



WBSCM Release 3.4 – April 30, 2015

On April 30, 2015, **Web-Based Supply Chain Management (WBSCM) Release 3.4** was imported into the system. The release contains several new functionalities that will now be available for vendors. These changes are identified below. This instruction provides guidance and procedures for the functionalities.

- I. [Ability to Export/Import Solicitation During the Creation of an Offer](#)
- II. [Error Messages for Incorrect File Format for Importing Offer File Back to WBSCM](#)
- III. [Purchase Order Item Report](#)
- IV. [Additional Fields Available Under the List of Invoice Report](#)

I. Ability to Export/Import Solicitation During the Creation of an Offer

Vendors may have the ability to export/import the solicitation RfX Response. The excel file can then be used to enter offers prices on all items except off-shore locations. If a solicitation can be exported out of WBSCM, there will be either an export and an import button, or only an export button, displayed under “Create RfX Response.”

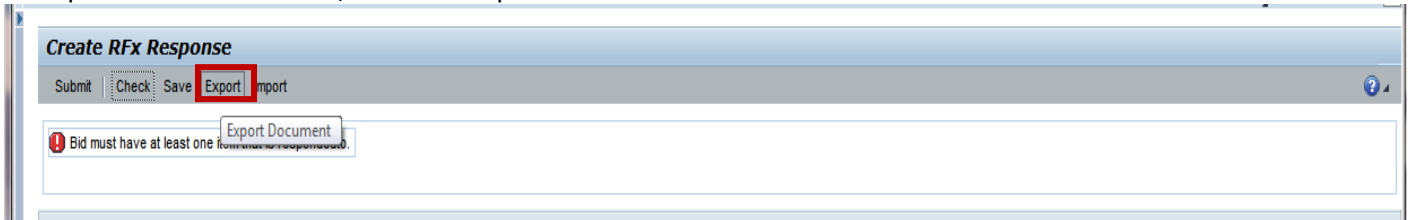
These instructions provide guidance on the proper procedures to follow when using the export/import functionality.

Prior to the steps below, the offeror must have created an offer and the Create Bid popup window “Create RfX Response” must be displayed:

Function	Number	Name	Phone Number
• Goods Recipient		multiple	multiple
• Ship-To Address		multiple	multiple
• Location		DOMESTIC STATISTICAL 1000	

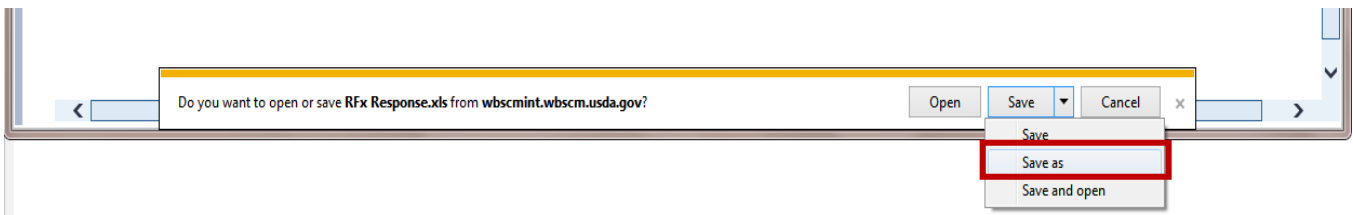


To export the bid offer form, click the "Export" link.



At the bottom of the page, your options will be displayed. To assure that the proper format is preserved, select "Save As" or "Save." If you select "Save," the file will be downloaded into a default download file folder.

AMS recommends you use the "Save As" feature.



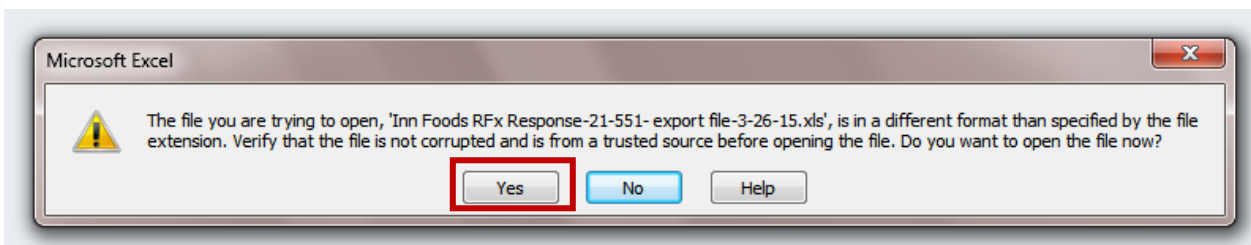
NOTE: If the user clicks on the "Open" file button, the file format will **NOT** work for importing data back into WBSM.

It is **IMPORTANT** to **NOT** change any of the fields or add any columns to the file if you intend to import it back into WBSM.

After the response file is exported, save the offer response so any work that has been completed on the RFX response page is saved.

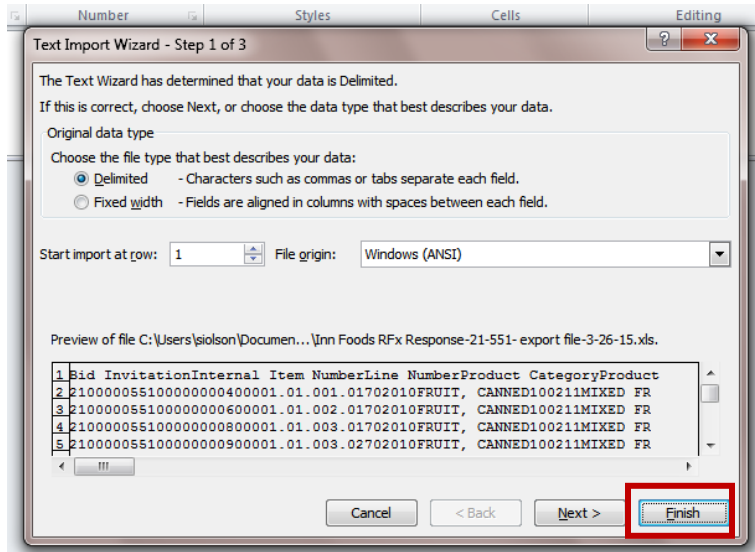


Opening The Excel File: Navigate to file location and click open, one will get the message that the file one is trying to open is in a different format do you want to continue. Click "Yes."





Once you click “Yes,” another pop window will display. Click the “Finish” button and the file will open.



After the file is open, enter your offer prices for the line item you want to bid on, excluding any offshore destinations.

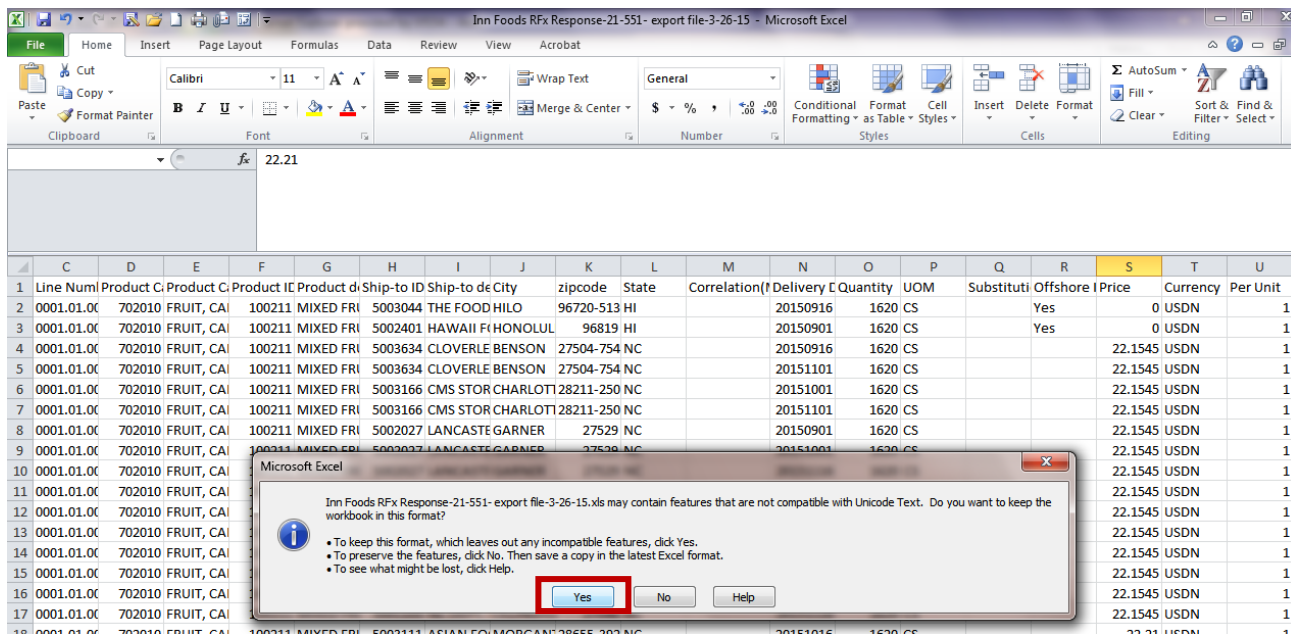
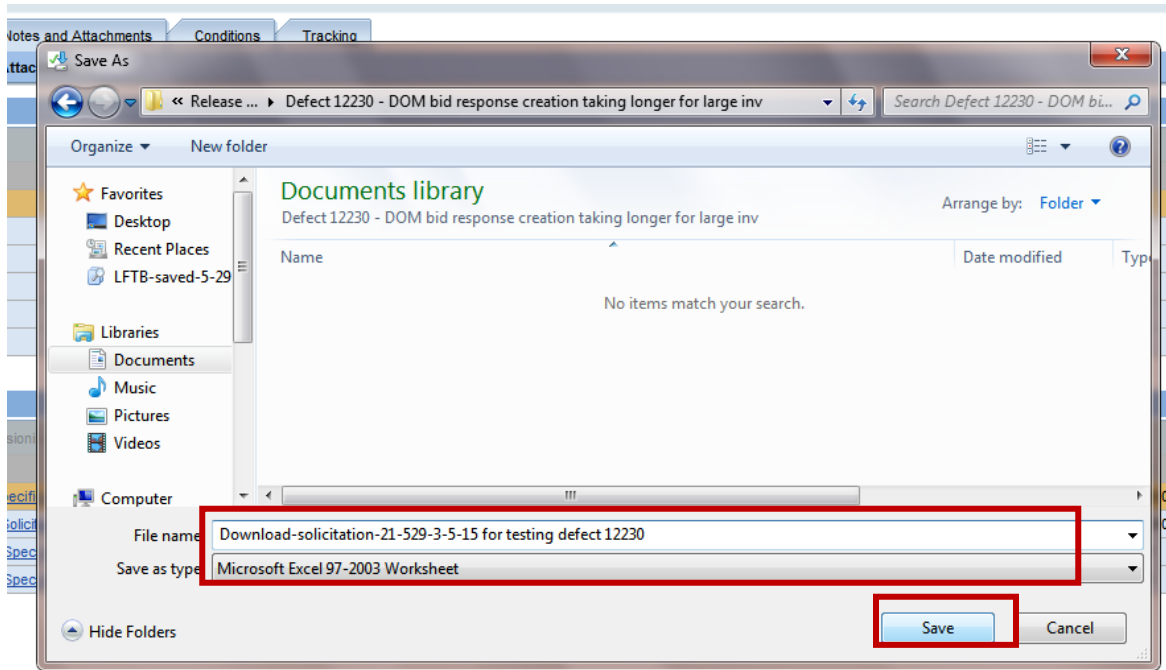
NOTE: Offshore destinations will have a “Yes” in the offshore column. Also, please note that destinations that are lotted together to form a full truckload will have a correlation number showing in the correlation column:

Line Num	Product C	Product C	Product IE	Product di	Ship-to ID	Ship-to de	City	zipcode	State	Correlation	Delivery C	Quantity	UOM	Substituti	Offshore	Price	Currency	Per Unit
2	0001.01.00	702010	FRUIT, CAI	100211	MIXED FRI	5003044	THE FOODHILO	96720-513	HI		20150916	1620	CS		yes	0	USD	N
3	0001.01.00	702010	FRUIT, CAI	100211	MIXED FRI	5002401	HAWAII F HONOLULU	96819	HI		20150901	1620	CS		yes	0	USD	N
4	0001.01.00	702010	FRUIT, CAI	100211	MIXED FRI	5003634	CLOVERLE BENSON	27504-754	NC		20150916	1620	CS			0	USD	N
5	0001.01.00	702010	FRUIT, CAI	100211	MIXED FRI	5003634	CLOVERLE BENSON	27504-754	NC		20151101	1620	CS			0	USD	N
6	0001.01.00	702010	FRUIT, CAI	100211	MIXED FRI	5003166	CMS STOR CHARLOTT	28211-250	NC		20151001	1620	CS			0	USD	N
7	0001.01.00	702010	FRUIT, CAI	100211	MIXED FRI	5003166	CMS STOR CHARLOTT	28211-250	NC		20151101	1620	CS			0	USD	N
8	0001.01.00	702010	FRUIT, CAI	100211	MIXED FRI	5002027	LANCASTE GARNER	27529	NC		20150901	1620	CS			0	USD	N
9	0001.01.00	702010	FRUIT, CAI	100211	MIXED FRI	5002027	LANCASTE GARNER	27529	NC		20151001	1620	CS			0	USD	N
10	0001.01.00	702010	FRUIT, CAI	100211	MIXED FRI	5002027	LANCASTE GARNER	27529	NC		20151116	1620	CS			0	USD	N
11	0001.01.00	702010	FRUIT, CAI	100211	MIXED FRI	5000875	HOLLY RID HOLLY RID	28445	NC		20151001	1620	CS			0	USD	N
12	0001.01.00	702010	FRUIT, CAI	100211	MIXED FRI	5000875	HOLLY RID HOLLY RID	28445	NC		20151116	1620	CS			0	USD	N
13	0001.01.00	702010	FRUIT, CAI	100211	MIXED FRI	5002984	CALDWELL LENOIR	28645-393	NC		20150916	1620	CS			0	USD	N
14	0001.01.00	702010	FRUIT, CAI	100211	MIXED FRI	5002984	CALDWELL LENOIR	28645-393	NC		20151101	1620	CS			0	USD	N
15	0001.01.00	702010	FRUIT, CAI	100211	MIXED FRI	5001105	NC DEPT. L LILLINGTO	27546	NC		20150901	1620	CS			0	USD	N
16	0001.01.00	702010	FRUIT, CAI	100211	MIXED FRI	5001105	NC DEPT. L LILLINGTO	27546	NC		20151016	1620	CS			0	USD	N
17	0001.01.00	702010	FRUIT, CAI	100211	MIXED FRI	5001105	NC DEPT. L LILLINGTO	27546	NC		20151116	1620	CS			0	USD	N
18	0001.01.00	702010	FRUIT, CAI	100211	MIXED FRI	5003111	ASIAN FOI MORGAN	28655-392	NC		20151016	1620	CS			0	USD	N
19	0001.01.01	702010	FRUIT, CAI	100211	MIXED FRI	5002985	CRAVEN C NEW BERT	28560-341	NC		20151001	1620	CS			0	USD	N
20	0001.01.01	702010	FRUIT, CAI	100211	MIXED FRI	5002985	CRAVEN C NEW BERT	28560-341	NC		20151101	1620	CS			0	USD	N
21	0001.01.01	702010	FRUIT, CAI	100211	MIXED FRI	5003278	NORTH CA OXFORD	27565-403	NC		20150901	1620	CS			0	USD	N
22	0001.01.01	702010	FRUIT, CAI	100211	MIXED FRI	5003278	NORTH CA OXFORD	27565-403	NC		20151016	1620	CS			0	USD	N
23	0001.01.01	702010	FRUIT, CAI	100211	MIXED FRI	5001403	HOUSE OF RAEFORD	28378	NC		20151001	1620	CS			0	USD	N
24	0001.01.01	702010	FRUIT, CAI	100211	MIXED FRI	5001403	HOUSE OF RAEFORD	28378	NC		20151116	1620	CS			0	USD	N
25	0001.01.01	702010	FRUIT, CAI	100211	MIXED FRI	5001787	NC DEPT. L SANFORD	27330	NC		20150901	1620	CS			0	USD	N
26	0001.01.01	702010	FRUIT, CAI	100211	MIXED FRI	5001787	NC DEPT. L SANFORD	27330	NC		20151016	1620	CS			0	USD	N
27	0001.01.01	702010	FRUIT, CAI	100211	MIXED FRI	5001787	NC DEPT. L SANFORD	27330	NC		20151116	1620	CS			0	USD	N
28	0001.01.01	702010	FRUIT, CAI	100211	MIXED FRI	5002731	BROOKW SILER CITY	27344	NC		20150916	1620	CS			0	USD	N
29	0001.01.01	702010	FRUIT, CAI	100211	MIXED FRI	5002731	BROOKW SILER CITY	27344	NC		20151101	1620	CS			0	USD	N
30	0001.01.01	702010	FRUIT, CAI	100211	MIXED FRI	5002980	US FOOD ZEBULON	27597-698	NC		20150916	1620	CS			0	USD	N
31	0001.01.01	702010	FRUIT, CAI	100211	MIXED FRI	5002980	US FOOD ZEBULON	27597-698	NC		20151016	1620	CS			0	USD	N
32	0001.01.01	702010	FRUIT, CAI	100211	MIXED FRI	5002984	CALDWELL LENOIR	28645-393	NC	3032015016	20150901	810	CS			0	USD	N
33	0001.01.01	702010	FRUIT, CAI	100211	MIXED FRI	5002731	BROOKW SILER CITY	27344	NC	3032015016	20150901	810	CS			0	USD	N



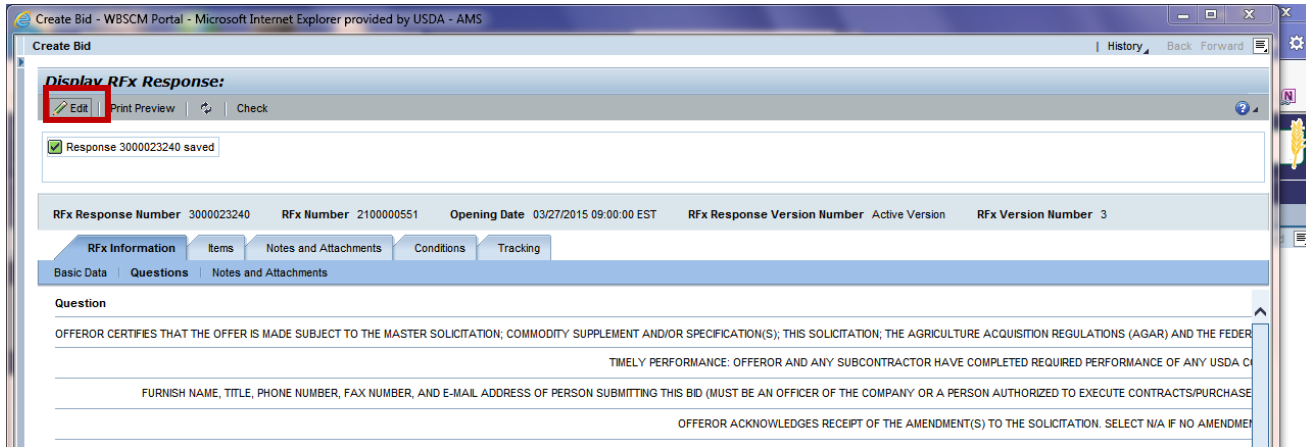
Save your Excel File: After all prices are entered, save the file – keeping it in the same file format. Click “Save As,” navigate to where you want the file saved, name your file, and Click “Save.”

DO NOT CHANGE EXCEL97-2003 Worksheet FORMAT.

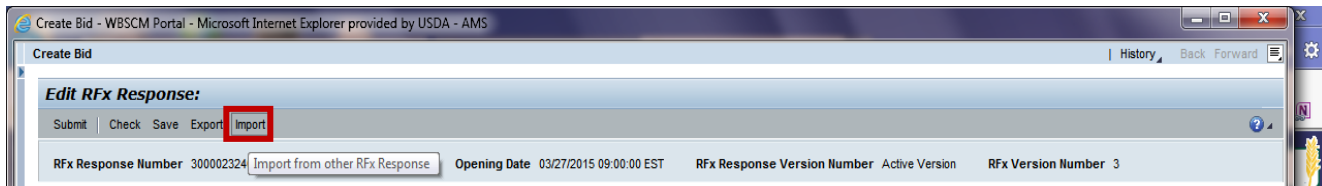




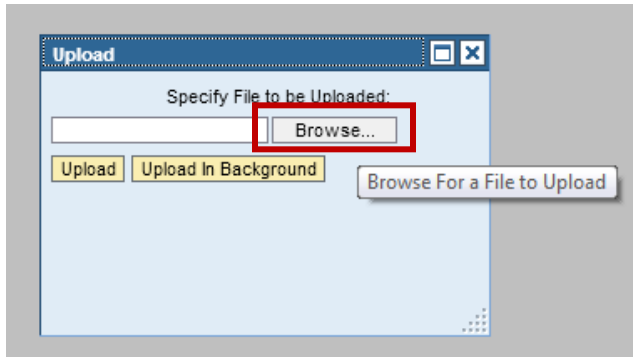
Now you are ready to import back in to WBSM RFX Response page. The page must be in edit mode. Click the “Edit” button:



Then click the “Import” button:

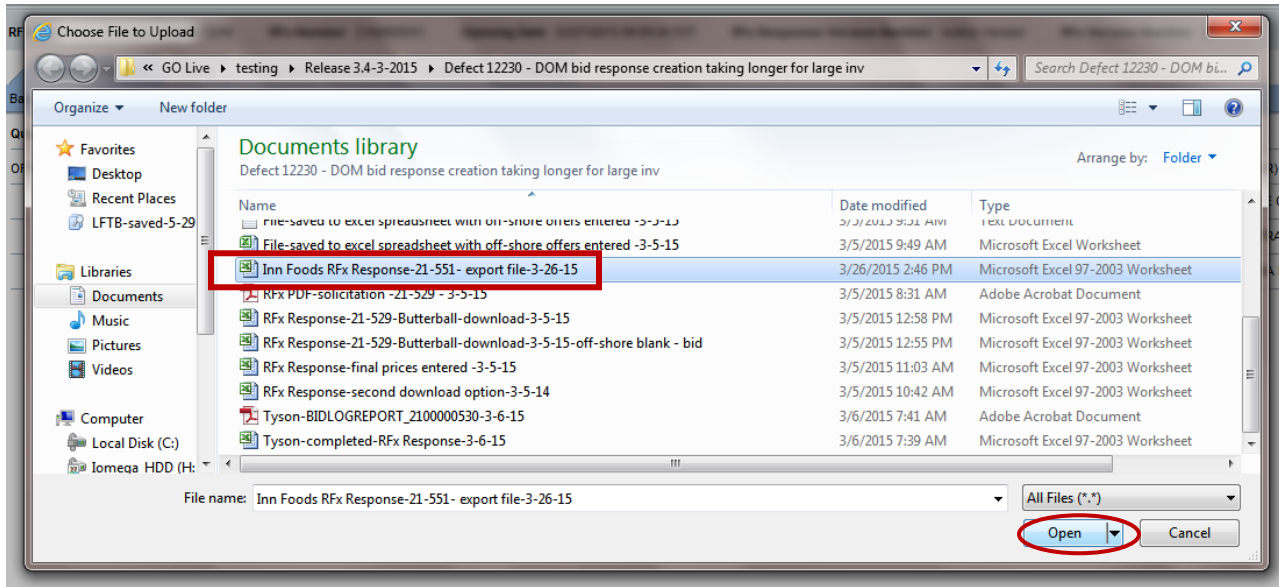


Browse to where the saved excel file is located:

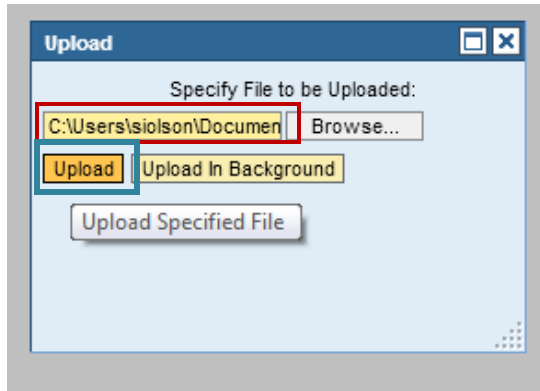




Select the file and click the “Open” button:



The URL for file will be displayed. Click the “Upload” button:

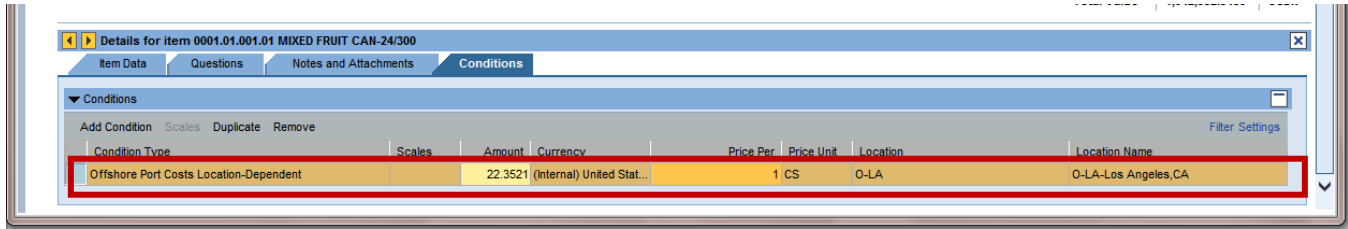


Once file is uploaded, navigate to **Items tab** and enter any offshore prices, if applicable, and check your offer.

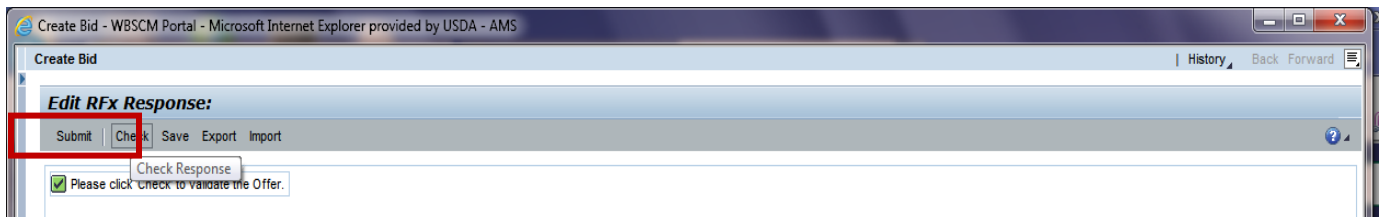
Line Number	Description	Internal Item Number	Lot	Product ID	Required Quantity	Unit	Price	Currency	Price Per	Delivery Date
0001	FRUIT, CANNED	10			0.000		0.0000	USDN		
0001.01	MIXED FRUIT CAN-24/300	20			0.000		0.0000	USDN		
0001.01.001	OFFSHORE: HILO HI	30			0.000		0.0000	USDN		
0001.01.001.01	MIXED FRUIT CAN-24/300	40		100211	1,620.000	CS	0.0000	USDN	1	On 09/30/2015
0001.01.002	OFFSHORE: HONOLULU HI	50			0.000		0.0000	USDN		
0001.01.002.01	MIXED FRUIT CAN-24/300	60		100211	1,620.000	CS	0.0000	USDN	1	On 09/15/2015



Follow off-shore bidding steps – under Item Detail – Conditions Tab



Check RFX Response: If you have no errors, you are ready to “Submit” the RFX Response page. Follow remaining steps for the Bid Submission Process.



Once all prices are entered, perform a validation check. If it passes all validations, then you are ready to submit the offer back to WBSM (Save).

Note: You can export the file again after entering all offer prices including the off-shore locations and performing a “Check” to validate the offer.

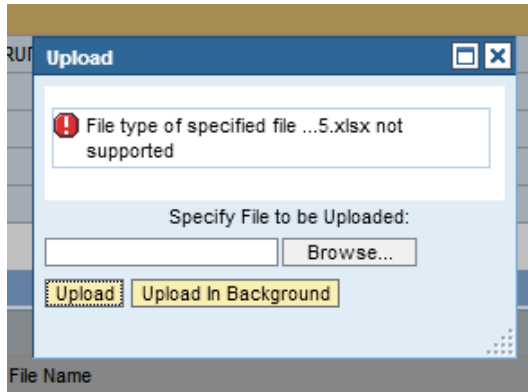
[\(Return to Title Page\)](#)



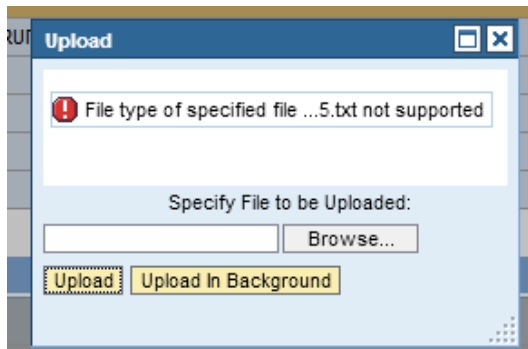
II. Error Messages for Incorrect File Format for Importing Offer File Back to WBSCM

The following are some examples of error messages you may encounter if the Excel file format was changed during the export/import process.

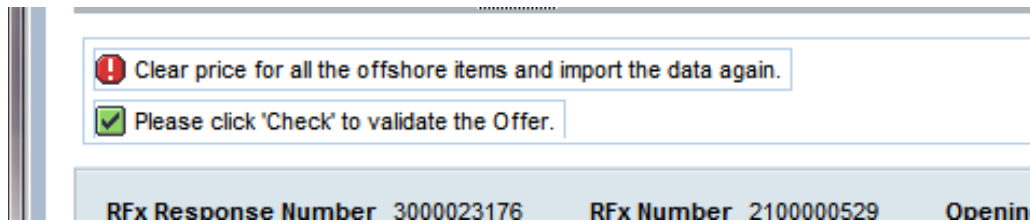
File saved in Excel spreadsheet format **other than Microsoft EXCEL97-2003 Worksheet**:



File saved as a text (Unicode txt) format:



1. If an offshore price is entered for an offshore line item, you will receive the error message below or in a pop window. Make sure that, for those rows that have an offshore indicator and “Yes,” the price is left as “0.”



[\(Return to Title Page\)](#)



III. Purchase Order Item Report

Navigate to Reports>Purchase Order Item Report:

The screenshot shows the 'Supplier Mgt' application interface. At the top, there is a navigation bar with tabs for 'Home', 'Suppliers', 'Admin', 'Reports', and 'Help'. Below this, the 'Purchase Order Item Report' is selected in the left-hand navigation menu. The main content area displays the 'Selection Criteria' search form, which includes various fields for filtering results, such as Purchase Order Number, Bid Invitation Number, Responsible Purch. Group, Product Category, Transaction Type, Status, Business Partner, Stevedore BP, Product ID, Contract, Scenario, Delivery date, FM Posting Date, Time Frame, Start Date, and End Date. Each field has a search icon and a 'To' field for range selection. A 'Search' button is located at the bottom left of the form.

Enter the search criterion you want to search. (For example, Purchase Order Number); click the “Search” button:

This screenshot shows the 'Selection Criteria' search form with the 'Purchase Order Number' field populated with the value '4100005237'. The 'Search' button at the bottom left is highlighted with a red box, indicating the next step in the process.



Once the report has run, you can change the report layout. Move the tool bar to the far right-hand side of page, and click on the “wrench” icon.

Fund	Funds ctr	Commitment item	Functional Area	Order	Sales Doc.	Sales Doc. Itm.	Correlation ID	Program Agency	Reference PO Number	Reference PO Item Number
13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000163750	100		FNS		
13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000164605	100		FNS		
13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000167100	100		FNS		
13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000167163	100		FNS		
13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000167473	200		FNS		
13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000167488	100		FNS		
13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000167582	100		FNS		
13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000167668	100		FNS		
13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000168770	200		FNS		
13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000168770	100		FNS		
13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000169334	100		FNS		
13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000169335	100		FNS		
13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000169336	100		FNS		
13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000169368	100		FNS		
13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000169513	100		FNS		
13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000169514	100		FNS		
13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000170150	100		FNS		
13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000170161	100		FNS		

Then select the columns that you want to add or remove using the “Add” and “Remove” buttons:

Purchase Order Validation Report

Settings

View: olson [Save] [Save as...] [Delete] [Properties...]

Column Selection | Sort | Calculation | Filter | Display

Hidden Columns: Transportation Rate-UOM, Transportation Rate-Unit, Transportation Rate-Value, Business Partner, Name 1/last name, Ship-To Street Address, Ship-To Postal Code

Displayed Columns: Purch. Grp. Desc., Transaction Number, Creation Date, Process Type Desc., Scenario, Award Type, Bid Number

[Add] [Remove] Add Selected Columns to Selection

[OK] [Cancel] [Apply] [Reset]

View: olson [Print Version] [Export]

ShipTo Name	G/L Acct	Fund	Funds ctr	Commitment item	Functional
WYOMING FOOD BANK OF THE ROCKIES	6100.0001	13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP
SYSCO FOOD SERVICE OF CT	6100.0001	13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP



You can move columns up/down by selecting the column and using the up or down sequence arrows:

ShipTo Name	G/L Acct	Fund	Funds ctr	Commitment item	Functional A
WYOMING FOOD BANK OF THE ROCKIES	6100.0001	13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP
SYSCO FOOD SERVICE OF CT	6100.0001	13143539R	CCC-LVSTK	COMMODITIES	6F-NSLP

Once all column/rows have been changed, click "Apply" to apply the changes:

ShipTo Name	G/L Acct	Fund	Funds ctr	Commitment item	Functional A
WYOMING FOOD BANK OF THE ROCKIES	6100.0001	13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP
SYSCO FOOD SERVICE OF CT	6100.0001	13143539R	CCC-LVSTK	COMMODITIES	6F-NSLP



You can then save the report and have it the initial view when accessing the report. Click the “Save as” button:

Purchase Order Validation Report

Settings

View: *olson Save Save as... Delete Properties...

Column Selection Sort Calculation Filter Display

Hidden Columns

- Transportation Rate-Price
- Transportation Rate-UOM
- Transportation Rate-Unit
- Transportation Rate-Value
- Business Partner
- Name 1/last name
- Ship-To Postal Code

Add Remove

Displayed Columns

- External Req. Item
- Sales Doc.
- Sales Doc.Itm.
- Itm.ShipTo
- ShipTo Name
- G/L Acct
- Fund
- Funds ctr

Change Sequence

OK Cancel Apply Reset

View: *olson Print Version Export

ShipTo Name	G/L Acct	Fund	Funds ctr	Commitment item	Functional A
WYOMING FOOD BANK OF THE ROCKIES	6100.0001	13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP

Give it a unique name if you want this to be your default view. Place a checkmark next to “Initial View” and click the “OK” button:

Save View as

Description: * olson-PO view

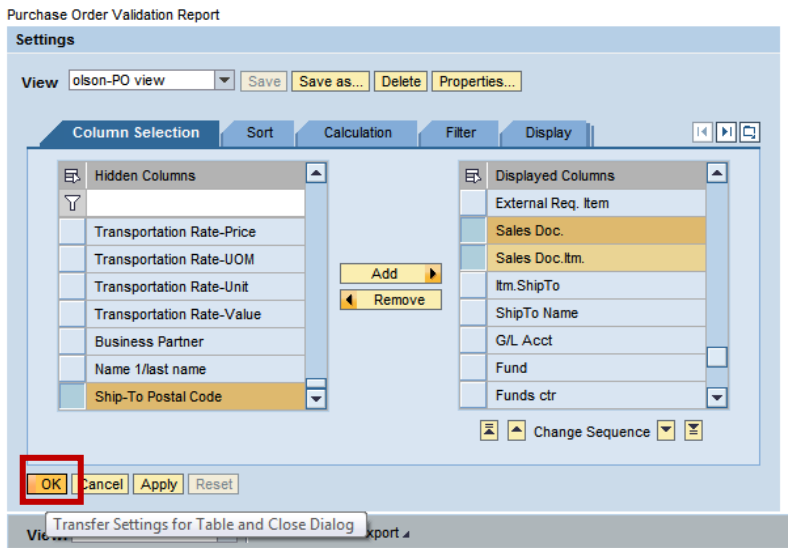
Assignment: User

Initial View

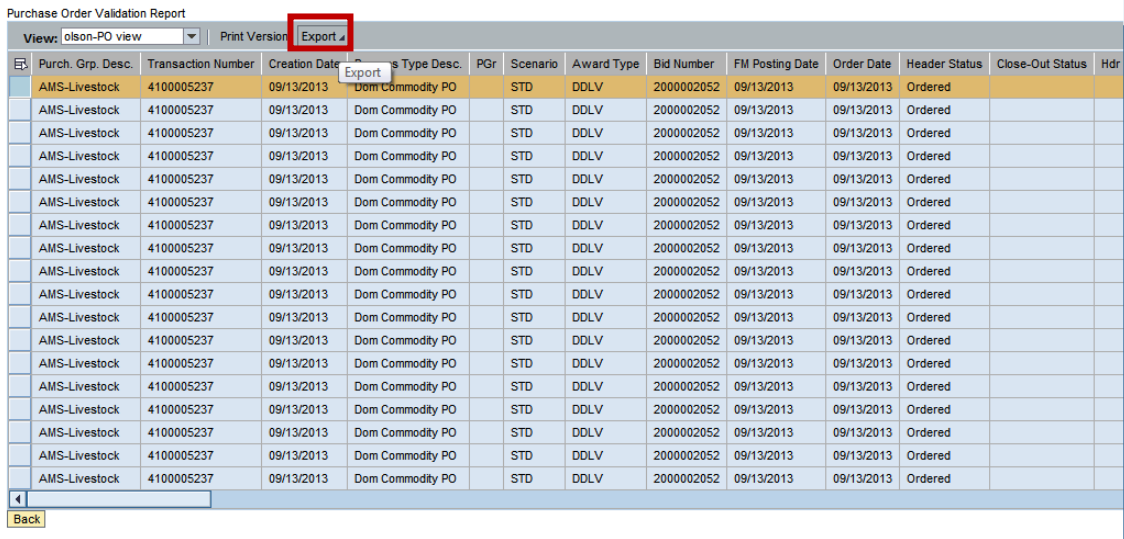
OK Cancel



Click OK to transfer settings and close the layout table:



You can export the Purchase Order Report to Excel. Click the “Export” button:

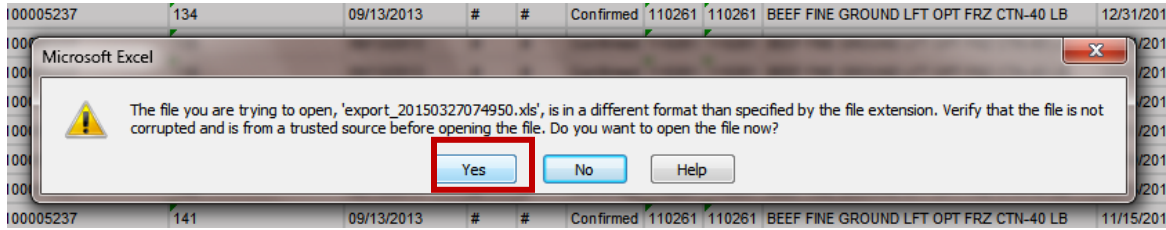


To open the file, select the “Open” button at bottom of page:

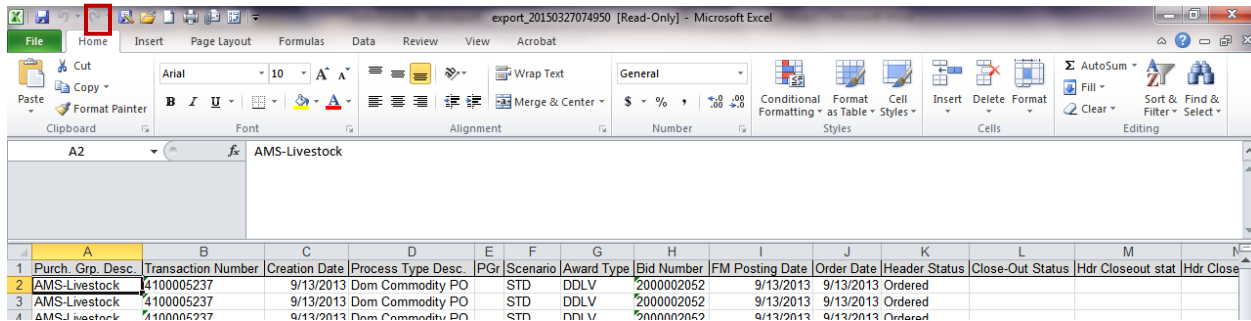




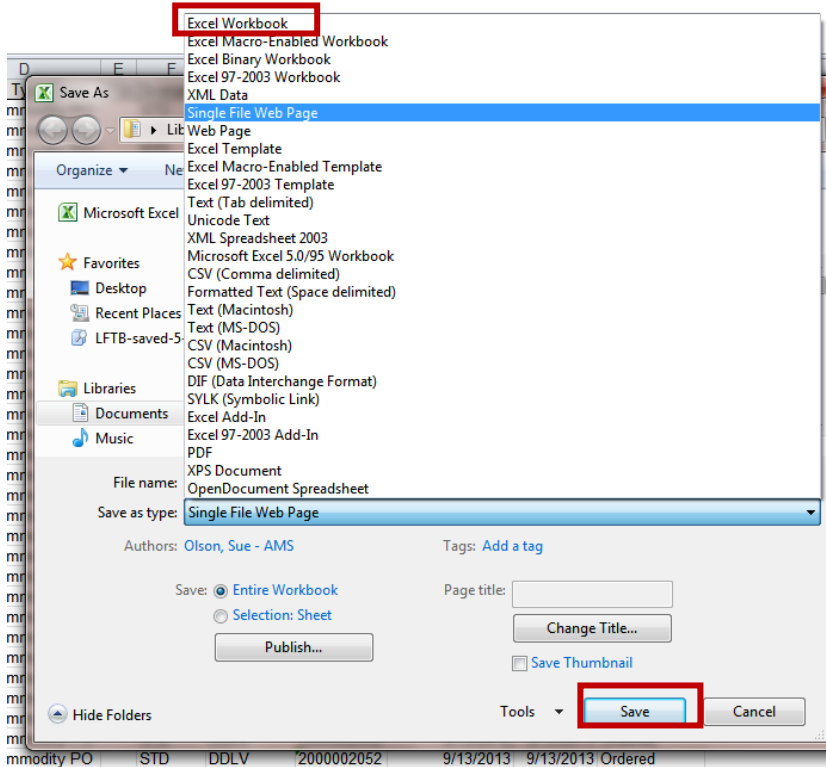
Click "Yes" to continue to open the file:



To enable editing, save the file:



Save it to an Excel file format:



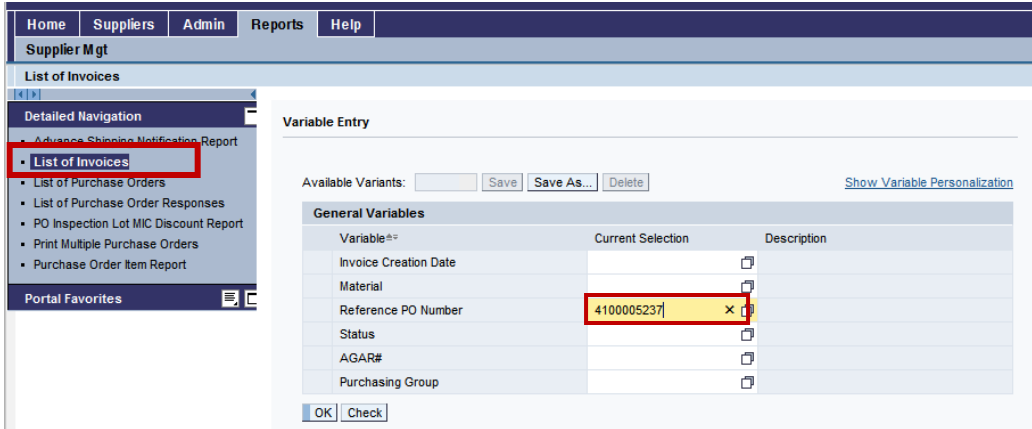
[\(Return to Title Page\)](#)



IV. Additional Fields Added to List of Invoice Reports

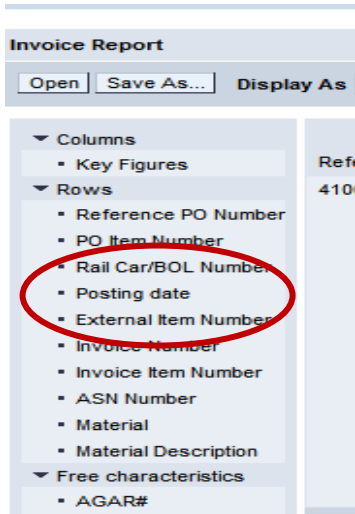
Navigate to Reports>List of Invoices

Enter search criteria – PO Number was used for this example:



New data elements added:

Rail car/BOL #, Posting Date, External Item number – In this example, these characteristics were moved up to display rows





The report is downloaded to Excel – new data elements highlighted in yellow:

1	Invoice Report													
2														
3														
4	Reference PO Number	PO Item Number	Rail Car/BOL Number	Posting date	External Item Number	Invoice Number	Invoice Item Number	ASN Number	Material	Material Description	Gross Amount	LIQ Discount	QM	
5	4100005237	102	39-15	10/03/2013	102	7100186156	10	6100210223	100159	100159	BEEF FINE GROUND FRZ PKG-40/1 LB	99,572.00	0.00	
6	4100005237	103	40-1	10/07/2013	103	7100186716	10	6100210229	100159	100159	BEEF FINE GROUND FRZ PKG-40/1 LB	100,276.00	0.00	
7	4100005237	104	40-2	10/07/2013	104	7100186773	10	6100210230	100159	100159	BEEF FINE GROUND FRZ PKG-40/1 LB	99,056.00	0.00	
8	4100005237	105	44-10	11/01/2013	105	7100195187	10	6100219748	100159	100159	BEEF FINE GROUND FRZ PKG-40/1 LB	99,948.00	0.00	
9	4100005237	106	41-19	10/15/2013	106	7100189865	10	6100214233	100159	100159	BEEF FINE GROUND FRZ PKG-40/1 LB	100,172.00	0.00	
10	4100005237	108	40-3	10/11/2013	108	7100188036	10	6100210231	100159	100159	BEEF FINE GROUND FRZ PKG-40/1 LB	99,348.00	0.00	
11	4100005237	109	41-20	10/16/2013	109	7100189300	10	6100214232	100159	100159	BEEF FINE GROUND FRZ PKG-40/1 LB	99,056.00	0.00	
12	4100005237	112	42-3	10/16/2013	112	7100189288	10	6100215095	100159	100159	BEEF FINE GROUND FRZ PKG-40/1 LB	98,768.00	-100.00	
13	4100005237	115	42-1	10/16/2013	115	7100189290	10	6100215081	100159	100159	BEEF FINE GROUND FRZ PKG-40/1 LB	24,966.00	-25.00	
14	4100005237	116	42-2	10/16/2013	116	7100189296	10	6100215091	100159	100159	BEEF FINE GROUND FRZ PKG-40/1 LB	74,898.00	-75.00	
15	4100005237	126	42-4	10/15/2013	126	7100189847	10	6100215111	110260	110260	BEEF FINE GROUND LFT OPT FRZ PKG-40/1 LB	97,776.00	0.00	
16	4100005237	158	44-1	10/30/2013	158	7100194305	10	6100219783	110349	110349	BEEF 100% PTY 85/15 FRZ 2.0MMA CTN-40 LB	89,938.40	0.00	

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