

Submitting Invoices in WBSCM: Service Purchase Orders or Purchase Orders not requiring ASN

June 5 , 2024

Use this procedure to process an invoice for a Service Purchase Order (PO) or for a PO which does not require an Advance Shipping Notice (ASN). This work instruction reviews the following instructions:

- Create/modify/update an invoice quantity
- Attach a file to the invoice

In the following examples of this work instruction, we will be using the Purchase Order below that has a quantity of 50,000 EA and a total dollar value of \$50,000

Purchase Order Header
PO Scenario: Non-FAR Services
Award Type: Financial Assistance

Purchase order text
Vendor Text - Header: This PO is issued under the AMS Unprocessed Fruit and Vegetable Pilot Program for use in submitting invoices from approved suppliers for deliveries from July 1, 2023-September 30, 2023.....

Item	Description	Required By	Quantity/UOM Weight	Unit price/ Net value
1	310070-AMS PILOT-UF&V	07/01/2023-09/30/2023	50,000.000 EA	1.00 USD/1 EA 50,000.00 USD

TOTAL UNITS: 50,000.000 EA
TOTAL VALUE: 50,000.00 USD

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.

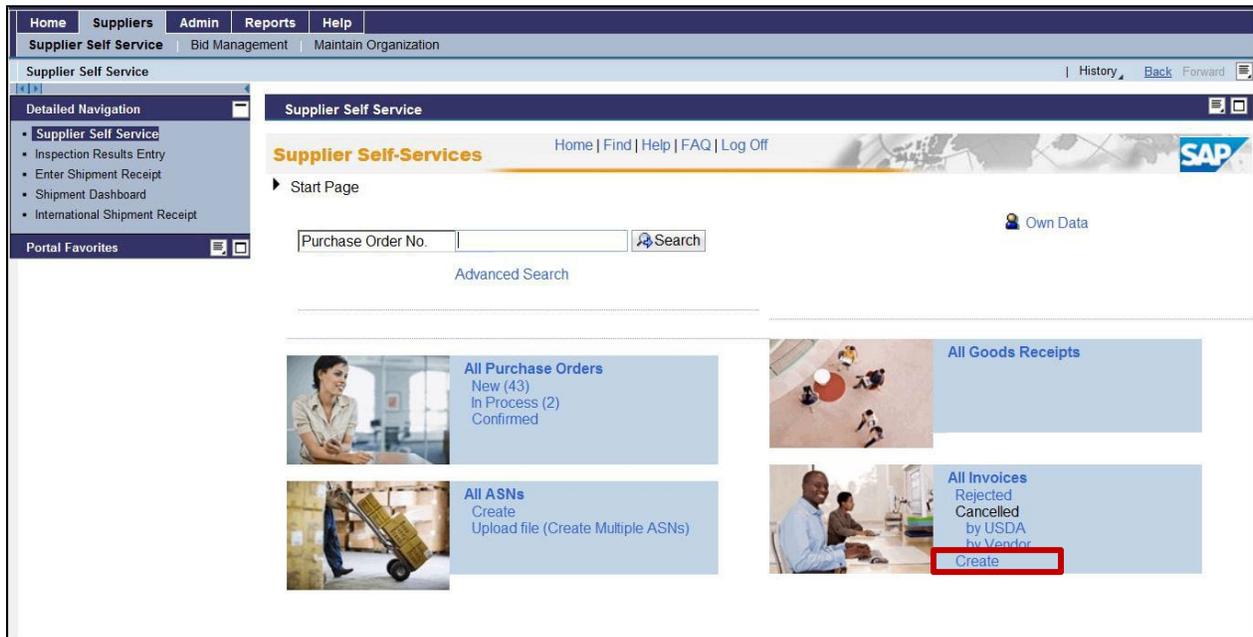
Portal Path: **Suppliers>Supplier Self Service**

The screenshot shows the WBSCM portal navigation menu with 'Suppliers' and 'Supplier Self Service' highlighted. The main content area displays the 'Supplier Self-Service' page for 'AMERICAN FOODS GROUP, LLC'. It includes a search bar for 'Purchase Order No.', an 'Advanced Search' link, and a summary of purchase orders: 'All Purchase Orders: New (6), In Process (33), Confirmed'.

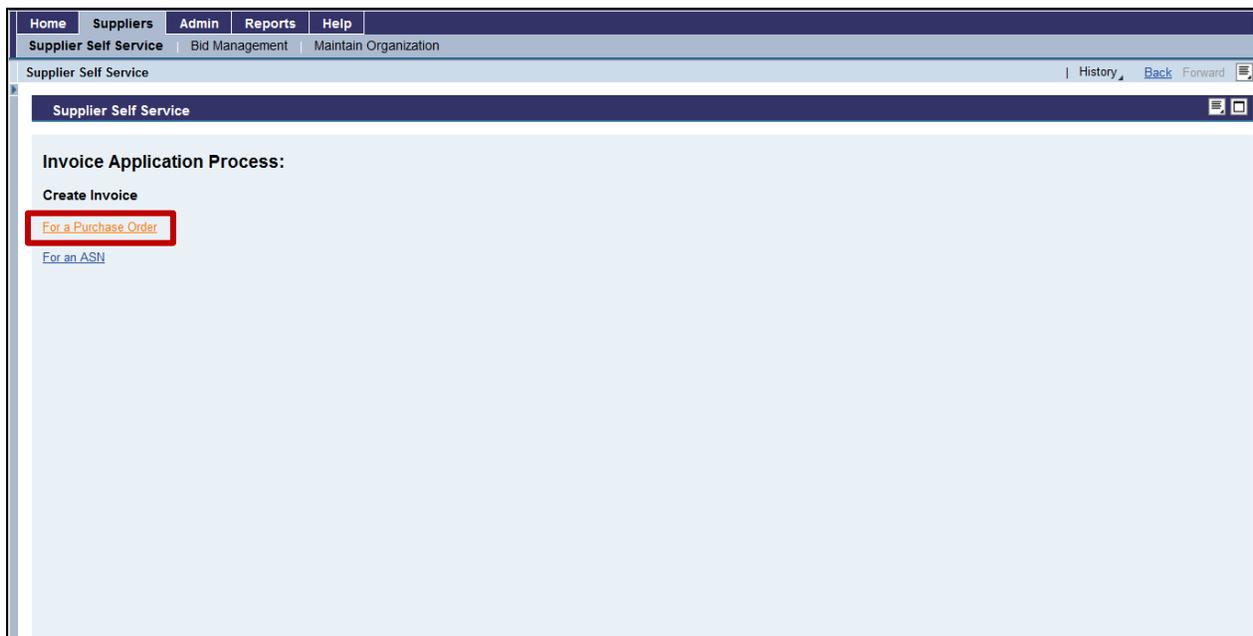
Submitting Invoices in WBSCM: Service Purchase Orders or Purchase Orders not requiring ASN

June 5 , 2024

In the **All Invoices** section of the Supplier Self Services Page, click **Create** link to begin the process of creating an invoice.



Select For a Purchase Order



Submitting Invoices in WBSCM: Service Purchase Orders or Purchase Orders not requiring ASN

June 5, 2024

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 tab

The screenshot shows a window titled "Create Invoice: Select Document for Processing". At the top, there are options for "View: [Standard View]", "Print Version", and "Export". Below this is a table with the following columns: Transaction ID, Name, Doc. Date, Status, TOTALVALUE, and PO Number. Three rows are visible, with the third row highlighted in orange. A red box highlights the gray selection box to the left of the third row. At the bottom of the window, there are two buttons: "Create Invoice" and "Go Back".

Transaction ID	Name	Doc. Date	Status	TOTALVALUE	PO Number
3100026118	12-3J14-17-P-1760-P00002	07/25/2017	In Process	54400.00	4300006673
3100040024	12-3J14-20-C-2984-P00001	08/17/2020	In Process	75000.00	4300009909
3100052137	FA-AMCP-23-C-0010	07/05/2023	Confirmed	50000.00	4360000015

Invoice creation page is displayed.

The **Quantity** for the line item is populated from the Purchase Order, with any previously invoiced amounts subtracted from it. The full **Quantity** of 50,000 is displaying because an invoice has not been created against it yet.

In the **Quantity field**, enter the dollar amount you would like to invoice for. Click the **Update Quantity** button.

The screenshot shows the "Document Action" and "Basic Data" sections of the invoice creation page. The "Document Action" section has buttons for "Submit", "Hold", "Print/Download", "Cancel", and "Back". The "Basic Data" section contains fields for Invoice (7100990192), Status (In Process), Description (FA-AMCP-23-C-0010), Document Date (05/08/2024), Reference Po No. (4360000015), Invoice Amount (50,000.00), Vendor Reference, and Invoice Receipt Date. Below this is the "Products and Services" section, which includes a table with columns: Item Number, Product Name, Short Text, Quantity, Unit, Net value, Tax Code, Purchase Order No., and Purchase Order Item. The first row of the table has a red box around the "Quantity" field, which contains the value "50,000.000". At the bottom of the "Products and Services" section, there is a button labeled "Update Quantity".

Item Number	Product Name	Short Text	Quantity	Unit	Net value	Tax Code	Purchase Order No.	Purchase Order Item
1	310070	AMS PILOT-UF&V	50,000.000	EA	50,000.00	IO	4360000015	000000001

Submitting Invoices in WBSCM: Service Purchase Orders or Purchase Orders not requiring ASN

June 5, 2024

In the example below, quantity was updated from 50,000 to 10,000. An invoice will get created for \$10,000.00.

Document Action
Submit Hold Print/Download Cancel Back

Basic Data
Invoice: 7100990192 Status: In Process Description: FA-AMCP-23-C-0010
Document Date: 05/08/2024 Reference Po No.: 4360000015 Invoice Amount: 10,000.00
Vendor Reference: Invoice Receipt Date:

Products and Services
View: [Standard View]

Item Number	Product Name	Short Text	Quantity	Unit	Net value	Tax Code	Purchase Order No.	Purchase Order
1	310070	AMS PILOT-UF&V	10,000.000	EA	10,000.00	I0	4360000015	000000001

Update Quantity

Click the **Down Arrow** on the vertical scrollbar to display the **Message** box.

- This message will be viewed by the invoice reviewer and is Optional. Enter text for clarification purposes in the **Message** box and click **Save Text**.

Home Suppliers Admin Reports Help
Supplier Self Service Bid Management Maintain Organization
Supplier Self Service History Back Forward

Supplier Self Service

Messages
Display Document Header
Message to Purchaser
Qty reduced to 5000
Message From Purchaser: Save Text

Partner Information
View: [Standard View]

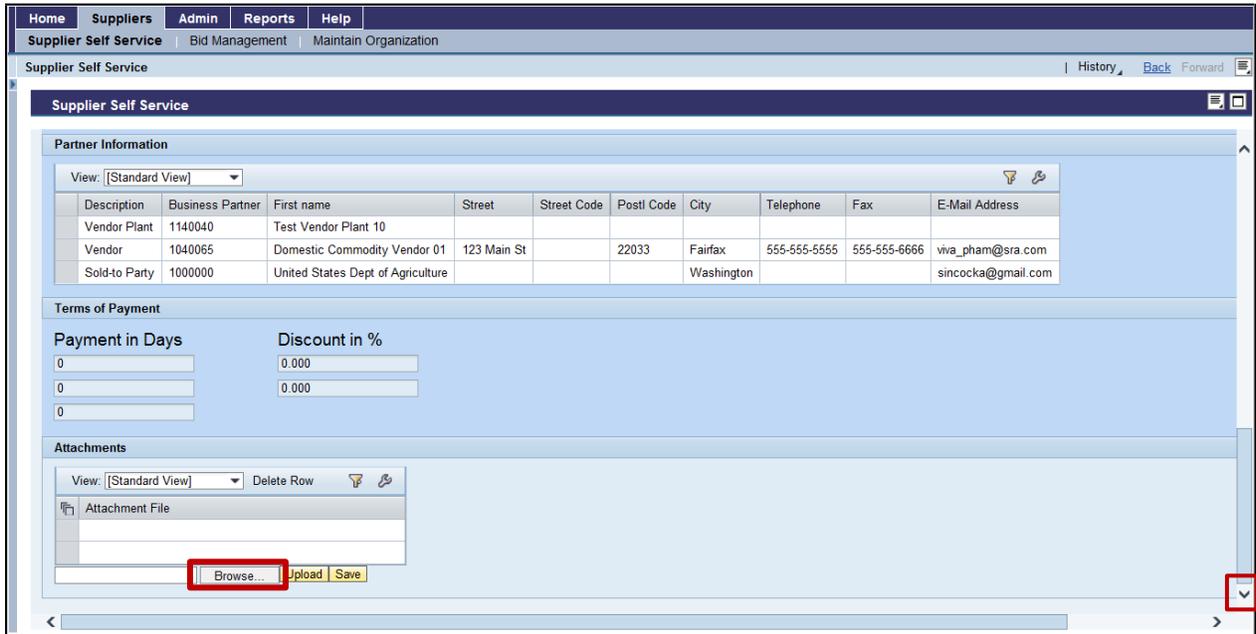
Description	Business Partner	First name	Street	Street Code	Postl Code	City	Telephone	Fax	E-Mail Address
Vendor Plant	1140040	Test Vendor Plant 10							
Vendor	1040065	Domestic Commodity Vendor 01	123 Main St		22033	Fairfax	555-555-5555	555-555-6666	wva_pham@sra.com
Sold-to Party	1000000	United States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

Terms of Payment
Payment in Days Discount in %
0 0.000
0 0.000
0

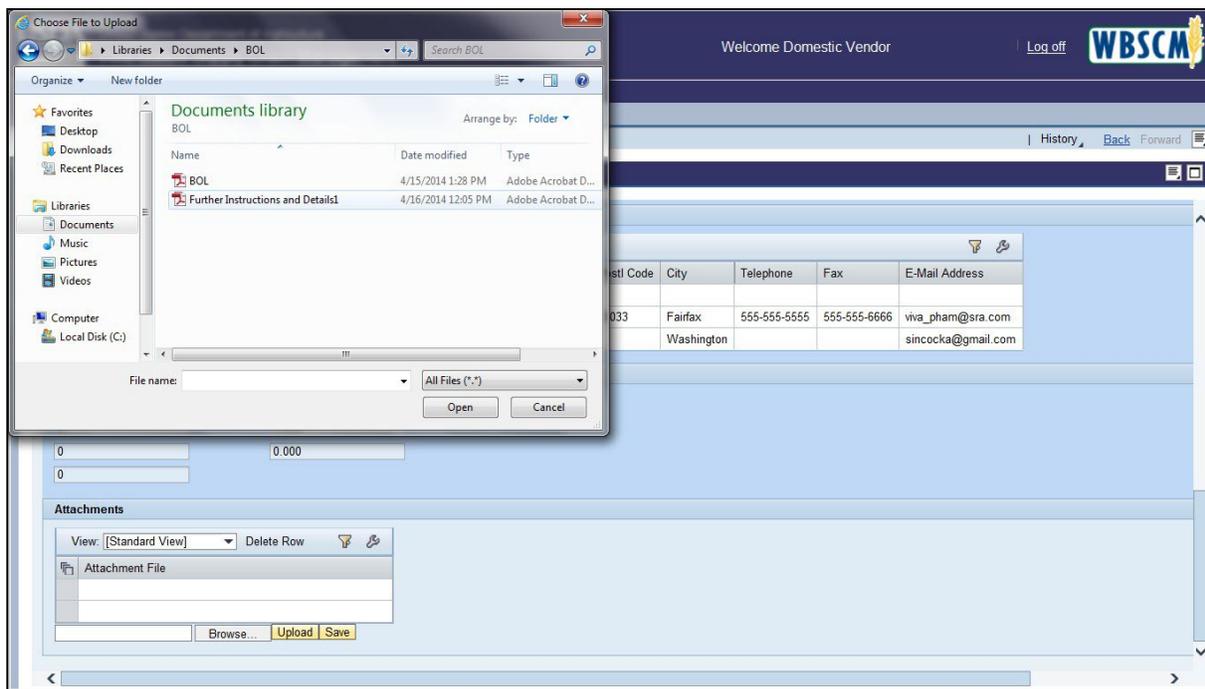
Submitting Invoices in WBSCM: Service Purchase Orders or Purchase Orders not requiring ASN

June 5, 2024

Click the **Down Arrow** on the vertical scrollbar to access the **Attachments** section to attach required documents. Click the **Browse** button.



Choose File to Upload from the Pop-up window.



Submitting Invoices in WBSCM: Service Purchase Orders or Purchase Orders not requiring ASN

June 5, 2024

Double-click the **File** name or Open to attach to the invoice. Click **Upload** button to attach the electronic document to the invoice in WBSCM.

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: 0
Discount in %: 0.000

Attachments

View: [Standard View] Delete Row

Attachment File

C:\fakepath\Further Instructions and Details1.pdf

Browse... Upload Save

Click the **Save** button.

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: 0
Discount in %: 0.000

Attachments

View: [Standard View] Delete Row

Attachment File

C:\fakepath\Further Instructions and Details1.pdf

Browse... Upload Save

Submitting Invoices in WBSCM: Service Purchase Orders or Purchase Orders not requiring ASN

June 5, 2024

Click the **Up Arrow** on the vertical scrollbar to submit the invoice. Click **Submit** button to process the invoice

The screenshot shows the 'Supplier Self Service' interface. At the top, there are navigation tabs: Home, Suppliers, Admin, Reports, and Help. Below this is a breadcrumb trail: Supplier Self Service > Bid Management > Maintain Organization. The main content area is titled 'Supplier Self Service' and contains a 'Document Action' section with buttons for Submit, Hold, Print/Download, Cancel, and Back. The 'Submit' button is highlighted with a red box. Below the 'Document Action' section is the 'Basic Data' section, which includes fields for 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), and Vendor Reference (ABC123). A vertical scrollbar is visible on the right side of the page, with a red arrow pointing upwards to the top arrow of the scrollbar.

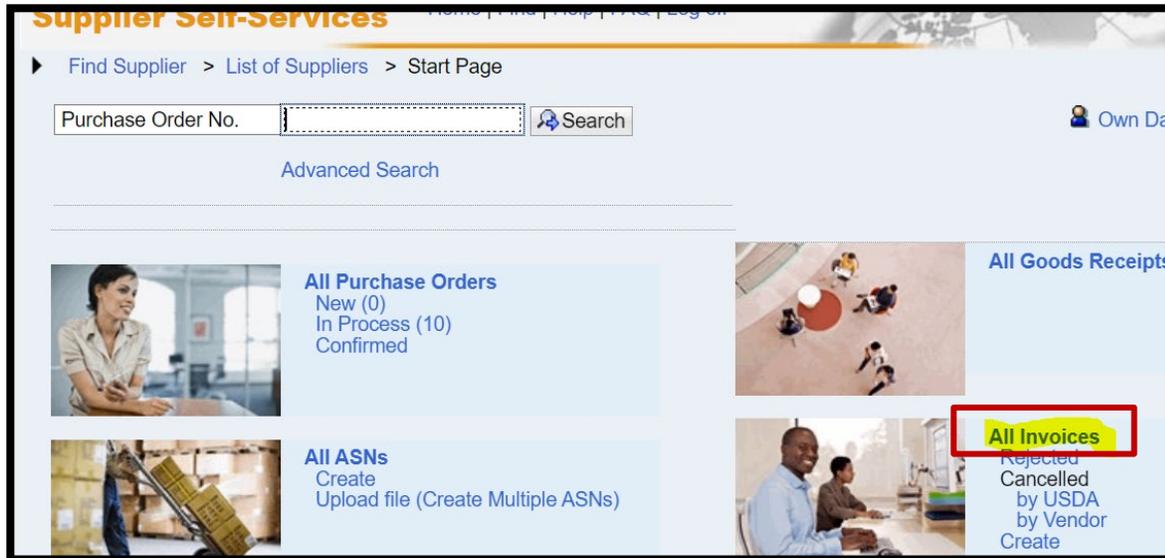
Should receive message **Invoice Successfully Processed**.

The screenshot shows the 'Supplier Self Service' interface after the invoice has been processed. A message box at the top left contains a green checkmark and the text 'Invoice Successfully Processed', which is highlighted with a red box. Below the message box is the 'Document Action' section with buttons for Submit, Hold, Print/Download, Cancel, and Back. The 'Basic Data' section is also visible, showing fields for Invoice (7100990200), Status (In Process), Document Date (06/04/2024), and Reference Po No. (4360000015).

Submitting Invoices in WBSCM: Service Purchase Orders or Purchase Orders not requiring ASN

June 5, 2024

To check the status of the invoice, select **All Invoices**. Notice that invoice number 7100990192 was created for a quantity of 10,000EA in the amount of \$10,000.



Supplier Self-Services

Find Supplier > List of Suppliers > Start Page

Purchase Order No. Search

Advanced Search

All Purchase Orders
New (0)
In Process (10)
Confirmed

All Goods Receipts

All ASNs
Create
Upload file (Create Multiple ASNs)

All Invoices
Rejected
Cancelled by USDA
by Vendor
Create

Welcome to All Invoices

Invoice Data

Select an invoice in the table below to continue

View: [Standard View] | Print Version | Export

Invoice Number	Invoice Name	Document Date	Status	Gross Amount
7100990192	FA-AMCP-23-C-0010	05/08/2024	Accepted by Customer	10000.00

Submitting Invoices in WBSCM: Service Purchase Orders or Purchase Orders not requiring ASN

June 5, 2024

To create additional invoices, **Highlight row** and Click **Create Invoice** button.

- Please note: the **Total Value** field is static, the PO is for \$50,000.00.

Create Invoice: Select Document for Processing

View: [Standard View] | Print Version | Export

Transaction ID	Name	Doc. Date	Status	TOTALVALUE	PO Number
3100026118	12-3J14-17-P-1760-P00002	07/25/2017	In Process	54400.00	4300006673
3100040024	12-3J14-20-C-2984-P00001	08/17/2020	In Process	75000.00	4300009909
3100052137	FA-AMCP-23-C-0010	07/05/2023	Confirmed	50000.00	4360000015

Create Invoice | **Go Back**

On this screen, the previously submitted invoice of 10,000 EA is reflected. The new **Quantity** will show 40,000 EA and **Invoice Amount** defaults to \$40,000. Follow the same process as above to continue creating invoices.

Document Action

Submit | **Hold** | **Print/Download** | **Cancel** | **Back**

Basic Data

Invoice: 7100990197 | Status: In Process | Description: FA-AMCP-23-C-0010
Document Date: 05/14/2024 | Reference Po No.: 4360000015 | **Invoice Amount: 40,000.00**
Vendor Reference: | Invoice Receipt Date: |

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	310070	AMS PILOT-UF&V	40,000.000	EA	40,000.00	10	4360000015	000000001

Update Quantity