

SUBMITTING INVOICES IN WBSCM FOR THE AMS UNPROCESSED FRUIT & VEGETABLE PILOT PROGRAM

November, 2017

Log into WBSCM (user must have been added to WBSCM and assigned the invoice creator role by the Corporate vendor administrator (CVA) or assigned the CVA role.

Proceed to Suppliers Self Service Page (SUS) by following the Portal Path:

- Suppliers → Supplier Self Service → Supplier Self Service

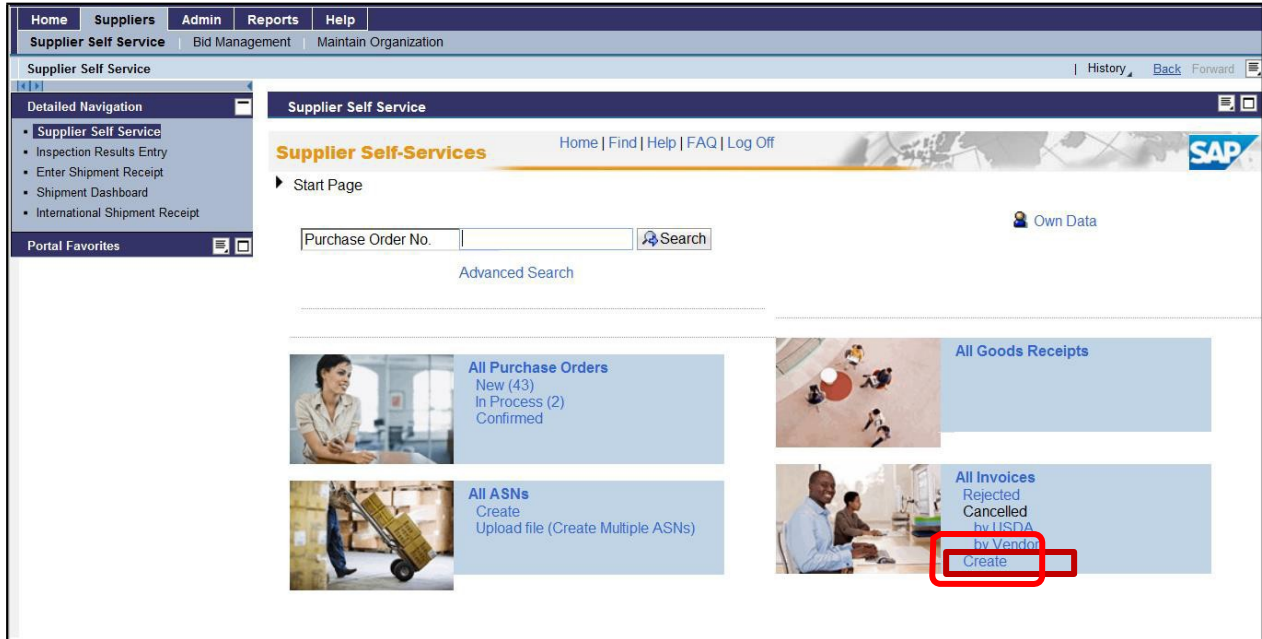
NOTE: The Suppliers, Supplier Self Service Tab, opens on the “Enter Shipment Receipt” screen, scroll down to click on the “Supplier Self Service” Tab.

The screenshot displays the USDA Web-Based Supply Chain Management (WBSCM) portal. At the top, the USDA logo and the text "United States Department of Agriculture Web-Based Supply Chain Management" are visible. Below the logo, there are navigation links: "Back", "Forward", "History", and "Favorites". The main navigation bar includes tabs for "Home", "Suppliers", "Admin", "Reports", and "Help". The "Suppliers" tab is highlighted in red. Below this bar, there are sub-tabs: "Supplier Self Service", "Bid Management", and "Maintain Organization". The "Supplier Self Service" tab is also highlighted in red. A dropdown menu is open under the "Suppliers" tab, showing options: "Enter Shipment Receipt", "Inspection Results Entry", "International Shipment Rece...", "Shipment Dashboard", and "Supplier Self Service". The "Supplier Self Service" option is highlighted in red. The main content area shows a breadcrumb trail: "Suppliers > Supplier Self Service > Enter Shipment Receipt". Below the breadcrumb, there is an "Order Search" section with a text input field for "Order Number: *" and a "Search" button. At the bottom of the page, there is a line of text: "WBSCM has the ability to receipt Sales Orders, Delivery Documents, and Pt".

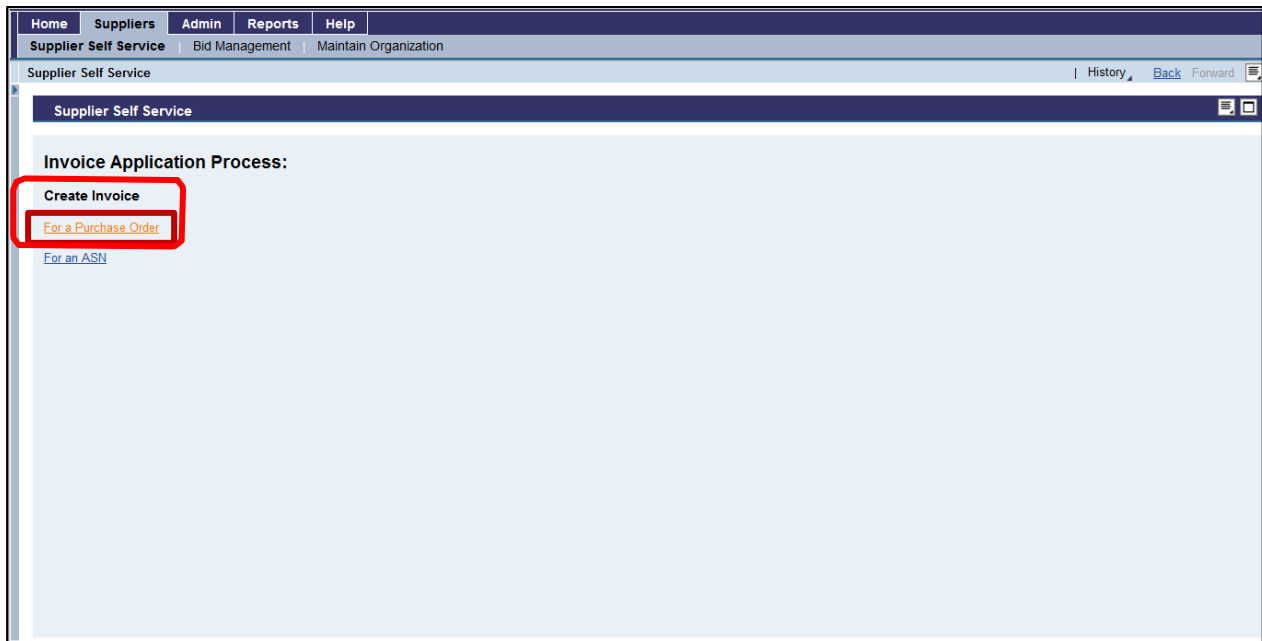
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In the "All Invoices" section of the Supplier Self Services Page, click [Create](#) (the **Create** link) to begin the process of creating an invoice.




Select "For a Purchase Order"



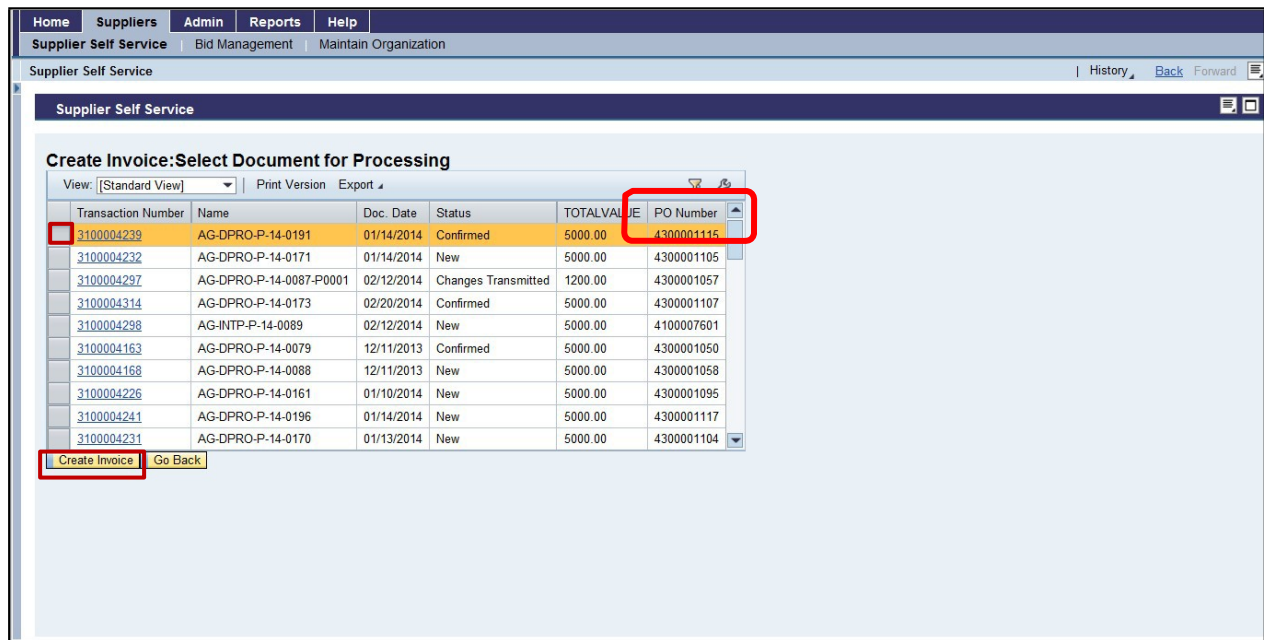
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A list of Purchase Orders (PO) will be displayed. Select the applicable PO that one wants to submit the invoice under by clicking the gray box to the left of the PO. The selected row should be highlighted in orange.

Click "Create Invoice"  at bottom of table.

If you don't know your Purchase Order number please contact Camillia Freeland-Taylor at camillia.freeland-taylor@ams.usda.gov or Kyle Hugo at kyle.hugo@ams.usda.gov.



Supplier Self Service

Supplier Self Service: Select Document for Processing

Transaction Number	Name	Doc. Date	Status	TOTALVALUE	PO Number
3100004239	AG-DPRO-P-14-0191	01/14/2014	Confirmed	5000.00	4300001115
3100004232	AG-DPRO-P-14-0171	01/14/2014	New	5000.00	4300001105
3100004297	AG-DPRO-P-14-0087-P0001	02/12/2014	Changes Transmitted	1200.00	4300001057
3100004314	AG-DPRO-P-14-0173	02/20/2014	Confirmed	5000.00	4300001107
3100004298	AG-INTP-P-14-0089	02/12/2014	New	5000.00	4100007601
3100004163	AG-DPRO-P-14-0079	12/11/2013	Confirmed	5000.00	4300001050
3100004168	AG-DPRO-P-14-0088	12/11/2013	New	5000.00	4300001058
3100004226	AG-DPRO-P-14-0161	01/10/2014	New	5000.00	4300001095
3100004241	AG-DPRO-P-14-0196	01/14/2014	New	5000.00	4300001117
3100004231	AG-DPRO-P-14-0170	01/13/2014	New	5000.00	4300001104

SUBMITTING INVOICES IN WBSMC FOR THE AMS UNPROCESSED FRUIT & VEGETABLE PILOT PROGRAM

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Invoice creation page is displayed.

In the Vendor Reference box, please enter "FV Pilot"

The screenshot shows the 'Document Action' section with buttons for Submit, Hold, Print/Download, Cancel, and Back. Below is the 'Basic Data' section with the following fields: Invoice: 7100478579, Status: In Process, Description: AG-3J16-D-16-0538, Document Date: 05/31/2016, Reference Po No.: 4100010632, Invoice Amount: 258,400.00, USD, Vendor Reference: FV Pilot (highlighted with a red box), and Invoice Receipt Date. The 'Products and Services' section shows a table with one item: Item Number 1, Product Name 310070, Short Text AMS PILOT-UF&V, Quantity 258,400.00, Unit EA, Net value 258,400.00, Tax Code I0, Purchase Order No. 4100010632, and Purchase Order Item 0000000001. An 'Update Quantity' button is visible below the table.


The quantity for the line item is derived from the Purchase Order less any quantities previously invoiced against this PO. The quantity should be the quantity for the bi-monthly invoice. Once the quantity (XX,XXX.XX) has been edited click the **Update Quantities** button.

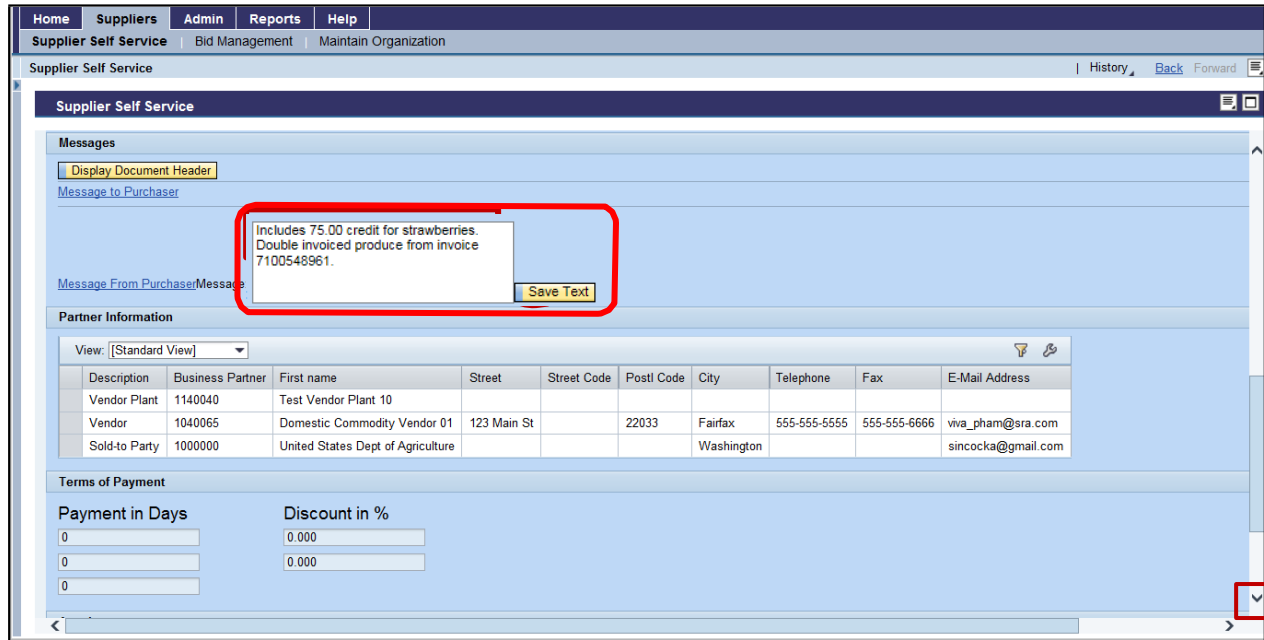
Note: the Invoice Quantity is the amount that was awarded under the PO line item or the remaining balance once invoices have been submitted and approved.

The screenshot shows the 'Supplier Self Service' interface. The 'Document Action' section has buttons for Submit, Hold, Print/Download, Cancel, and Back. The 'Basic Data' section includes: Invoice: 7100005344, Status: In Process, Description: AG-DPRO-P-14-0088, Document Date: 04/21/2014, Reference Po No.: 4300001058, Invoice Amount: 5,000.00, USD, and Vendor Reference. The 'Products and Services' section shows a table with one item: Item Number 1, Product Name 330099, Short Text DOD RES, Quantity 5,000.00 (highlighted with a red box), Unit EA, Net value 5,000.00, Tax Code I0, Purchase Order No. 4300001058, and Purchase Order Item 0000000001. The 'Update Quantity' button is highlighted with a red box. The 'QM Selections' section at the bottom shows a table with columns: Select, Light, Insp Lot, Created-On, Status, Orig Qty, Open Qty, Inv Qty, Premium, Discount, PO-Item, Tot Premium, Tot Discount, and Other Dis.

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Click  (the **Down** arrow) on the vertical scrollbar to display the **Message** box. **Optional**- enter text for clarification purposes in the **Message** box and click "Save Text".



Supplier Self Service

Messages

Display Document Header

Message to Purchaser

Message From Purchaser

Includes 75.00 credit for strawberries.
Double invoiced produce from invoice
7100548961.

Save Text

Partner Information

View: [Standard View]

Description	Business Partner	First name	Street	Street Code	Postl Code	City	Telephone	Fax	E-Mail Address
Vendor Plant	1140040	Test Vendor Plant 10							
Vendor	1040065	Domestic Commodity Vendor 01	123 Main St		22033	Fairfax	555-555-5555	555-555-6666	viva_pham@sra.com
Sold-to Party	1000000	United States Dept of Agriculture				Washington			sincocka@gmail.com

Terms of Payment


Payment in Days

Discount in %

0 0.000

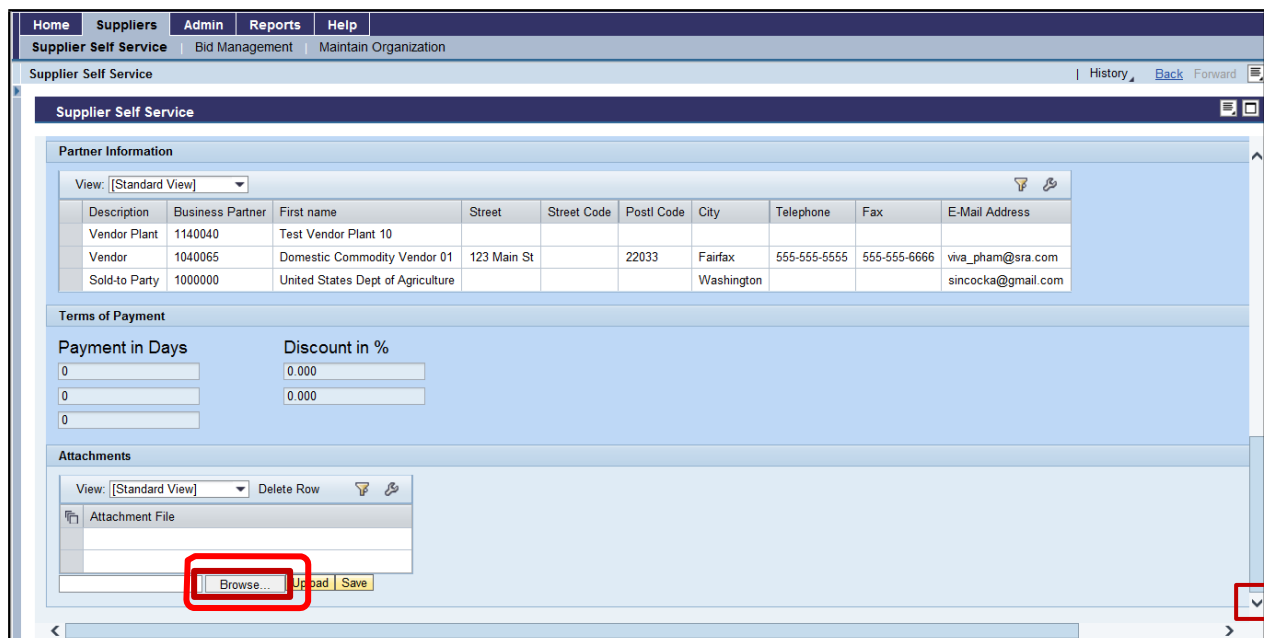
0 0.000

0

Click  (the **Down** arrow) on the vertical scrollbar to access the **Attachments** section. Attach the excel invoice file in this section. Click (the **Browse...** button).

Required attached documents include:

1. Excel Invoicing Template found [here](#).
2. Verification documentation of approved invoicing from state/school.



Supplier Self Service

Partner Information

View: [Standard View]

Description	Business Partner	First name	Street	Street Code	Postl Code	City	Telephone	Fax	E-Mail Address
Vendor Plant	1140040	Test Vendor Plant 10							
Vendor	1040065	Domestic Commodity Vendor 01	123 Main St		22033	Fairfax	555-555-5555	555-555-6666	viva_pham@sra.com
Sold-to Party	1000000	United States Dept of Agriculture				Washington			sincocka@gmail.com

Terms of Payment

Payment in Days

Discount in %

0 0.000

0 0.000

0

Attachments

View: [Standard View] Delete Row

Attachment File

Browse... Upload Save

SUBMITTING INVOICES IN WBSM FOR THE AMS UNPROCESSED FRUIT & VEGETABLE PILOT PROGRAM

November, 2017

Choose File to Upload from the Pop-up window

The screenshot shows a 'Choose File to Upload' dialog box in the foreground. The dialog box title is 'Choose File to Upload' and it shows the 'Documents library' with the following files:

Name	Date modified	Type
BOL	4/15/2014 1:28 PM	Adobe Acrobat D...
Further Instructions and Details1	4/16/2014 12:05 PM	Adobe Acrobat D...

The background page is the 'Welcome Domestic Vendor' page. It has a 'Log off' link and the WBSM logo. Below the header, there is a table with the following data:

Postl Code	City	Telephone	Fax	E-Mail Address
033	Fairfax	555-555-5555	555-555-6666	viva_pham@sra.com
	Washington			sincocka@gmail.com

Below the table, there is an 'Attachments' section with a 'View: [Standard View]' dropdown, a 'Delete Row' button, and a table with the following data:

Attachment File

At the bottom of the 'Attachments' section, there are 'Browse...', 'Upload', and 'Save' buttons.

Double-click **Further Instructions and Details1** (the **File** name) or Open to attach to the invoice.

The screenshot shows the 'Supplier Self Service' page. The page has a navigation menu with 'Home', 'Suppliers', 'Admin', 'Reports', and 'Help'. Below the navigation menu, there is a 'Supplier Self Service' section with a 'History', 'Back', and 'Forward' link. The main content area is divided into three sections:

Partner Information

Description	Business Partner	First name	Street	Street Code	Postl Code	City	Telephone	Fax	E-Mail Address
Vendor Plant	1140040	Test Vendor Plant 10							
Vendor	1040065	Domestic Commodity Vendor 01	123 Main St		22033	Fairfax	555-555-5555	555-555-6666	viva_pham@sra.com
Sold-to Party	1000000	United States Dept of Agriculture				Washington			sincocka@gmail.com

Terms of Payment

Payment in Days	Discount in %
0	0.000
0	0.000
0	

Attachments

Attachment File

At the bottom of the 'Attachments' section, there is a 'Browse...' button and 'Upload' and 'Save' buttons.

SUBMITTING INVOICES IN WBSCM FOR THE AMS UNPROCESSED FRUIT & VEGETABLE PILOT PROGRAM

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Click **Upload** (the **Upload** button) to attach the electronic document to the invoice in WBSCM.

The screenshot shows the 'Supplier Self Service' interface. The 'Attachments' section is active, displaying a table with one row: 'C:\fakepath\Further Instructions and Details1.pdf'. Below the table, the 'Upload' button is highlighted with a red box.

Description	Business Partner	First name	Street	Street Code	Postl Code	City	Telephone	Fax	E-Mail Address
Vendor Plant	1140040	Test Vendor Plant 10							
Vendor	1040065	Domestic Commodity Vendor 01	123 Main St		22033	Fairfax	555-555-5555	555-555-6666	viva_pham@sra.com
Sold-to Party	1000000	United States Dept of Agriculture				Washington			sincocka@gmail.com



Click **Save** (the **Save** button).

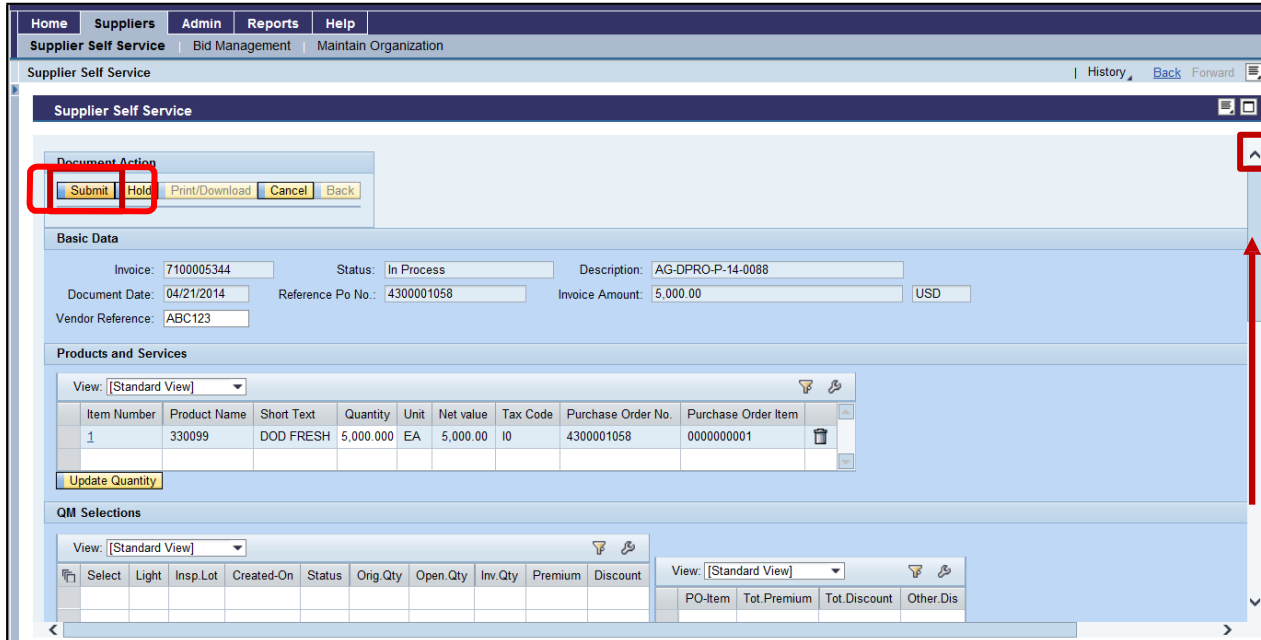
The screenshot shows the 'Supplier Self Service' interface. The 'Attachments' section is active, displaying a table with one row: 'C:\fakepath\Further Instructions and Details1.pdf'. Below the table, the 'Save' button is highlighted with a red box.

Description	Business Partner	First name	Street	Street Code	Postl Code	City	Telephone	Fax	E-Mail Address
Vendor Plant	1140040	Test Vendor Plant 10							
Vendor	1040065	Domestic Commodity Vendor 01	123 Main St		22033	Fairfax	555-555-5555	555-555-6666	viva_pham@sra.com
Sold-to Party	1000000	United States Dept of Agriculture				Washington			sincocka@gmail.com

SUBMITTING INVOICES IN WBS/CM FOR THE AMS UNPROCESSED FRUIT & VEGETABLE PILOT PROGRAM

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Click  (the **Up** arrow) on the vertical scrollbar to submit the invoice. Click  (the **Submit** button) to process the invoice



Supplier Self Service

Document Action

Submit Hold Print/Download Cancel Back

Basic Data

Invoice: 7100005344 Status: In Process Description: AG-DPRO-P-14-0088
Document Date: 04/21/2014 Reference Po No.: 4300001058 Invoice Amount: 5,000.00 USD
Vendor Reference: ABC123

Products and Services

View: [Standard View]

Item Number	Product Name	Short Text	Quantity	Unit	Net value	Tax Code	Purchase Order No.	Purchase Order Item
1	330099	DOD FRESH	5,000.000	EA	5,000.00	10	4300001058	0000000001

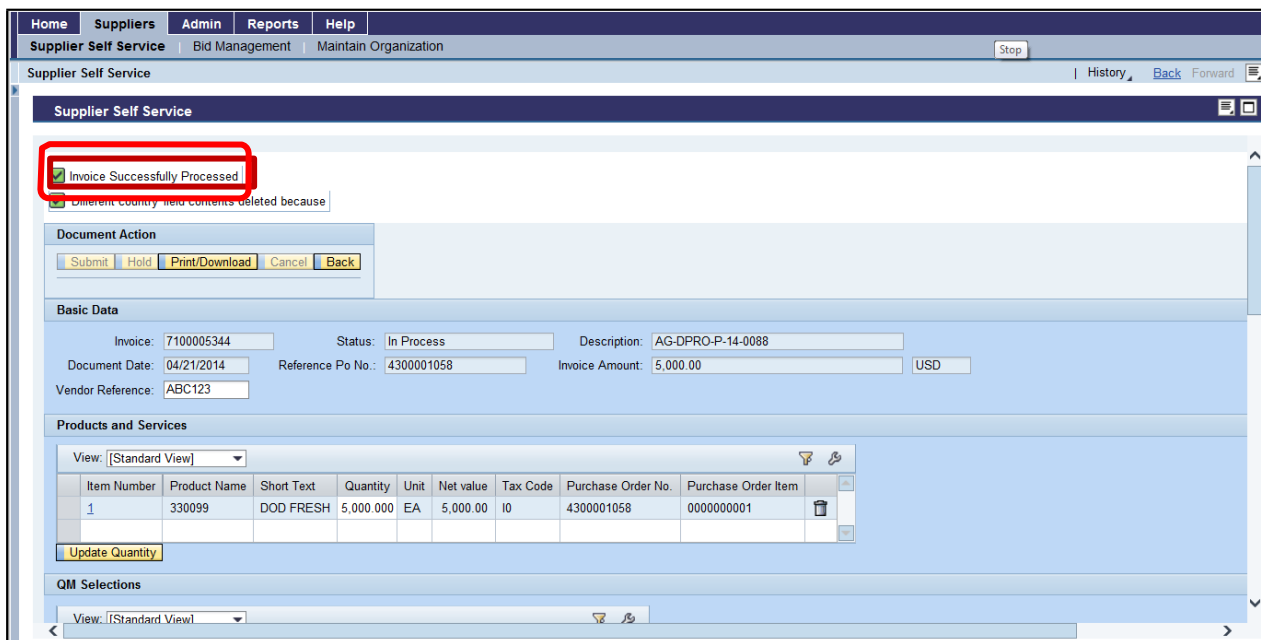
Update Quantity

QM Selections

View: [Standard View]

Select	Light	Insp.Lot	Created-On	Status	Orig.Qty	Open.Qty	Inv.Qty	Premium	Discount	PO-Item	Tot.Premium	Tot.Discout	Other.Dis
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.One should receive message "Invoice Successfully Processed".



Supplier Self Service

Invoice Successfully Processed

Document Action

Submit Hold Print/Download Cancel Back

Basic Data

Invoice: 7100005344 Status: In Process Description: AG-DPRO-P-14-0088
Document Date: 04/21/2014 Reference Po No.: 4300001058 Invoice Amount: 5,000.00 USD
Vendor Reference: ABC123

Products and Services

View: [Standard View]

Item Number	Product Name	Short Text	Quantity	Unit	Net value	Tax Code	Purchase Order No.	Purchase Order Item
1	330099	DOD FRESH	5,000.000	EA	5,000.00	10	4300001058	0000000001

Update Quantity

QM Selections

View: [Standard View]

You have completed this transaction.