	10/8/2013	1	2	
10	100035	2300	1000	0100463	11/3/2012	11/3/2013	1	20	
11	100035	2300	1000	0100860	11/29/2012	11/29/2013	1	3	

- Save the **National Warehouse Batch Details Upload File** locally and note the location where the spreadsheet is saved.



(Note) The upload file must be in Excel format (.xlsx). Other formats will result in an error during the upload and validation process.

**Image: Upload National Warehouse Batch Details Screen**

Welcome To Upload National Warehouse Batch Details

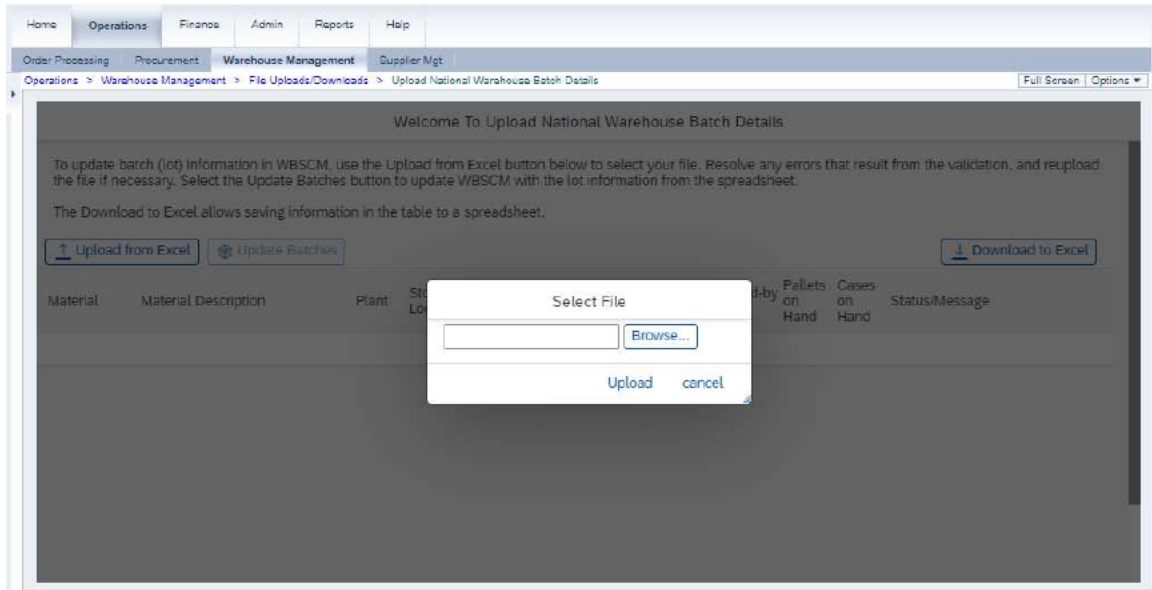
To update batch (lot) information in WBSCM, use the Upload from Excel button below to select your file. Resolve any errors that result from the validation, and reupload the file if necessary. Select the Update Batches button to update WBSCM with the lot information from the spreadsheet.

The Download to Excel allows saving information in the table to a spreadsheet.

Material	Material Description	Plant	Storage Location	Batch	Manufactured Date	Best if Used-by Date	Pallets on Hand	Cases on Hand	Status/Message
No Batch Data to Update.									

7. Click  (the **Upload from Excel** button) to upload the **National Warehouse Batch Details Upload File** to WBSCM.

### Image: Select File Pop-Up Screen



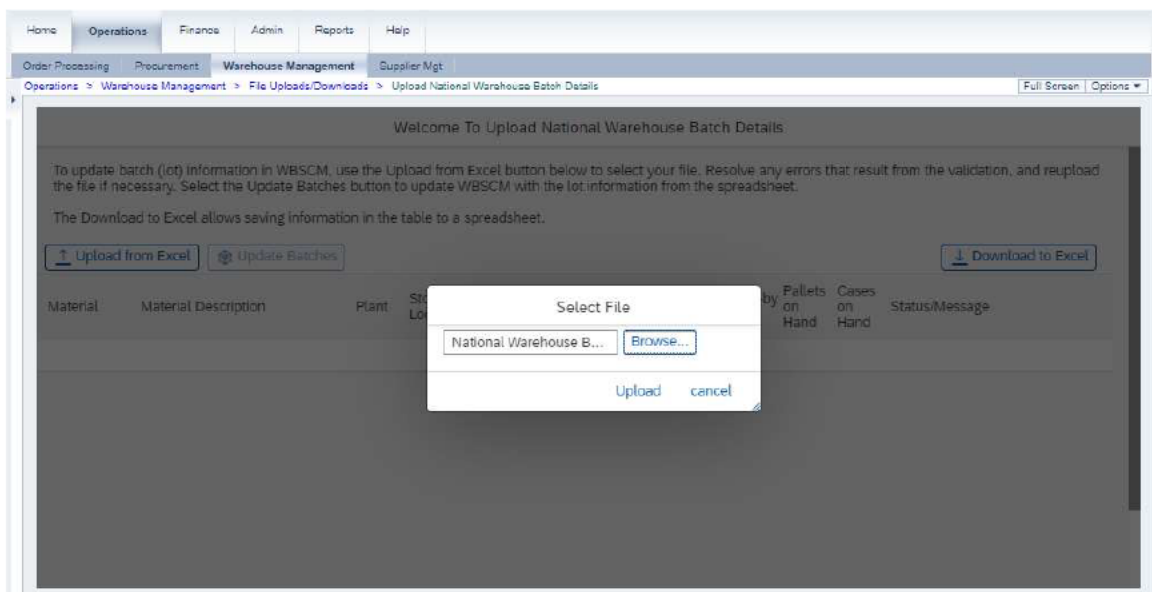
8. Click  (the **Browse...** button) to select the upload file.



(Note) The upload file must be in Excel format (.xlsx) to be uploaded. Other formats will result in an error during the upload process.

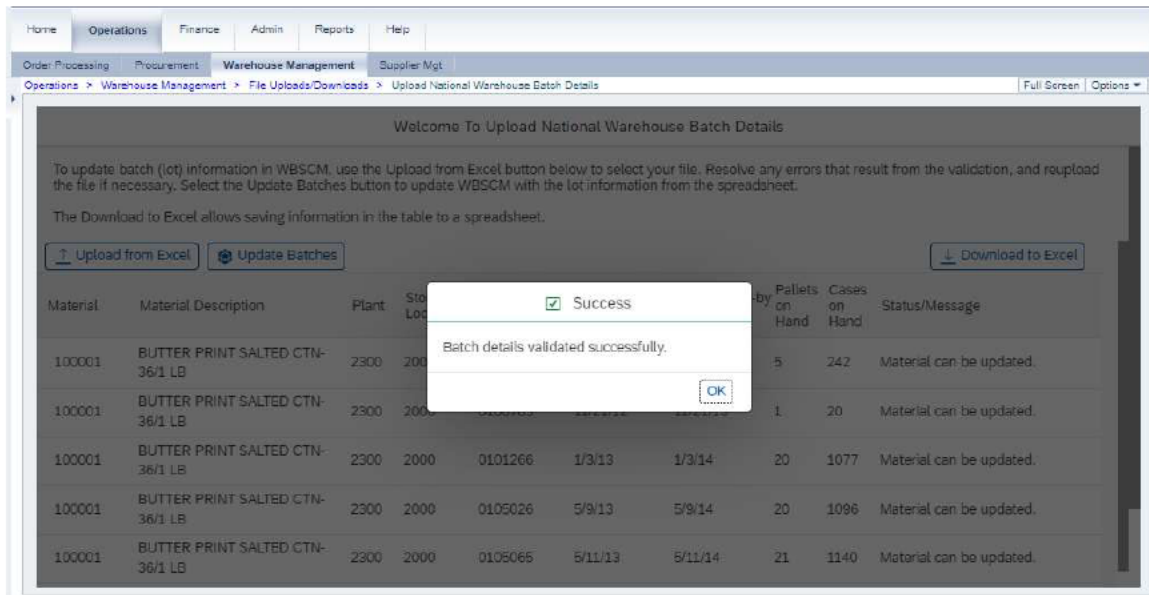
9. Locate and select the appropriate file to be uploaded. In this example, the **National Warehouse Batch Details Upload.xlsx** file was selected.

### Image: Select File Pop-Up Screen



10. Click **Upload** (the **Upload** button).

**Image: Success Pop-Up Screen**

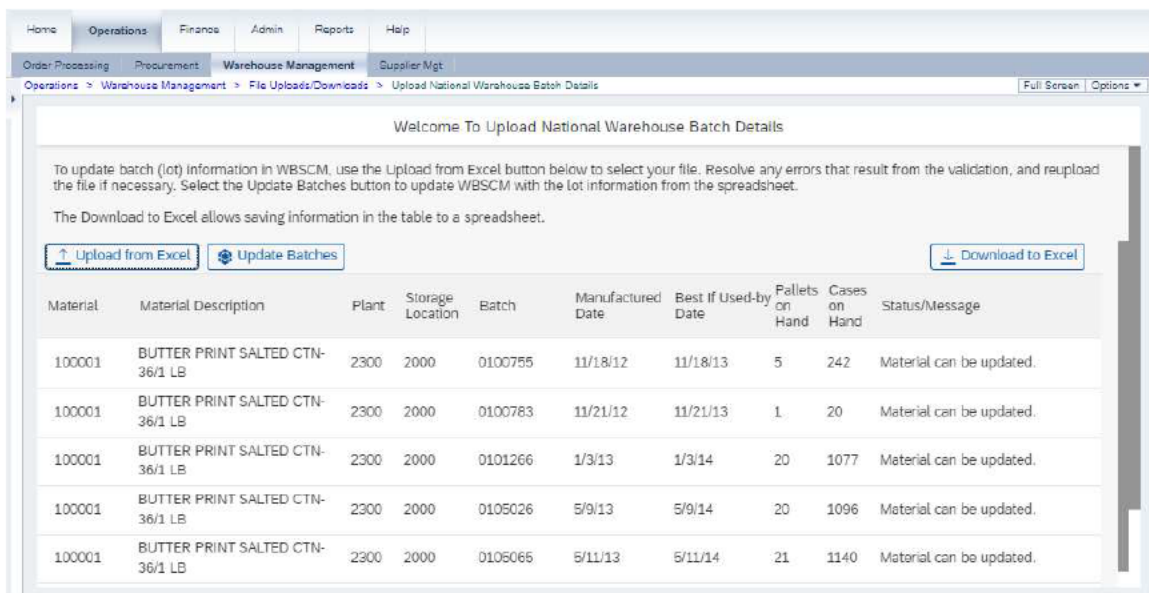


11. Click **OK** (the **OK** button).



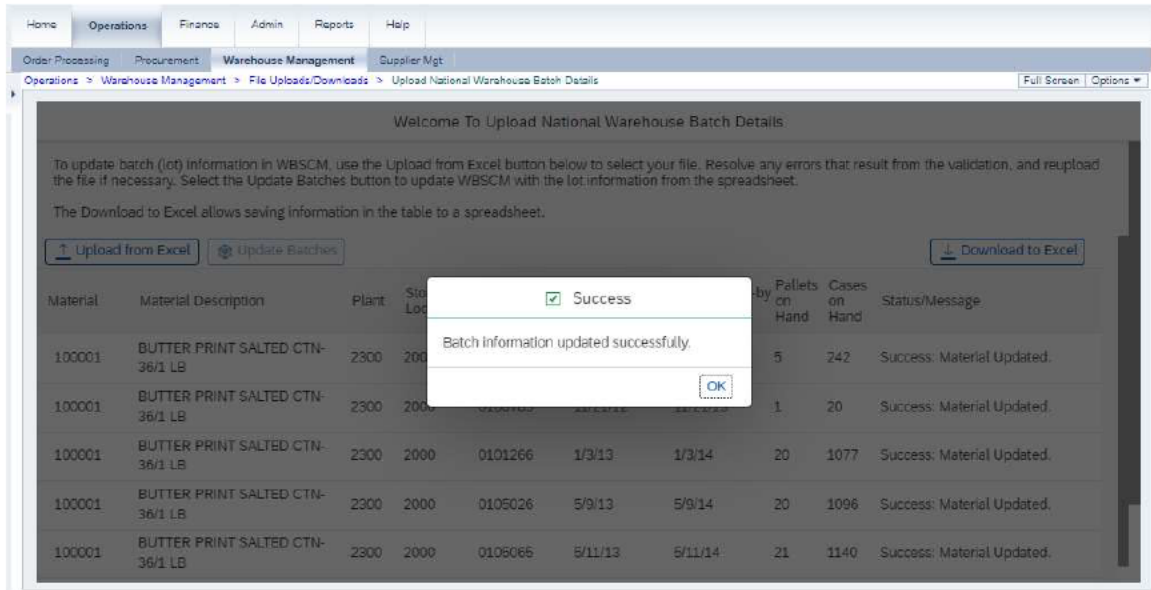
(Note) The upload file goes through a validation process. After the process is completed, any records containing errors are listed at the top of the display table for easy identification. These errors must be corrected or the records removed from the file before it is re-uploaded to WBSCM; otherwise, the update with error records will be prevented.

**Image: Upload National Warehouse Batch Details Screen**



12. Click  (the **Update Batches** button) to update the batch information in WBCSCM.

### Image: Success Pop-Up Screen



13. Click  (the **OK** button).

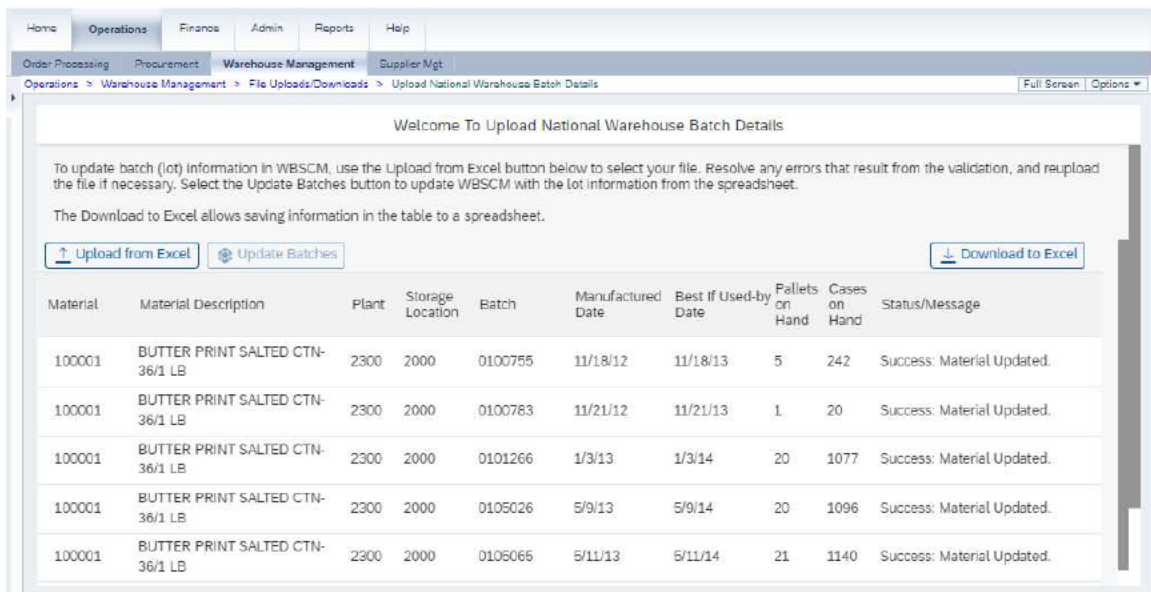


(Note) The *Status/Message* column is updated with the current status of the uploaded records. In this example, **Success: Material Updated.** is the status showing for each row.



(Note) Any records with errors will be listed at the top of the display table.

### Image: Upload National Warehouse Batch Details Screen



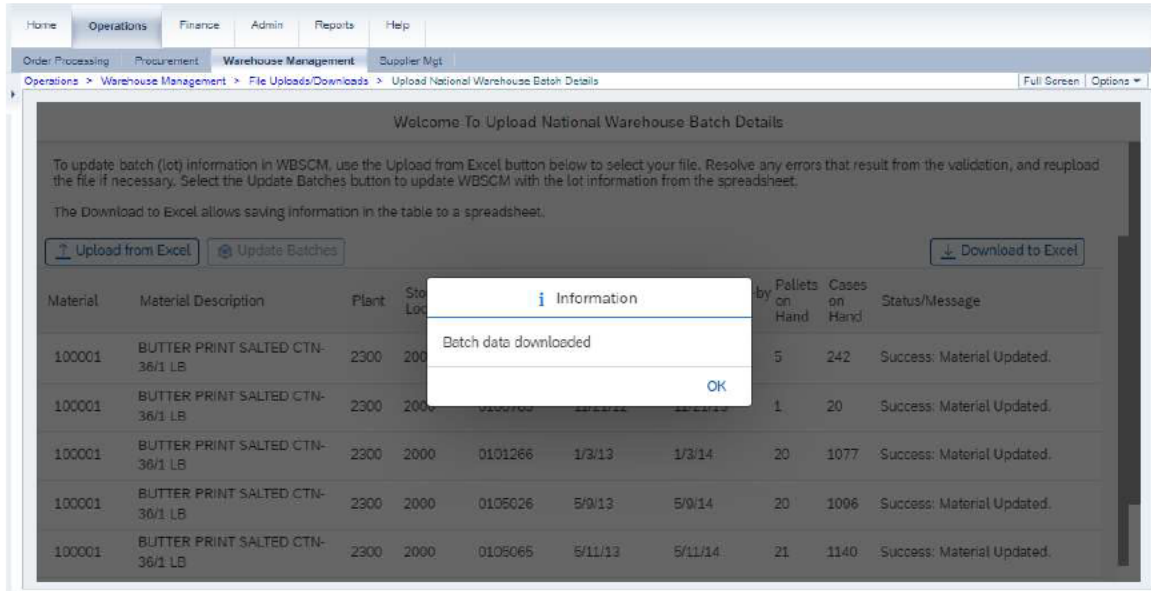


14. Click  (the **Download to Excel** button) to download the status results of the uploaded batch information.



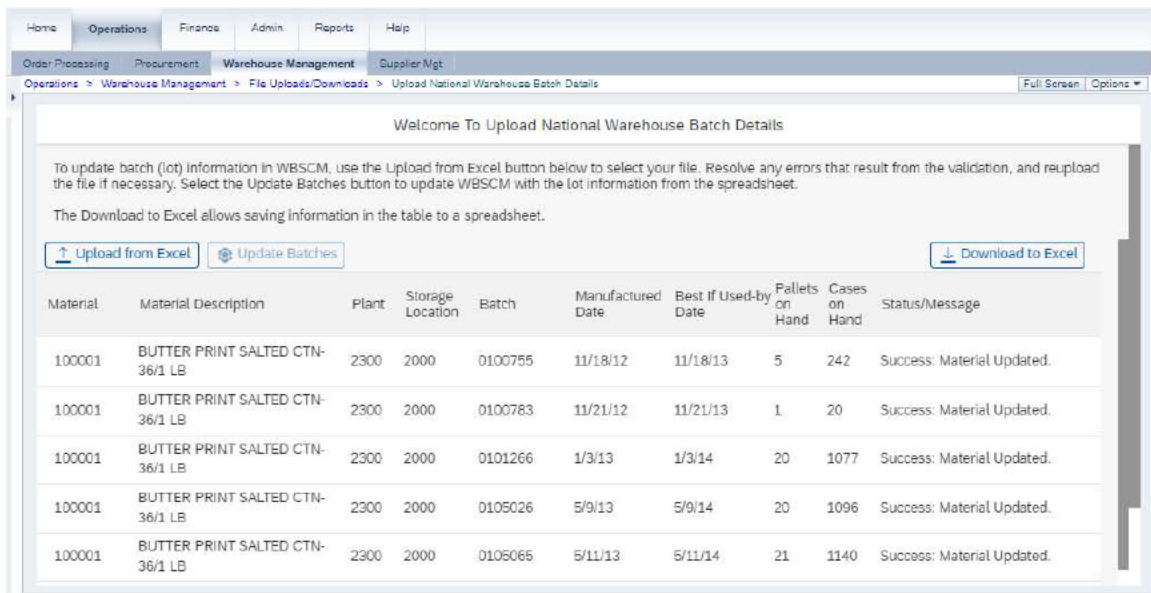
(Note) An Excel file containing the uploaded batch details with the updated **Status/Message** information for each record is downloaded to the user's local download storage location.

**Image: Information Pop-Up Screen**



15. Click  (the **OK** button).

**Image: Upload National Warehouse Batch Details Screen**



16. The transaction is complete.



Work Instruction  
Upload National Warehouse Batch Details

**RESULT**

National Warehouse Batch Details data has been uploaded, validated, and stored in WBSCM. The results of the process have been downloaded locally.



## PROCESS OVERVIEW

### Purpose

The purpose of this transaction is to update a Recipient Agency (RA) organization in WBSCM by an SDA Org Admin. There are two options for updating:

1. Enter updates with the [Maintain RA Organization](#) transaction.
2. Upload an XML file containing the information to be updated.

This document reviews steps to upload an XML file.

### Process Trigger

An update to an RA Organization is required.

### Prerequisites

- The RA must exist in WBSCM.
- An XML file must exist on the user's computer.

### Portal Path

Follow the Portal path to complete this transaction:

- Select **Admin** tab → **Organization Maintenance** tab → **Upload RA Updates** link to go to the *Upload RA Updates* 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.



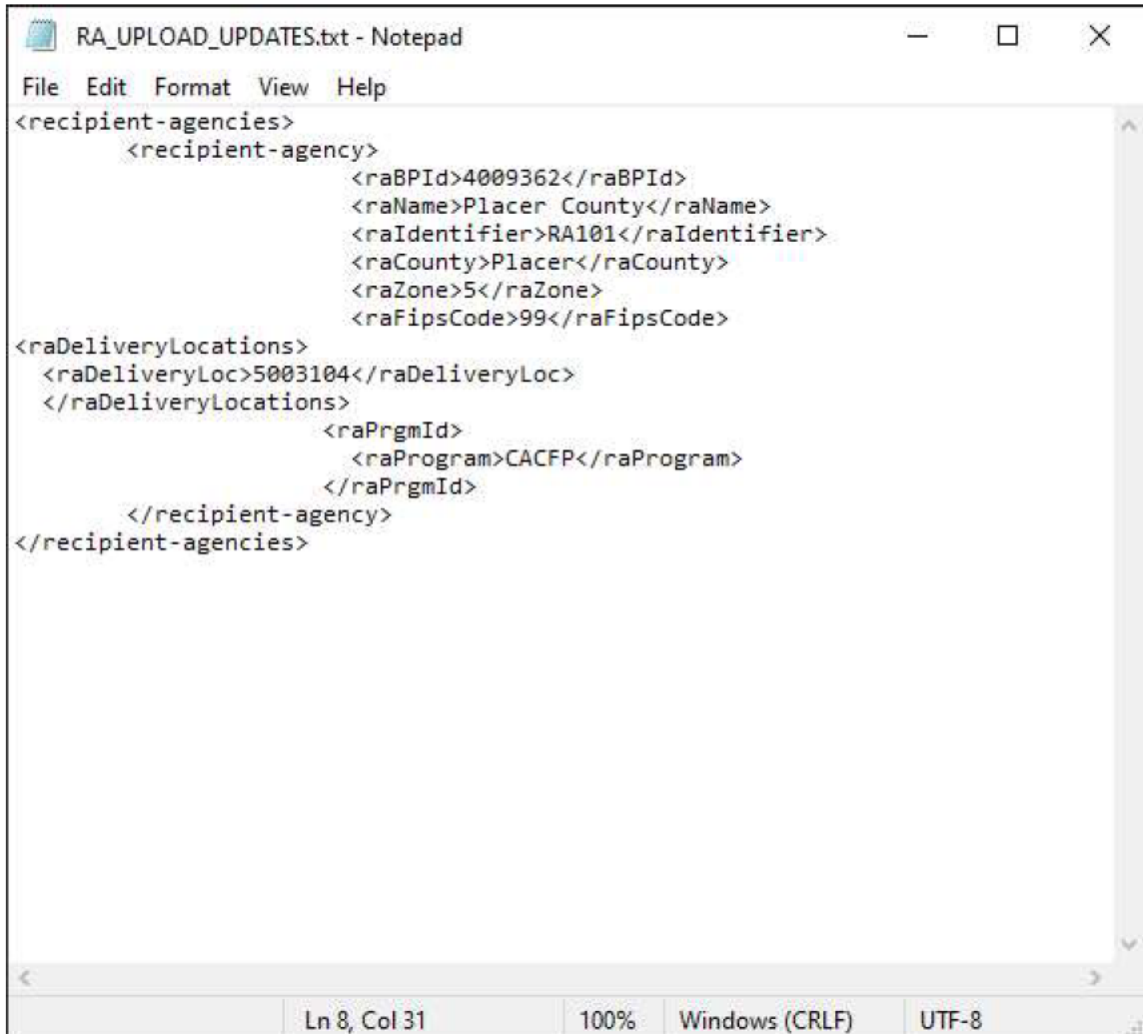
## PROCEDURE

1. Open the XML file.



(Note) The XML file must contain all RA maintenance fields and data in the correct format to for a successful upload.

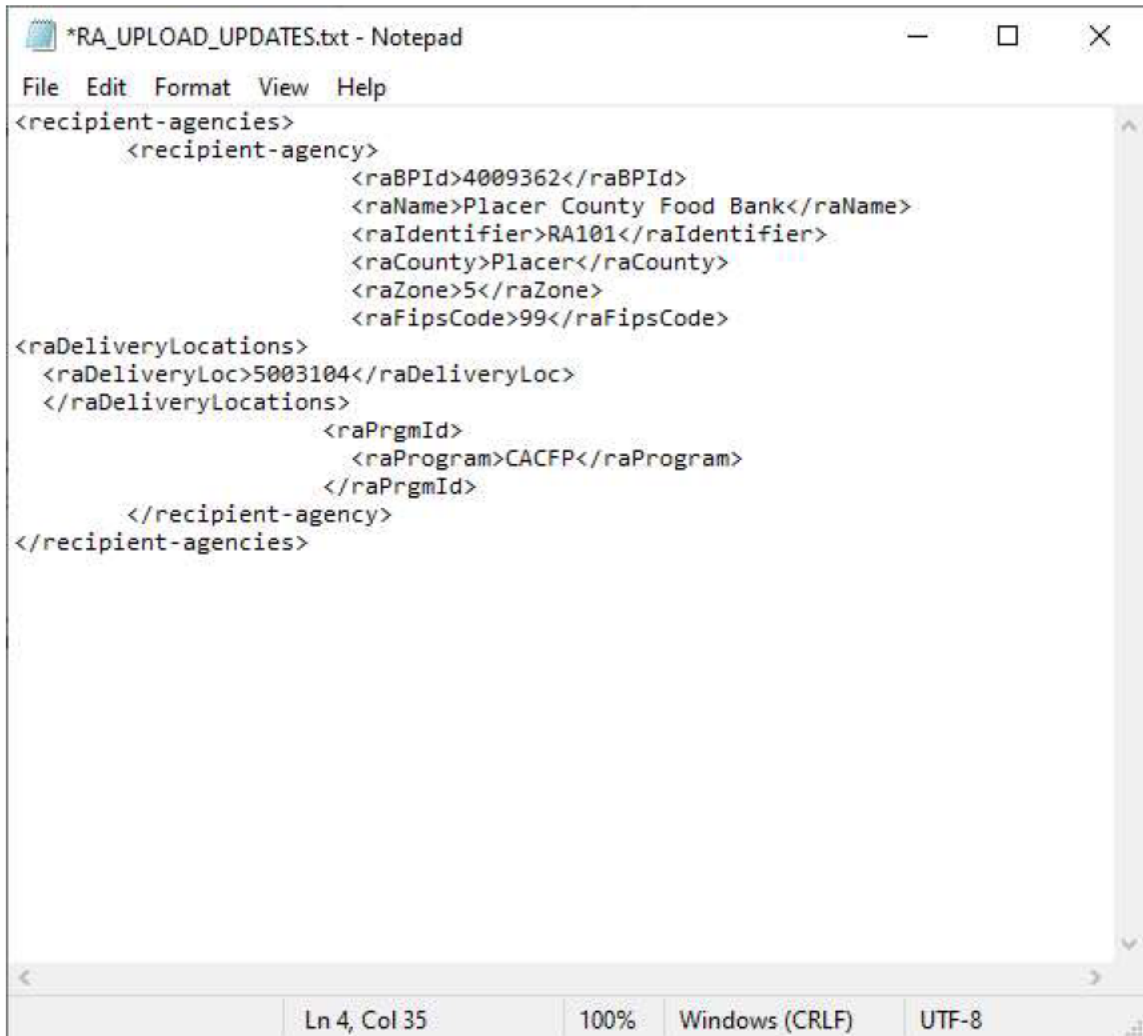
### Image: Notepad Screen



```
RA_UPLOAD_UPDATES.txt - Notepad
File Edit Format View Help
<recipient-agencies>
  <recipient-agency>
    <raBPIId>4009362</raBPIId>
    <raName>Placer County</raName>
    <raIdentifier>RA101</raIdentifier>
    <raCounty>Placer</raCounty>
    <raZone>5</raZone>
    <raFipsCode>99</raFipsCode>
  <raDeliveryLocations>
    <raDeliveryLoc>5003104</raDeliveryLoc>
  </raDeliveryLocations>
  <raPrgmId>
    <raProgram>CACFP</raProgram>
  </raPrgmId>
</recipient-agency>
</recipient-agencies>
Ln 8, Col 31 100% Windows (CRLF) UTF-8
```

2. Update the XML as necessary. In this example, the **<raName>** field is changed to **Placer County Food Bank**.

Image: Notepad Screen

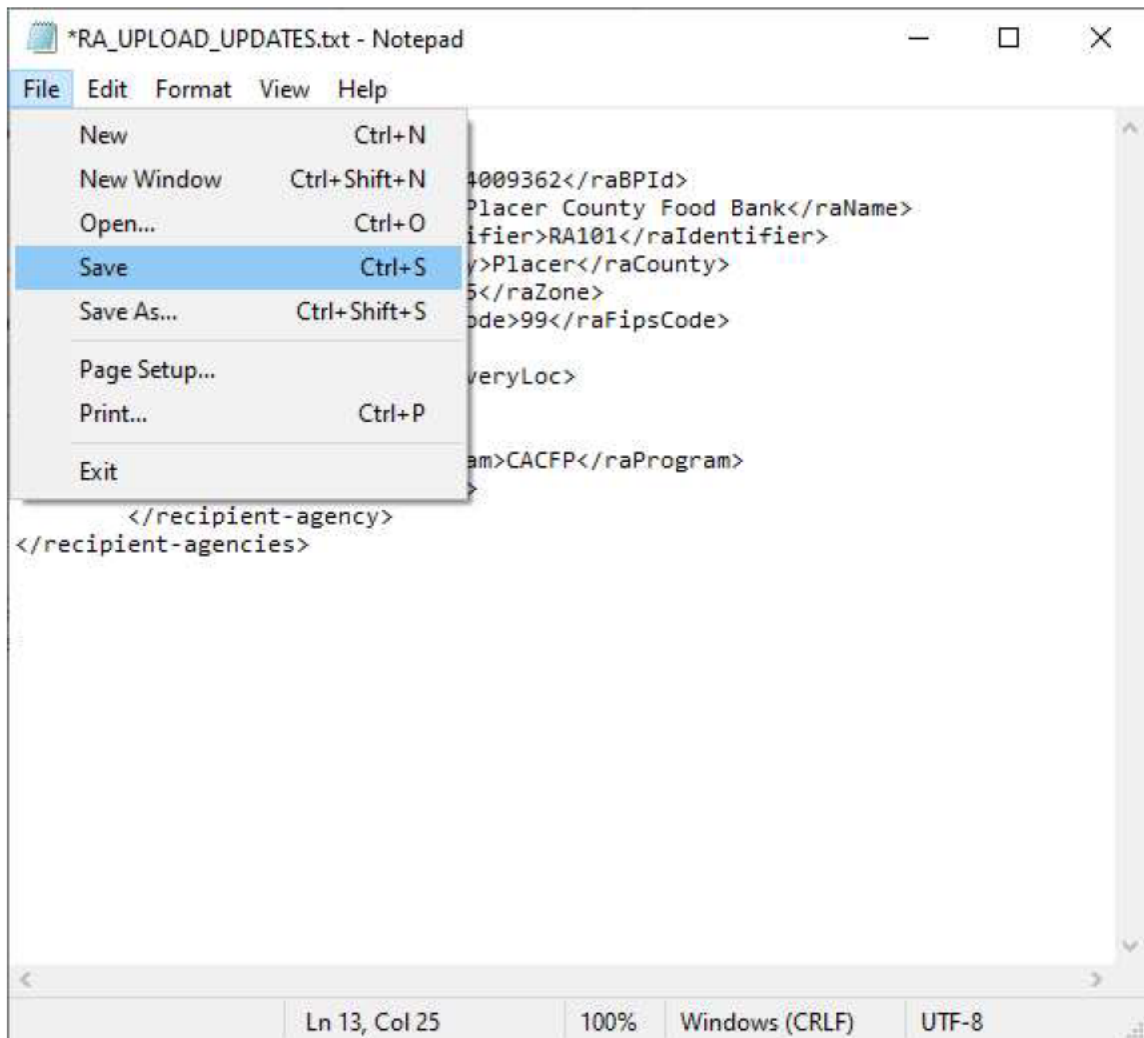


```
*RA_UPLOAD_UPDATES.txt - Notepad
File Edit Format View Help
<recipient-agencies>
  <recipient-agency>
    <raBPIId>4009362</raBPIId>
    <raName>Placer County Food Bank</raName>
    <raIdentifier>RA101</raIdentifier>
    <raCounty>Placer</raCounty>
    <raZone>5</raZone>
    <raFipsCode>99</raFipsCode>
  <raDeliveryLocations>
    <raDeliveryLoc>5003104</raDeliveryLoc>
  </raDeliveryLocations>
    <raPrgmId>
      <raProgram>CACFP</raProgram>
    </raPrgmId>
  </recipient-agency>
</recipient-agencies>
```

Ln 4, Col 35      100%      Windows (CRLF)      UTF-8

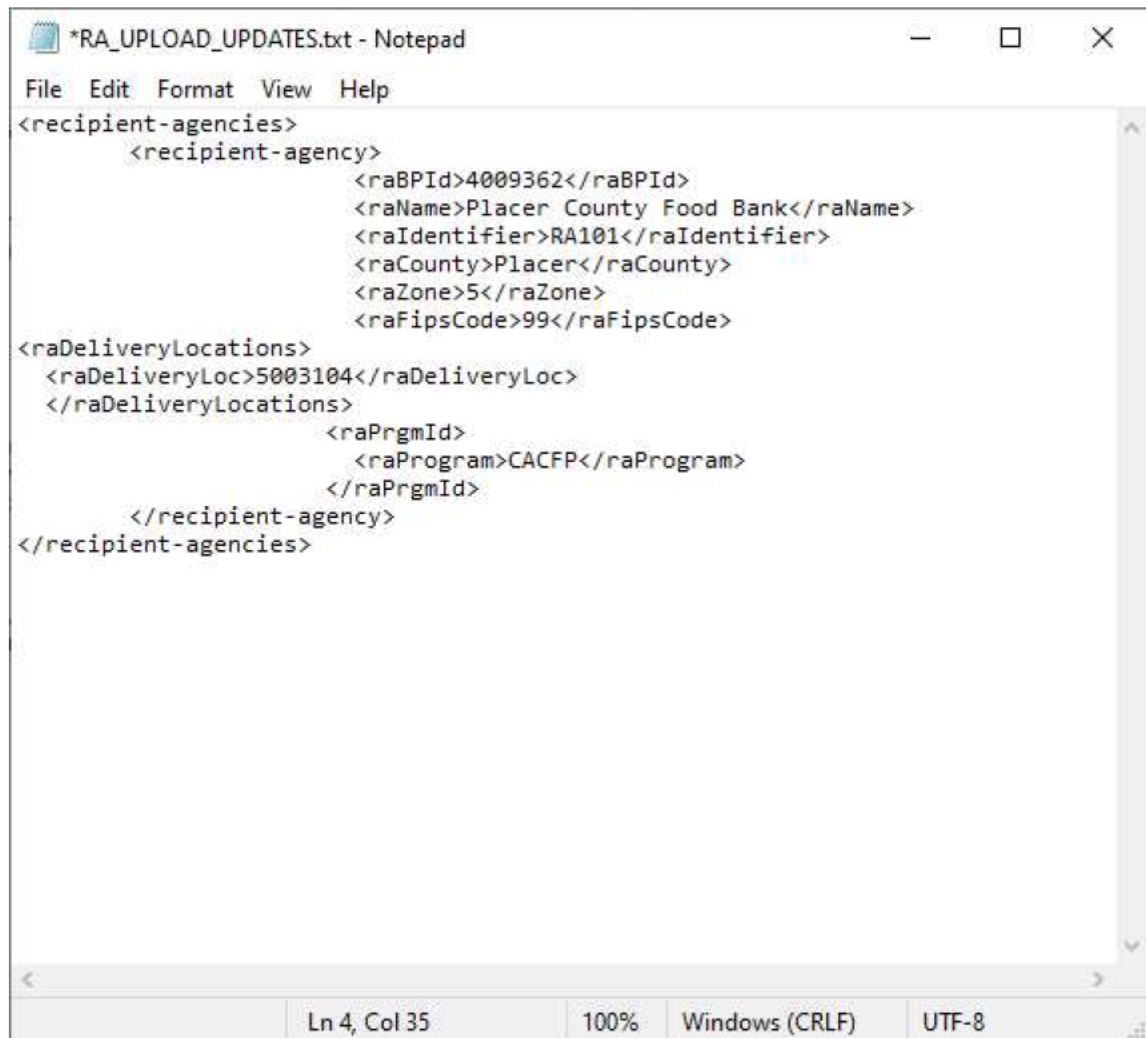
3. Select **File** (the **File** menu option).

Image: Notepad Screen




4. Select **Save** (the **Save** option).

**Image: Notepad Screen**



```
*RA_UPLOAD_UPDATES.txt - Notepad
File Edit Format View Help
<recipient-agencies>
  <recipient-agency>
    <raBPIId>4009362</raBPIId>
    <raName>Placer County Food Bank</raName>
    <raIdentifier>RA101</raIdentifier>
    <raCounty>Placer</raCounty>
    <raZone>5</raZone>
    <raFipsCode>99</raFipsCode>
  <raDeliveryLocations>
    <raDeliveryLoc>5003104</raDeliveryLoc>
  </raDeliveryLocations>
    <raPrgmId>
      <raProgram>CACFP</raProgram>
    </raPrgmId>
  </recipient-agency>
</recipient-agencies>
```

Ln 4, Col 35      100%      Windows (CRLF)      UTF-8

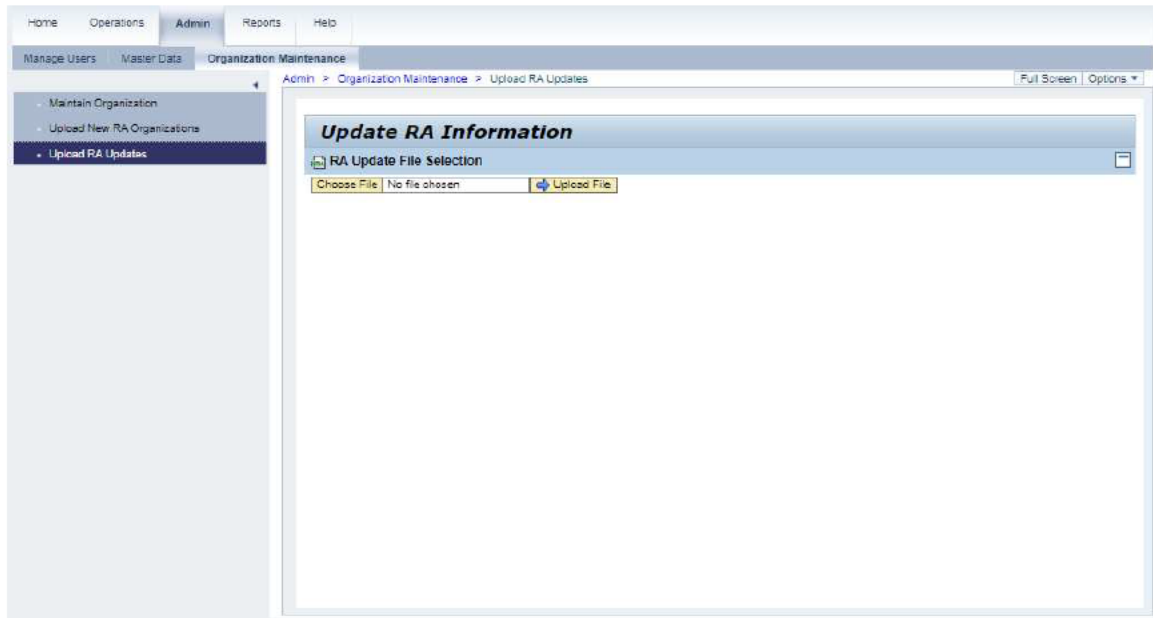
5. Click  (the **Close** button).




(Note) After closing the XML file, navigate to the *Upload RA Updates* screen on the portal to upload the XML file.

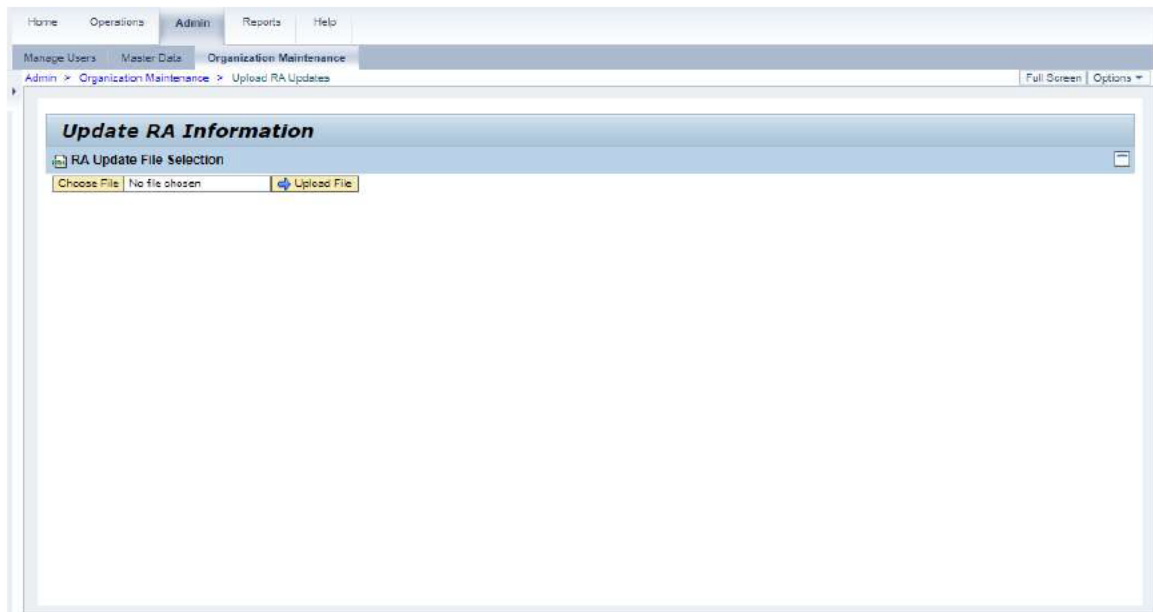
6. Start the transaction using the Portal path: **Admin tab** → **Organization Maintenance tab** → **Upload RA Updates** link.

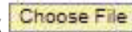
## Image: Upload RA Updates Screen



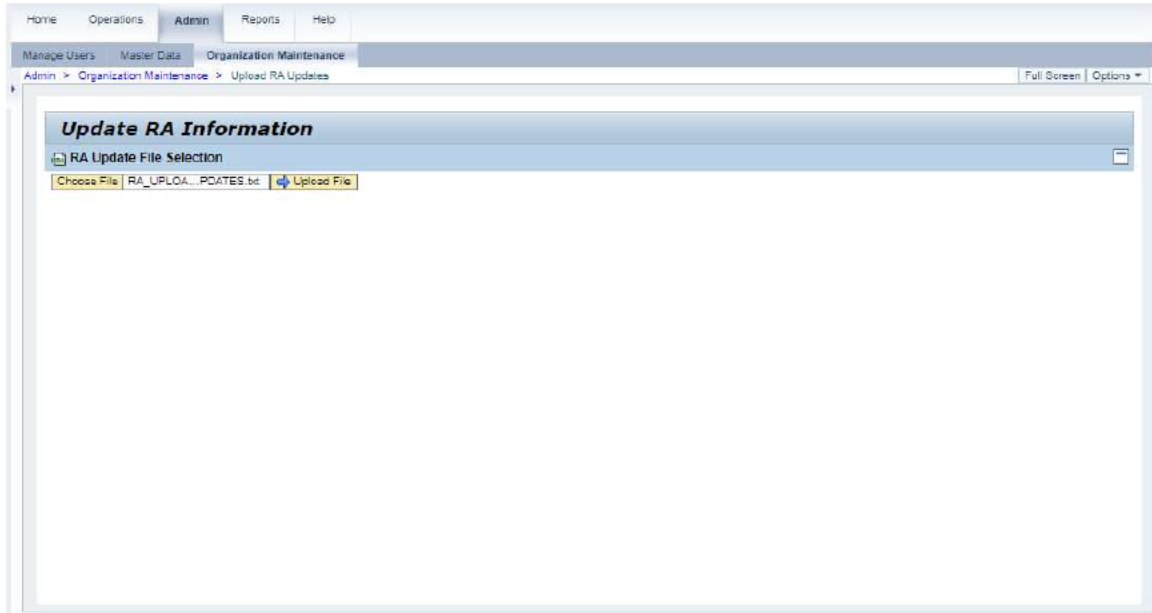
7. Click  (the **Hide Navigator** arrow) to minimize the Portal menu. Note that this can be done with any transaction in WBSCM.

## Image: Upload RA Updates Screen



8. Click  (the **Choose File** button) to locate the file to be uploaded. In this example, the **RA\_UPLOAD\_UPDATES.txt** file was located.

### Upload RA Updates Screen



Home Operations Admin Reports Help

Manage Users Master Data Organization Maintenance

Admin > Organization Maintenance > Upload RA Updates

Full Screen Options

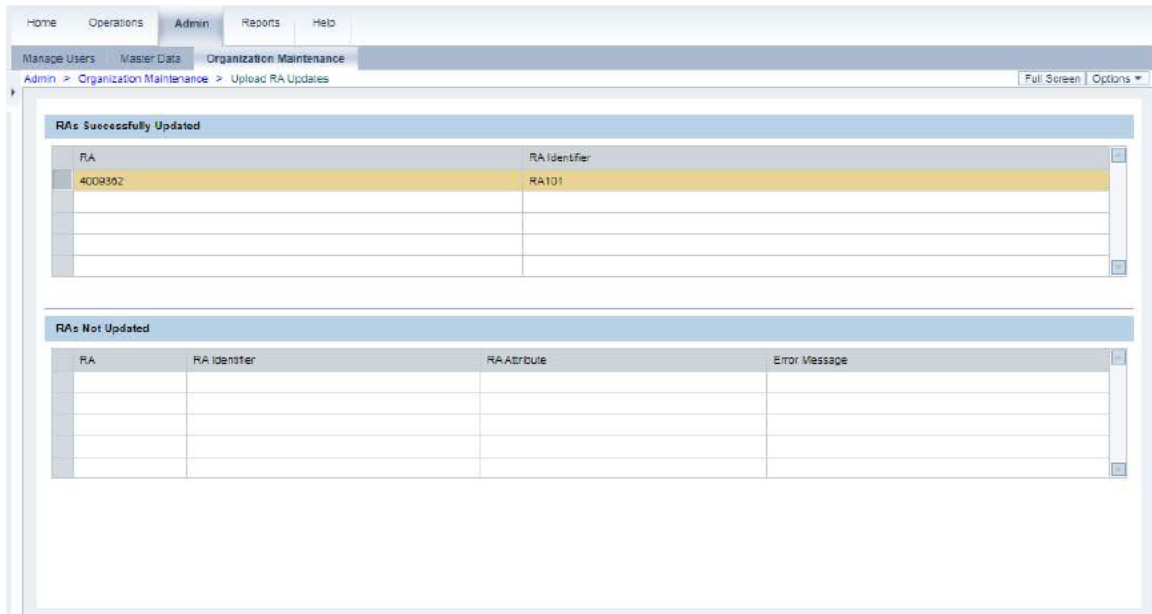
**Update RA Information**

RA Update File Selection

Choose File RA\_UPLOA...PCATES.bt Upload File

9. Click  (the **Upload File** button).

### Upload RA Updates Screen



Home Operations Admin Reports Help

Manage Users Master Data Organization Maintenance

Admin > Organization Maintenance > Upload RA Updates

Full Screen Options

**RAs Successfully Updated**

RA	RA Identifier
4009392	RA101

**RAs Not Updated**

RA	RA Identifier	RA ATTRIBUTE	Error Message

10. Review the *RAs Successfully Updated* section.



(Note) The following display:

- Business Partner Number in the **RA** column
- **RA Identifier** of the RA that was modified.

11. The transaction is complete.



Work Instruction  
Upload RA Updates

**RESULT**

The RA organization was updated by uploading an XML file to WBSCM.



## PROCESS OVERVIEW

### Purpose

The purpose of this transaction is to update an SDA sales order by uploading sales order XML files to WBSCM.

### Process Trigger

Use this procedure to upload an XML file containing updated information for one or multiple sales orders.

### Prerequisites

- An XML file containing sales order information (such as valid Sold-To, Ship-To, correct delivery date, material ID, Program Code, Quantity, UOM, Entitlement/Bonus, Correlation ID) must be available to the SDA user.

### Portal Path

Follow the Portal path below to complete this transaction:

- Select **Operations** tab → **Order Processing** tab → **File Uploads/Downloads** folder → **Upload SDA Sales Order** link to go to the *Upload SDA Sales Order* Screen

### Tips and Tricks

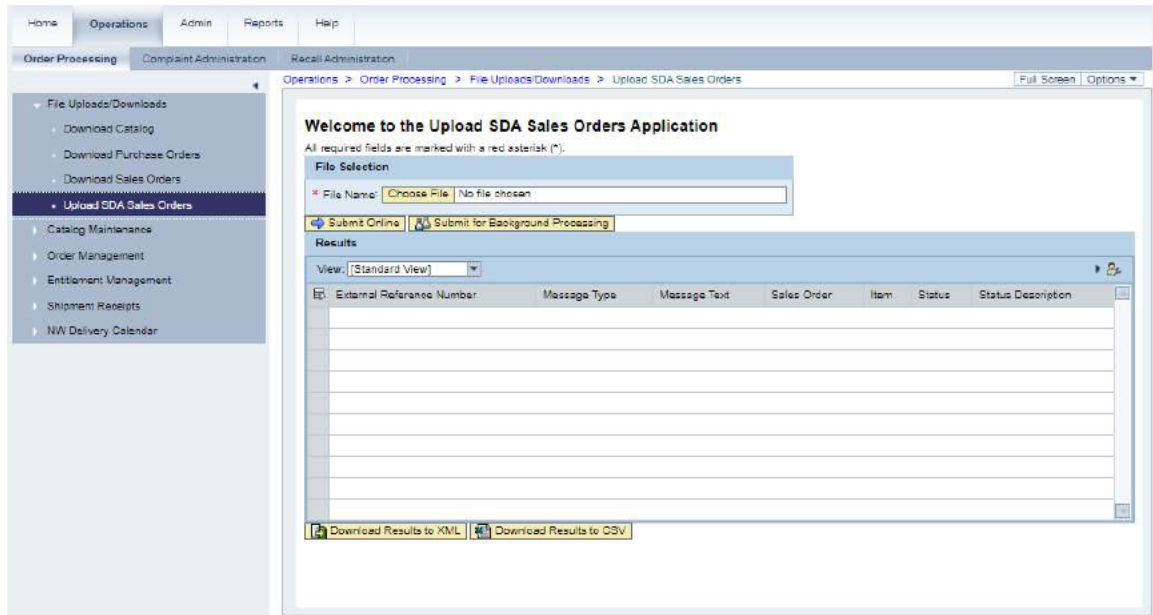
- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
  - **Required (R)** – a mandatory field necessary to complete the transaction
  - **Optional (O)** – a non-mandatory field not required to complete the transaction
  - **Conditional (C)** – a field that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




## PROCEDURE

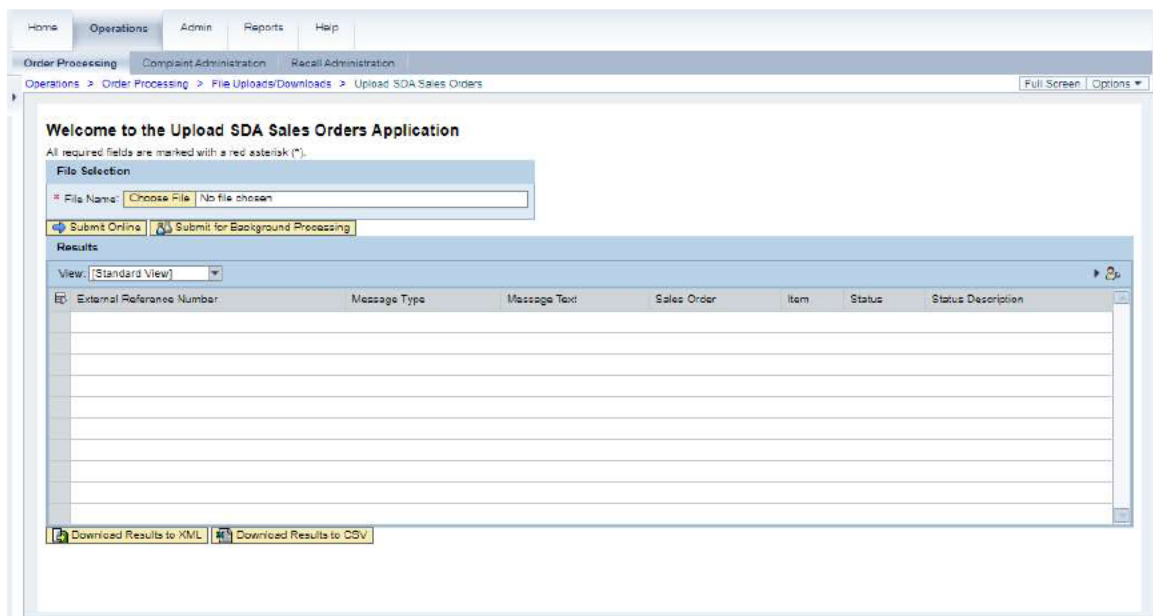
1. Start the transaction using the Portal path: **Operations** tab → **Order Processing** tab → **File Uploads/Downloads** folder → **Upload SDA Sales Order** link.

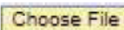
### Image: Upload SDA Sales Orders Screen



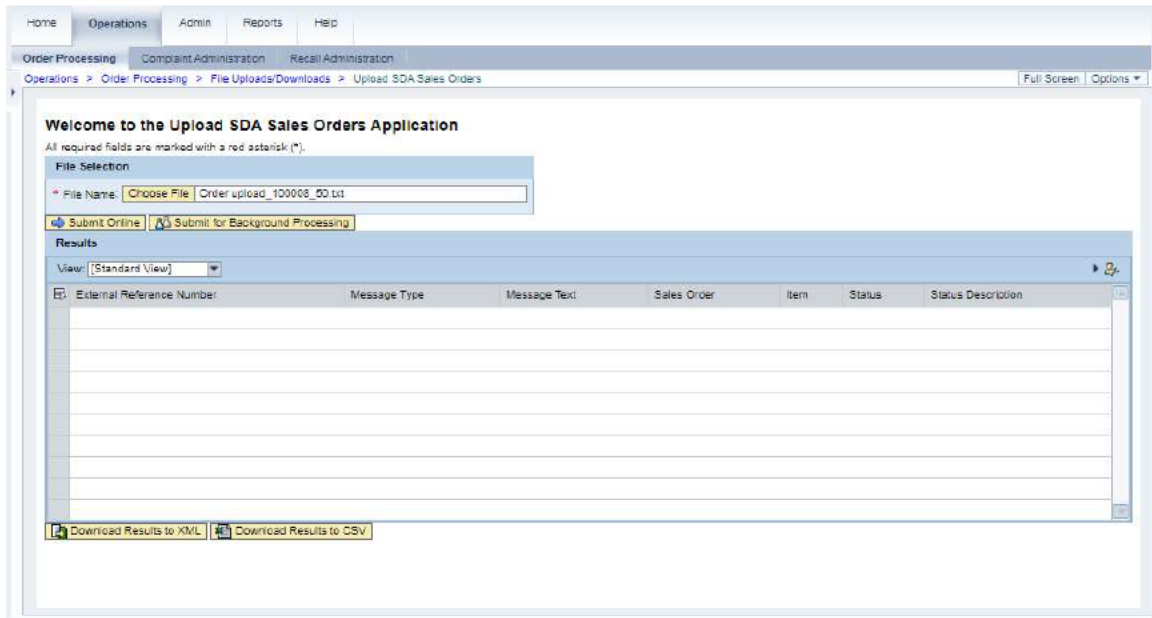
2. Click  (the **Hide Navigator** arrow) to minimize the Portal menu. Note that this can be done with any transaction in WBSCM.

### Image: Upload SDA Sales Orders Screen



3. Click  (the **Choose File** button) to locate the SDA Sales Order XML file to be uploaded.

## Image: Upload SDA Sales Orders Screen



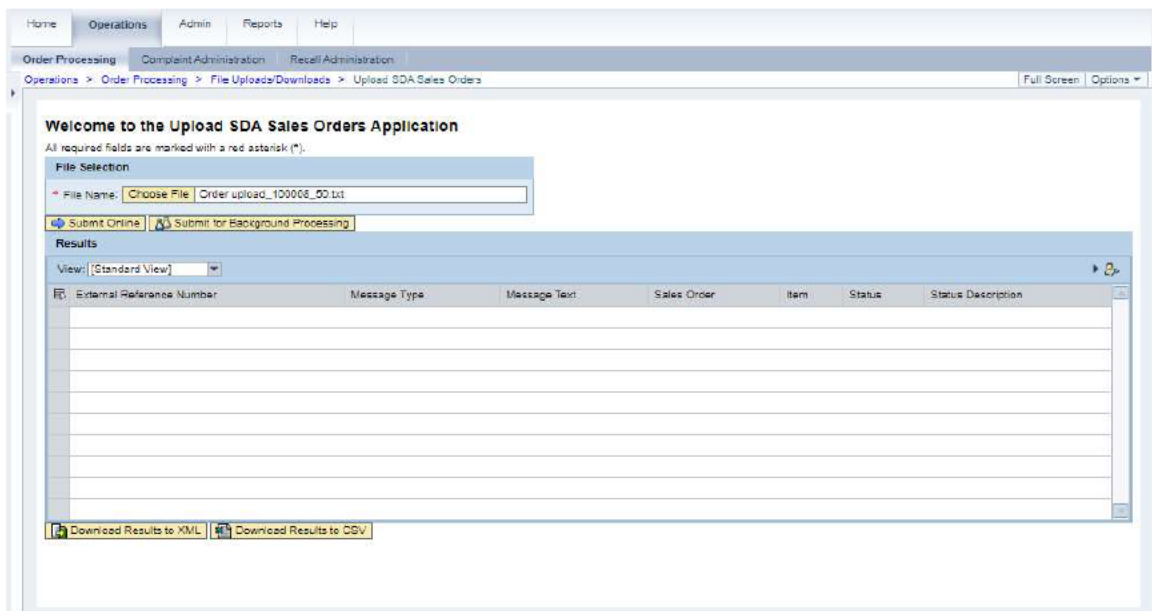
### 4. Perform one of the following:

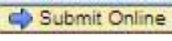
If	Then
The Sales Order XML document contains fewer than 50 records	Go to Step 6.
The Sales Order XML document contains 50 records or more	Go to Step 9.





(Note) The user located and selected the XML file. In this example, **Order upload\_100008\_50.txt** was selected.

## Image: Upload SDA Sales Orders Screen



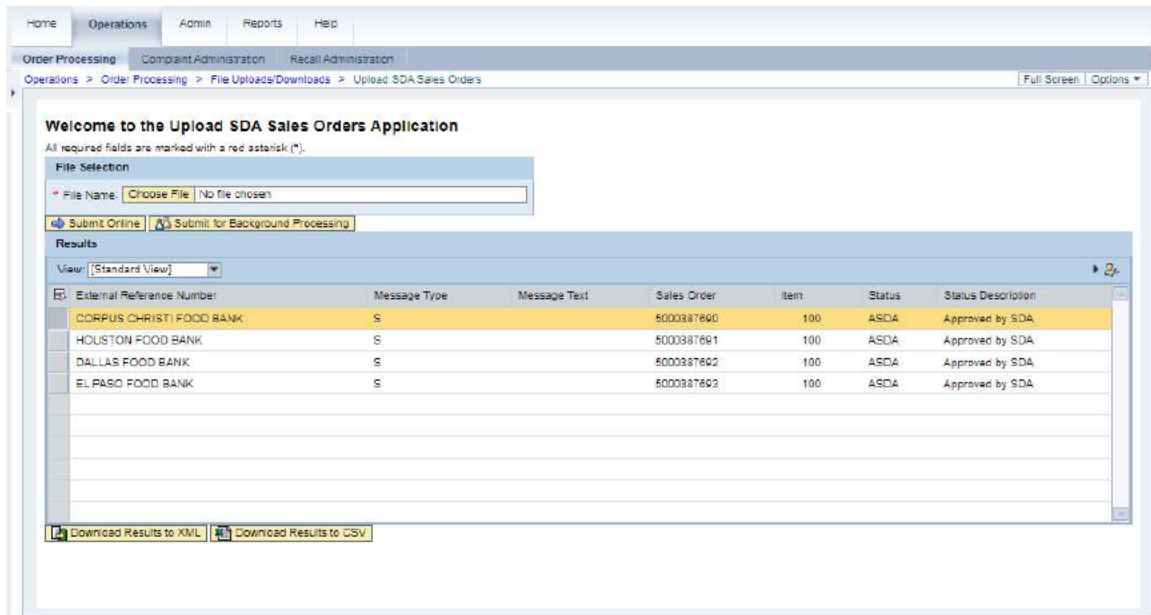
5. Click  (the **Submit Online** button).




(Note) The **Submit Online** option is used to upload or process an XML file with fewer than 50 orders or records. If there are more than 50 orders, and  (the **Submit Online** button) is used, an error message displays asking to use  (the **Submit for Background Processing** button):

"Your file has more than 50 Records. Please use the 'Submit for background processing' option to process the XML file."

**Image: Upload SDA Sales Orders Screen**

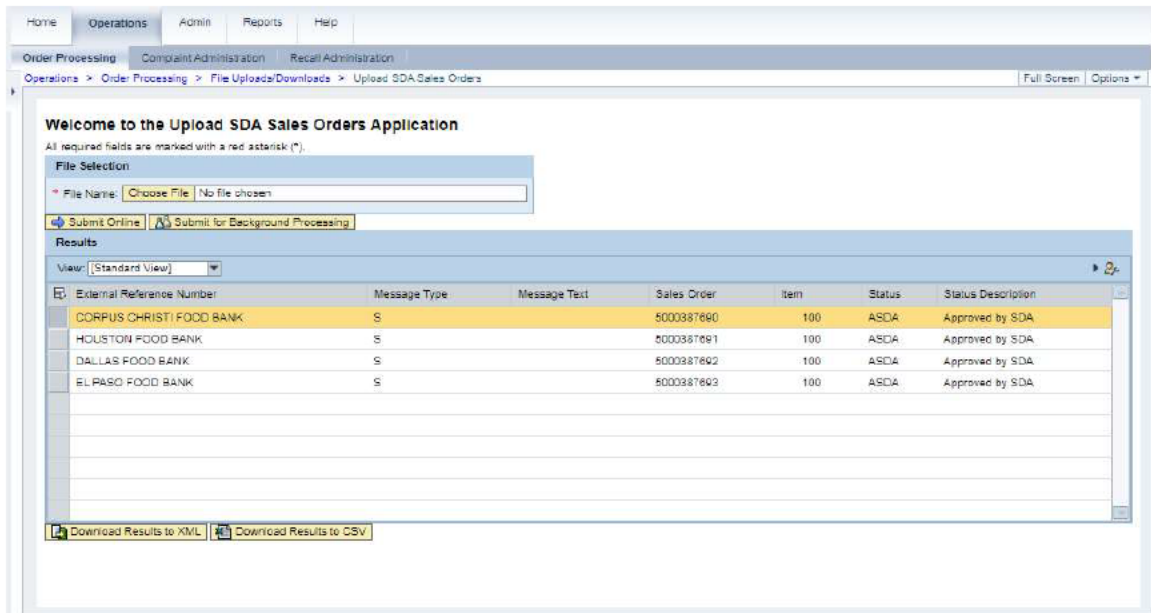


6. As required, complete/review the following fields:



Field	R/O/C	Description
External Reference Number	O	The Sold-To Party's external reference information.  <b>Example:</b> Corpus Christi Food Bank
Message Type	O	Specific interpretation scheme for electronically transmitted data.  <b>Example:</b> S   (Note) Options for this field are S (Success), E (Error), W (Warning), I (Information), or A (Abort)

Field	R/O/C	Description
Message Text	O	The text of the system message. Note that this field may not populate if there is no message provided.
Sales Order	O	Legal document created with sales information such as name of customer, materials purchased, quantities requested, and price.  <b>Example:</b> 5000387690
Item	O	The line item on the document.  <b>Example:</b> 100
Status	O	The code for status of the document.  <b>Example:</b> ASDA
Status Description	O	The definition of the status code.  <b>Example:</b> Approved by SDA

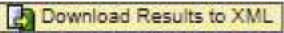
**Image: Upload SDA Sales Orders Screen**



7. Perform one of the following:

If	Then
To download results in XML format	Click  (the <b>Download Results to XML</b> button).
To download results in CSV format	Click  (the <b>Download Results to CSV</b> button).

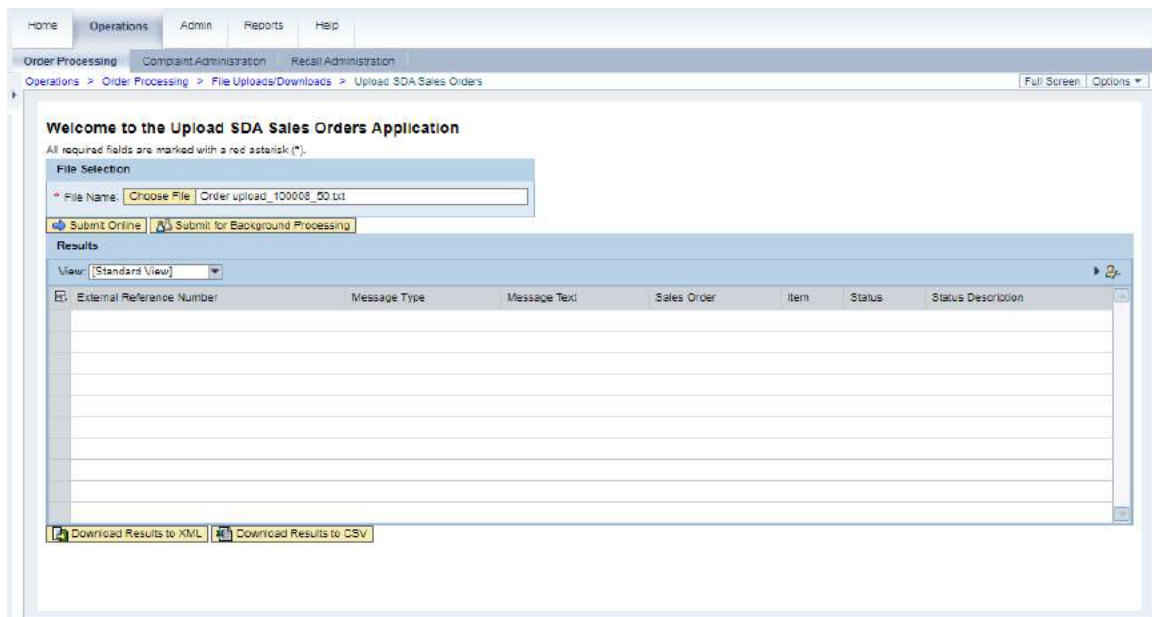


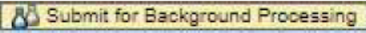
(Note) Note  (the **Download Results to XML**) and  (the **Download Results to CSV** button) are only enabled after clicking the **Submit Online** button.

The download step is optional. Perform the download to validate the upload results.

8. Go to Step 12.

**Image: Upload SDA Sales Orders Screen**

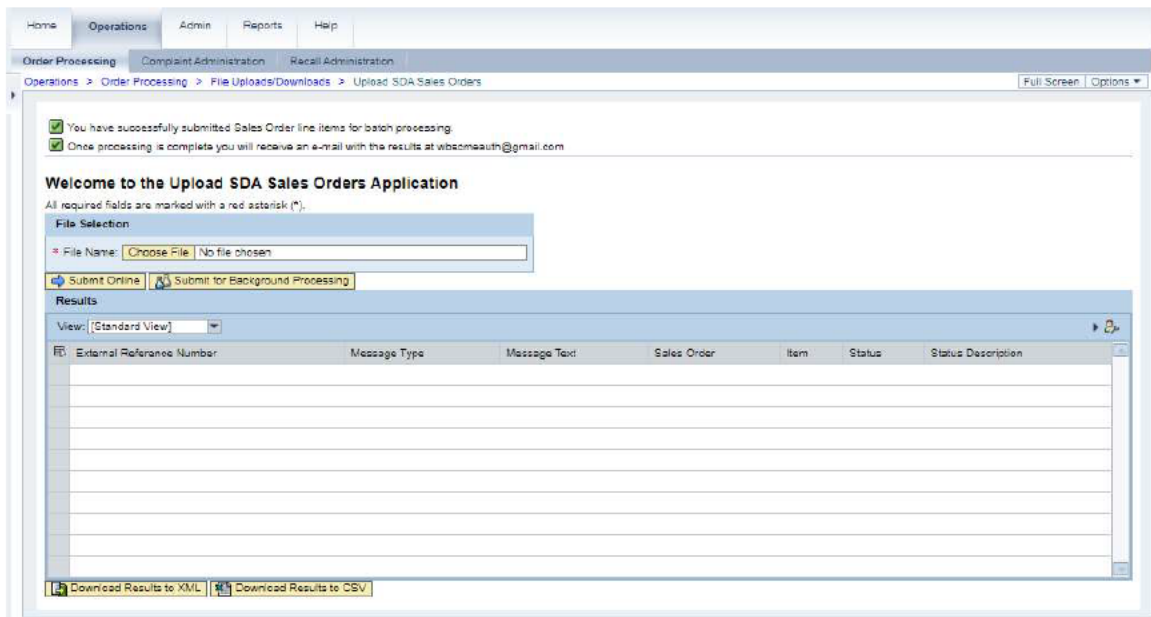


9. Click  (the **Submit for Background Processing** button) to process the Sales Order XML file with 50 or more records.



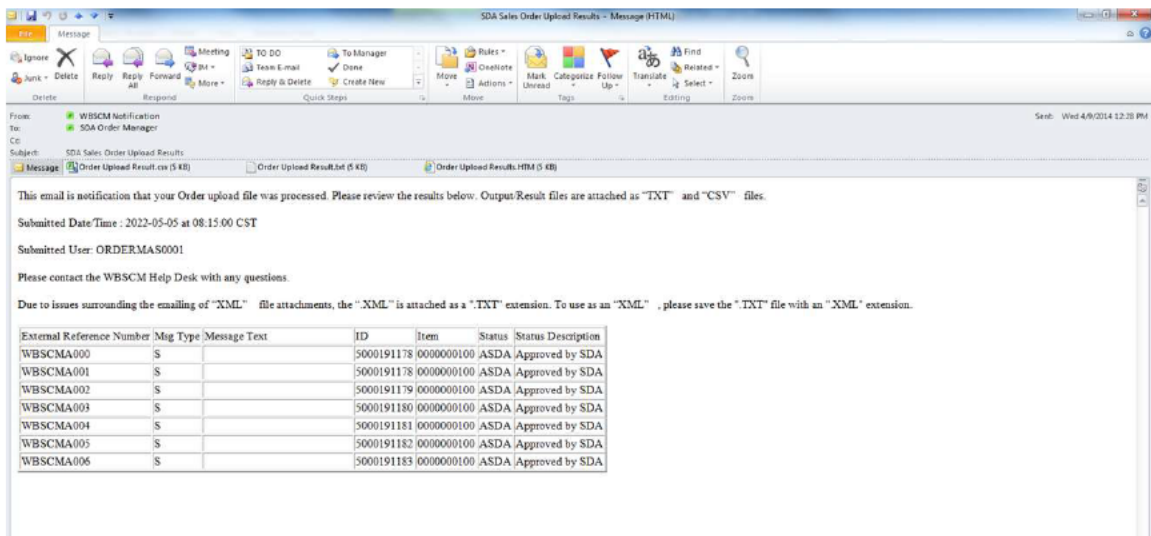
(Note) The system performs validations to ensure the XML file formatting is correct, data is valid (i.e. Sold-To, Ship-To, and Material ID, Program Code, Req Delivery Periods, FTL quantity, UOM, Correlation ID, Ent/Bonus indicator) and that the user has a valid email address on their profile.

## Image: Upload SDA Sales Orders Screen



10. Review the confirmation messages.

## Image: WBSCM Notification



11. Access the email account linked to the WBSCM User ID used when performing the sales order update. Locate and view the WBSCM Notification email.



(Note) The order upload results will be attached in CSV, TXT and HTM file formats.

12. The transaction is complete.





## Work Instruction Upload SDA Sales Orders

### RESULT

The SDA sales order has been updated by uploading an XML file. The XML file has been uploaded one of two ways:

- Less than 50 files – Submitted online
- More than 50 files – Submitted for background processing