Process Overview

Purpose

The purpose of this transaction is to search for a Sales Order. This function would normally be performed by the Program Agencies, PVOs, and Freight Forwarders. There are two different ways to search for a sales order. The first is to go through the Maintain Sales Documents screen. The second is to go through the Order Entry screen. For the purposes of this document, we will go through the Maintain Sales Document screen and the USAID Order Entry screen.

Process Trigger

A Sales Order was created that needs to be displayed.

Prerequisites

- A Sales Order must exist on WBSCM.

Portal Path

Follow the Portal path below to complete this transaction:

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

Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.

    - A **Conditional field**: an entry that becomes required as a result of entering something previous to it, which then deems it required

    - An **Optional field:** you may enter information in an optional field, but an entry is not required for the completion of the transaction

- Refer to WBSCM Portal Basic Navigation course for tips on creating favorites, perform searches, etc.

Reminders

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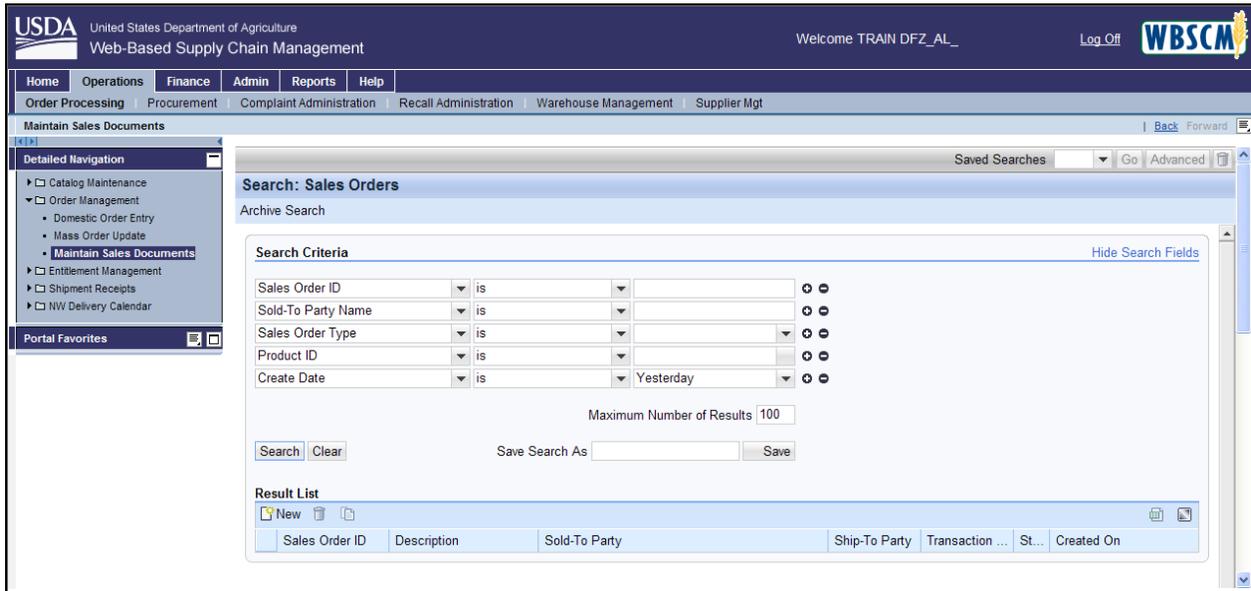- Refer to the Help Option (to the right of the screen) in the Portal for further assistance.

Procedure

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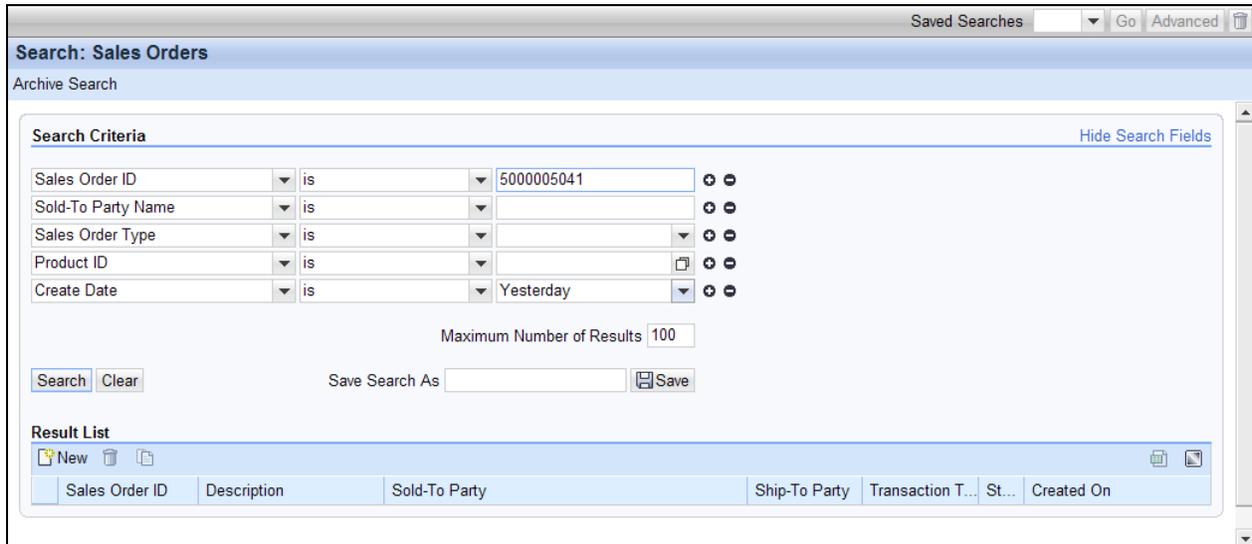
Search: Sales Orders Screen

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

Field	R/O/C	Description
Sales Order ID	O	**Example:** 5000005041

(Note) When searching for a sales order through the Maintain Sales Documents screen, you may use search criteria such as Sales Order ID, Sold-To Party Name, Sales Order Type, Product ID, Create Date, Sold-To Party ID, Ship-To Party Name, Ship-To Party ID, USDA Agency, Created By, Status, or Description. Only the first 5 search criteria are shown by default. If you wish to search by other search criteria, click on the Dropdown button and select another criteria. More than one search criteria may be used to narrow the search results down further.

Search: Sales Orders Screen

3. In the third entry field of the **Create Date** field, click on the **Dropdown** button to choose a new create date.
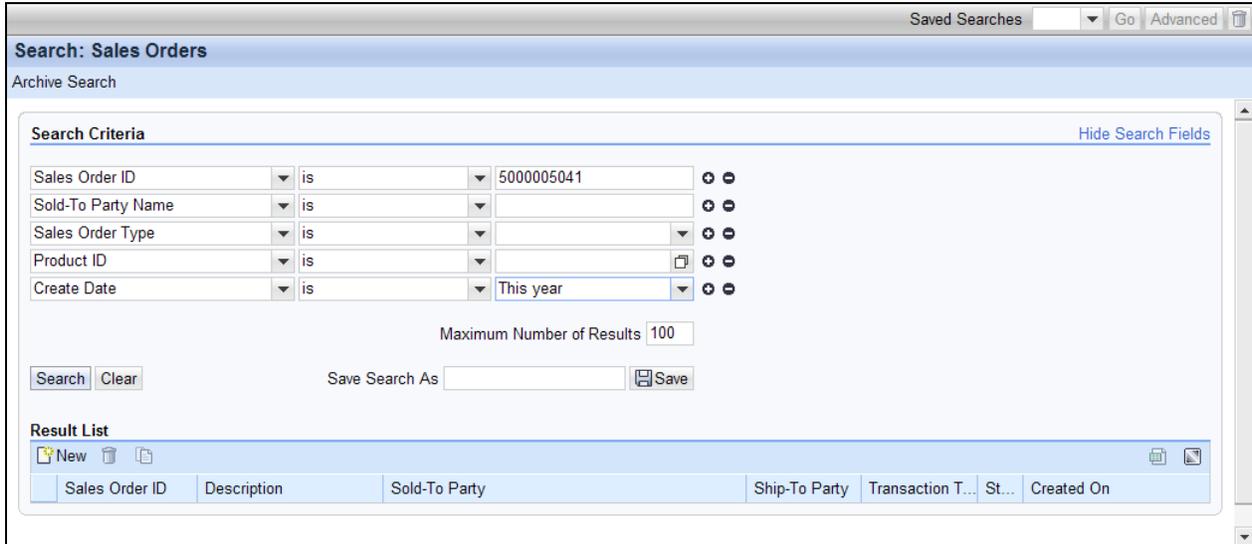
Search: Sales Orders Screen

4. From the Dropdown list, select This year (the **This Year** option).

(Note) Other options you can choose are Today, Tomorrow, <-14 days->, Last week, This week, Next week, Last month, This month, Next month, Last year, This year, or Next year.

Search: Sales Orders Screen

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

(Note) If you choose to search by Sales Order Type, you will be able to search by B2B: Internet Sales, Partner Ship: Order, B2C: Internet sales, Customer Shop: Order on Behalf, Complaints, Credit Memo Request: Chargeback, Debit Memo Request: Chargeback, Entitlement Decrement, Entitlement Increment, Internet Sales Collaborative Showroom, ISA: Hosted Order Management, Int'l Swap Credit, International Swap Order, MOM Advanced Shipping Notification, MOM Invoice, MOM Standard Order, Quotation in Internet Sales, Quotation, Redonation Credit, Redonation Order, Rel. From Value Contr., Replenishment Order, Return to Customer, Return to Remanufacturer, Domestic Emergency Order, Domestic Requisition, Standard Domestic Sales Order, FAS International Sales Order, USAID International Sales Order, Sale of Price Support Inventory, Supplier Self-Services Confirmation, Supplier Self-Services ERS Invoice, Supplier Self-Services Invoice Request, Supplier Self-Services Order, SUS Shipping Notification, Sales Order with Billing in CRM, Sales: Leased Object, Sample Order, Service Fee Simulation, Standard Order, Standard Order for Auction,Telesales, or Web Auction Quotation.

If you choose to search by Status, you will be able to search by Blocked for billing, Blocked for Delivery, Complete GI, Completed, Completely Delivered, Contains Errors, Credit Check Not OK, Credit Check OK, Credit Check Very Good, Credit Rating Check Not OK, Distributed, Distribution incorrect, Distribution lock, Do not print, Document from OLTP, Fully Billed, In Process, Incomplete: Billing, Incomplete: Delivery, Incomplete: General, Incomplete: Pricing, Item in Conflict, Not Complete, Open, Order Template, Partial GI, Partially Billed, Partially Delivered, Quotation accepted, Rejected Released, Resend Item, To be Distributed, or Transferred to bill. document.

Search: Sales Orders Screen

6. Your sales order is displayed. Click on the Sales Order ID link to display details of the order.

7. We will now go through the second option of searching for a sales order using the Order Entry screen. Start the transaction using the following Portal path: **Operations** tab ➜ **Order Processing** tab ➜ **Order Management** folder ➜ **USAID Order Entry**

USAID Order Entry Screen

8. Click **My Transactions** (the **My Transactions** link) to search for existing orders.

USAID Order Entry Screen
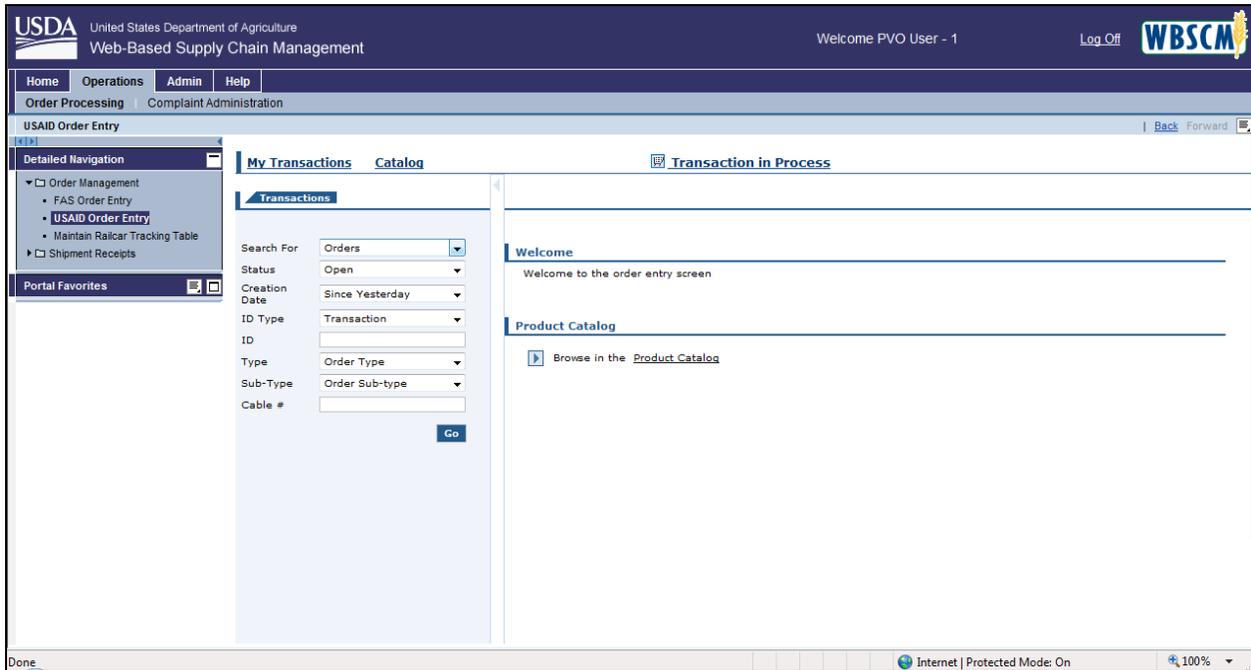
9. In the **Search For** field, click on the **Dropdown** button.

(Note) The blue panel on the lefthand side of the screen (also known as the My Transactions panel) is where you can perform searches. You may search for an existing Sales Order or Agreement. Agreement searches are only available if you use the FAS Order Entry navigational path.

USAID Order Entry Screen
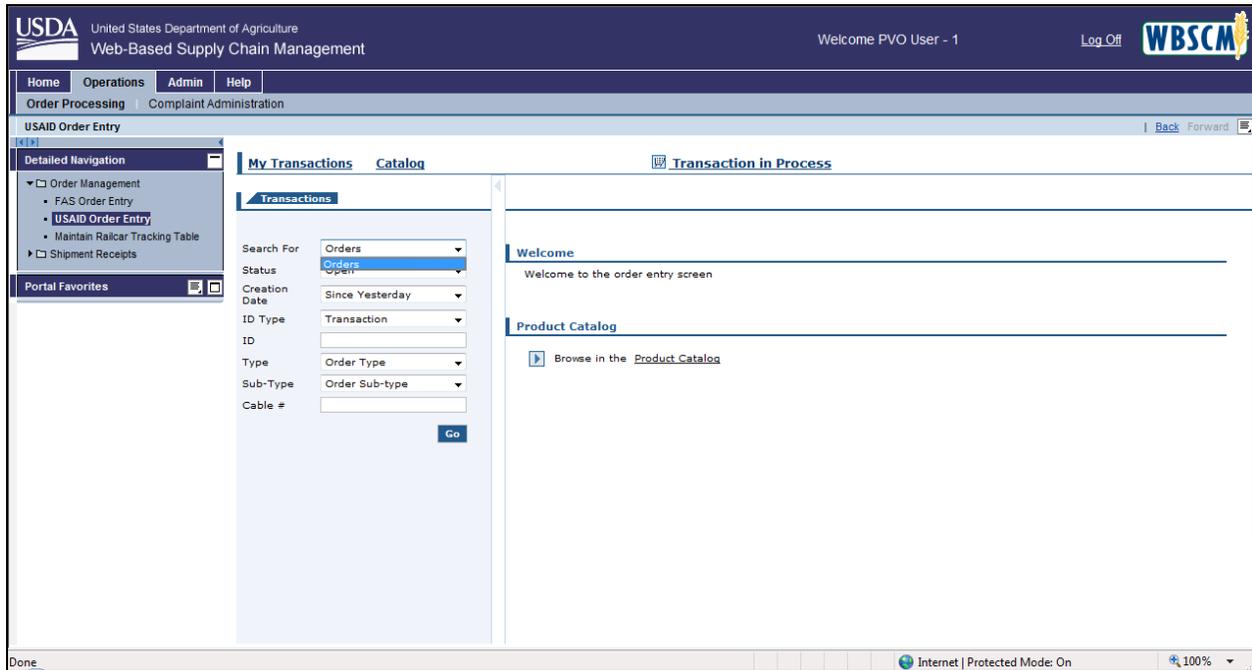
10. From the Dropdown list, select **Orders** (the **Orders** option).

(Note) Use this field to indicate whether you would like to search for an order an agreement or order items.
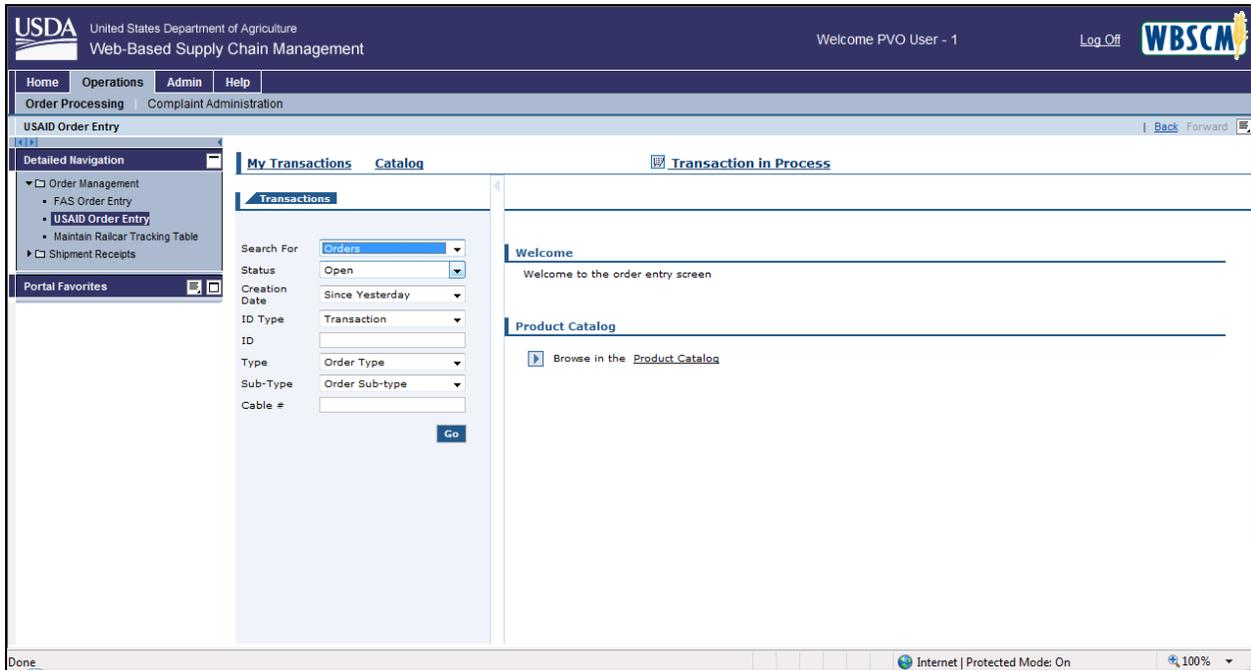
Orders - A sales order placed in WBSCM by the PVO/IO to indicate a desire to order goods.

Agreement - Typically used by FAS to search for FAS Agreements that are referenced in orders. (This option will not be available under USAID Order Entry)

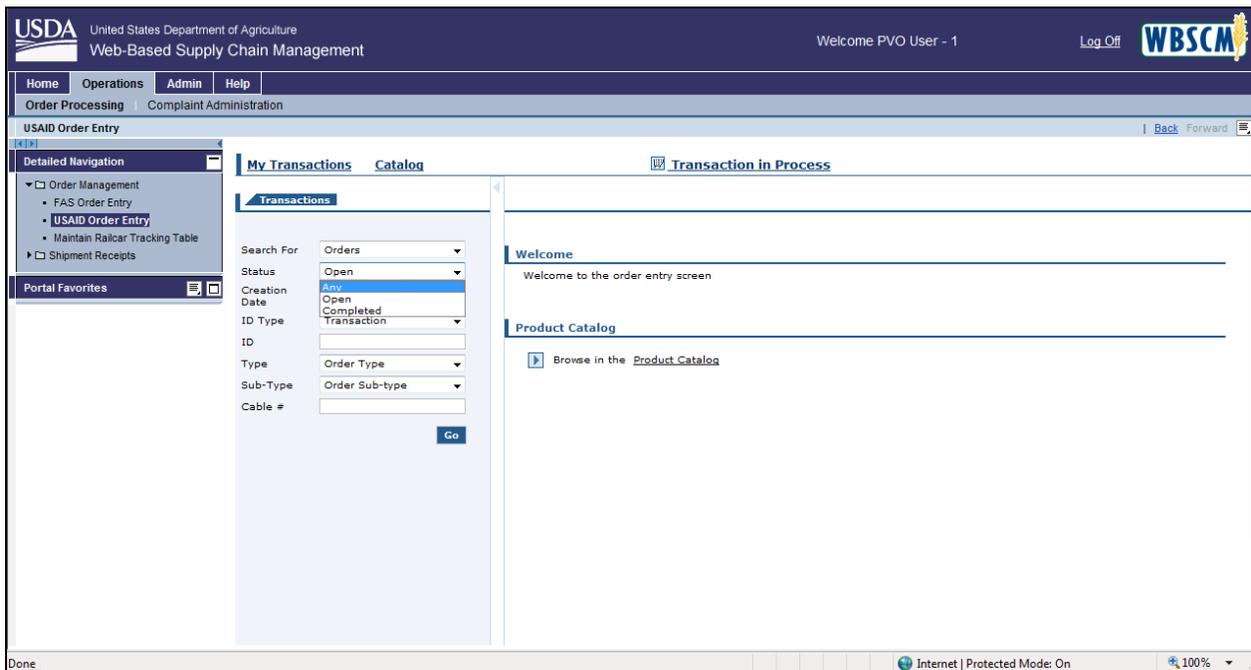**Order Items** - This selection displays all materials that match your criteria.

USAID Order Entry Screen

11. In the **Status** field, click on the **Dropdown** button.

USAID Order Entry Screen

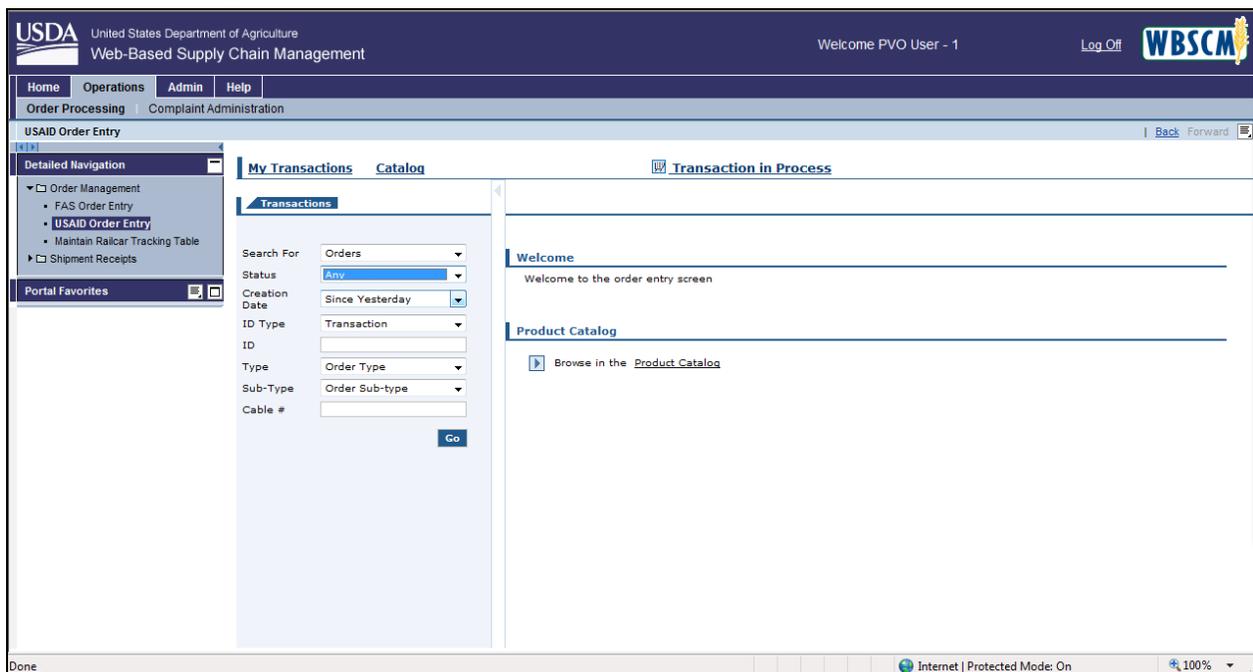12. From the Dropdown list, select **Any** (the **Any** option).

(Note) Use this field to indicate whether you would like to display orders specifically in the **Open** or **Completed** Status, or orders in any status.

Open - Only orders that are open (i.e. have not yet been delivered or receipted) will display in search results.

Completed - Only orders that are completed (i.e. have already been delivered and receipted) will display in search results.

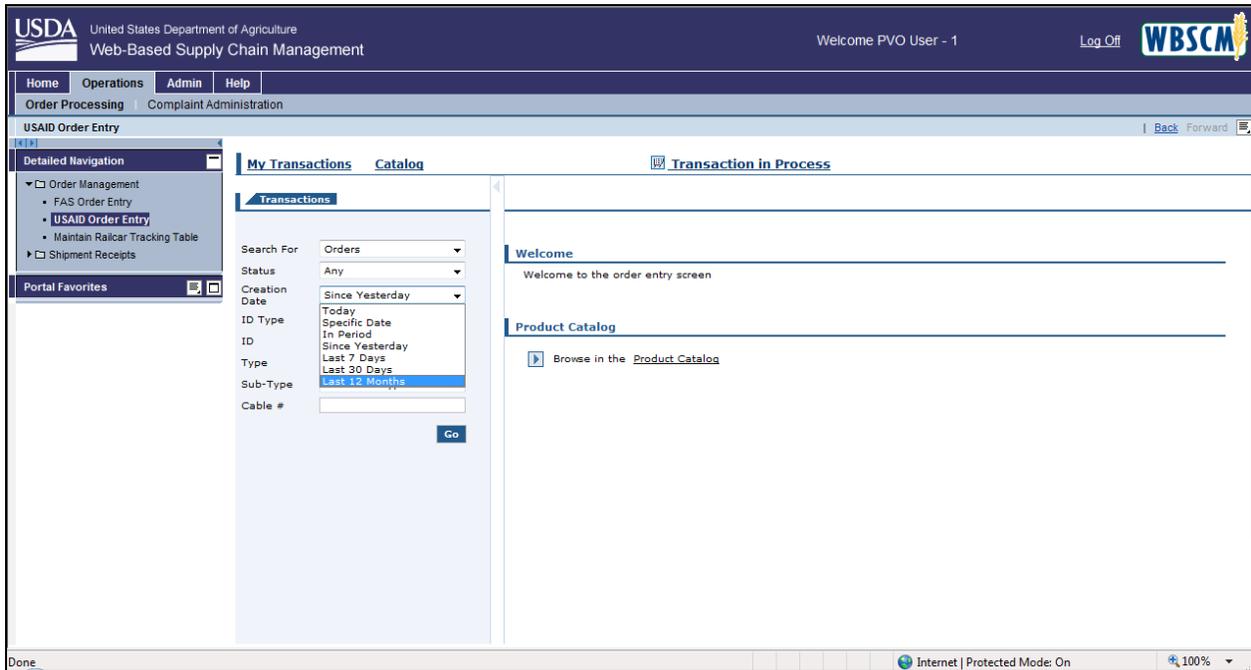**Any** - Orders in open status, and orders in closed status will display.

USAID Order Entry Screen

13. In the **Creation Date** field, click on the **Dropdown** button.
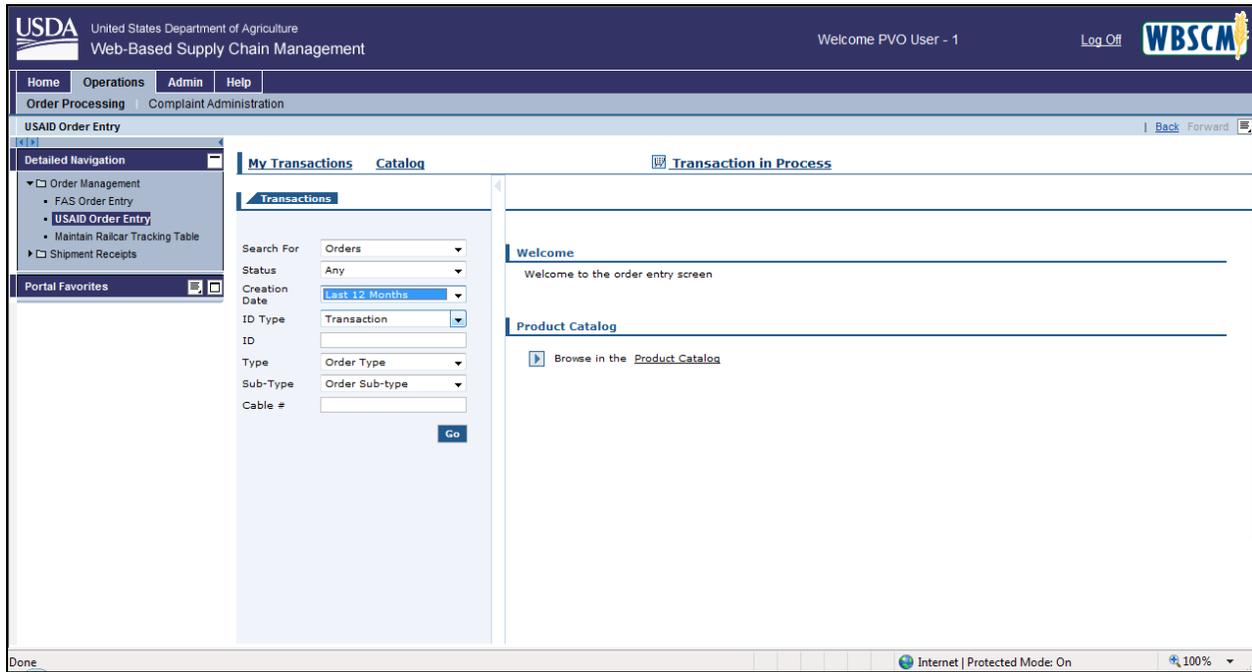
USAID Order Entry Screen

14. From the Dropdown list, select `Last 12 Months` (the **Last 12 Months** option).

(Note) By making a selection for this field, you are indicating that you would like to display all sales orders created within the particular date range you indicate. Possible selections for this field include: **Today**, **Specific Date**, **In Period**, **Since Yesterday**, **Last 7 Days**, **Last 30 Days**, or **Last 12 Months**. If you select **Specific Date**, a free text field will display, prompting you to enter the specific date in a MM/DD/YYYY format.
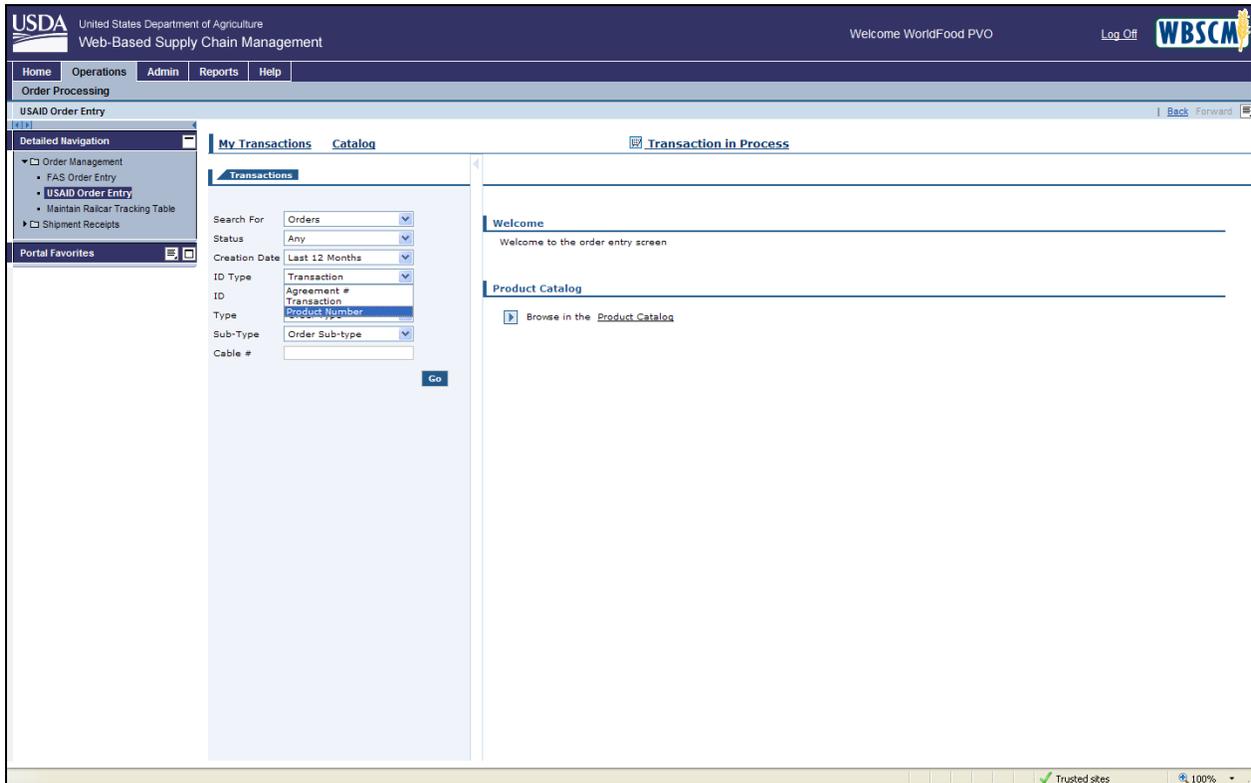
USAID Order Entry Screen

15. In the **ID Type** field, click on the **Dropdown** button.

USAID Order Entry Screen

16. From the Dropdown list, select `Product Number` (the **Product Number** option).

> (Note) This field allows you to search by a specific identifying factor on the sales order such as the Agreement Number, Transaction Number, Product Number, Campaign Number, or Delivery Number. Explanations of the fields are below:
>
> **Agreement Number** - Unique number assigned to a particular FAS Agreement in WBSCM. Users will not be able to search for a USAID Sales Order via the Agreement Number, but they may search for an FAS Sales Order using this number.
>
> **Transaction Number** - Unique sales order number. This can be used to search for FAS or UASID Sales Orders.
>
> **Product Number** - Unique material number. This can be used to search for FAS or USAID Sales Orders that contain a particular commodity.
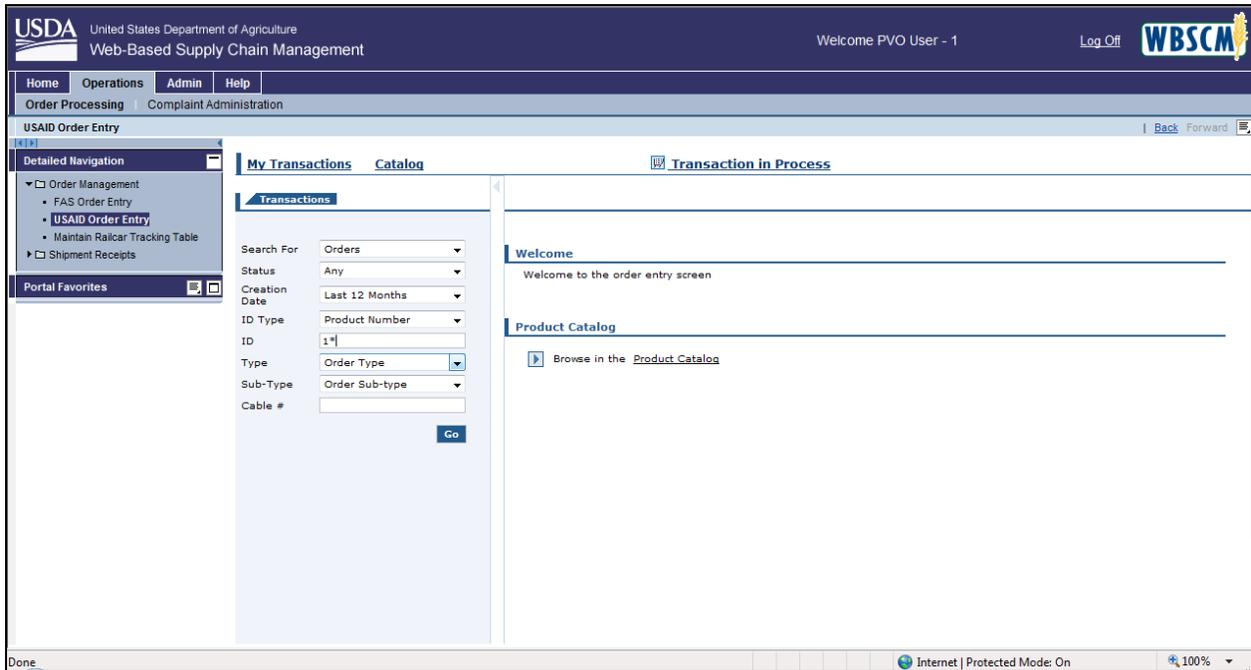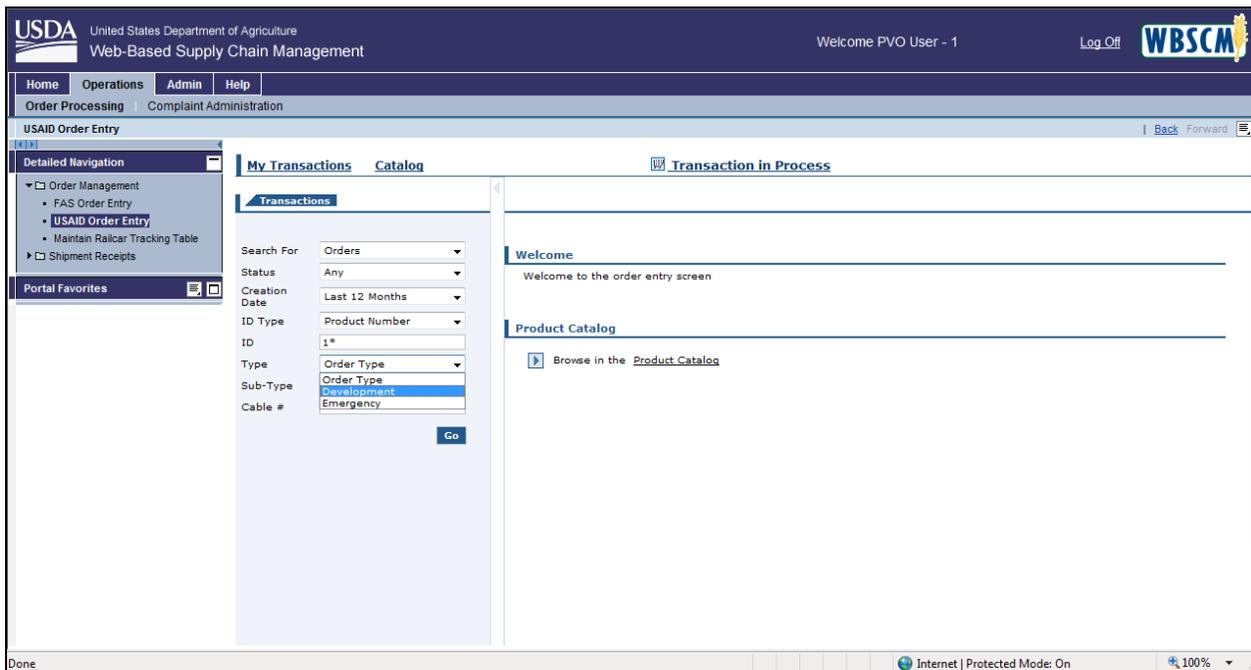
USAID Order Entry Screen
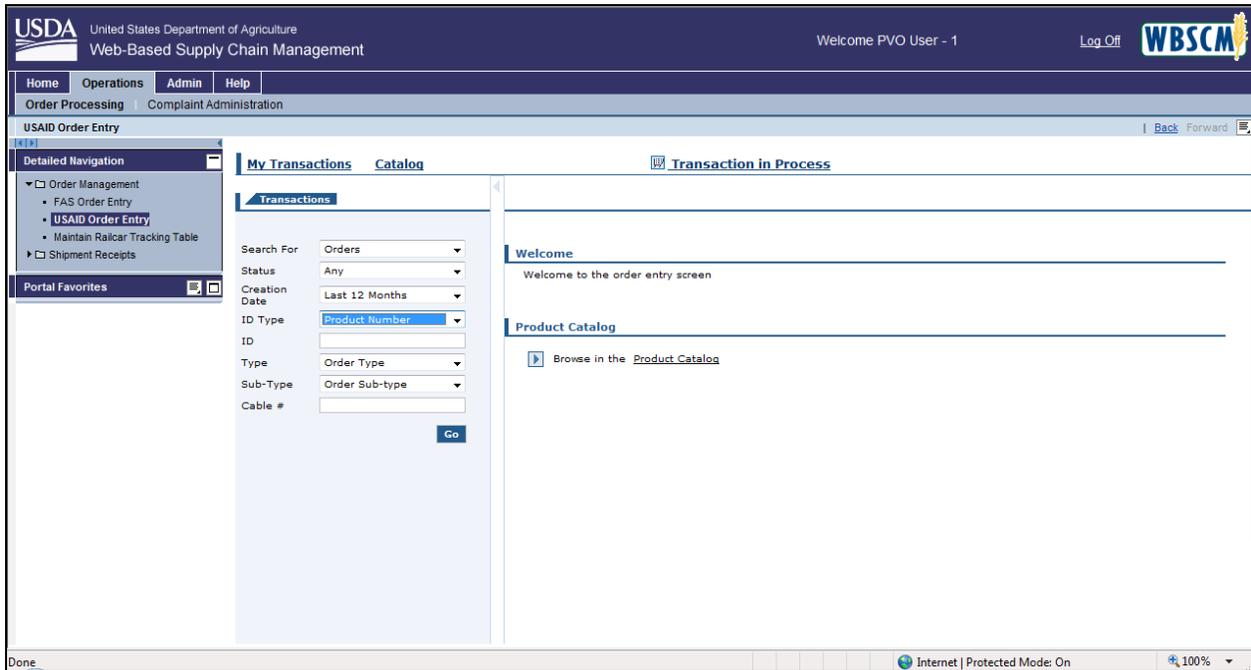
17. As required, complete/review the following fields:

Field	R/O/C	Description
ID	R	Identification. Additional information used to differentiate between payment proposals. **Example:** 1*

USAID Order Entry Screen

18. In the **Type** field, click on the **Dropdown** button.

USAID Order Entry Screen

19. From the Dropdown list, select `Development` (the **Development** option).

(Note) The **Order Type** refers to whether the order was for development or emergency purposes. Explanations are as follows:

Development - order was planned in advance, and is used for developing a country's infrastructure.

Emergency - order may be planned in advance or last minute, and is used for helping a country undergoing a natural disaster, political crisis, or other emergency situation.

USAID Order Entry Screen
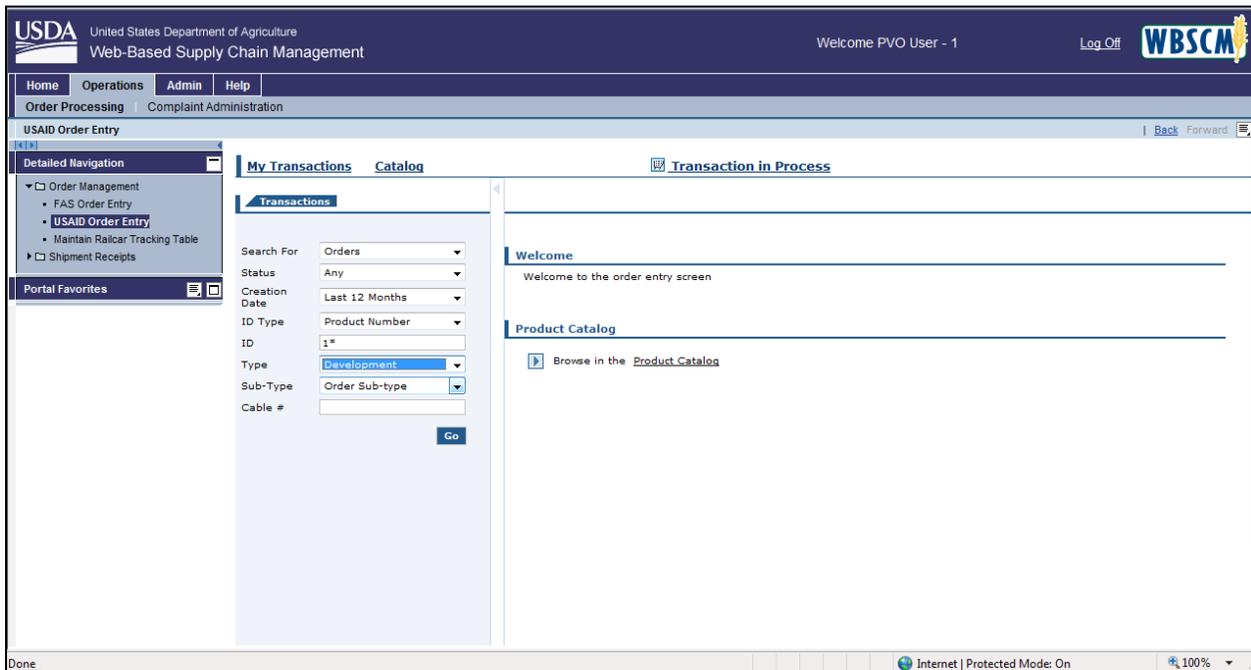
20. In the **Sub-Type** field, click on the **Dropdown** button.

USAID Order Entry Screen

21. From the Dropdown list, select Direct Distribution (the **Direct Distribution** option).

(Note) The **Order Sub-Type** refers to whether the order is for direct distribution or monetization. Explanations are as follows:

Direct Distribution - commodities are distributed within the recipient country. The recipient country receives the benefit of food aid.

Monetization - commodities are sold in a different country. The recipient country receives the monetary proceeds from the sale of food aid.
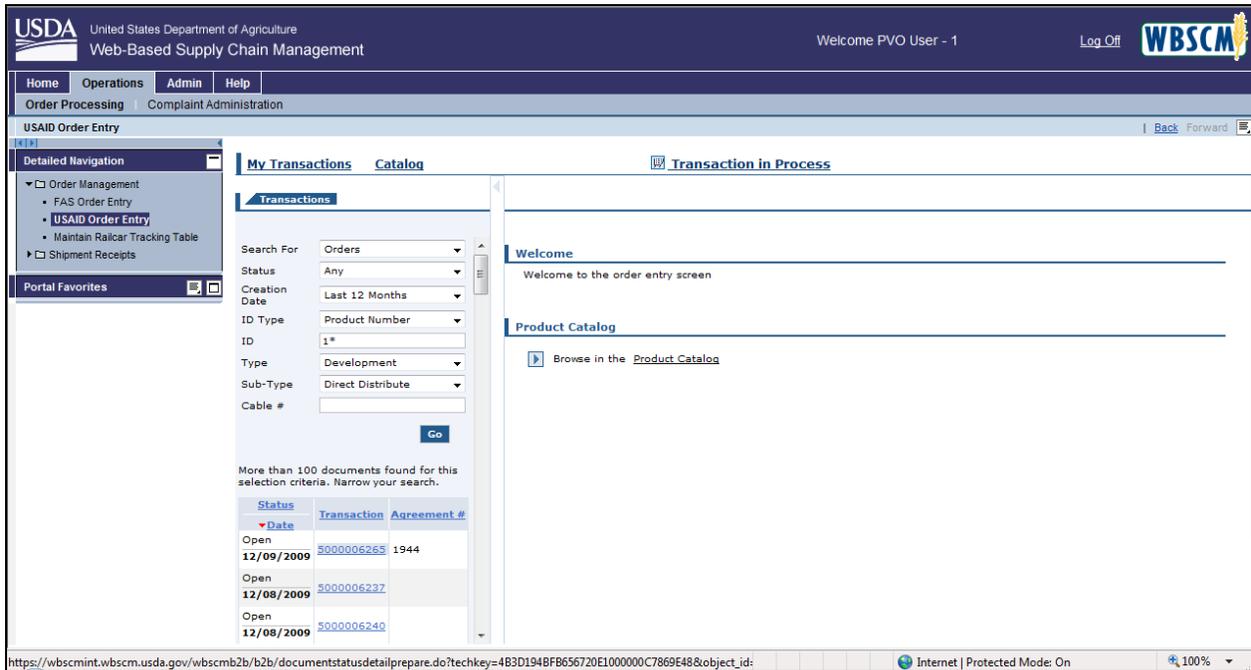
USAID Order Entry Screen

22. After entering search criteria, click **Go** (the **Go** button) to start your search.

USAID Order Entry Screen

23. Sales orders that match your criteria display. Click on a transaction number link to display the order.

> (Note) A table displays outlining all sales orders that match your criteria. Information displayed in the table includes:
>
> **Status** - overall status of the order. This field may be populated with "open" meaning the order has not yet been delivered and receipted, or "completed" meaning the order has been delivered and a delivery acknowledgment has been entered.
>
> **Date** - creation date for the order. This field can be sorted in ascending or descending order, if desired.
>
> **Transaction** - sales order number.
>
> **Agreement #** - unique agreement number associated with an FAS Agreement. This field should only be applicable for FAS Sales Orders (which have corresponding agreements).

24. You have completed this transaction.