

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:

Create Bid				History	Back Forward 💻
Create RFx Response					
Submit Check Save Export	Import				2 4
Attribute OFFEROR CERTIFIES TH	OFFERIOR AND ANY SUBCONTRACTO	nandatory; maintain attribute v	aue		^
Please click 'Check' to validate the	Offer	ik is mandatory, maintain attrib	ute value		~
Please click cireck to validate the	oner.				
RFx Response Number 3000023	176 RFx Number 2100000529	Opening Date 03/06/20	015 08:00:00 EST RFx Response Version Number Active Version RF	x Version Number 1	
RFx Information Items	Notes and Attachments Co	onditions Tracking			
Basic Data Questions Note	s and Attachments				
Event Parameters					
Currency: (Internal) United Sta	ates Dollar (4 Dec.)		Status and Statistics		
			Status and Statistics	_	
OfferLabel:			Adjust Price: 0.0000		
Vendor Plant:					
Shipping Point:					
	n				
Details Send E-Mail Call Cle	ar				Filter Settings
Function		Number	Name	Phone Number	
Goods Recipient Shin-To Address			multiple	multiple	
Location			DOMESTIC STATISTICAL 1000	manpo	



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

2	
Create RFx Response	
Submit Check Save Export mport	
Bid must have at least one kommune and approximate the second sec	

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.

<	Do you want to open or save RFx Response.xls from wbscmint.wbscm.usda.gov ?	Open	Save Cancel	×	>
			Save as Save and open		

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

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 WBSCM.

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

C	reate Bid	History	Back Forw	ward 🔳
	Display RFx Response:			
	📝 Edit Print Preview 🗘 Check			24
	Response 3000023240 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."

The file you are trying to open, 'Inn Foods RFx Response-21-551- export file-3-26-15.xls', is in a different format than specified b extension. Verify that the file is not corrupted and is from a trusted source before opening the file. Do you want to open the file response to the f	y the file ow?
Yes No Help	

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

G.	Number	G.	Styles	Cells	Editing
	Text Import Wizard	- Step 1 of 3			? ×
	The Text Wizard has	determined that y	our data is Delimited.		
	If this is correct, choo	ose Next, or choo	se the data type that be	est describes your data.	
	Original data type				
	Choose the file type	e that best descri	bes your data:		
	Delimited	- Characters su	ch as commas or tabs se	parate each field.	
		- Fields are aligi	ned in columns with space	es between each field.	
	Start import at <u>r</u> ow:	1	File origin: Window	s (ANSI)	•
	Preview of file C:\\	sers/siolson/Docu	men \Inn Foods PEx P	esponse-21-551- evport file-	3-26-15 vie
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	1 Bid Invitat	ionInternal	Item NumberLine N 1 01 001 01702010	NumberProduct Catego	TYProduct
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	<	0000000000000	1.01.000.02702010	inoir, chambriotrin	• • •
			Cancel	Back	t > <u>Fi</u> nish
					U

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:

	С	D	E	F	G	Н	1	J	К	L	М	N	0	Р	Q	R	S	Т	U	E
1	Line Numl	Product C	Product Ca	Product II	Product d	Ship-to ID	Ship-to d	e City	zipcode	State	Correlation(Delivery D	Quantity	UOM	Substituti	Offshore I	Price	Currency	Per Unit	
2	0001.01.00	702010	FRUIT, CA	100211	MIXED FR	5003044	THE FOOD	HILO	96720-513	ні 📑		20150916	1620	CS		/es		0 USDN	1	
3	0001.01.00	702010	FRUIT, CA	100211	MIXED FR	5002401	HAWAII F	HONOLUL	96819	HI		20150901	1620	CS		/es		0 USDN	1	
4	0001.01.00	702010	FRUIT, CA	100211	MIXED FR	5003634	CLOVERLE	BENSON	27504-754	NC		20150916	1620	CS			· ·	0 USD N	1	
5	0001.01.00	702010	FRUIT, CA	100211	MIXED FRU	5003634	CLOVERLE	BENSON	27504-754	NC		20151101	1620	CS				0 USD N	1	
6	0001.01.00	702010	FRUIT, CA	100211	MIXED FRU	5003166	CMS STOP	CHARLOT	28211-250	NC		20151001	1620	CS				0 USD N	1	
7	0001.01.00	702010	FRUIT, CA	100211	MIXED FR	5003166	CMS STOP	CHARLOT	28211-250	NC		20151101	1620	CS				0 USD N	1	
8	0001.01.00	702010	FRUIT, CA	100211	MIXED FR	5002027	LANCAST	GARNER	27529	NC		20150901	1620	CS				0 USD N	1	
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12	0001.01.00	702010	FRUIT, CA	100211	MIXED FRU	5000875	HOLLY RID	HOLLY RID	28445	NC		20151116	1620	CS				0 USD N	1	
13	0001.01.00	702010	FRUIT, CA	100211	MIXED FR	5002984	CALDWEL	LENOIR	28645-393	NC		20150916	1620	CS				0 USD N	1	
14	0001.01.00	702010	FRUIT, CA	100211	MIXED FRU	5002984	CALDWEL	LENOIR	28645-393	NC		20151101	1620	CS				0 USD N	1	
15	0001.01.00	702010	FRUIT, CA	100211	MIXED FR	5001105	NC DEPT.	LILLINGTO	27546	NC		20150901	1620	CS				0 USD N	1	
16	0001.01.00	702010	FRUIT, CA	100211	MIXED FR	5001105	NC DEPT.	LILLINGTO	27546	NC		20151016	1620	CS				0 USD N	1	
17	0001.01.00	702010	FRUIT, CA	100211	MIXED FRU	5001105	NC DEPT.	LILLINGTO	27546	NC		20151116	1620	CS				0 USD N	1	. =
18	0001.01.00	702010	FRUIT, CA	100211	MIXED FR	5003111	ASIAN FO	MORGAN	28655-392	NC		20151016	1620	CS				0 USD N	1	
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20	0001.01.01	702010	FRUIT, CA	100211	MIXED FR	5002985	CRAVEN	NEW BERN	28560-341	NC		20151101	1620	CS				0 USD N	1	
21	0001.01.01	702010	FRUIT, CA	100211	MIXED FRU	5003278	NORTH C	OXFORD	27565-403	NC		20150901	1620	CS				0 USD N	1	
22	0001.01.01	702010	FRUIT, CA	100211	MIXED FR	5003278	NORTH C	OXFORD	27565-403	NC		20151016	1620	CS				0 USD N	1	
23	0001.01.01	702010	FRUIT, CA	100211	MIXED FR	5001403	HOUSE O	RAEFORD	28378	NC		20151001	1620	CS				0 USD N	1	
24	0001.01.01	702010	FRUIT, CA	100211	MIXED FR	5001403	HOUSE O	FRAEFORD	28378	NC		20151116	1620	CS				0 USD N	1	
25	0001.01.01	702010	FRUIT, CA	100211	MIXED FR	5001787	NC DEPT.	SANFORD	27330	NC		20150901	1620	CS				0 USD N	1	
26	0001.01.01	702010	FRUIT, CA	100211	MIXED FRU	5001787	NC DEPT.	SANFORD	27330	NC		20151016	1620	CS				0 USD N	1	
27	0001.01.01	702010	FRUIT, CA	100211	MIXED FR	5001787	NC DEPT.	SANFORD	27330	NC		20151116	1620	CS				0 USD N	1	
28	0001.01.01	702010	FRUIT, CA	100211	MIXED FRU	5002731	BROOKW	SILER CITY	27344	NC		20150916	1620	CS				0 USD N	1	
29	0001.01.01	702010	FRUIT, CA	100211	MIXED FR	5002731	BROOKW	SILER CITY	27344	NC		20151101	1620	CS				0 USD N	1	
30	0001.01.01	702010	FRUIT, CA	100211	MIXED FRU	5002980	US FOOD	ZEBULON	27597-698	NC		20150916	1620	CS				0 USD N	1	
31	0001.01.01	702010	FRUIT, CA	100211	MIXED FR	5002980	US FOOD	ZEBULON	27597-698	NC		20151016	1620	CS				0 USD N	1	
32	0001.01.01	702010	FRUIT, CA	100211	MIXED FR	5002984	CALDWEL	LENOIR	28645-393	NC	3032015016	20150901	810	CS				0 USD N	1	
33	0001.01.01	702010	FRUIT, CA	100211	MIXED FR	5002731	BROOKW	SILER CITY	27344	NC	3032015016	20150901	810	CS				0 USE N	1	. –
34																				¥
14 4	D H Inn	Foods RI	Fx Response	e-21-551-	/ 🐑 /							Î Î 4								1



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.

c 🛃 Save As	Conditions	Tracking	
○ ○ ○ ○ ○ ○ ○ ○ ○ ○	Release	 Defect 12230 - DOM bid response creation taking longer for large in 	w 🗸 😽 Search Defect 12230 - DOM bi 🔎
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☆ Favorites ■ Desktop	•	Documents library Defect 12230 - DOM bid response creation taking longer for large in	Arrange by: Folder 🔻
Recent Pla	aces ed-5-29 [≡]	Name	Date modified Type
		No items match your	r search.
Documen	nts		
Music			
Videos			
📔 👰 Computer	-		•
File na	me Down	pad-solicitation-21-529-3-5-15 for testing defect 12230	
Save as ty	/pe Micros	oft Excel 97-2003 Worksheet	
A Hide Folders			Save Cancel

	9	• (*	* 🔣 🗀	1) (Å i	3 ₹	-	-	I	nn Foods RFx	Response-21	-551- expo	rt file-3-26-15 -	Microsoft Ex	cel						
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Pa	aste	Cut Copy ` Forma	t Painter	Calibri B Z	Ū,	• 11	1 т А́л <u>Э</u> т <u>А</u>	· = =	= %	wr	ap Text Irge & Cente	Gener	al % • • •	Conditi	ional Forma	at Cell	Insert D	elete Format	Σ AutoS Fill ▼ Clear	um * Z	Find &
	Clipbo	oard	Gi.			Font		Gi Ca	А	lignment		G.	Number	Est.	Styles	e styles	(Cells	-	Editing	Server
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1	Line N	uml P	roduct C	Produ	ct Ci Pr	oduct IE	Product de	Ship-to ID	Ship-to	de City	zipcode	State	Correlation(l Delivery I	Quantity	UOM	Substitut	ti Offshore	l Price	Currency	Per Unit
2	0001.0	1.00	702010	FRUIT,	, CAI	100211	MIXED FRU	5003044	THE FOO	DD HILO	96720-513	HI		20150916	1620	CS		Yes	0	USDN	1
3	0001.0	1.00	702010	FRUIT,	, CAI	100211	MIXED FRU	5002401	HAWAII	FCHONOLUI	96819	HI		20150901	1620	CS		Yes	0	USDN	1
4	0001.0	1.00	702010	FRUIT,	, CAI	100211	MIXED FRU	5003634	CLOVER	LE BENSON	27504-754	NC		20150916	1620	CS			22.1545	USDN	1
5	0001.0	1.00	702010	FRUIT,	, CAI	100211	MIXED FRI	5003634	CLOVER	LE BENSON	27504-754	NC		20151101	1620	CS			22.1545	USDN	1
6	0001.0	1.00	702010	FRUIT,	, CAI	100211	MIXED FRU	5003166	CMS STO	OR CHARLOT	128211-250	NC		20151001	1620	CS			22.1545	USDN	1
7	0001.0	1.00	702010	FRUIT,	, CAI	100211	MIXED FRI	5003166	CMS STO	OR CHARLOT	28211-250	NC		20151101	1620	CS			22.1545	USDN	1
8	0001.0	1.00	702010	FRUIT,	, CAI	100211	MIXED FRU	5002027	LANCAS	TE GARNER	27529	NC		20150901	1620	CS			22.1545	USDN	1
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10	0001.0	1.00	702010	FRUIT,	, CAI	Micros	soft Excel		-	The Party number of the Pa		-		-				x	22.1545	USDN	1
11	0001.0	1.00	702010	FRUIT,	, CAI	:													22.1545	USDN	1
12	0001.0	1.00	702010	FRUIT,	, CAI	1	workbo	ok in this for	mat?	51- export nie	3-26-15.XIS M	ay contain re	atures that are n	ot compatible	with Unicode	lext. Do yo	u want to kee	ep the	22.1545	USDN	1
13	0001.0	1.00	702010	FRUIT,	, CAI	1 6	і) та Іна	an dein Canan	بدا باديان الد			والمتابر ومحمدهم							22.1545	USDN	1
14	0001.0	1.00	702010	FRUIT,	CAI	:	• To pr	eserve the fe	eatures, did	k No. Then sav	e a copy in th	e latest Exo	el format.						22.1545	USDN	1
15	0001.0	1.00	702010	FRUIT,	, CAI	1	• To se	e what might	t be lost, di	ck Help.									22.1545	USDN	1
16	0001.0	1.00	702010	FRUIT,	CAI	-					Yes	No	Help						22.1545	USDN	1
17	0001.0	1.00	702010	FRUIT,	, CAI			_	-	_					_	-			22.1545	USDN	1



Now you are ready to import back in to WBSCM RFx Response page. The page must be in edit mode. Click the "Edit" button:

Create Bid - WBSCM Portal - Microsoft Internet Explorer provided by USDA - AMS	×
Create Bid History Back Forward 🗐	₿
Display RFx Response:	
Response 3000023240 saved	ļ
RFx Response Number 3000023240 RFx Number 2100000551 Opening Date 03/27/2015 09:00:00 EST RFx Response Version Number Active Version RFx Version Number 3	
RFx Information Items Notes and Attachments Conditions Tracking	
Basic Data Questions Notes and Attachments	
Question	
OFFEROR CERTIFIES THAT THE OFFER IS MADE SUBJECT TO THE MASTER SOLICITATION; COMMODITY SUPPLEMENT AND/OR SPECIFICATION(S); THIS SOLICITATION; THE AGRICULTURE ACQUISITION REGULATIONS (AGAR) AND THE FEDER	
TIMELY PERFORMANCE: OFFEROR AND ANY SUBCONTRACTOR HAVE COMPLETED REQUIRED PERFORMANCE OF ANY USDA C	
FURNISH NAME, TITLE, PHONE NUMBER, FAX NUMBER, AND E-MAIL ADDRESS OF PERSON SUBMITTING THIS BID (MUST BE AN OFFICER OF THE COMPANY OR A PERSON AUTHORIZED TO EXECUTE CONTRACTS/PURCHASE	
OFFEROR ACKNOWLEDGES RECEIPT OF THE AMENDMENT(S) TO THE SOLICITATION. SELECT IVA IF NO AMENDMEN	

Then click the "Import" button:

6	Create Bid - WBSCM Portal - Microsoft Internet Explorer provided by USDA - AMS	
I,	Create Bid Hist	tory_ Back Forward 🗐 🔅
l	Edit RFx Response:	(1)
	Submit Check Save Export Import	?₄
	RFx Response Number 300002324 Import from other RFx Response Opening Date 03/27/2015 09:00:00 EST RFx Response Version Number Active Version Number 3	

Upload Specify File to be Uploaded: Browse... Upload Upload In Background Browse For a File to Upload

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:

Upload	
Specify File to be Uploaded:	
C:\Users\siolson\Documen Browse	
Upload In Background	
Upload Specified File	
<u> </u>	

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

RFx Information Items Notes and Attachments Conditions Tracking										
▼ tem Overview										
Details Add New Add Subline Copy Paste Delete Calculate Value										
Line Number	Description	Internal Item Number	Lot	Product ID	Required Quantity	Unit	Price	Currency	Price Per	Delivery Date
▼ 10001 =,	FRUIT, CANNED	10			0.000		0.0000	USDN		
✓ <u>0001.01</u> =	MIXED FRUIT CAN-24/300	20			0.000		0.0000	USDN		
	OFFSHORE: HILO HI	30			0.000		0.0000	USDN		
•	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 Material	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

					· · · · · · · · · · · · · · · · · · ·	
● Details for item 0001.01.001.01 MIXED FRUIT CAN-2	4/300					×
Item Data Questions Notes and Attachn	nents	Conditions				
▼ Conditions						
Add Condition Scales Duplicate Remove					Filter Setti	ngs
Condition Type	Scales	Amount Currency	Price Per Price Unit	Location	Location Name	
Offshore Port Costs Location-Dependent		22.3521 (Internal) United Stat	1 CS	0-LA	O-LA-Los Angeles,CA	

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.

6	Create Bid - WBSCM Portal - Microsoft Internet Explorer provided by USDA - AMS		_ D _ X
Γ	Create Bid	History	Back Forward 💻
	Edit DEv Despanses		
h			
	Submit Che k Save Export Import		€ 3
	Check Response		

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



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:

งบเ	Upload	
	File type of specified file5.xlsx not supported	
_	Specify File to be Uploaded:	
	Browse	
	Upload In Background	
File	Name	

File saved as a text (Unicode txt) format:

١Us	Upload
	File type of specified file5.txt not supported
_	Specify File to be Uploaded:
	Upload In Background

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."

Clear price for all the offshore items and i	mport the data again.	
Please click 'Check' to validate the Offer.		
DEx Desponse Number 2000022176	PEx Number 210000529	One



III. Purchase Order Item Report

Navigate to Reports>Purchase Order Item Report:

Home Suppliers Admin Repo	orts Help						
Supplier M gt							
Purchase Order Item Report							
Detailed Navigation	Selection Criteria						
 Advance Shipping Notification Report 	ooloollon ontona						
 List of Invoices 	Purchase Order Number:	♦ [D	То	D		⇒
List of Purchase Orders	Bid Invitation Number:	0	 	То			⇒
List of Purchase Order Responses	Decembra Durch Occurs	0					=
PO Inspection Lot MIC Discount Report Print Multiple Purchase Orders	Responsible Purch. Group.			- 10			-
Purchase Order Item Report	Product Category:	~ [10			2
	Transaction Type:	[]		То			- -
Portal Favorites 📃 🗖	Status:	○ [Ð	То		ð	-
	Business Partner:	♦ [То	0		a
	Stevedore BP:	♦ [То			a
	Product ID:	♦ [🗇 То			0 🕈
	Contract:	♦ [D	То	ð		\$
	Scenario:	0		То			⇒
	Delivery date:			то			⇒
	Envery date.			-			-
	FM Posting Date:	× L		10	<u> </u>		
	Time Frame:	L					
	Start Date:	l	<u> </u>				
	End Date:						
	Search						

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





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.

3143539R (Funus cu	Commitment item	Functional Area	Order	Sales Doc.	Sales Doc.ltm.	Correlation ID	Program Agency	Reference PO Number	Reference PO Item Number
3143539R	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000163750	100		FNS		Open Settings Dia
	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000164605	100		FNS		
3143539R (CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000167100	100		FNS		
3143539R (CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000167163	100		FNS		
3143539R (CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000167473	200		FNS		
3143539R (CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000167488	100		FNS		
3143539R (CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000167582	100		FNS		
3143539R (CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000167668	100		FNS		
3143539R (CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000168770	200		FNS		
3143539R (CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000168770	100		FNS		
3143539R (CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000169334	100		FNS		
3143539R (CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000169335	100		FNS		
3143539R	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000169336	100		FNS		
3143539R	CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000169368	100		FNS		
3143539R (CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000169513	100		FNS		
3143539R (CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000169514	100		FNS		
3143539R (CCC-LVSTK	COMMODITIES	6E-NSLP	ENTITLE-SY14	5000170150	100		FNS		
3143539R (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:





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

ort	Purchas Setting View	e Order Validation Report gs * olson 💌	Save Save	e as Delete	e Propertie:	S		
oort		Column Selection	Sort (Calculation	Filter	Display		N 📮
30		Hidden Columns Image: Transportation Rate-Print Transportation Rate-UC Name 1/last name Ship-To Postal Code	ce)M it ilue	Add Remov		Displayed Colum Order Sales Doc. Sales Doc.tm. Correlation ID Program Agency Reference PO It Ship-To Street A Ange St	ns umber em Number (ddress	
	OK	Cancel Apply Reset				INDVE SEIEC	teu columnis op	1
	View	v: olson 💌	Print Versi	ion Export a				
	🚯 Sh	nipTo Name		G/L Acct	Fund	Funds ctr	Commitment item	Functional A
	w	YOMING FOOD BANK OF TH	EROCKIES	6100.0001	13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP
	S	SCO FOOD SERVICE OF CT		6100 0001	13143539R	CCC-LVSTK	COMMODITIES	6E-NSLP

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

_	C	olumn Selection	Sort	(Calculation F	ilter	Display	
	卧	Hidden Columns			[₿	Displayed Columns	
	Y						External Req. Item	
		Transportation Rate-Pric	е				Sales Doc.	
		Transportation Rate-UOM	4				Sales Doc.ltm.	
		Transportation Rate-Unit	nit		Add		ltm.ShipTo	
	Transportation Rate-Value		Je	Remove	Remove		ShipTo Name	
		Business Partner					G/L Acct	
		Name 1/last name					Fund	
		Ship-To Postal Code		Ŧ			Funds ctr	-
							- Change Sequence	



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	e as Delet	e Propertie	!S			
Column Selection Sort C	Calculation	Filter	Display			
Hidden Columns		₽.	Displayed Colum	ins		
Υ			External Req. Ite	m		
Transportation Rate-Price			Sales Doc.			
Transportation Rate-UOM	bbA		Sales Doc.ltm.			
Transportation Rate-Unit	4 Demos		ltm.ShipTo			
Transportation Rate-Value	- Nome		ShipTo Name			
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		Ā	📕 📥 Change S	equence 💌 🔳		
OK Cancel Apply Reset						
View: * olson Print Version	on Export⊿					
🗈 ShipTo Name	G/L Acct	Fund	Funds ctr	Commitment item	Functional A	
WYOMING FOOD BANK OF THE ROCKIES	6100 0001	131435300		COMMODITIES	6E-NSLP	

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

A.		Sales Doc.ltm.	
	Save View as		
Je	Description: *	olson-PO view	
	Assignment:	User	
	Initial View		
		OK Cancel	
		OK	1



Click OK to transfer settings and close the layout table:



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

Purchase Order Validation Report													
View: olson-PO view 🔽 Print Version Export 4													
₽	Purch. Grp. Desc.	Transaction Number	Creation Date	s Type Desc.	PGr	Scenario	Award Type	Bid Number	FM Posting Date	Order Date	Header Status	Close-Out Status	Hdr
	AMS-Livestock	4100005237	09/13/2013	Dom Commodity PO		STD	DDLV	2000002052	09/13/2013	09/13/2013	Ordered		
	AMS-Livestock	4100005237	09/13/2013	Dom Commodity PO		STD	DDLV	2000002052	09/13/2013	09/13/2013	Ordered		
	AMS-Livestock	4100005237	09/13/2013	Dom Commodity PO		STD	DDLV	2000002052	09/13/2013	09/13/2013	Ordered		
	AMS-Livestock	4100005237	09/13/2013	Dom Commodity PO		STD	DDLV	2000002052	09/13/2013	09/13/2013	Ordered		
	AMS-Livestock	4100005237	09/13/2013	Dom Commodity PO		STD	DDLV	2000002052	09/13/2013	09/13/2013	Ordered		
	AMS-Livestock	4100005237	09/13/2013	Dom Commodity PO		STD	DDLV	2000002052	09/13/2013	09/13/2013	Ordered		
	AMS-Livestock	4100005237	09/13/2013	Dom Commodity PO		STD	DDLV	2000002052	09/13/2013	09/13/2013	Ordered		
	AMS-Livestock	4100005237	09/13/2013	Dom Commodity PO		STD	DDLV	2000002052	09/13/2013	09/13/2013	Ordered		
	AMS-Livestock	4100005237	09/13/2013	Dom Commodity PO		STD	DDLV	2000002052	09/13/2013	09/13/2013	Ordered		
	AMS-Livestock	4100005237	09/13/2013	Dom Commodity PO		STD	DDLV	2000002052	09/13/2013	09/13/2013	Ordered		
	AMS-Livestock	4100005237	09/13/2013	Dom Commodity PO		STD	DDLV	2000002052	09/13/2013	09/13/2013	Ordered		
	AMS-Livestock	4100005237	09/13/2013	Dom Commodity PO		STD	DDLV	2000002052	09/13/2013	09/13/2013	Ordered		
	AMS-Livestock	4100005237	09/13/2013	Dom Commodity PO		STD	DDLV	2000002052	09/13/2013	09/13/2013	Ordered		
	AMS-Livestock	4100005237	09/13/2013	Dom Commodity PO		STD	DDLV	2000002052	09/13/2013	09/13/2013	Ordered		
	AMS-Livestock	4100005237	09/13/2013	Dom Commodity PO		STD	DDLV	2000002052 09/13/2013		09/13/2013 Ordered			
	AMS-Livestock	4100005237	09/13/2013	Dom Commodity PO		STD	DDLV	2000002052	09/13/2013	09/13/2013	Ordered		
	AMS-Livestock	4100005237	09/13/2013	Dom Commodity PO		STD	DDLV	2000002052	09/13/2013	09/13/2013	Ordered		
	AMS-Livestock	4100005237	09/13/2013	Dom Commodity PO		STD	DDLV	2000002052	09/13/2013	09/13/2013	Ordered		
•	_												
Bad	*												

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

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Click "Yes" to continue to open the file:



To enable editing, save the file:

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1	Purch. Grp. Desc	Transaction Number	Creation Date	Process Type Desc.	PGr	Scenario	Award Typ	e Bid Number	FM Po	sting Date	Order Date	Header	Status	Close-O	ut Status	Hdr Closeou	It stat	Idr Clos	e
2	AMS-Livestock	4100005237	9/13/2013	Dom Commodity PO		STD	DDLV	2000002052		9/13/2013	9/13/2013	Ordered							
3	AMS-Livestock	4100005237	9/13/2013	Dom Commodity PO		STD	DDLV	2000002052		9/13/2013	9/13/2013	Ordered							
Λ	AMS-Livestock	1100005237	9/13/2013	Dom Commodity PO		STD		2000005025		9/13/2013	9/13/2013	Ordorod							

Save it to an Excel file format:

		Excel Workbook	
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mmo	odity PO STD	DDLV 2000002052	9/13/2013 9/13/2013 Ordered



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

Invoice Report									
Open Save As Displa	y As								
 Columns 									
 Key Figures 	Refe								
▼ Rows	410								
 Reference PO Number 									
 PO Item Number 									
 Rail Car/BOL Number 									
 Posting date 									
External Item Number									
 Invoice Namper 									
 Invoice Item Number 									
 ASN Number 									
 Material 									
 Material Description 									
 Free characteristics 									
 AGAR# 									



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

1	Invoice Report														ſ
2															
3			-										Gross Amount	LIQ Discount	QM (
4	Reference PO Number	PO Item N	mber	Rail Car/BOL Number	Posting date	External Item Numb	r Invoice Number	Invoice Item Number	ASN Number	Material		Material Description			
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	7100188665	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	7100188647	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	6100219763	110349	110349	BEEF 100% PTY 85/15 FRZ 2.0MMA CTN-40 LB	89,938.40	0.00	