Processing via Extended Search

Order Managers will use this procedure to request Processing Diversion via WBSCM Extended Search.

1

	Processing Diversion via Extended Search
1 ⭐	a) Find *your RA's* bid-awarded processors in the Approved Processors list on SquareMeals b) Only the product number(s) listed in the "**Food Items"** column are accepted by your bid-awarded processor c) Pick a processor for your request
2	In WBSCM, select "**Operations**" tab
3	Select **"Order Management"**
4	Click "**Domestic Order Entry"**
5	Click the "**Extended Search"** link
6	In "**Product Number**" field, enter a product number listed for the processor in Step 1c.
7	Click **"Search"**
8	Confirm **Product Name** is desired product
9	Click shopping cart icon for the line item with the appropriate **Product Sub-Area** (Entitlement or Bonus)
10	Enter desired quantity in the **'Quantity'** column for selected delivery dates.
11	Click **"Move to Cart"** once all material quantities have been entered.
12	Repeat Steps 5-11 to add more materials for selected processor
13	At the top of screen, click **"View Cart"**

Proceed to Table 2

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2

Assign Deliver-To and Change to DRAFT Status

1	Enter reference and description in **"Your Reference"** and **"Your Description"** if desired.
2	Click checkbox in "**Deliver-To Selection"** row header
3	Confirm all line items have been checked
4	Under "**Default Delivery Settings…"** select the processor in Step 1c from "**Deliver To"** dropdown list
5	Click **"Update"** to save.
6	Click **"Order"** to save your request until you have reviewed your order and are ready to finalize
7	Click **"OK"** when pop-up box appears to complete transaction.
8	Click **"Print"** to print or save confirmation of receipt as PDF for Changes to be notes

For RAs with multiple Processor Locations:
Repeat steps in Tables 1 and 2 to create and submit a *separate* Processing request for *each Processor*.

Proceed to Chart 3 for Submission

Food and Nutrition Division
National School Lunch Program

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www.SquareMeals.org

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3

	Change Status to *READY for Approval* and Request Submission
Step 1	In WBSCM, select "**Operations**" tab
Step 2	In Navigation Panel, select **"Order Management"**
Step 3	Click "**Domestic Order Entry***"*
Step 4	At the top of the **"Product Catalog"** panel, click "**MY Transactions**"
Step 5	On the **Transaction Screen** change the following information: 1.Change *status* to "**ANY"** 2.Change *creation date* to **"Last 12 months"** 3.Then click **"GO"**
Step 6	A list of Transactions will appear you will select the requisition you were working on; based off your **Order Date** and **Transaction Number** a) Click on the "**Transaction Number**" you would like to open
Step 7	Your transaction will appear, and you can make any edits to the following areas at this time: **1.Status** = This must be completed **(Step 8)** **2.Deliver to** = Only if changes are necessary **3.Quantity** = Only if changes are necessary
Step 8	Under the Status column change Status to "**Ready for Approval**" status for *EACH* line item.
Step 9	Click **"Update"** to save changes
Step 10	Click **"SAVE"** when you are ready to submit your requisition for approval
Step 11	Click **"OK"** when pop-up box appears to complete transaction
Step 12	Click **"Print"** to print or save confirmation of receipt as PDF for your records

Request Complete!

Submitting Requests to Multiple Processors:
Create and submit a *separate* request for *each processor*