Food Distribution - SFA

*Task Guide*

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Food Distribution - SFA

Task Guide

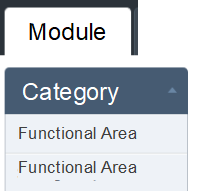
# Introduction

PrimeroEdge Software structure contains **Realms,** **Modules**, **Categories** and **Functional Areas**. The hierarchy allows for easy navigation and division between tasks. The structure provides for comprehensive operations while remaining easy to navigate.

# Document Conventions

This document uses the following typographical conventions:

* **Bold Print:** this print represents **Modules**, **Categories**, **Functional Areas** and key names such as **Tab** or **Enter** keys.
* *Italics:* this print represents messages such as *User has been added successfully*. This print represents variable information such as information you type on command lines.
* **Buttons**: Bold print and/or a graphic image of a button represents button names such as **Apply**.



**Selection Sequences**: The names of each PrimeroEdge **Module**, **Category** and **Functional Area** act as a tool for navigation when placed between arrows. Arrows represent selection sequences in order from left to right as in **Module** **>** **Category** **> Functional Area**. An example of a sequence is **Inventory > Orders > Create Orders**.

**▲Modules, Categories** and **Functional Areas** will be available to you based on your Role Permissions.

Icons in this document alert the reader to special information.

* The green check box **🗹** represents helpful tip.
* The red triangle **▲** represents a warning with critical task information.
* The blue circle **⚫** represents a status note.

# District—Food Distribution Home Page

Click the **Food Distribution Module** tab. The **Food Distribution** **Home** page provides a snapshot of your organization’s **Food Distribution** performance in the **District Realm**.

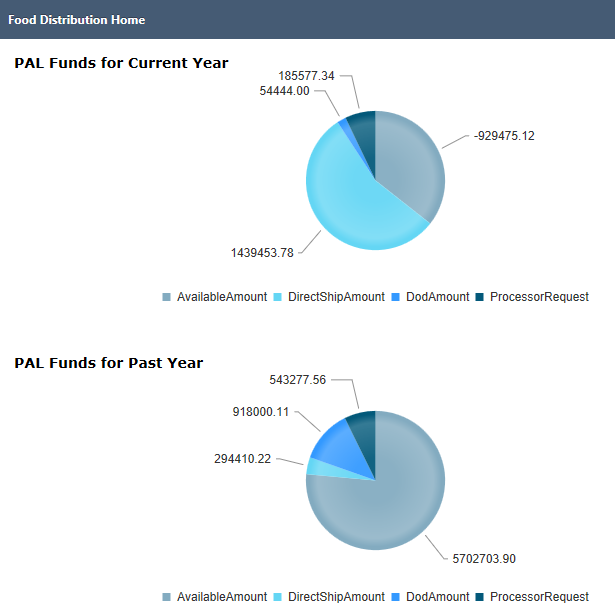


Figure 1 Food Distribution Home Page--District Realm

# District—Configuration

This **Category** contains tasks for managing configuration in the **District Realm**. Improper configuration settings may result in inaccessible functions.

## USDA Foods List

This section contains tasks for managing the **USDA Foods List**.

Go to **District >** **Food Distribution > Configuration > USDA Foods List**

**▲** You cannot edit the **USDA Foods List** in the **District Realm.**

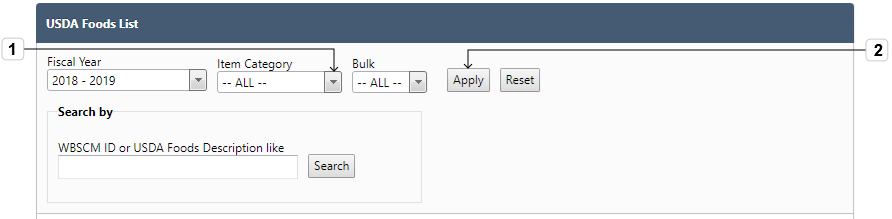


Figure 2 USDA Foods List Filters

1. Select the **Item Category** and **Bulk**
2. Click **Apply**

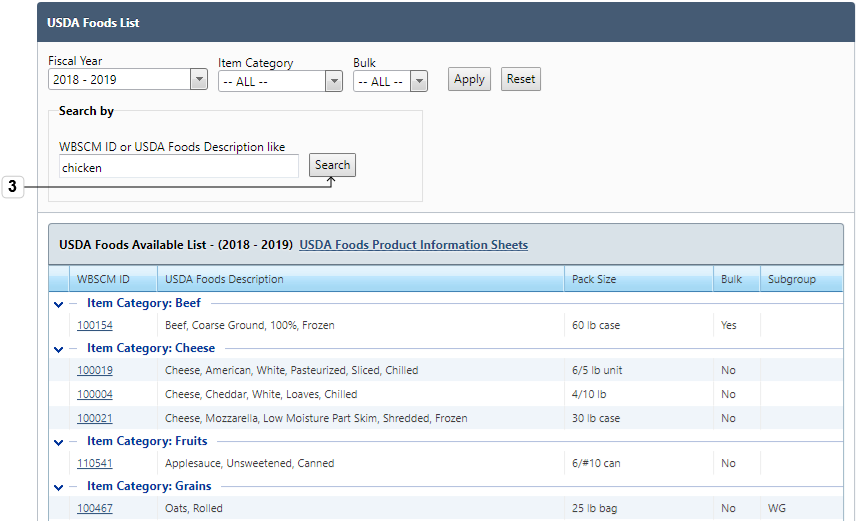


Figure 3 USDA Foods List

1. Search by entering part of the Item Number or Description in the **WBSCM ID or USDA Foods Description like** text field and click **Search**

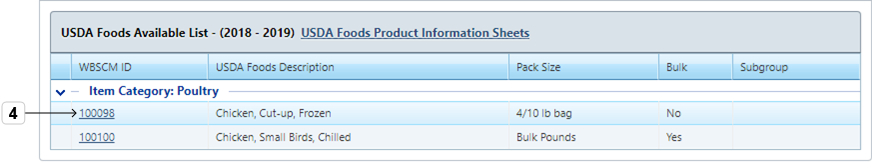


Figure 4 USDA Foods Available List - (2018-2019)

1. Click the hyperlink under **WBSCM ID** column header

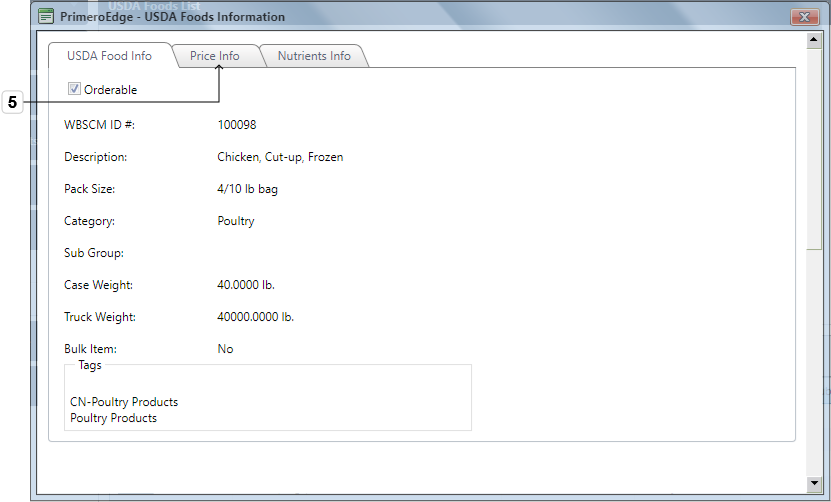


Figure 5 USDA Foods Info

1. Click the **Price Info** tab to view the item's pricing information

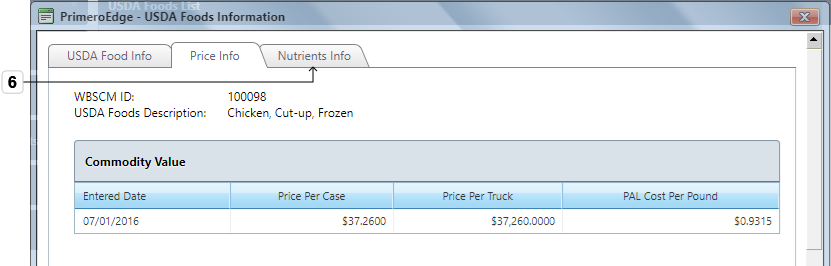


Figure 6 USDA Foods Price Info

1. Click the **Nutrients** tab to view the item’s nutritional information

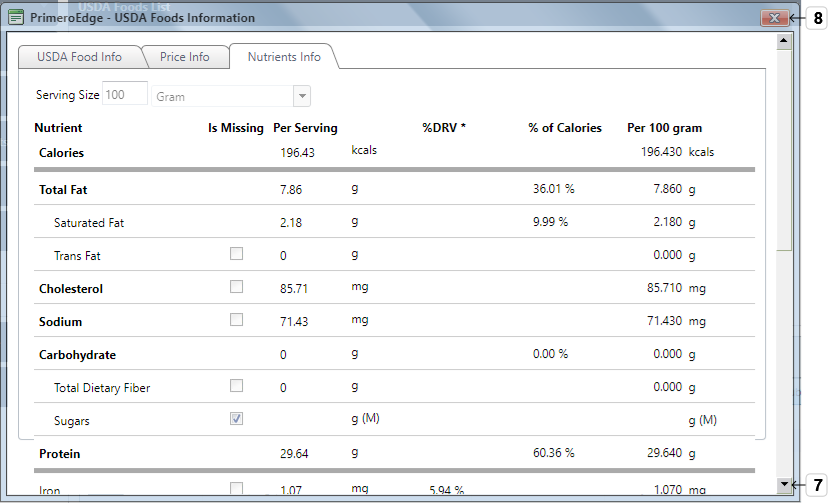


Figure 7 USDA Nutrients Info Tab

1. Scroll or resize view to see all the nutritional information
2. Click **Close** to exit the view

## Processors

**SFA/Sponsors** or contracting entity (CE) often use the food processing industry to convert bulk or hard-to-use USDA foods into more convenient and usable products.

Federal law requires that CEs receive the full value of their USDA Foods. When processing, this value must pass through to the CE by the processor. The **Value Pass-through Method** is the term for crediting the CE for the value of the USDA Food.

Go to **District > Food Distribution > Configuration > Processors**

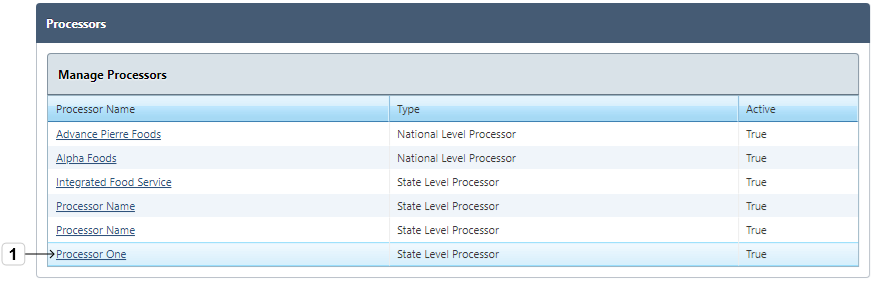


Figure 8 Manage Processors

1. Click the hyperlink under the **Processor Name** column header

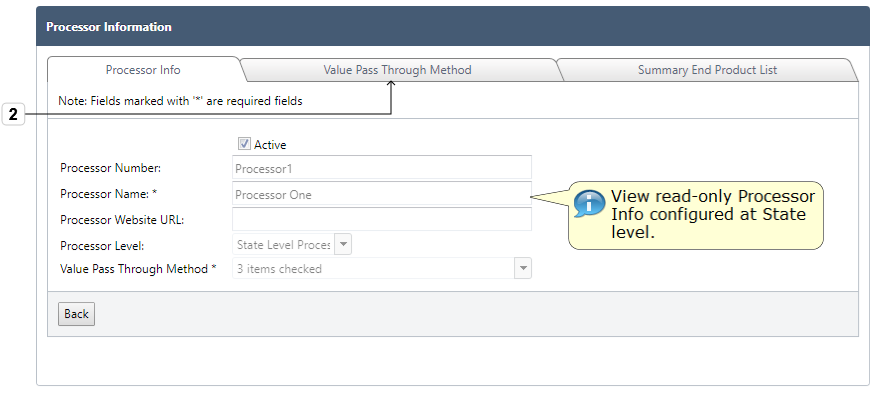


Figure 9 Processor Info

1. Click the **Value Pass Through Method** tab

▲ This is a read-only view. **Processor Configuration** occurs in the **Central Realm**.

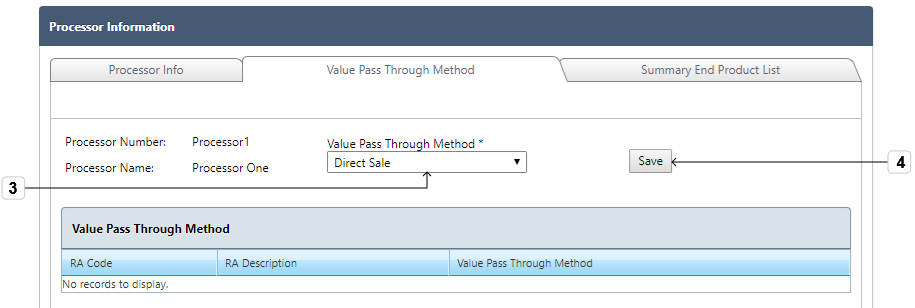


Figure 10 Value Pass-through Method

1. Use dropdown menu to select **Value Pass Through Method** for the Recipient Agency

**⚫** The options in **Step 3** are set in the **Central Realm**.

1. Click **Save**

**🗹** View the **Green** success note and the change listed under the **Value Pass-through Method** section header.

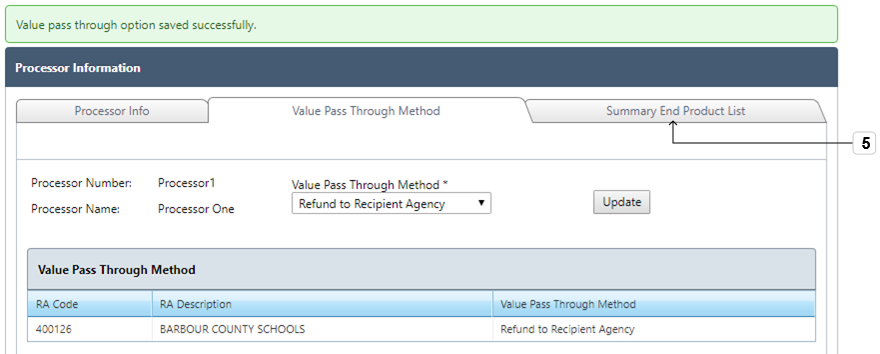


Figure 11 Value-pass Through Method Selection

1. Click **Summary End Product List** tab to view **SEPDS** (**Summary End Product Data Schedule**) information

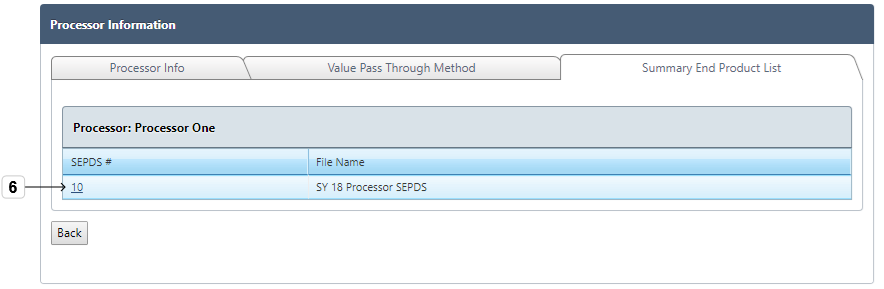


Figure 12 Summary End Product List

1. Click the hyperlink under the **SEPDS#** column header to open and view individual **SEPDS** file

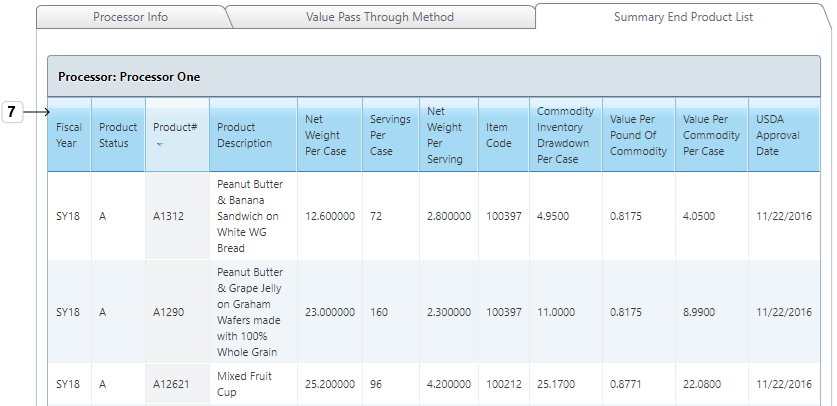


Figure 13 Processor: Processor One List

1. View **SEPDS** items and click column headers to change the list order

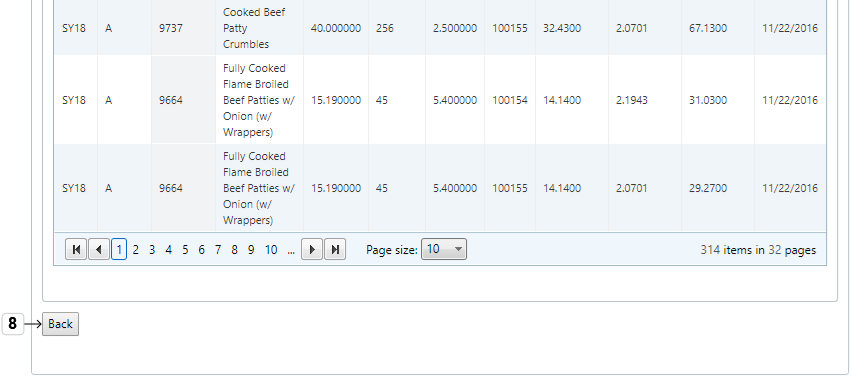


Figure 14 Back Button

1. Click **Back** to return to **SEPDS** list or other tabs

# District—Catalogs

This **Category** contains tasks for managing **Direct Ship Catalog Response** and **Processed Goods Catalog Response** in the **District Realm**.

## Catalogs

This section contains tasks for responding to open **Catalogs**.

Go to **District > Food Distribution > Catalogs > Catalogs**

### Direct Ship Catalog Response

This page allows districts to respond to an open catalog with requested quantities of items.

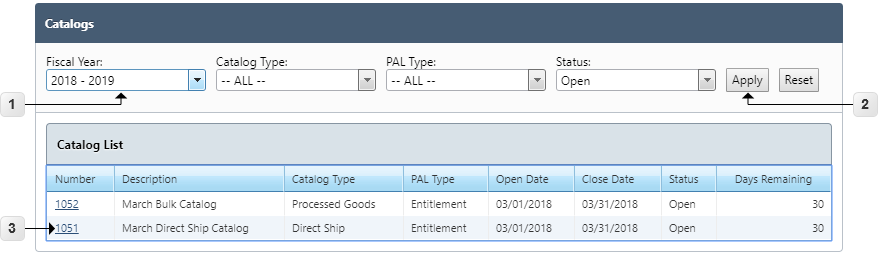


Figure 15 Catalogs

1. Select the **Fiscal Year, Catalog Type, PAL Type** and **Status**
2. Click **Apply** or **Reset** apply or reset the selections
3. Click the hyperlink under the **Number** column header to open the catalog



Figure 16 Direct Ship Catalog

1. Click **Expand** arrow for the header or a single item to expand **Order Calendar** sub-grid

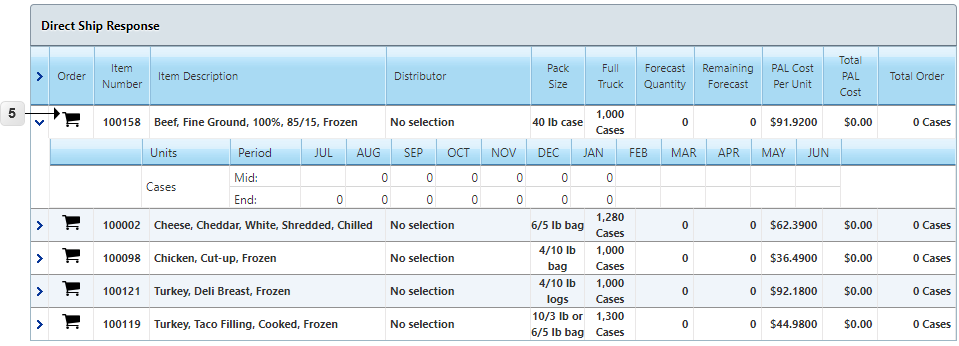


Figure 17 Direct Ship Response

1. Click **Cart** to enter order quantities for the selected item

**⚫** The **Delivery Periods** with a numerical value are the possible delivery dates. The dates with an empty cell indicate that the item is not orderable for that date.

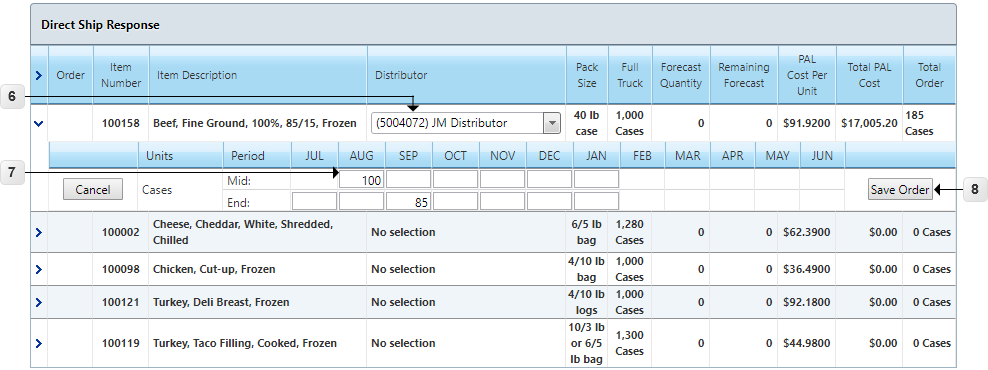


Figure 18 Direct Ship Order

1. Select the **Distributor**
2. Enter **Order Quantities**
3. Click **Save Order** (**Cancel** to cancel order entry)

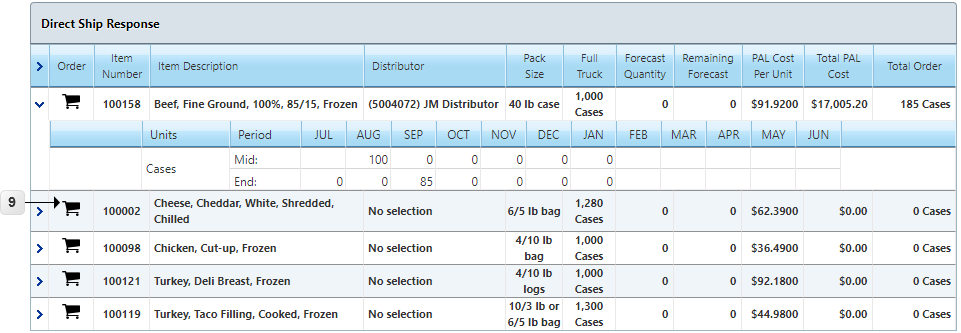


Figure 19 Direct Ship Order

1. Click **Cart** to enter orders for other items and repeat until catalog response is complete

### Processed Goods Catalog Response

This page allows districts to respond to an open catalog with requested quantities of bulk items and associated processor end products.

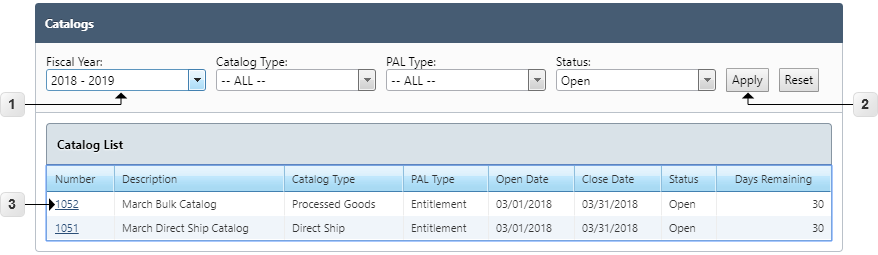


Figure 20 Catalogs

1. Select the **Fiscal Year, Catalog Type, PAL Type** and **Status**
2. Click **Apply** or **Reset** to apply or reset the selections
3. Click the hyperlink under the **Number** column header to open the catalog

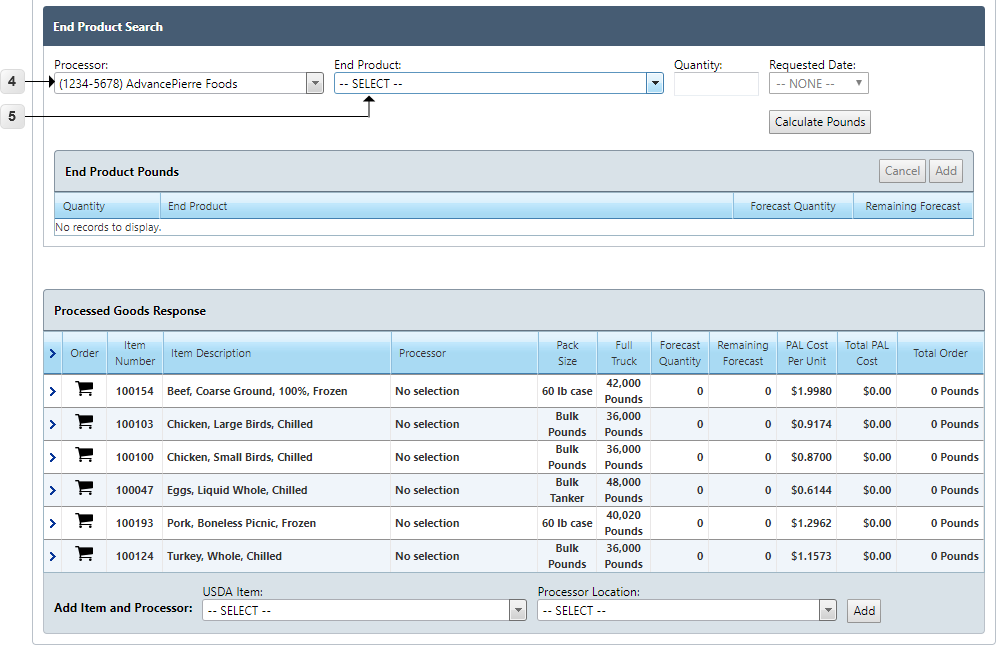


Figure 21 End Product Search

1. Select the **Processor** to order pounds through **End Products**
2. Select an **End Product**

**⚫** Ordering through End Products is an optional feature. Ordering pounds directly is shown in Step 20.

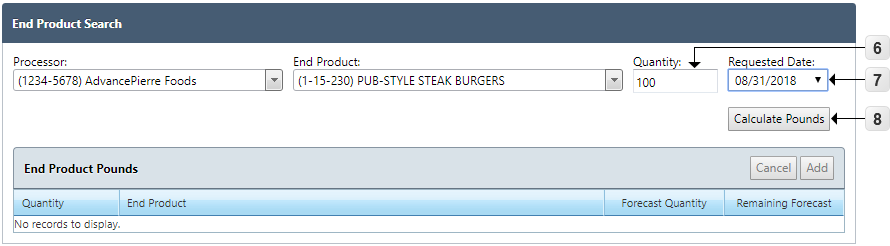


Figure 22 Calculate Pounds

1. Enter **End Product Quantity**
2. Select **Requested Date**
3. Click **Calculate Pounds**

**⚫** The system calculates **Commodity Pounds** based on the **End Product quantity** request.



Figure 23 End Product Pounds

1. Select the **Processor Location** for the USDA Item
2. Select a **Delivery Date**
3. Click **Add** (**Cancel** to cancel and add a different End Product)

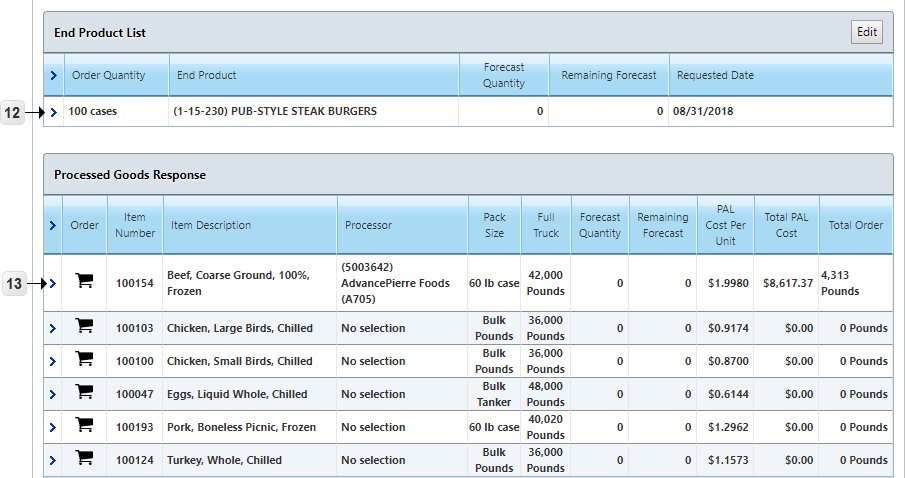


Figure 24 Processor End Products

**⚫** The End Product record is created in the **End Product List** and the corresponding Pounds are inserted in the **Processed Goods Response** grid.

1. Click **Expand** **>** arrow to display **End Product** details
2. Click **Expand** **>** arrow to display **Commodity Pounds** details

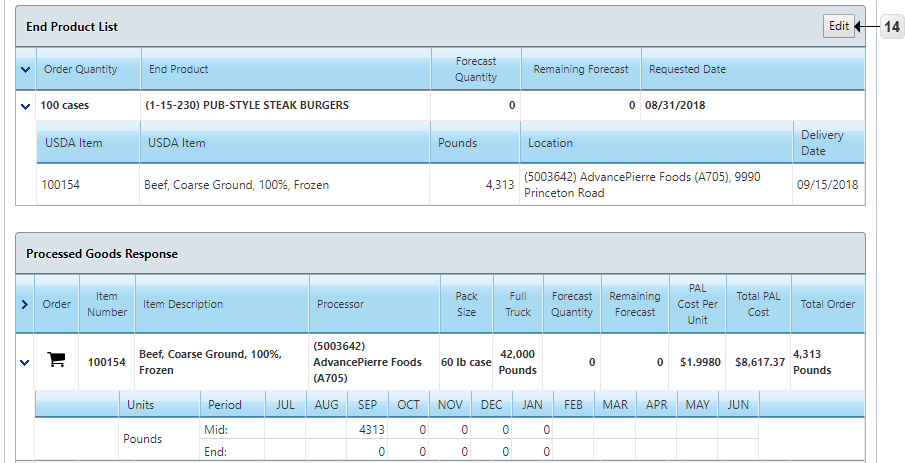


Figure 25 End Product List

1. Click **Edit** to modify **End Product Quantity**

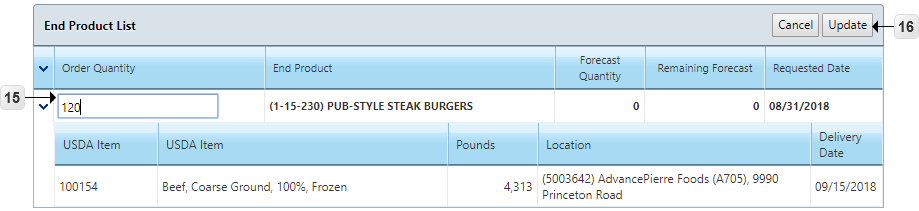


Figure 26 Update End Product Quantity

1. Modify **End Product** **Order Quantity**
2. Click **Update** (**Cancel** to revert any changes)

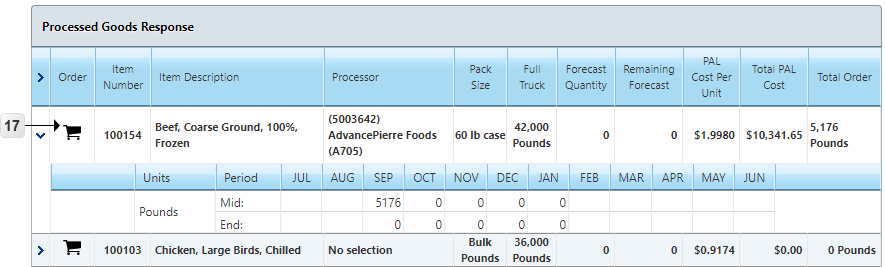


Figure 27 Processed Goods Response

1. Click **Cart** to enter order quantities for the selected item

**⚫** The Delivery Periods with a numerical value are the possible delivery dates. The dates with an empty cell indicate that the item is not orderable for that date.

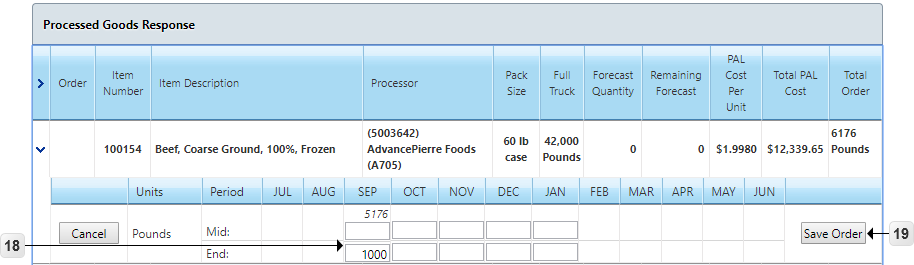


Figure 28 Processed Goods Order

1. Enter **Order Quantities**

**⚫** The italicized quantities above the order fields are the calculated pounds from End Products and are not editable through this grid. The End Product Pounds are modified through the End Product List. Processor is also not editable as it has been selected through the End Product tool.

1. Click **Save Order** (**Cancel** button to cancel order entry)

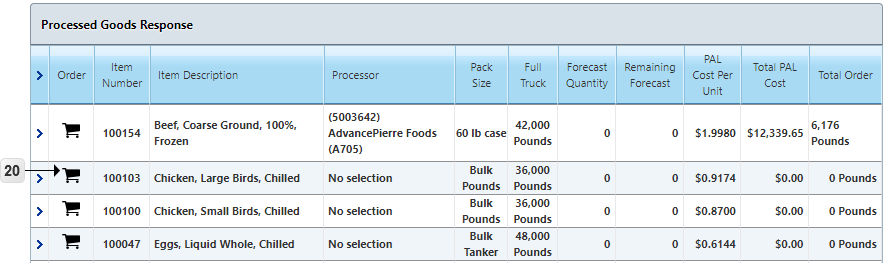


Figure 29 Processed Goods Response

1. Click **Cart** to enter manual (non End Product derived) order quantities for another item

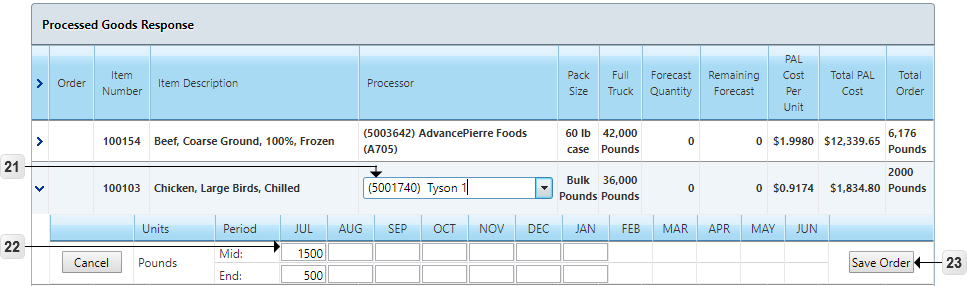


Figure 30 Processed Goods Manual Entry

1. Select the **Processor Location**
2. Enter **Order Quantities**
3. Click **Save Order**

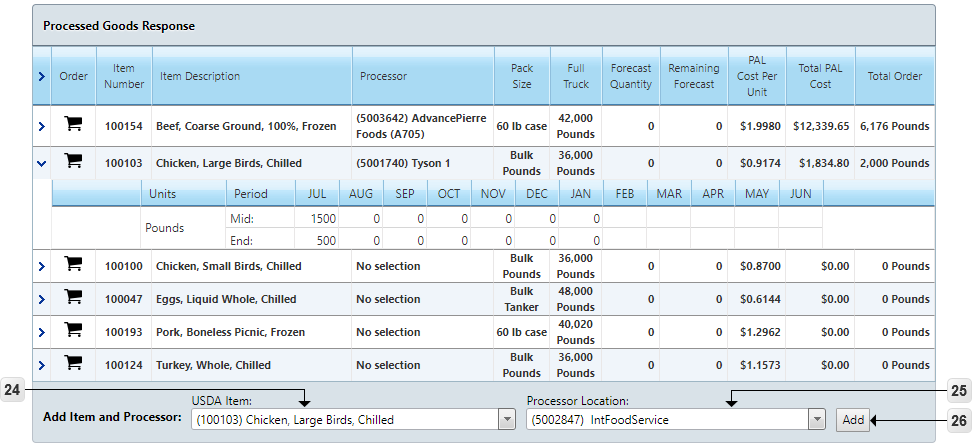


Figure 31 Add Item and Processor

1. Select **USDA Item** in the **Add Item Processor** tool to add an Item already on the catalog but with a different Processor.
2. Select **Processor Location**
3. Click **Add**

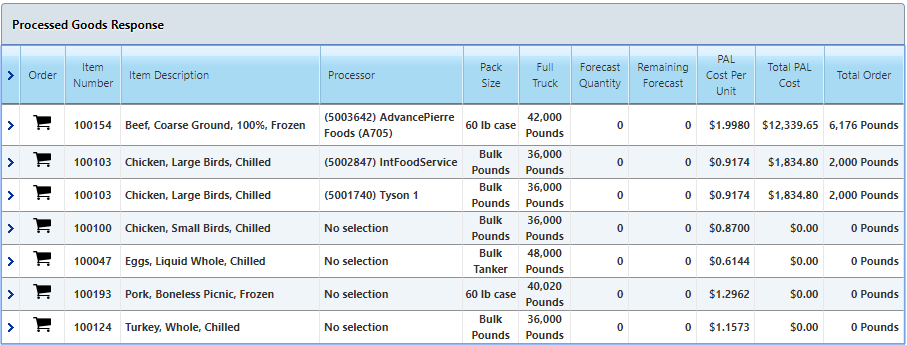


Figure 32 Processed Goods Catalog Response

Repeat the process, ordering through either End Product tool or Manual Entry, until all desired items have saved order quantities.

# District—Orders/Receipts

This **Category** contains tasks for managing **Orders/Receipts** in the **District Realm**. These tasks include **Receipts** and **Adding a Complaint.**

## Receipts

This section contains tasks for managing **Receipts**. The **Receipts** page lists all receipts for a fiscal year and allows for the editing of certain receipt information.

Go to **District >** **Food Distribution > Orders/Receipts > Receipts**

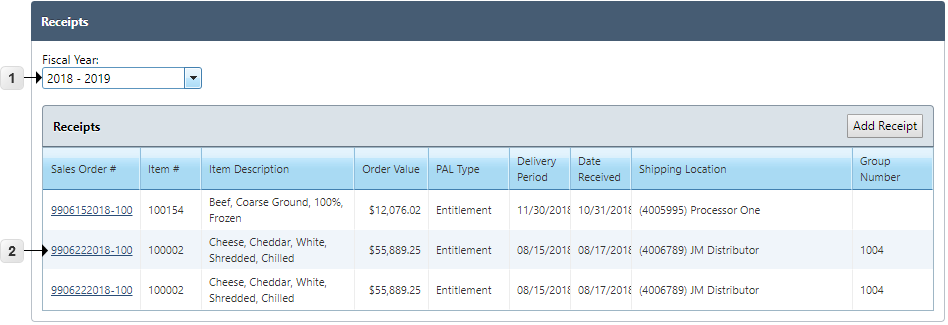


Figure 33 Receipts

1. Select the **Fiscal Year**
2. Click the **Sales Order #** link to open and view a Receipt

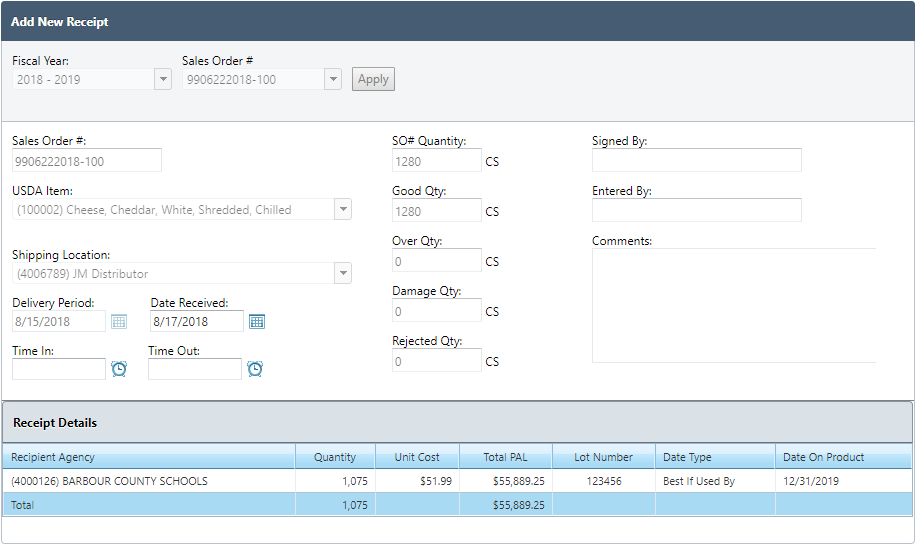


Figure 34 View Receipt

1. View the read-only Receipt information created at the State level

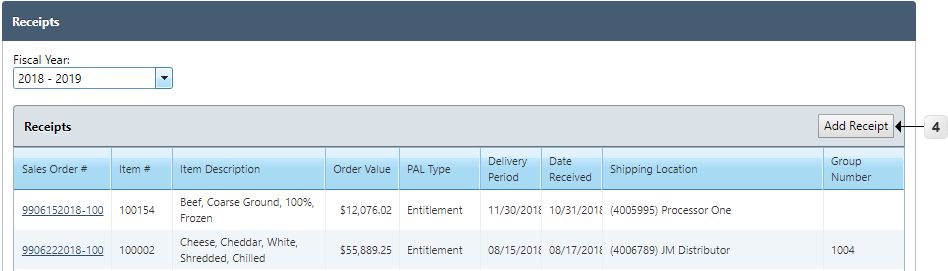


Figure 35 Add Receipt Button

1. Click **Add Receipt** to add a new receipt

**⚫** Note: District-level Add Receipt functionality is only available to District Warehouse users with the appropriate permissions.

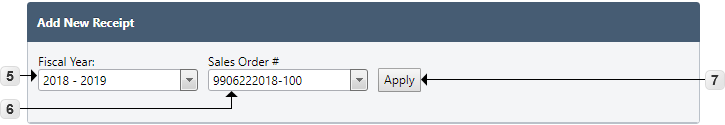


Figure 36 Add Receipt

1. Select the **Fiscal Year** for the new Receipt
2. Select the **Sales Order Number**
3. Click **Apply**

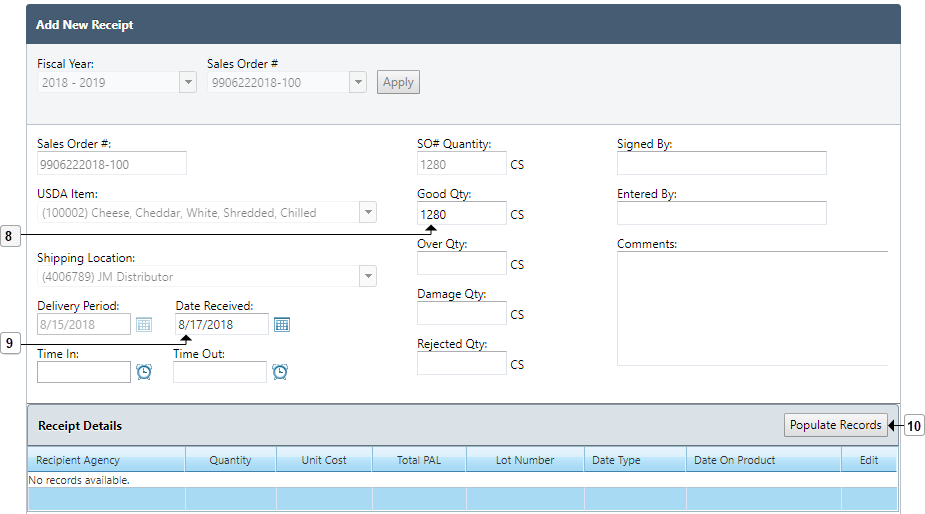


Figure 37 Add Receipt

1. Enter Receipt **Good Quantity**
2. Enter **Date Received**

**⚫** All other fields are optional

1. Click **Populate Records** to create the individual receipt records

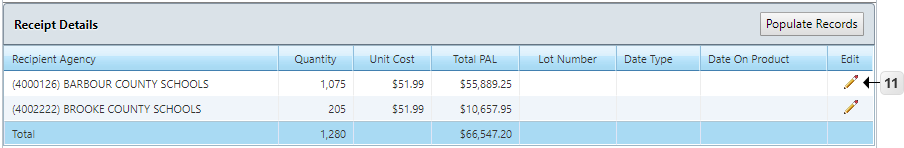


Figure 38 Receipt Details

1. Click the **Edit** **Pencil** to add lot information

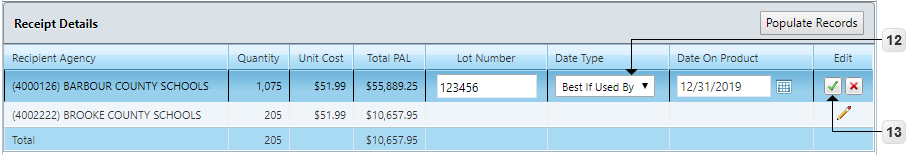


Figure 39 Edit Receipt Details

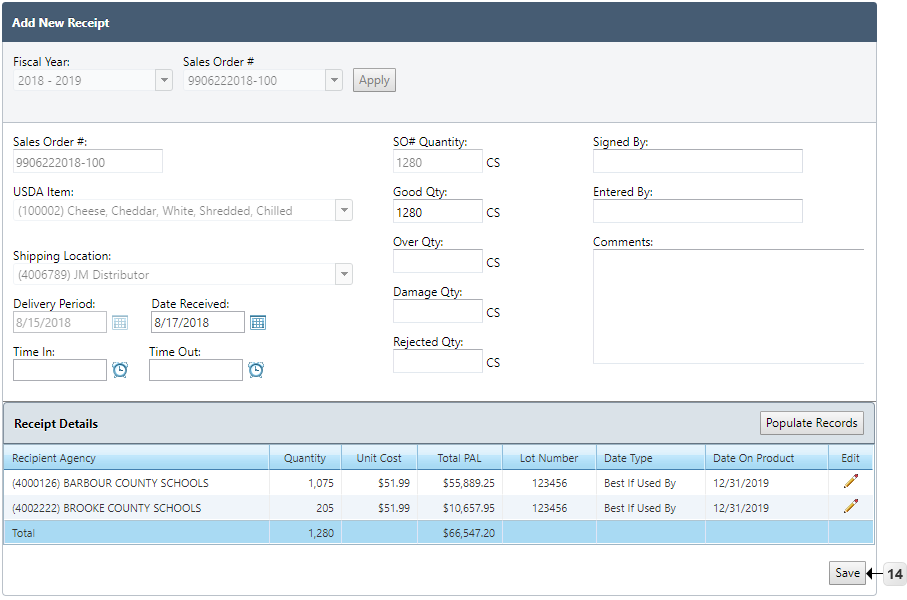
1. Enter the **Lot Number, Date Type,** or **Date on Product**
2. Click the **checkmark** icon to confirm changes

Figure 40 Save Receipt

1. Click **Save** to confirm the Receipt

## Bill of Lading List

This **Functional A**rea contains tasks for managing a **Bill of Lading List**.

**▲** You must first import a spreadsheet (.xml) of data from WBSCM for this **Function** to work.

Go to **District >** **Food Distribution > Orders/Receipts > Bill of Lading List**

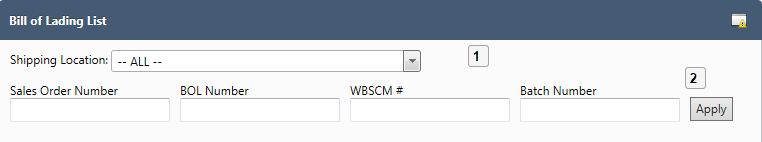


Figure 41 Bill of Lading List Selections

1. Select the **Shipping Location** and enter text for **Sales Order Number, BOL Number WBSCM#** and **Batch Number**
2. Click **Apply**

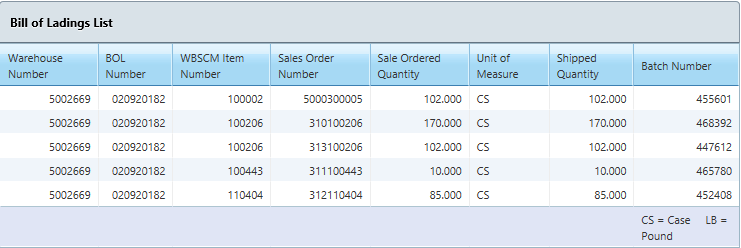


Figure 42 Bill of Ladings List

**⚫** The **Bill of Ladings List** displays.

# District—Transfers

Manage transfers in the **District Realm** using the PrimeroEdge tools for the **Transfer of USDA Foods, Transfers List** and **Advertisements List**. Transfers occur from one **Recipient Agency (RA)** to another **RA**.

## Transfer USDA Foods

This section contains steps for creating a transfer from one RA to another RA. Additionally, this section contains the steps for acknowledging the RA to RA Transfer.

Go to **District** > **Food Distribution > Transfers > Transfer USDA Foods**

### Create RA to RA Transfer

This section contains the steps in creating the **RA-to-RA** **Transfer**.

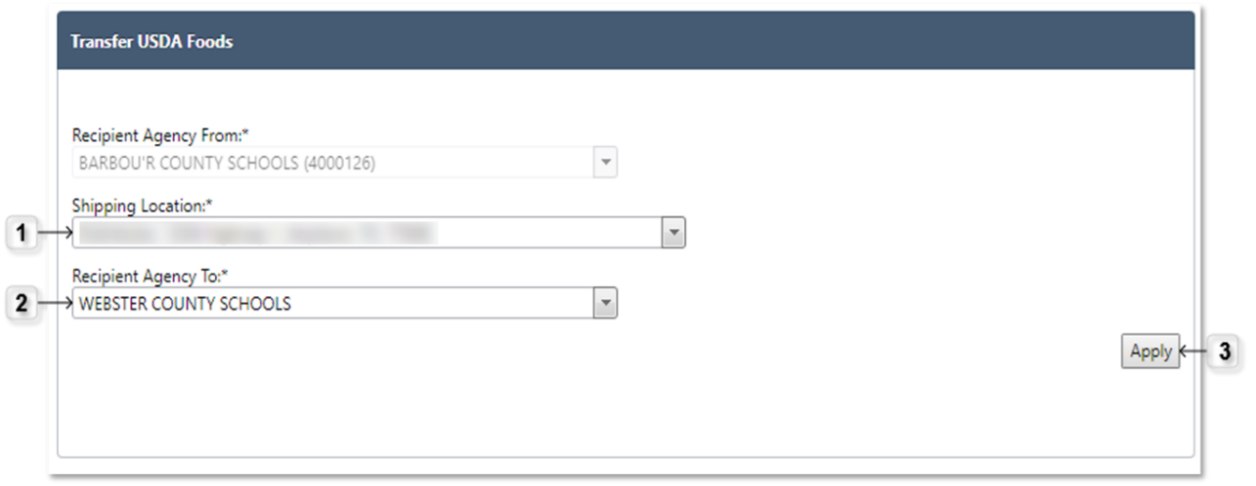


Figure 43 Transfer USDA Foods

1. Select the **Shipping Location**
2. Select the **Recipient Agency** to receive the transfer
3. Click **Apply**

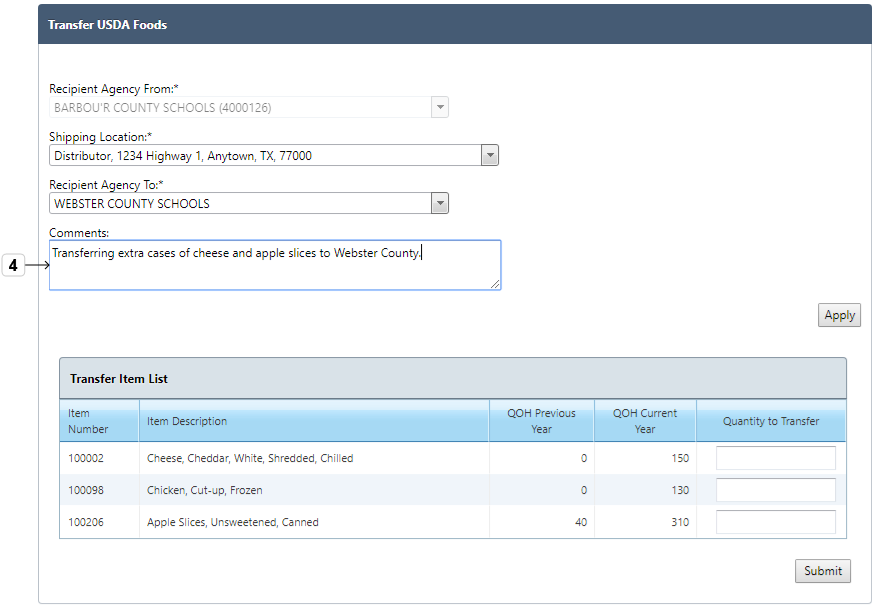


Figure 44 Field for Optional Comments

1. Use the text-entry field to enter optional **Comments**

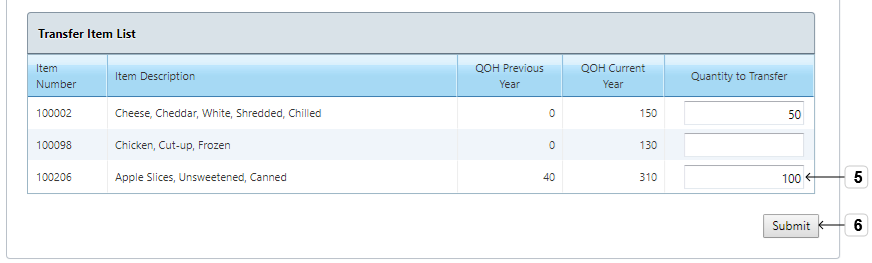


Figure 45 Transfer Item List

1. Enter **Quantity to Transfer** for at least one item
2. Click **Submit**

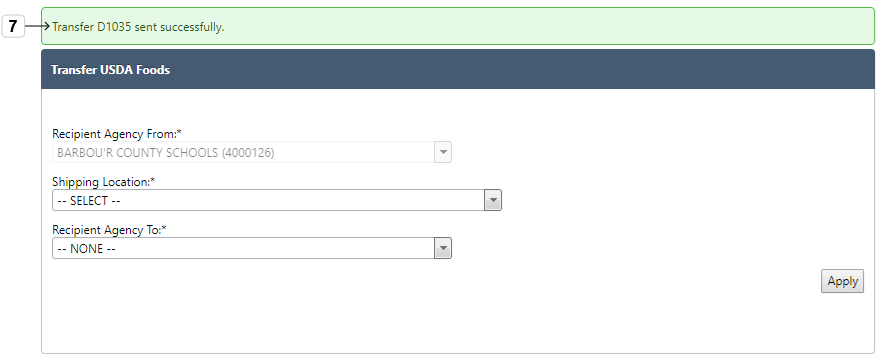


Figure 46 Transfer Success Note

1. Review **Green Transfer** success note indicating the **Transfer** submittal, **Transfer** assignment number and appearance on the **Transfers List**

## Transfers List

This section contains tasks for taking actions through the **Transfers List**.

Go to **District >** **Food Distribution > Transfers > Transfers List**

### Acknowledge RA to RA Transfer

This section contains tasks for the **District Realm** to acknowledge the **Central Realm**.

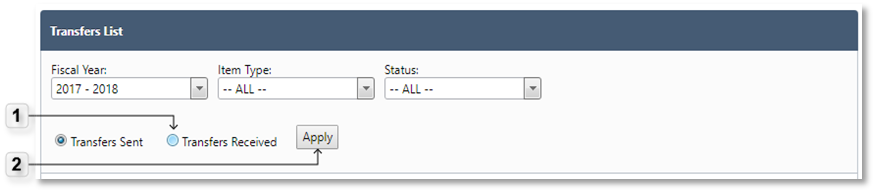


Figure 47 Transfers Received

1. Select **Transfers Received**
2. Click **Apply**

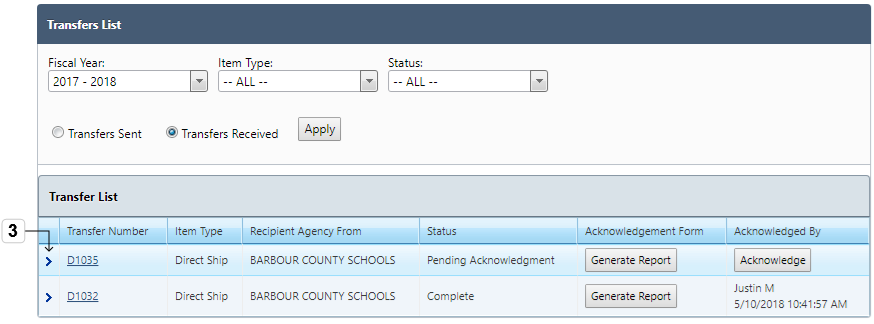


Figure 48 Transfer List

1. Click **Expand Arrow >** to view **Transfer** item details and **Collapse Arrow (v)** to close the detail view

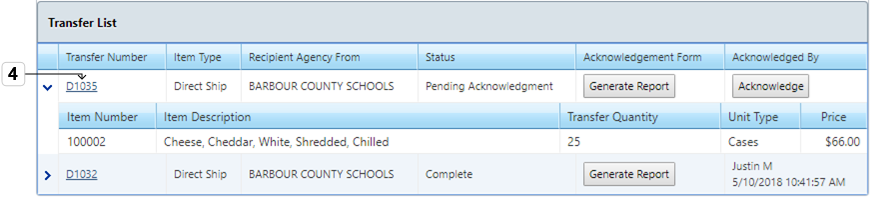


Figure 49 Transfer Number Hyperlink

1. Click the **Transfer Number** hyperlink to open the **RA to RA Transfer**

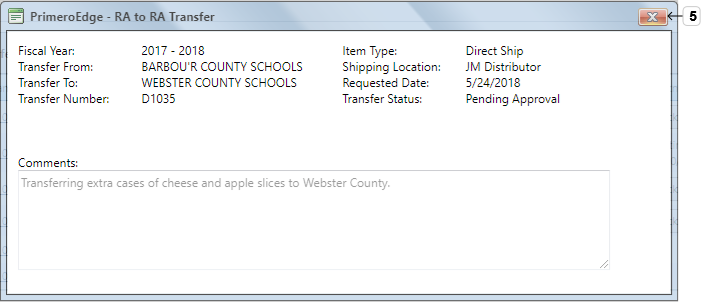


Figure 50 RA-to-RA Transfer

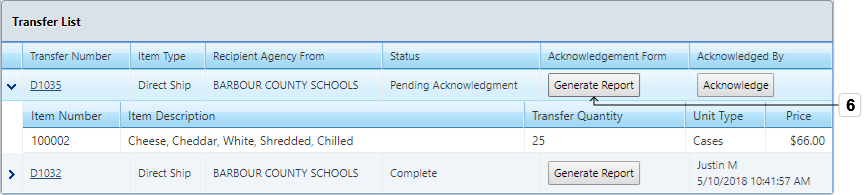
1. Click **X** to close the box

Figure 51 Generate Report Button

1. Click **Generate Report** under the **Acknowledgement Form** column header on the **Transfer List**

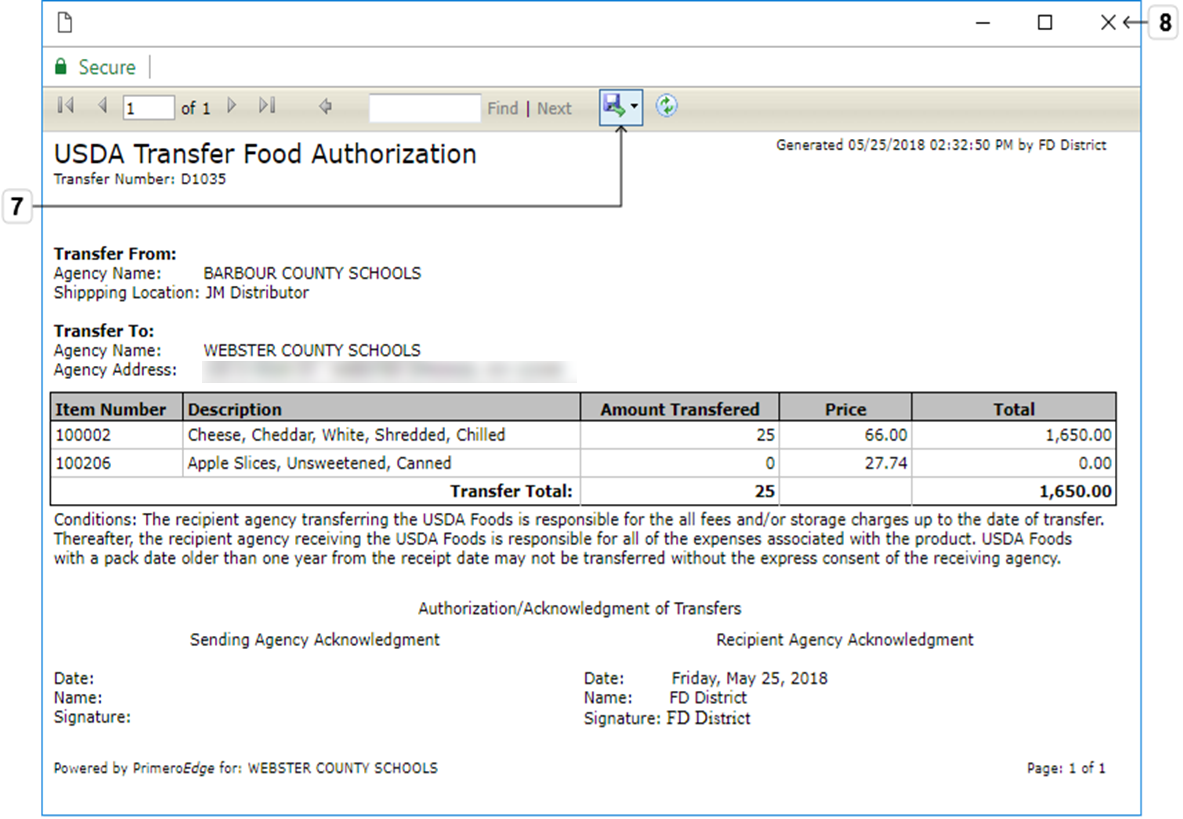


Figure 52 USDA Transfer Food Authorization Report

1. Click the **Export** iconto export the form in various formats
2. Click the **X** to exit the report viewer

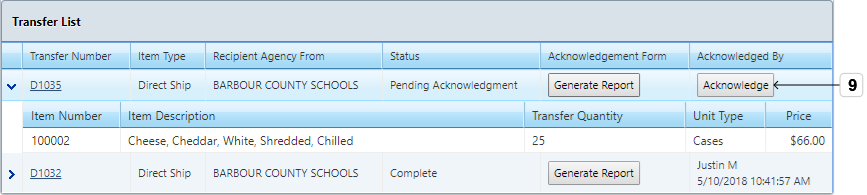
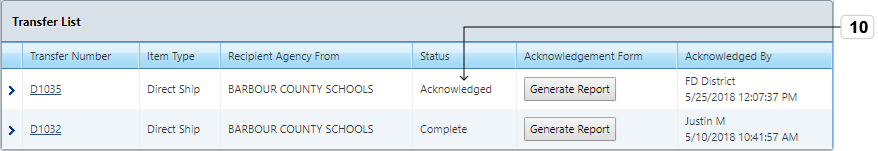


Figure 53 Acknowledge Button

1. Click **Acknowledge** under the **Acknowledged By** column header

**Figure 54 Transfer List**

View the **Transfer Status Acknowledgement** under the **Status** column header

🗹 The **Transfer** is now available for completion in the **Central Realm**.

## Advertisements List

In the first part of the **Advertisement** process, the **Central Realm** posts the **Advertisement**. The **District Realm** then responds. The **Central Realm** then completes and generates the acknowledgement. In the last part of the process, the **District Realm** acknowledges the **Central Realm**.

Go to **District >** **Food Distribution > Transfers > Advertisements List**

### Respond to Advertisement

This section contains tasks for the **District** to respond to an open **Advertisement**. This allows the district to respond with requested quantities of USDA foods on an advertisement posted by the state.

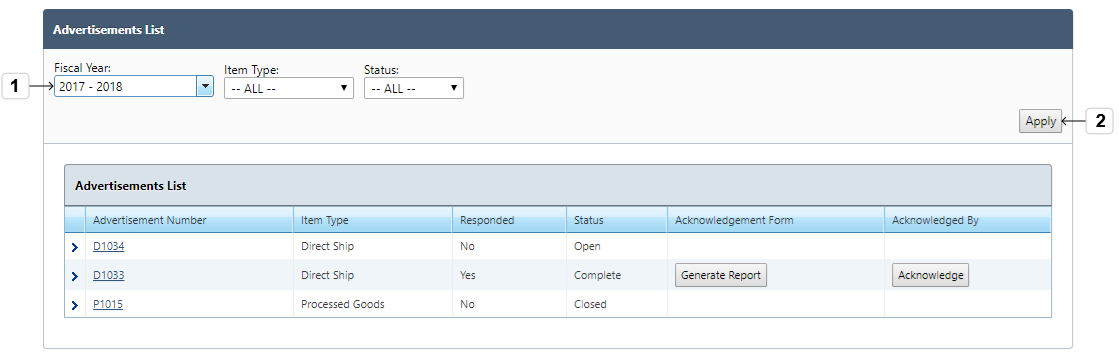


Figure 55 Advertisement List

1. Select the **Fiscal Year, Item Type** and **Status**
2. Click **Apply**

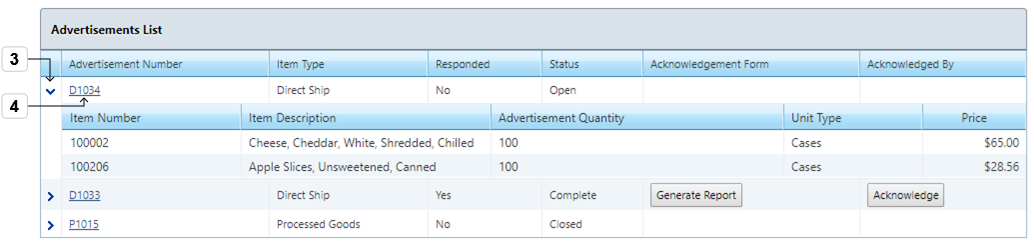


Figure 56 Hyperlink and Expansion Arrows

1. Click **Expand Arrow >** to view the item details of the **Advertisement** and the **Collapse Arrow (v)** to close the detail view
2. Click the **Advertisement Number** hyperlink of an **Advertisement** in **Open** status to open the **Advertisement Response** page

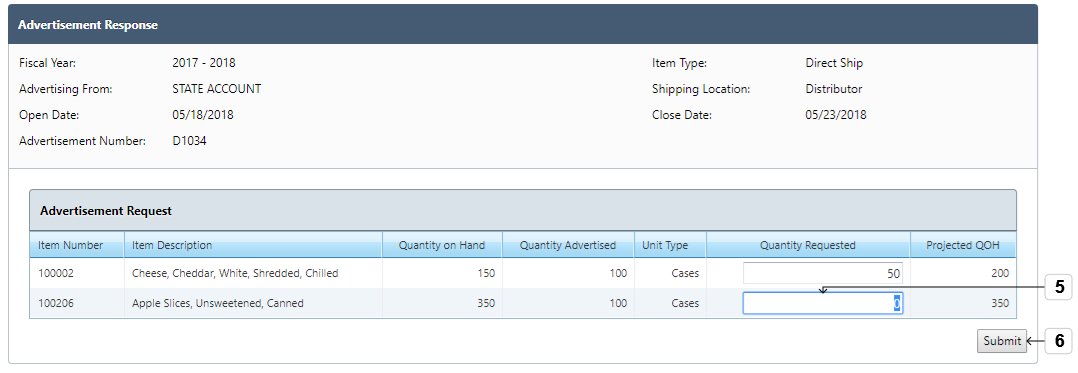


Figure 57 Advertisement Response

1. Enter **Quantity Requested** for **Advertisement** item(s)
2. Click **Submit**

### Acknowledge Advertisement

This section contains tasks for acknowledging an advertisement in the **District Realm**. After an Advertisement is completed at State level and acknowledgment is requested, the RA can acknowledge at the Advertisements List.

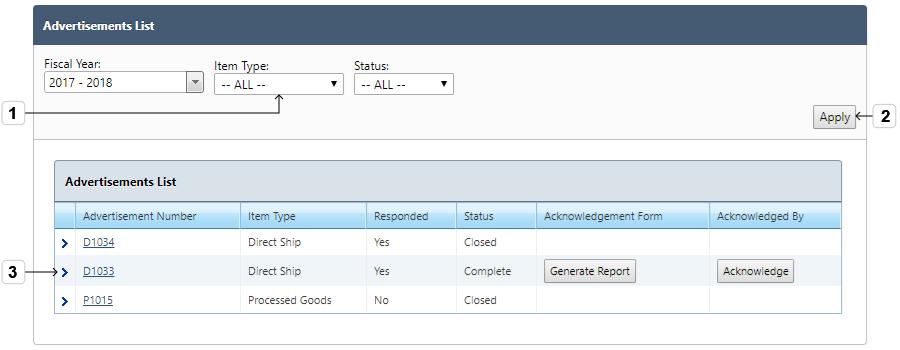


Figure 58 Advertisements List

1. Select the **Fiscal Year, Item Type** and **Status**
2. Click **Apply**
3. Click **Expand Arrow >** to view the item details of the **Advertisement** and the **Collapse Arrow (v)** to close the detail view

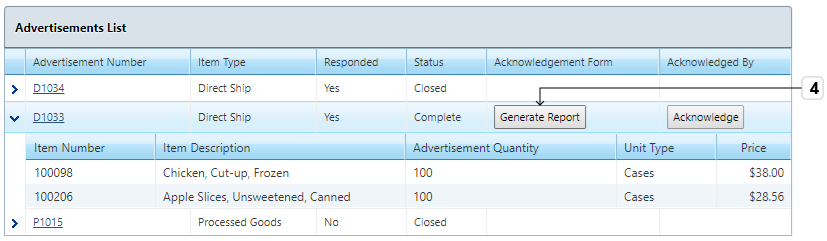


Figure 59 Generate Report Button

1. Click **Generate Report** to view the **Advertisement Acknowledgement** form

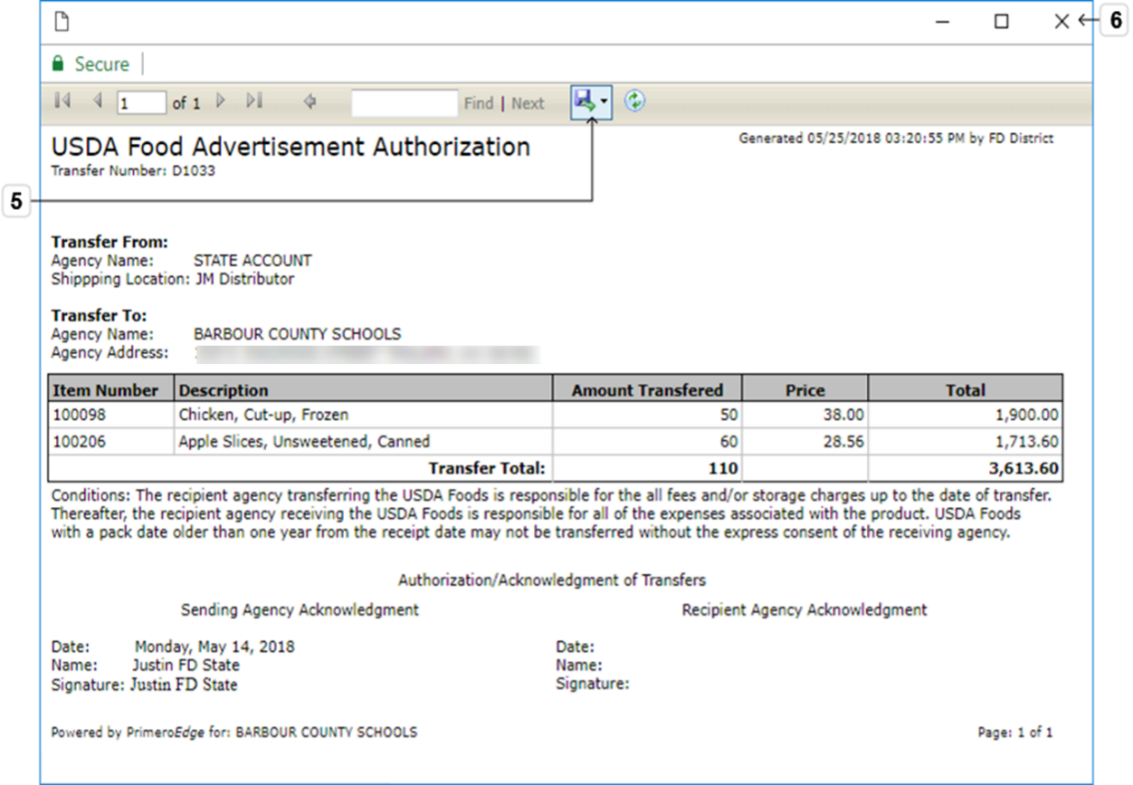


Figure 60 USDA Food Advertisement Authorization (Acknowledgement)

1. Click the **Export** icon to export the form in various formats
2. Click the **X** to close the report view

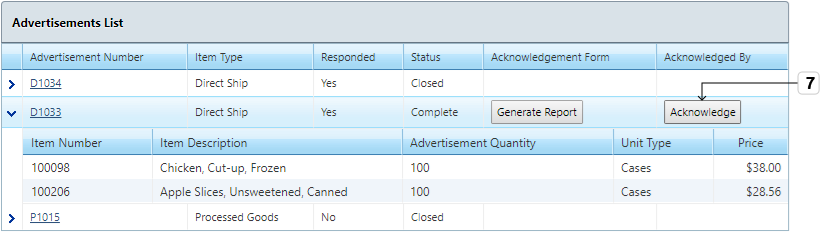


Figure 61 Acknowledge Button

1. Click **Acknowledge** under the **Acknowledged By** column header

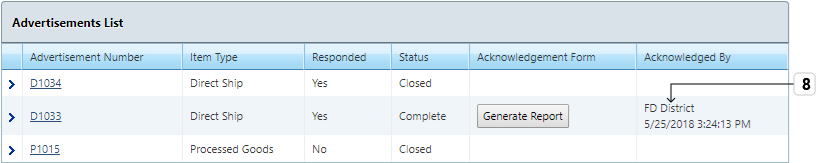


Figure 62 Advertisements List

1. **Advertisement** is **Acknowledged** to the **Central Realm**

# District—Recalls/Complaints

This **Category** provides a method to capture and log recalls into the system.

## Recall List

This section contains tasks for managing the **Recall List**.

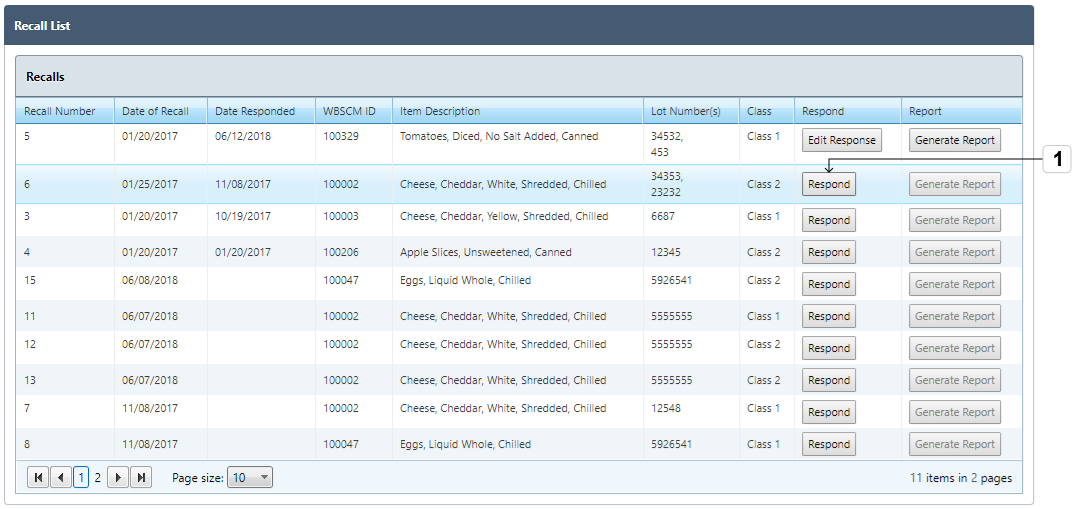
Go to **District >** **Food Distribution > Recalls/Complaints > Recall List**

Figure 63 Recalls

1. Click **Respond** to respond to a recall

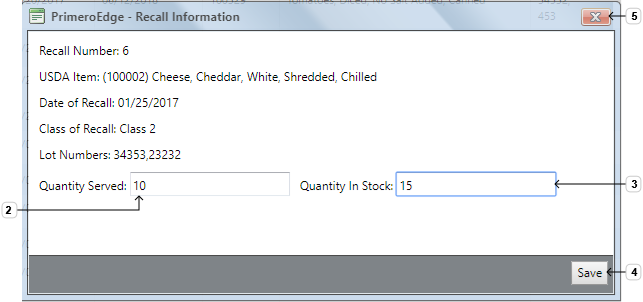


Figure 64 Recall Information

1. Enter **Quantity Served**
2. Enter **Quantity in Stock**
3. Click **Save**
4. Click **X** to close the view

Edit a Recall

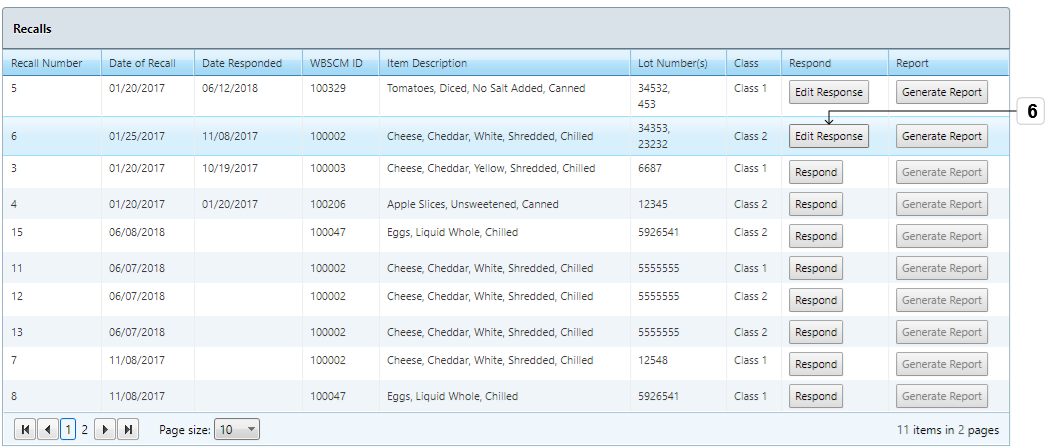


Figure 65 Edit Response Button

1. Click **Edit Response** to edit an existing recall response

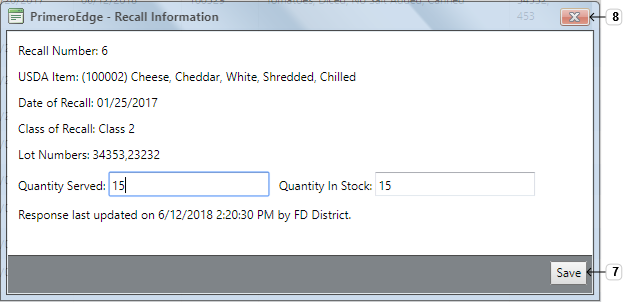


Figure 66 Recall Information

1. Make changes and click **Save**
2. Click **X** to close the view

Generate a Recall Report

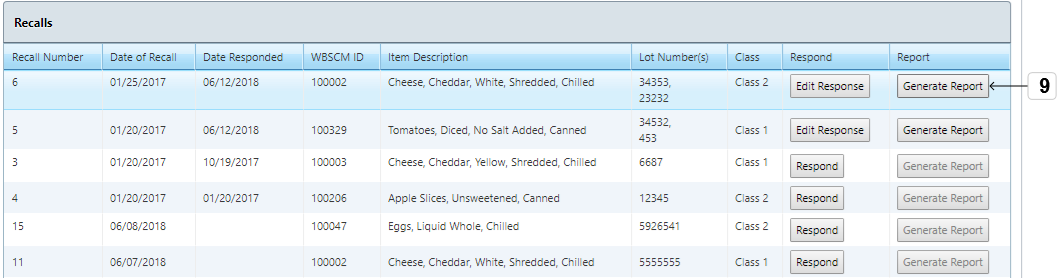


Figure 67 Generate Report Button

1. Click **Generate Report** to view the **Recall Record Report**

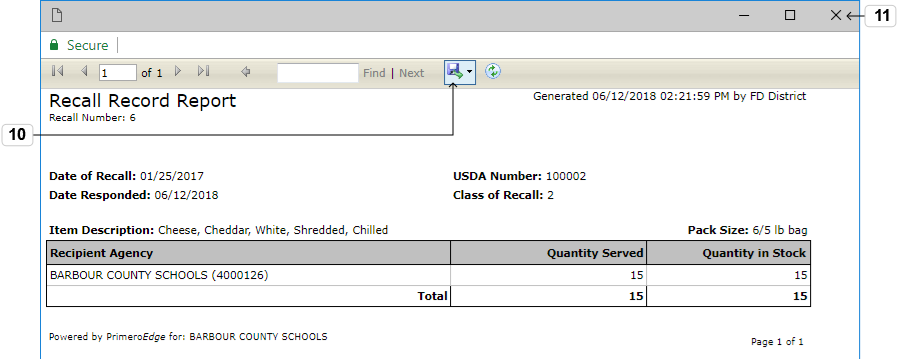


Figure 68 Recall Record Report

1. Click the **Export** icon to export the report in various formats

**🗹** Exporting as **PDF** will yield better printing results

1. Click **X** to close the report view

## Complaint List

This section contains tasks for managing the **Complaint List**.

Go to **District > Food Distribution > Recalls/Complaints > Complaint List**

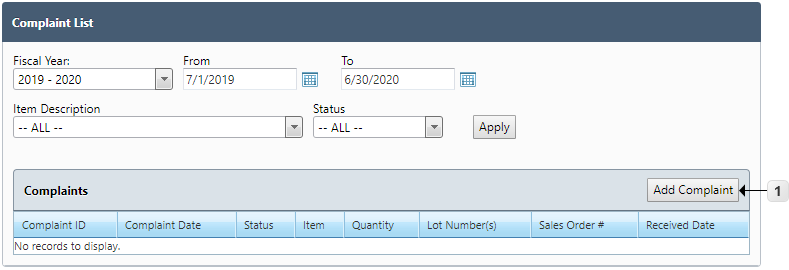


Figure 69 Complaint List

1. Click **Add Complaint**

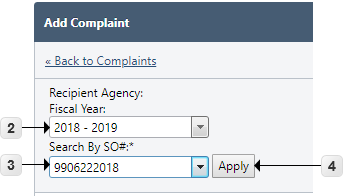


Figure 70 Add Complaint

1. Select the **Fiscal Year**
2. Select the **Sales Order Number**
3. Click **Apply**

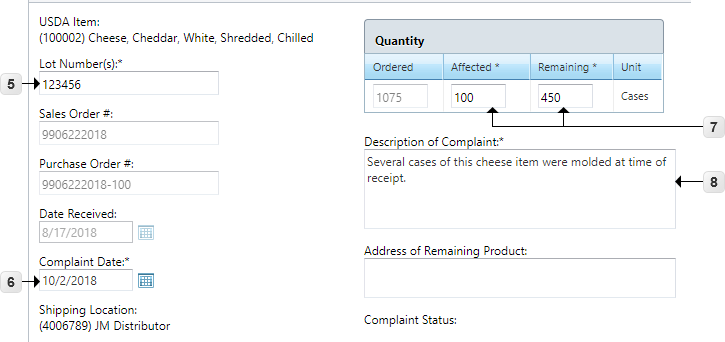


Figure 71 Add Complaint

1. Enter the **Lot Number(s)**
2. Select the **Complaint Date**
3. Enter **Affected** and **Remaining Quantity**
4. Enter **Description of Complaint**

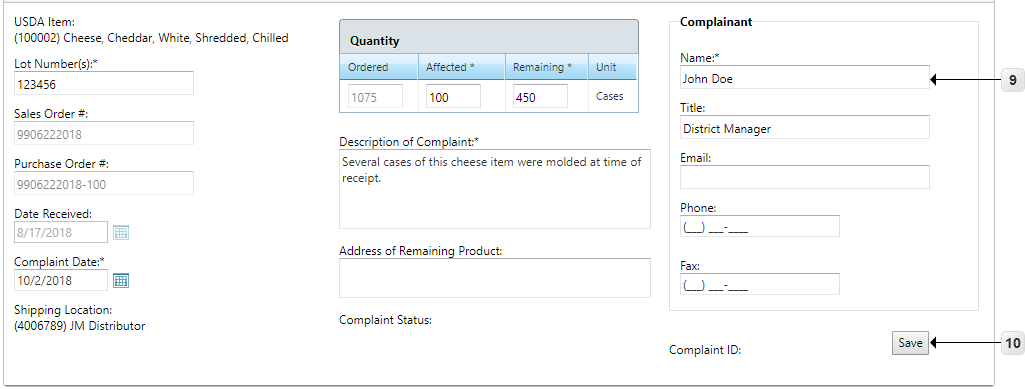


Figure 72 Add Complaint

1. Enter **Complainant Name**
2. Click **Save**

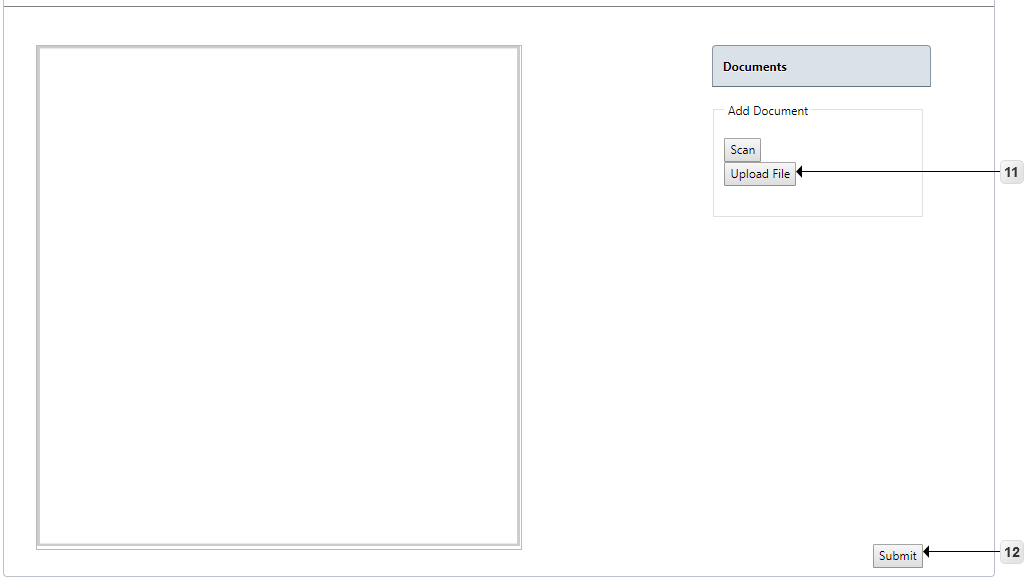


Figure 73 Submit Complaint

1. Click **Upload File** to add attachments
2. Click **Submit** to finalize the Complaint

# District—Reports

PrimeroEdge **Food Distribution** updates reports in real time. Reports include **PAL Balances, USDA Item History, Catalog Response, Commodity Perpetual Inventory, Transaction History** and **Shippers Breakdown**.

## Orders

This Functional Area contains tasks for generating an **Orders Report**. The Orders Report provides the current status of all placed orders that have received a Sales Order number and provides updates on the status as they are received.

Go to **District > Food Distribution > Reports > Orders**

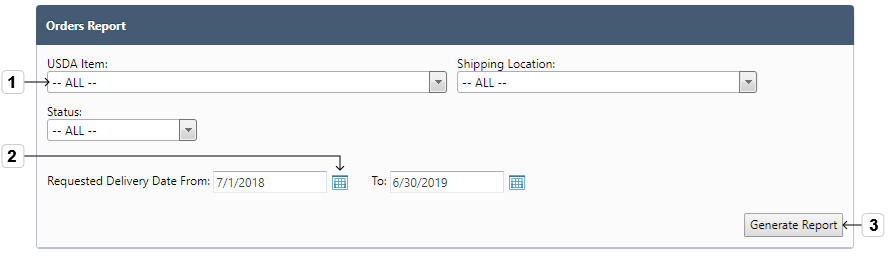


Figure 74 District Orders Report Selections

1. Select the **USDA Item, Shipping Location,** or **Status**
2. Modify **Requested** **Delivery Date** range by using the calendar
3. Click **Generate Report**

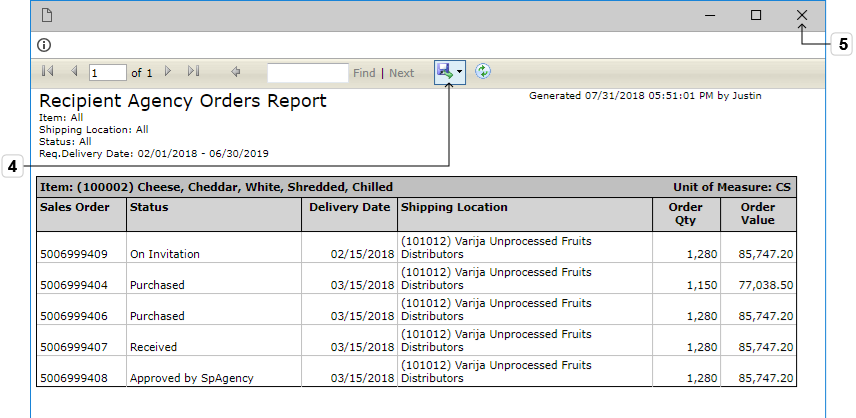


Figure 75 District Orders Report

1. Click the **Export** iconto save the worksheet in one of the optional formats **🗹** Exporting as **PDF** will yield better printing results
2. Click the **X** to close the report view

## PAL Balances

This section contains tasks for generating a **PAL Balances** report. The PAL Balances Report displays a list of transactions that affected the PAL funds balance for the Recipient Agency.

Go to **District > Food Distribution > Reports > PAL Balances**



Figure 76 District PAL Balances Selections

1. Select the **Fiscal Year**
2. Click **Generate Report** to view the report

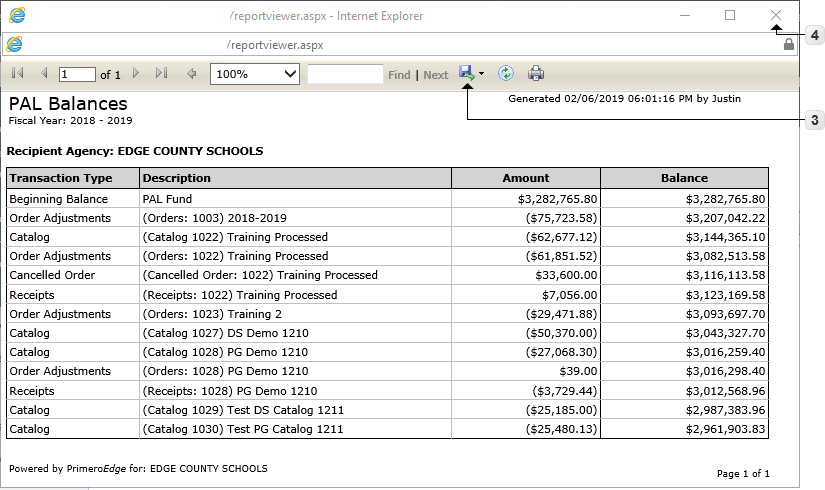


Figure 77 PAL Balances Report

1. Click the **Export** iconto save the worksheet in one of the optional formats **🗹** Exporting as **PDF** will yield better printing results
2. Click the **X** to close the report view

## USDA Item History

This section contains tasks for generating a **USDA Item History** report. The USDA Item History Report provides a historical list of transactions for each item at a selected Shipping Location.

Go to **District >** **Food Distribution > Reports > USDA Item History**

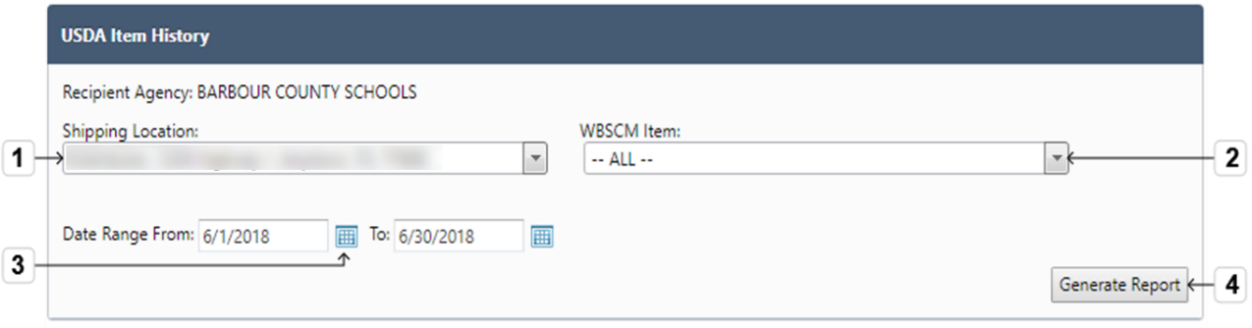


Figure 78 USDA Item History Selections

1. Select the **Shipping Location**
2. Select a **WBSCM Item**
3. Use the **Calendar** to select **Date Range**
4. Click **Generate Report**

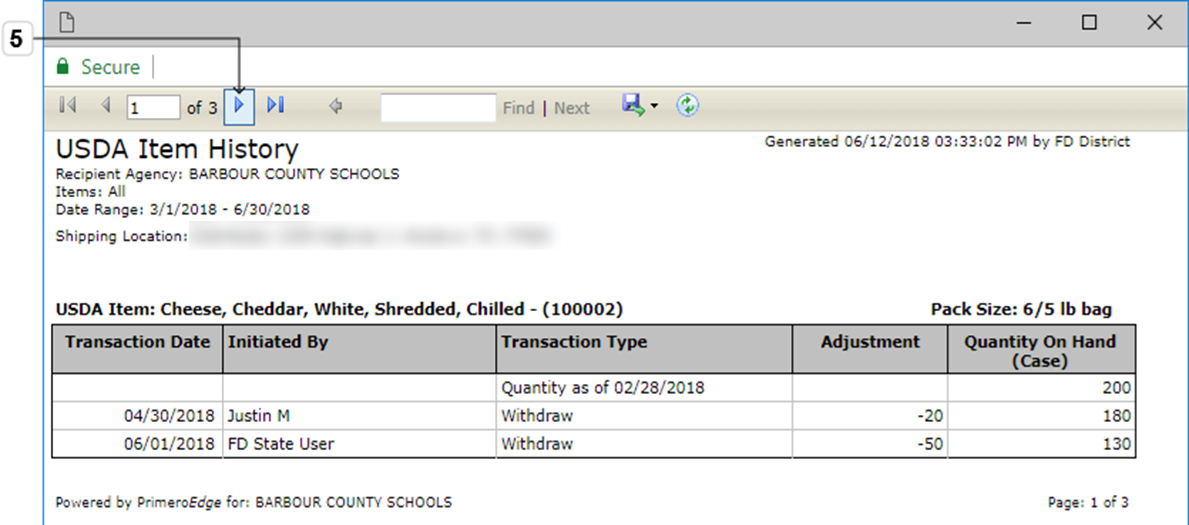


Figure 79 Next Page Control

1. Click **Next Page** to view the different items and their transaction history

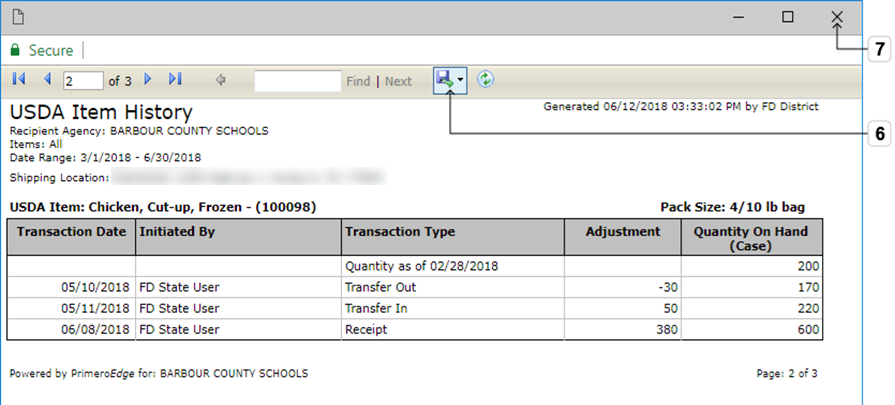


Figure 80 Download Icon

1. Click the **Export** iconto save the worksheet in one of the optional formats **🗹** Exporting as **PDF** will yield better printing results
2. Click the **X** to close the report view

## Catalog Response

This section contains tasks for generating a **Catalog Response** report. The Catalog Response Report displays a page by page summary of the Recipient Agency's responses to catalogs for a Fiscal Year.

Go to **District >** **Food Distribution > Reports > Catalog Response**

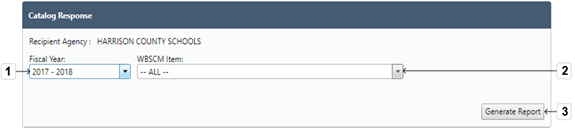


Figure 81 Catalog Response

1. Select the **Fiscal Year**
2. Select a **WBSCM Item**
3. Click **Generate Report**

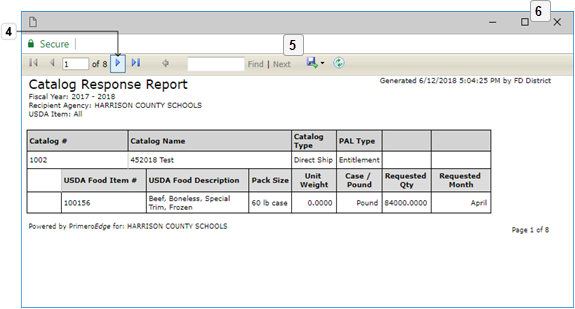


Figure 82 Next Page Control

1. Click **Next Page** to view the different **Catalogs**
2. Click the **Export** iconto save the worksheet in one of the optional formats **🗹** Exporting as **PDF** will yield better printing results
3. Click the **X** to close the report view

## Commodity Perpetual Inventory

This section contains tasks for generating a **Commodity Perpetual Inventory Report**. The Commodity Perpetual Inventory Report displays all items with quantity on hand at the selected Shipping Location(s).

Go to **District >** **Food Distribution > Reports > Commodity Perpetual Inventory**

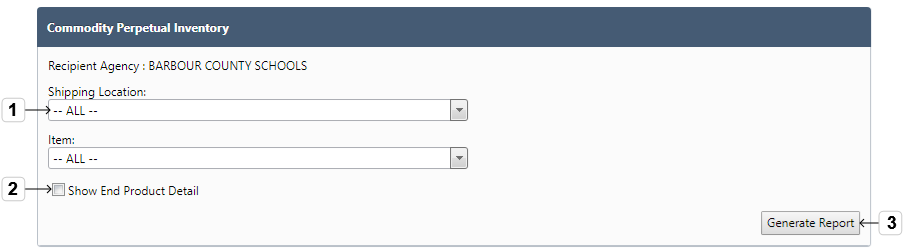


Figure 83 Virtual Inventory

1. Select the **Shipping location** and **WBSCM Item**
2. Click **Show End Product Detail** to show the sub-grid for any commodity items at a processor that are used to create end products
3. Click **Generate Report**

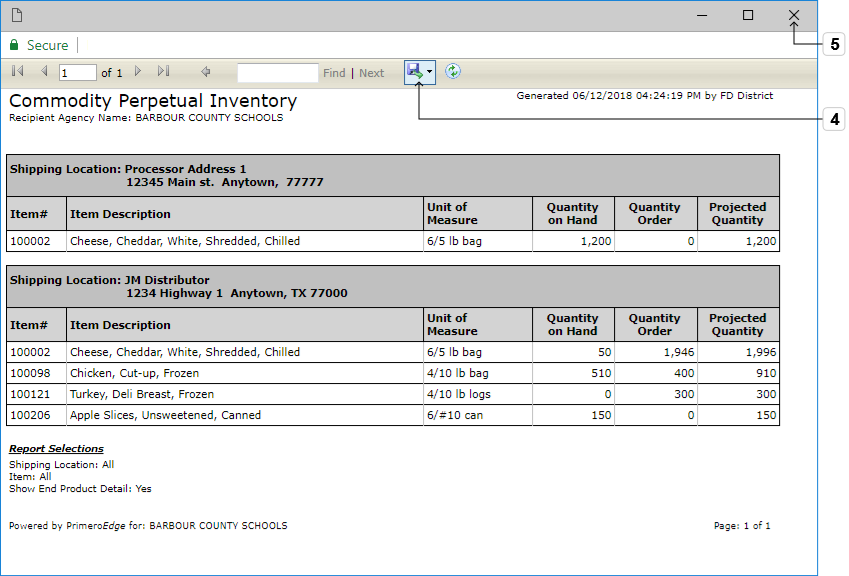


Figure 84 Commodity Perpetual Inventory Report

1. Click the **Export** iconto save the worksheet in one of the optional formats **🗹** Exporting as **PDF** will yield better printing results
2. Click the **X** to close the report view

## Transaction History

This section contains tasks for generating a **Transaction History** report. The Transaction History Report lists all Recipient Agency transactions for a specified date range.

Go to **District** **> Food Distribution > Reports > Transaction History**

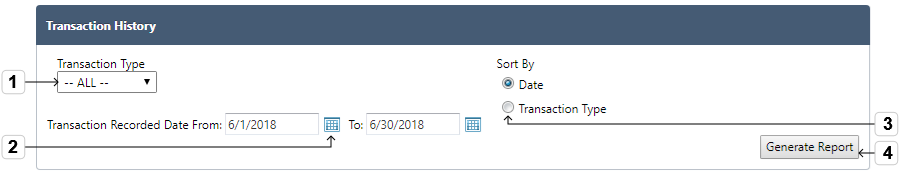


Figure 85 Transaction History

1. Select a **Transaction Type**
2. Select **Transaction Recorded Date** range
3. Click applicable **Radio** to **Sort By Date** or **Transaction Type**
4. Click **Generate Report**

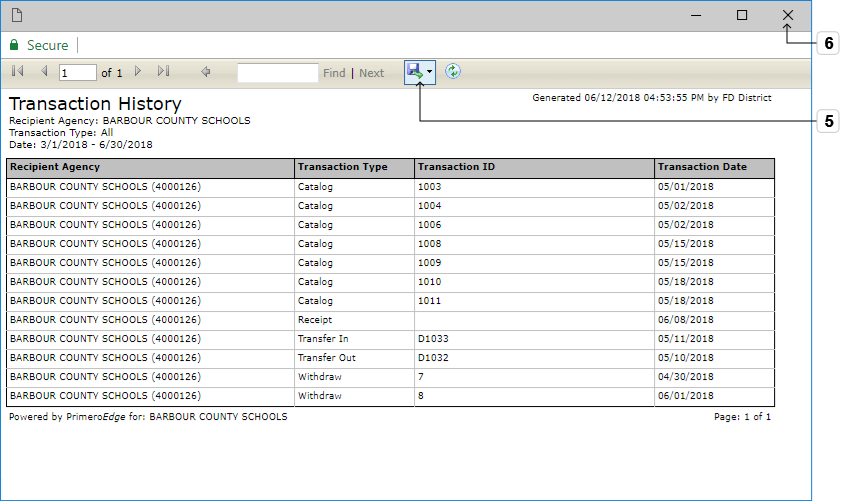


Figure 86 Transaction History Download Control

1. Click the **Export** iconto save the worksheet in one of the optional formats **🗹** Exporting as **PDF** will yield better printing results
2. Click the **X** to close the report view

## Shippers Breakdown

This **Functional Area** contains tasks for generating a **Shippers Breakdown Report**. The Shippers Breakdown Report provides an item breakdown with RA address for Distributors to use for delivering orders.

Go to **District >** **Food Distribution > Reports > Shippers Breakdown**

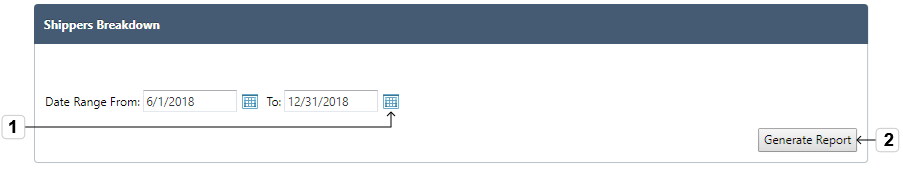


Figure 87 Shippers’ Breakdown Selections

1. Select a **Date Range**
2. Click **Generate Report**

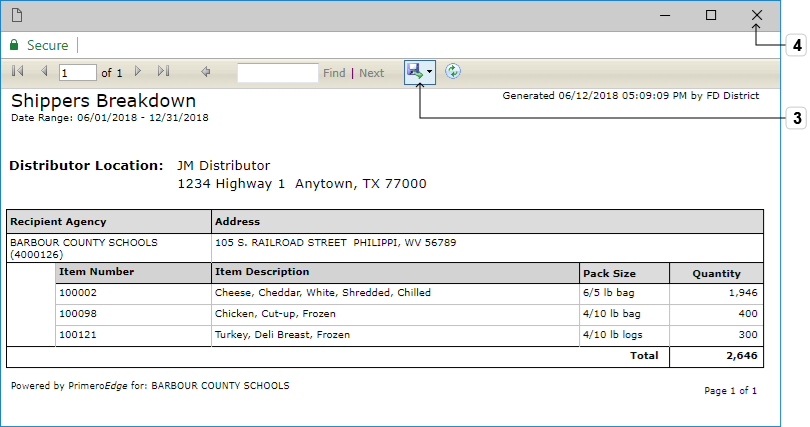


Figure 88 Shippers' Breakdown Report

1. Click the **Export** iconto save the worksheet in one of the optional formats **🗹** Exporting as **PDF** will yield better printing results
2. Click the **X** to close the report view

# District—Management

This **Category** contains tasks for managing **Commodity Drawdown, Forms** and **Planned Assistance Level (PAL)** in the **District Realm**.

## Planned Assistance Level

This section contains tasks for managing **Planned Assistance Levels**. The Planned Assistance Level page allows the district to allocate its PAL funds to the various programs for spending that fiscal year.

Go to **District > Food Distribution > Management > Planned Assistance Level**

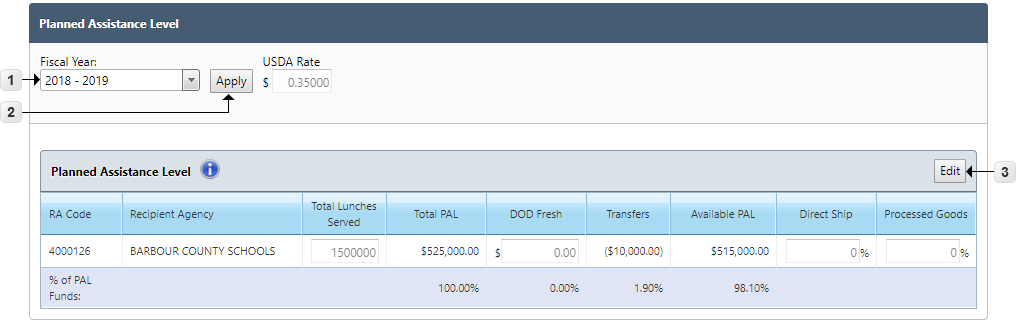


Figure 89 Planned Assistance Level Selections

1. Select the **Fiscal Year**
2. Click **Apply**
3. Click **Edit**

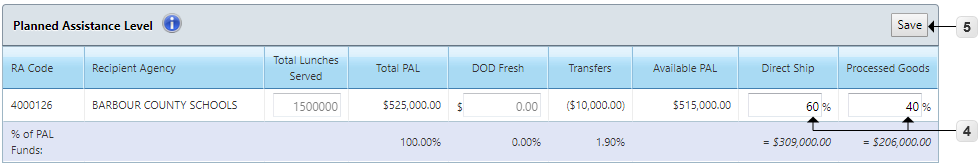


Figure 90 Planned Assistance Level List

1. Enter optional **Direct Ship** and **Processed Goods** allocation percentages
2. Click **Save**

## Commodity Drawdown

This section contains tasks for managing **Commodity Drawdown**. This page allows the manual drawdown of items with quantity on hand at a processor or distributor location.

Go to **District >** **Food Distribution > Management > Commodity Drawdown**

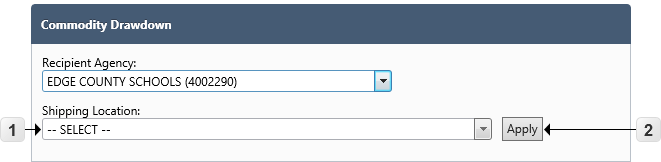


Figure 91 Commodity Drawdown

1. Select the **Shipping Location**
2. Click **Apply**

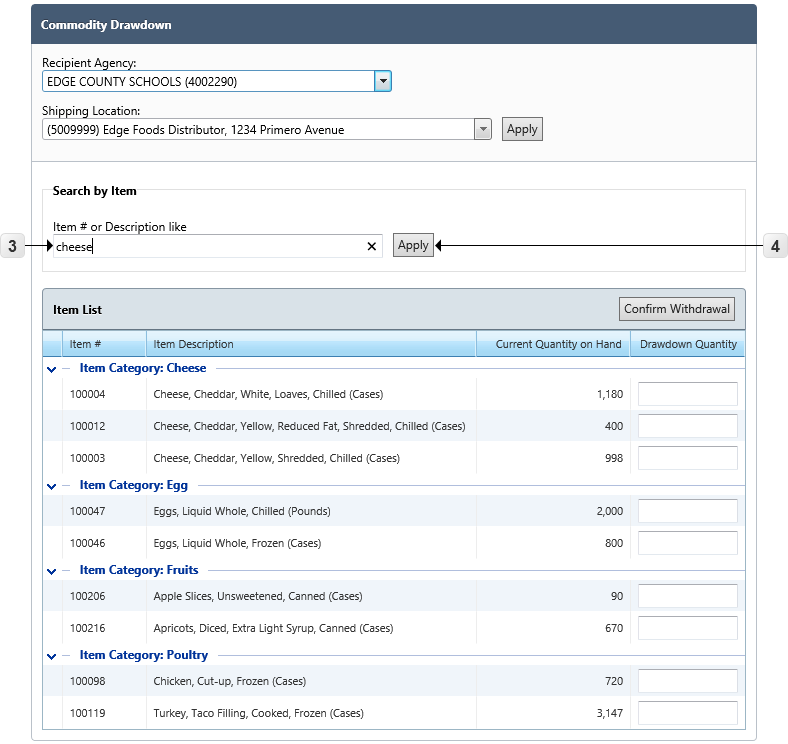


Figure 92 Commodity Drawdown Item Search

1. Use the **Item Search Box** to filter results by **Item Number** or **Item Description**
2. Click **Apply**

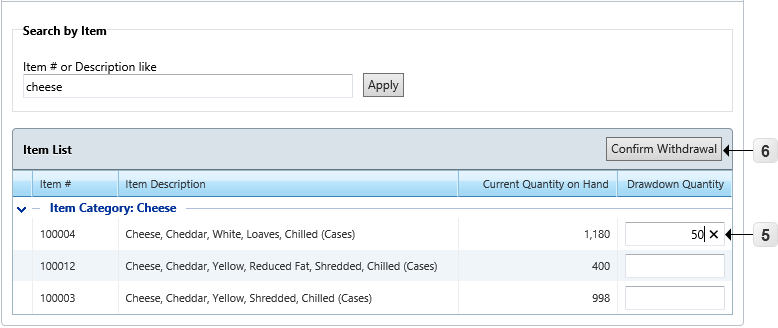


Figure 93 Commodity Drawdown Confirm Withdrawal

1. Enter **Drawdown Quantity** for item(s)
2. Click **Confirm Withdrawal**

## Forms

This section contains tasks for managing **Forms**. The Forms page allows for the upload of district forms and viewing of forms uploaded at the state level.

Go to **District >** **Food Distribution > Management > Forms**

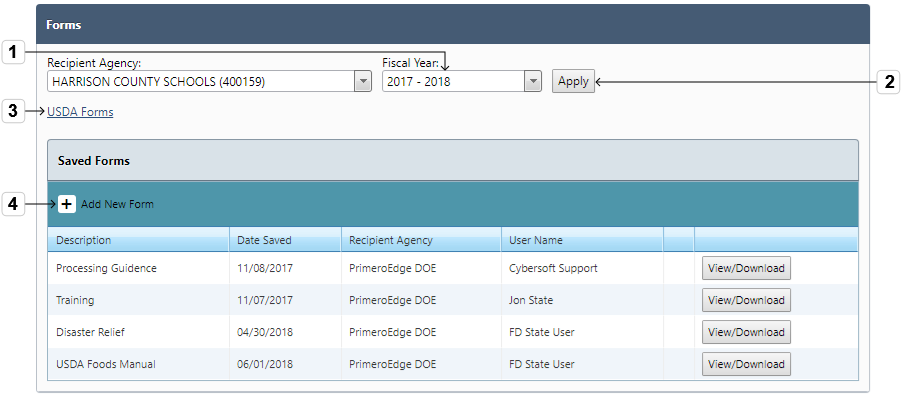


Figure 94 Forms Selections and Saved Forms List

1. Select the **Fiscal Year**
2. Click **Apply**
3. Clickthe **USDA Forms** hyperlink to open a new window to the external **FNS** (Food and Nutrition Service) Forms page
4. Click **Add New Form Plus Sign**

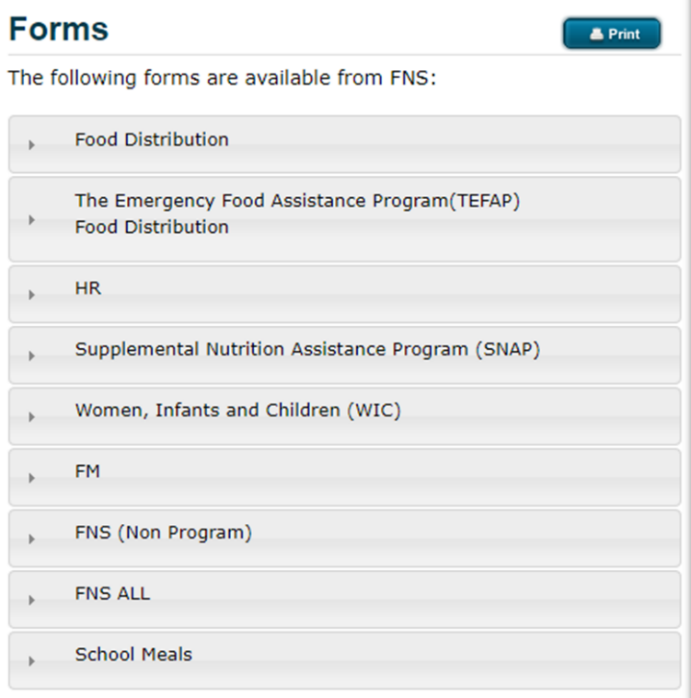


Figure 95 FNS Forms External View

**🗹** Download these forms directly from the USDA website.

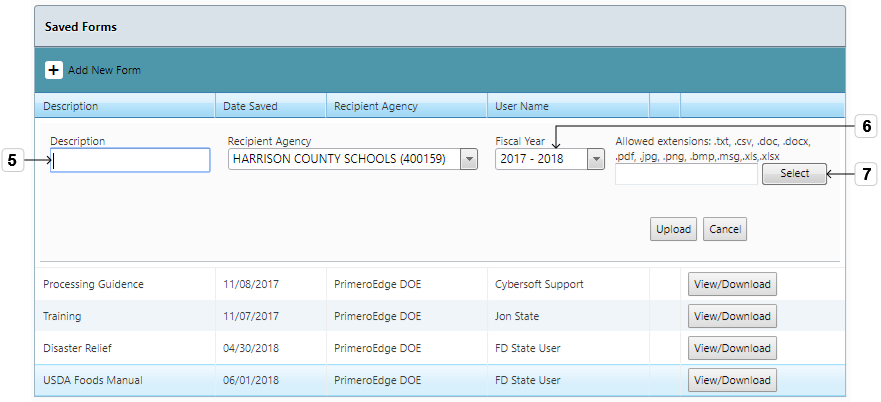


Figure 96 Form Description and Year Selections

1. Use text field to enter the **Form Description**
2. Select the **Fiscal Year**
3. Click **Select**

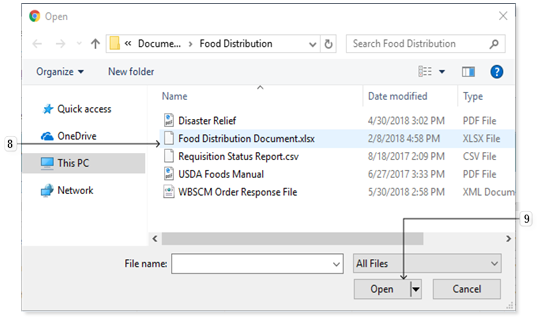


Figure 97 Local Computer Files

1. Navigate to the file and select it
2. Click **Open**

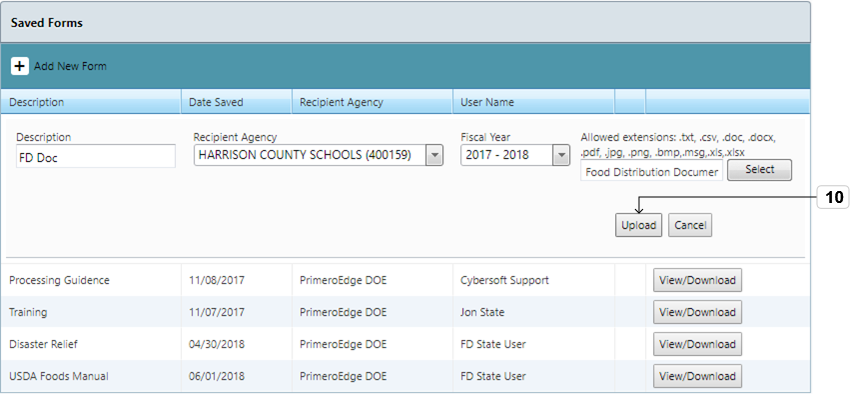


Figure 98 Upload Button

1. Click **Upload**

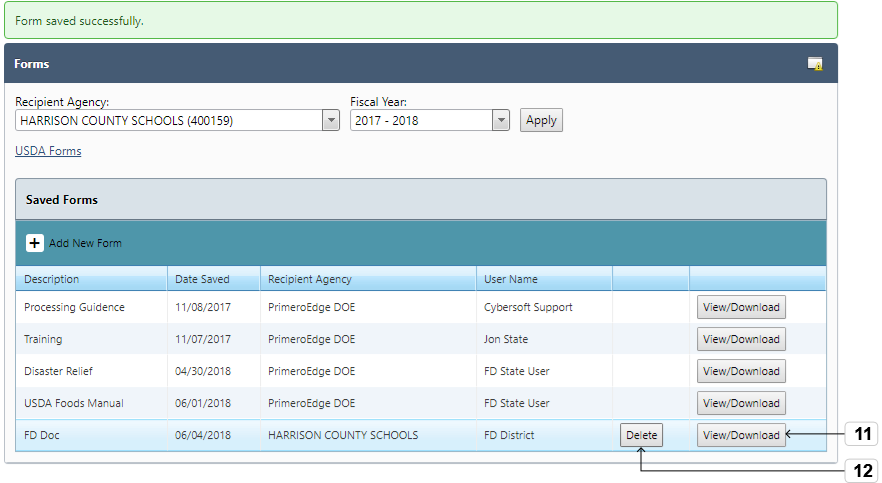


Figure 99 View/Download Button

1. Click **View/Download** to view a form
2. Click **Delete** to remove a form

**▲** The **Delete** button is only available for forms uploaded within the logged-in **District**.

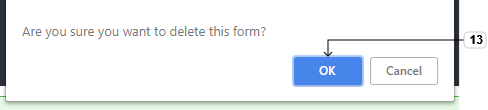


Figure 90 Delete Confirmation Box

1. Click **OK** to confirm deletion