**Purpose**

This job aid provides the steps to add a WBSCM transaction as a Portal Favorite. WBSCM transactions that are used often can be saved as a Favorite. When you select a Favorite link, it directly opens the transaction. This job aid also reviews the steps to delete and maintain Favorites.

**Target Audience**

All WBSCM Users

**WBSCM Home Page Navigation**

The WBSCM Home Page is divided into the following three panels:

1. The **Portal Banner** panel contains:
   - The USDA and WBSCM system logos
   - Session Navigation buttons
   - Menu Bar links
   - Module Navigation and Help buttons
   - Personal User Navigation links
   - Breadcrumbs
   - Portal Navigation Options

2. The **Portal Transactions** panel displays the contents of the WBSCM module selected.

3. The **Contents** panel contains the transaction details.
WBSCM Home Page – Portal Banner Navigation

The Portal Banner contains the following sections:

1. Menu Bar
   - **Page Navigation** links – Displays previous (Back) and next (Forward) screens.
   - **History** link – Displays previously used transactions.
   - **Favorites** link – Displays options to access and maintain Portal Favorites.

2. Module Tabs
   - **Modules** – Displays WBSCM modules based on role-based access.
   - **Help** – Directs to the Training and Help Desk pages.

3. Module Sub-Tabs – Displays module sub-tabs based on the primary WBSCM Module selected. WBSCM Home Page defaults to:
   - **News and Alerts** – Displays key news (available through Forum postings and system alerts, when applicable).
   - **Inbox** – Displays applicable actions for the user.

4. Breadcrumbs – Displays the WBSCM Portal menu path. This menu path is based on the Module tabs, Module Sub-tabs, and Portal Transaction selection.

5. Portal Navigation Options
   - **Full Screen** button – Hides the Module tabs and Module Sub-tabs links, displaying only the Breadcrumbs, Menu Bar, and Contents panel.
   - **Options** button – Provides links to open a new session, refresh the transaction, access Context-sensitive Help, access transaction details, and add a transaction to the WBSCM Portal Favorites.
Add a Favorite

The **Favorites** dropdown displays the following options:

- **Add to Favorites** – Adds the current transaction to the Favorites.
- **Organize Favorites** – Displays Favorites and allows organization as appropriate.

By default, Favorites display in the **Favorites** dropdown in alphabetical order.

1. Navigate to the transaction to add as a Favorite
2. Create a Favorite using the **Favorites > Add to Favorites** portal path from the transaction.
3. The bookmarked transaction appears in the **Favorites** dropdown.

⚠️ Do not create Favorites for the following transactions as they may not work as expected; it is recommended to access these transactions directly from the Portal standard navigation:

- Maintain Catalogs - FNS, FSA
- Maintain Sales Documents - FNS, FSA, USAID
- Maintain Sales Order - FAS
- Create/Display Recall - FNS
- Display FNS Recall - SDA
- Display FAS Contract - FAS
Organize Favorites

Sort Favorites
Use the Organize Favorites feature to sort the Favorites.

Sort Favorites using the WBSCM Portal path: Favorites > Organize link. The Organize Favorites window displays.

1. Click (the Favorites folder item) to expand the Favorites folder.
2. Click (the Portal Favorites folder item) to expand the Portal Favorites subfolder.
3. All saved Favorites display in alphabetical order by default.
4. Highlight a Favorite and move it to the required location using one of the following icons:
   - Click (the Up arrow icon) to move the highlighted Favorite to the previous line in the list of Favorites.
   - Click (the Down arrow icon) to move the highlighted Favorite to the next line in the list of Favorites.
   - Click (the Top arrow icon) to move the highlighted Favorite to the first line in the list of Favorites.
   - Click (the Bottom arrow icon) to move the highlighted Favorite to the last line in the list of Favorites.
Add a Favorites Folder

Use the Organize Favorites feature to add a new Favorites folder, sort your Favorites, edit the standard transaction name, or delete a Favorite.

Start the transaction using the WBSCM Portal path: Favorites > Organize Favorites > Portal Favorites link. The Organize Favorites window displays.

1. Click (the Create Folder icon).
2. The Create Folder window displays. Type a new folder name in the Name field.
3. Click (the Add button).
4. The new folder displays at the end of the Favorites list and can be moved using arrow buttons.
5. Add existing Favorite link to new Favorites folder by highlighting favorite
   a) Highlighting Favorite link.
   b) Click (the Cut button).
   c) Highlight the new Favorites folder.
   d) Click (the Paste button) to add the Favorites link to the Favorites folder.

   Paste button is active after selecting the Cut button.
Delete a Favorite

Use the Organize Favorites feature to delete any unwanted Favorites.

Start the transaction using the WBSCM Portal path: Favorites > Organize Favorites > Portal Favorites link. The Organize Favorites window displays.

1. Highlight the Favorite to remove.
2. Click (the Delete icon) to remove any unwanted transactions from your Favorites.
3. The Remove Favorite message window displays to ensure you want to remove the Favorite. Click (the Yes button).
4. The Favorites list displays without the deleted Favorite.
Organize Favorites

Use the Organize Favorites feature to sort the Favorites.

Start the transaction using the WBSCM Portal path Favorites > Organize Favorites > Portal Favorites link. The Organize Favorites window displays.

1. Highlight the Favorite to rename.
2. Use the (the Edit icon) to change the name of a saved transaction.
3. Delete the name in the New Name field and type the desired name.
4. Click (the Rename button).
5. The renamed Favorite displays in the Favorites list.

Rename a Favorite

Use the Organize Favorites feature to sort the Favorites.
Access a Favorite

Use the Favorites link to access a Favorite.

Start the transaction using the WBSCM Portal path: **Favorites > [Transaction name]**.

1. Click the required Favorite for transaction to execute.
2. The transaction displays in the current browser window.