



HILTON SUPPLY MANAGEMENT

LEVEL I

“SIMPLE SHOPPING”

www.hsm-online.com

Introduction

Hilton Hotels Corporation has partnered with Birch Street Systems, Inc. to develop its next generation of e-Procurement software. The Birch Street application is designed to connect buyers and suppliers in a private marketplace.

The system has been developed by hoteliers, for hoteliers and is simply an enabling tool, which provides Hilton with a common platform to connect buyers to the suppliers we conduct business with today.

The system is also designed to capture and leverage our “*collective*” spend across the organization. The e-Procurement system does not change the relationship between the buyer and supplier.

- **Key System Benefits:**
 - ✓ Facilitates electronic purchasing activities through contracted and approved suppliers
 - ✓ Provides order guide templates, robust catalog search engine, multiple buying methods (Catalog Content, Non-Catalog Content, Supplier on Demand)
 - ✓ Enables the connectivity of multiple locations to leverage the purchasing power of our organization
 - ✓ Simplifies the purchasing process through a consistent platform
 - ✓ Supports multi data transmission methods (cXML, EDI, Facsimile, Internet)
 - ✓ Direct Supplier User Interface - Catalog Maintenance and PO Acceptance
 - ✓ Classifies spend
 - ✓ Captures maverick spend
 - ✓ No cost to hotels or suppliers

- **Level II Training**
 - ✓ Hotel Administrative Process (Add/Remove/Edit User Information)
 - ✓ Workflow and Approval Process
 - ✓ Receiving and Reconciliation Process
 - ✓ Basic Reports

- **Level III Training**
 - ✓ Declining Checkbook / Budget Management
 - ✓ Request For Quote (RFQ)
 - ✓ Change Order Process
 - ✓ Advanced Reports

Training classes for Level II and Level III will commence during the 1st Quarter 2004.

(cont'd.)

STOP – PLEASE READ

- The Level I Reference Guide is designed to be used by Team Members who have completed the one hour on-line training. The material covered during the on-line training is reflected in the enclosed guide.
 - Each Team Member who went through the on-line training received either a “Class Reminder” and/or a “Thank You” e-mail, which included a hyperlink to access the Level I Reference Guide.
 - The Level I Reference Guide has been formatted for printing. Please print a copy of this guide and place it in a 3-ring binder. Additional guides should be added to your binder as your hotel completes the Level II and Level III training segments. As previously stated, training classes for Level II and Level III will commence during the 1st Quarter 2004.
 - The Level I Reference Guide will soon be available through the Hilton.net site, under: Departments - Hilton Supply Management - Resources Library - Level I Reference Guide
-

Application Note

SCREEN LOADING RATES WILL VARY DEPENDING ON A HOST OF CRITERIA. SCREENS THAT HANDLE A LARGE AMOUNT OF DATA AND/OR PROCESSING WILL LOAD SLOWER IF IT IS THE FIRST TIME THE SCREEN HAS BEEN LOADED SINCE A REBOOT. THE SAME SCREEN WILL LOAD MUCH FASTER AFTER THE INITIAL SCREEN LOAD

Support

Birch Street Customer Support

Support Hours: 8 am to 5 pm Pacific Standard Time (PST)

Phone: 1 - (949) 567-7030

E-mail: support@birchstreetsystems.com

On-Line Support

Tutorials On the www.hsm-online.com Home page

Help Within the Birch Street application

FAQ's / Q-Tips On the www.hsm-online.com Home page and within the Birch Street application

HSM Regional Offices

<u>Office</u>	<u>Telephone</u>	<u>E-mail Address</u>
HSM-Central States: (DC, IL, IN, IA, KS, MD, MI, MN, MO, NE, OH, PA, SD, VA, WV, WI)	312-621-7355	hsm_ce@hilton.com
HSM-Hawaii States: (HI)	808-947-7866	hsm_hi@hilton.com
HSM-Northeast States: (CT, DE, ME, MA, NH, NJ, NY, RI, VT)	212-261-5800	hsm_ne@hilton.com
HSM-Southeast States: (AL, AR, FL, GA, KY, LA, MS, NC, SC, TN)	770-937-5175	hsm_se@hilton.com
HSM-Southwest States: (AZ, CO, NV, NM, OK, TX, UT)	602-640-1390	hsm_sw@hilton.com
HSM-West States: (AK, CA, ID, MT, OR, WA, WY)	310-205-4440	hsm_we@hilton.com

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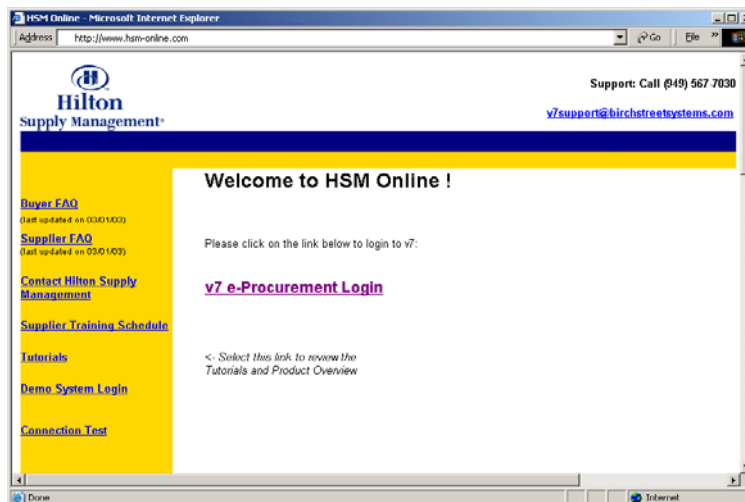
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Chapter 1 - Getting Started

1. First Time Login - Go to www.hsm-online.com

Step 1: Click on V7 Procurement Login.



Step 2: Enter your Birch Street Login ID and Password provided.

(Please obtain your Birch Street Login ID/Password from your hotel GM, if not already provided).

Step 3: Go through the First Time Login process - click *Continue*



Welcome to HSM Online!
Making your selling experience more efficient.

Before we can get started, we need to take care of a few details. First, we would like you to review and acknowledge your acceptance of the Terms of Use regarding this electronic commerce site. Next, we will ask you to change your password. Finally, we will ask you to complete your profile information and select a few personal settings to customize the system for your needs.

After setting up your personal settings, we suggest that you review the tutorials by clicking on the "Tutorial" link in the top right of the home page. There are a number of tutorials that you can access at any time.

Summary of Initial Login Steps

- Site Usage and Information Agreement
- Change your password
- Review and Update My Settings

Thank you for using HSM Online!

[Continue](#)



Chapter 1 - Getting Started

1. First Time Login - Go to www.hsm-online.com

Step 4: Click “Accept” Terms of Use



Step 5: Enter your original password/
Change (Create) your new password – known only to you.
Retype new password.
Click “Change”.

Login ID:	<input type="text" value="YourLogin"/>
Old password:	<input type="password"/>
New password:	<input type="password"/>
Retype new password:	<input type="password"/>
	<input type="button" value="Change"/>

You will automatically be redirected to your “My Settings” screen.

You have successfully logged into the Birch Street application for the first time. This is the only time you will need to satisfy these steps. All future system access will take you directly from the Login screen to your Home Page.

Chapter 1 - Getting Started

2. Updating Your Personal Information - “My Settings”

- Step 1: Update any missing or incorrect information in your “My Settings” screen.
IMPORTANT - If you do not have a **work** e-mail address, change your Notification Option to: **Birch Street In-Box only**.
- Step 2: Click the blue “**Save**” button, then click the blue “**Close**” button.

- Step 3: Click the “**Home**” link below the Hilton Logo on the Summary Panel.

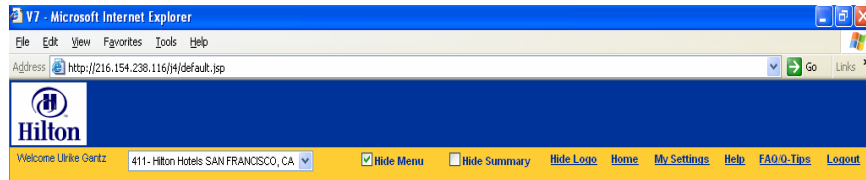
Chapter 1 - Getting Started

3. Creating the e-SYSCO Link

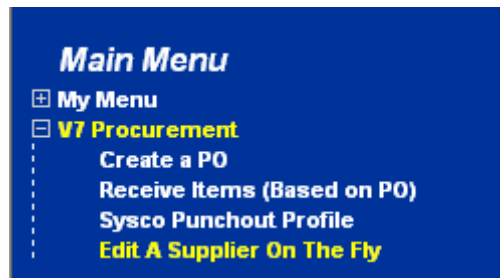
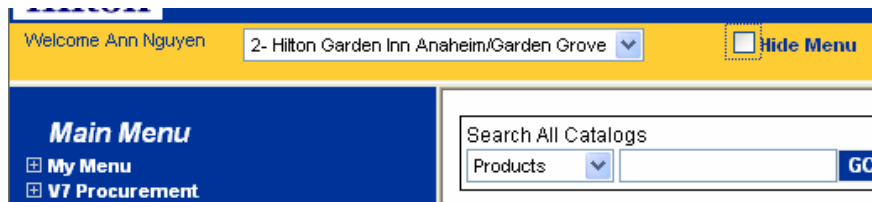
IMPORTANT - Please skip this section if you do not currently buy from SYSCO or have a SYSCO account.

The Hilton e-Procurement system provides Buyers with the ability to connect with a select group of suppliers via a Punch-out, directly into the supplier's web site. At the conclusion of your 'buying' session, the products purchased will be reflected in your Birch Street account in the form of a Purchase Order (PO).

Step 1: Click the "**Hide Menu**" check box below the Hilton Logo on the Summary Panel.



Step 2: From the Main Menu, select **v7 Procurement**, then select **SYSCO Punchout Profile** option .



Step 3: **Enter** the following information in the 2 white background fields: Your existing **SYSCO Login ID** **and** your existing **SYSCO Account Number**.

A screenshot of the Hilton e-Procurement system's Punchout Profile form. The form has a header with 'New', 'Save', 'Delete', and 'Print' buttons. Below the header, there are four input fields: 'Punchout profile ID' with a dropdown menu set to '[New]', 'eSysco login ID (up to 20 characters)', 'eSysco acct # (6 digits)', and 'Sysco operating co.'. There are also search icons (magnifying glasses) next to the 'Punchout profile ID' and 'Sysco operating co.' fields.

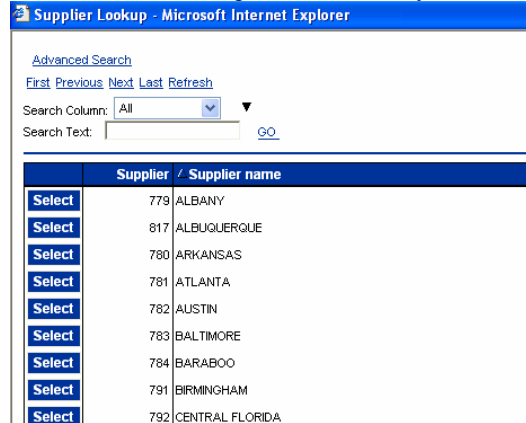
Chapter 1 - Getting Started

3. Creating the e-SYSCO Link

Step 4: Click on the **magnifying glass** icon to display all of the SYSCO Distributors or Operating Companies (OpCo) – Let the screen load the data before you continue.

Sysco operating co. 

Step 5: **Select** the SYSCO OpCo that currently services your hotel.

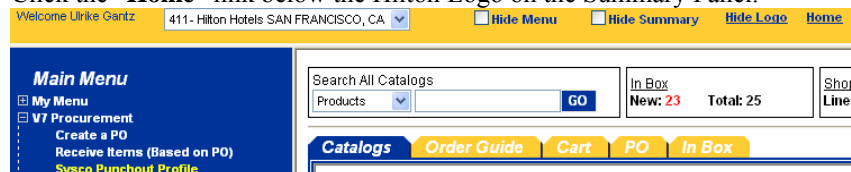


Supplier	Supplier name
Select 779	ALBANY
Select 817	ALBUQUERQUE
Select 780	ARKANSAS
Select 781	ATLANTA
Select 782	AUSTIN
Select 783	BALTIMORE
Select 784	BARABOO
Select 791	BIRMINGHAM
Select 792	CENTRAL FLORIDA

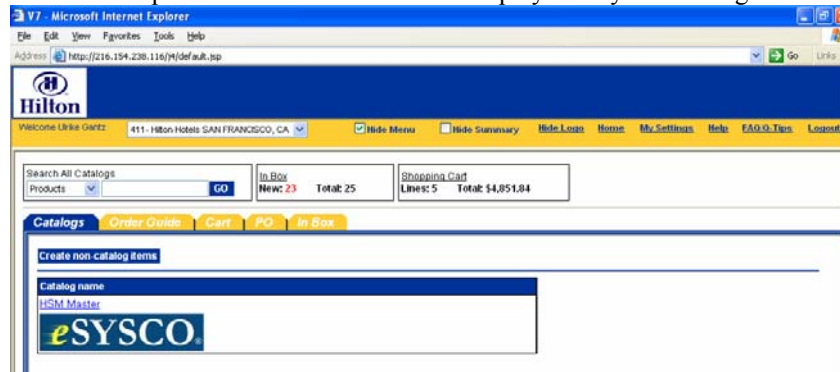
Step 6: Click the blue **“Save”** button, then click the blue **“Close”** button.



Step 7: Click the **“Home”** link below the Hilton Logo on the Summary Panel.



The SYSCO punchout link should now be displayed on your Catalog Tab.

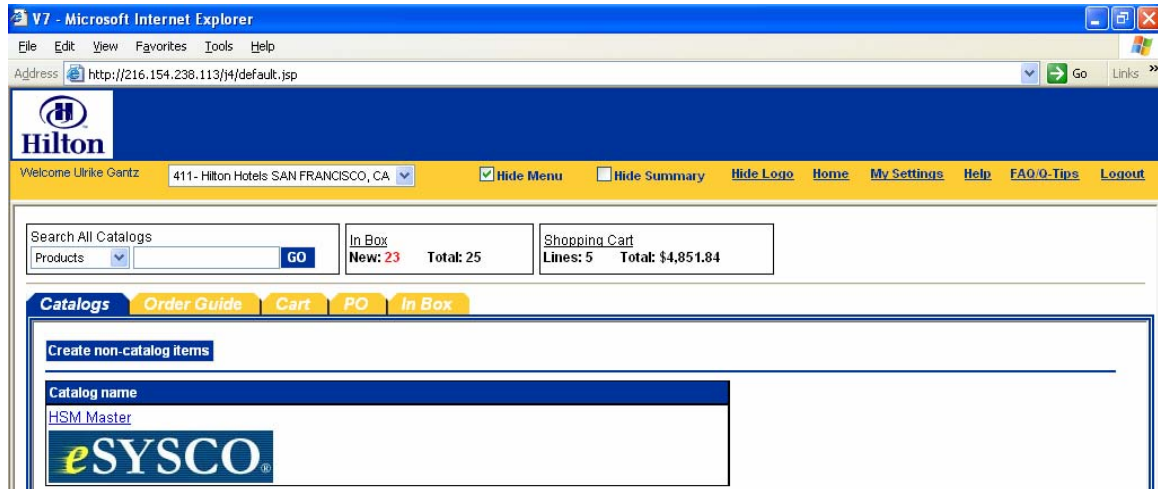


Please contact your HSM Regional Office if you do not know your SYSCO Login ID or SYSCO account number.

Chapter 2 - System Navigation

1. The Front Page

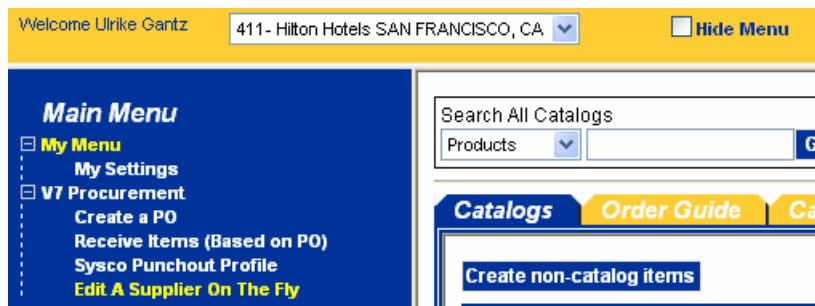
When you log in to the Birch Street application you are taken to the “Front” page. The “Front” page is designed to manage all the activities a buyer typically requires throughout the transaction cycle. Buyers can ‘toggle’ between the Front Page tabs to select a variety of features.



2. Main Menu

Accessing the main menu is achieved by un-checking the Hide Menu checkbox on the Logo Panel. The Main Menu is used to navigate and access additional features that are not typically required to manage the purchasing cycle. You will need to access the Main Menu to create your Sysco Punchout Profile account and Edit Supplier-On-The-Fly (S-O-T-F) records.

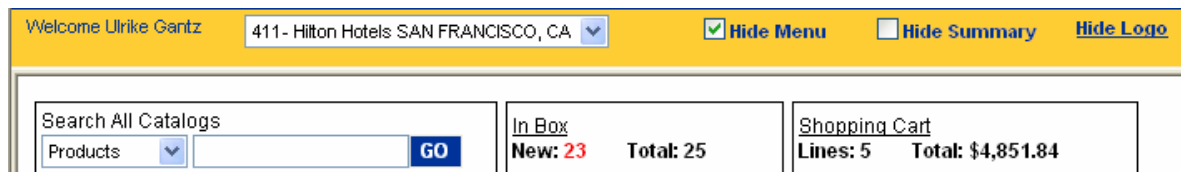
1. My Menu – Provides alternate access to the My Settings screen.
2. SYSCO Punchout Profile
3. Edit A Supplier On The Fly (S-O-T-F)
4. V7 Procurement – Provides various access to other Maintenance Screens, Reports and alternate access to screens also accessible via the Front Page Tabs



Chapter 2 - System Navigation

3. Summary / Search Panel

The Summary/Search Panel provides high level summary information from the application as well as catalog search functionality. The Summary Panel contains the Search All Catalogs screen, In Box and Shopping Cart Summary. Selecting the '**Hide Summary**' check box will hide the Search All Catalogs screen, In Box and Shopping Cart Summary. Un-checking the box will re-display the Summary/Search Panel.



Search All Catalogs – This functionality provides catalog searches based upon 3 criteria:

- **Product** Searches allow the user to search by any descriptive criteria including product number.
- **Category** Searches allow the user to search by product category name.
- **Supplier** Searches allow the user to search by Supplier Name.

In Box – This summary information provides the number of new messages (NOT new PO's) and total message count in the Birch Street In Box. The In Box is accessible via the Front Page Tabs.

Shopping Cart – This summary information provides the number of items (Lines) and the total dollar value (Total) in the Cart. The Cart is accessible via the Front Page Tabs.

4. Logo Panel

The Logo Panel provides access to program maintenance, configuration and Help functionality. Clicking on the '**Hide Logo**' link hides the blue '**Logo**' section. Re-clicking this link will display the Logo Panel. Hiding the Logo panel will create additional screen space to display other information.

Display items and links available from the Logo panel are as follows:



- **Hide Menu Checkbox** - Checking this box hides the main menu. Un-checking it displays the Main Menu.
- **Hide Summary Checkbox** - Checking this box hides the Summary/Search panel.
- **Hide Logo** - This link hides the Logo section of the Logo Panel.
- **Home** - This link refreshes the Front Page Tabs to display the Home Catalog tab.
- **My Settings** – This link displays the My Settings screen for adjustment of personal contact information and individual application settings.
- **Help** – This link displays application 'Help' resources.
- **FAQ/Q-Tips** - This link displays Frequently Asked Questions and Quick-Tips.
- **Logout** – This link logs the user out of the application and returns them to the hsm-online Login Page.

Chapter 2 - System Navigation

5. Front Page Tabs



The Front Page Tabs provide for convenient application navigation organized by specific program functionality.

Catalogs - The Catalog Tab provides for access to the following functionality:

- Adding Non-Catalog Content to existing or current PO's.
- Accessing Catalogs directly through the Category Structure.
- Displays the Results from any Catalog Searches initiated through the **Search All Catalog** functionality.

Order Guide - The Order Guide Tab allows for the creation, maintenance and use of Order Guides in the PO process.

Cart - The Cart is a temporary staging area for the creation of PO's that allows for comparisons of products from any number of suppliers.

PO - The PO tab lists existing PO's and all relevant actions taken against PO's can be initiated from this tab (New, Submitted, Viewed, Accepted, Rejected, PO Header information...more.)

In Box - The In Box tab maintains a list of all system generated notifications delivered to the user. The user will receive notifications within this In Box only if the Message Delivery setting on the My Settings Screen includes delivery to the "Birch Street In Box".

Chapter 3 - Searching Catalogs

1. Product Search

Search All Catalogs

Products shampoo GO

Step 1: On the Front Page, in the Search All Catalogs section of the Summary Panel, select “**Product**” from the drop down list.

Step 2: In the field immediately to the Right of the Products drop down list, type the product name or item number of the product you wish to find. In this example, we searched for the product: **Shampoo**.

Step 3: Click on the “**Go**” button. - The search results are displayed in the below Result Grid.

Search All Catalogs

Products shampoo GO

In Box **New: 23 Total: 25**

Shopping Cart
Lines: 5 Total: \$4,851.84

Catalogs
Order Guide
Cart
PO
In Box

Add to cart
Add to order guide
Create PO
Add to PO

Catalog: Various Up

Products: **5**

Pages: **1**

Item #	Product Name Supplier Name	Manufacturer	Pack/Size	UOM	Min qty	Ord Qty Price	Select
30508 More Product Info	Hilton Neutrogena Shampoo 1.75 oz. Cone Bottle Guest Supply, Inc.	Guest Supply, Inc.	180 / 2oz	CS	1	<input style="width: 40px;" type="text"/> \$59.40	<input type="checkbox"/>
30509 More Product Info	Hilton Neutrogena Shampoo 1 oz. Cone Bottle Guest Supply, Inc.	Guest Supply, Inc.	210 / 1oz	CS	1	<input style="width: 40px;" type="text"/> \$41.58	<input type="checkbox"/>
443460.0001.0 More Product Info	Shampoo/Conditioner, Breck, 1.0 Ounce Bottle Best Manufacturing Group, LLC	DIAL	288 /	CS	1	<input style="width: 40px;" type="text"/> \$45.88	<input type="checkbox"/>
45476 More Product Info	High Performance Carpet Shampoo 1 Gallon Guest Supply, Inc.	Ramsey Co.	4 / 1Gal	CS	1	<input style="width: 40px;" type="text"/> \$68.04	<input type="checkbox"/>
46817 More Product Info	Eurobath Hair & Body Shampoo 500 ml Guest Supply, Inc.	Kimberly-Clark Corp.	18 / 500ml	CS	1	<input style="width: 40px;" type="text"/> \$63.79	<input type="checkbox"/>

From the above screen, a Buyer can do any of the following:

- Click on the “Computer Monitor Icon” to view the product image.
- Click on the “More Product Info” link to view additional product information.
- Click on the “Select” box (far right column) to tag the item – Add to Order Guide.
- Enter a Order Quantity (second column from right) – Create a PO.

Chapter 3 - Searching Catalogs

2. Category Search



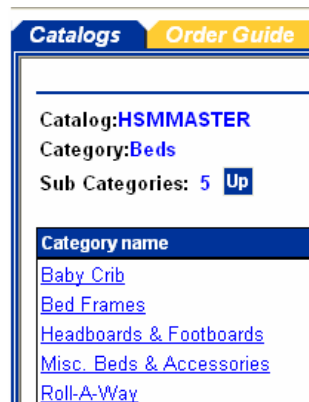
- Step 1:** On the Front Page, in the **Search All Catalog** section of the Summary Panel, select “**Categories**” from the drop down list.
- Step 2:** In the field immediately to the Right of the **Categories** drop down list, type in the “Category” you wish to find. In this example, we searched for Category: **beds**.
- Step 3:** Click on the “Go” button. - The result is displayed in the Result Grid.

Categories Found:4

Category name
HSMMASTER / Beds
HSMMASTER / Bedspreads, Comforters & Duvet Covers
HSMMASTER / Misc. Beds & Accessories
HSMMASTER / Sofas & Sofa Beds

Notice that we are now “drilling down” within the category structure, further refining our catalog search. At the top left of the tab the **Catalog, Category and Sub Category** information is now displayed along with a blue “Up” button, that if clicked will move you back “up” the category structure. Also displayed on the top right of the tab is an additional **Search *this* Catalog** feature that provides for searches within the sub-category. **Clicking on any of the Categories will either display any existing Sub-Categories or the product(s) within the Category.**

- Step 4:** The next level down displays sub-categories.



Chapter 3 - Searching Catalogs

3. Category Search

Step 5: Click on any of the sub-categories to display the products contained within the sub-category.

The screenshot shows a web catalog interface with a navigation bar at the top containing tabs for 'Catalogs', 'Order Guide', 'Cart', 'REQ', 'PO', 'In Box', and 'Supplier PO'. Below the navigation bar is a row of action buttons: 'Add to cart', 'Add to order guide', 'Create PO', 'Add to PO', 'Create REQ', and 'Add to REQ'. The main content area displays the following information:

- Catalog: HSMMASTER
- Category: Baby Crib [UP](#)
- Products: 6
- Pages: 1

Item #	Product Name Supplier Name	Manufacturer	Pack/Size	UOM	Min qty	Ord Qty Price	Select
37945 More Product Info	Pack 'N Play Crib Guest Supply, Inc.	Graco Children Products	1 /	EA	1	<input type="text"/> \$100.28	<input type="checkbox"/>
49181 More Product Info	Baby Changing Station Horizontal Cream Guest Supply, Inc.	Guest Supply, Inc.	1 /	EA	1	<input type="text"/> \$165.00	<input type="checkbox"/>

Chapter 3 - Searching Catalogs

3. Supplier Search

Search All Catalogs	
All suppliers <input type="button" value="v"/>	<input type="text" value="National"/> <input type="button" value="GO"/>

- Step 1:** On the Front Page, in the **Search All Catalog** section of the Summary Panel, select **Suppliers** from the drop down list.
- Step 2:** In the field immediately to the Right of the **Suppliers** drop down list, type in the Supplier Name you wish to find.
- Step 3:** Click on the “Go” button.

Suppliers	
Aqua Sun Ozone International	View Products View categories
Contact: Matthew Pabor (800)500-5144 Fax:(800)500-5144 aspipure@aol.com 723 Eugene Road Palm Springs CA 92264 (Proxy) (National) (Product)	
Artex International, Inc.	View Products View categories
Contact: Kim Hagler (618)654-0296 Fax:(618)654-0200 kimh@artex-int.com 1405 Walnut Highland IL 62249 (Direct) (National) (Product)	
Morey's Seafood International	View Products View categories
Contact: James Hill (314)428-7777 Ext:10 Fax:(314)428-0751 jhill@moreys.com 8501 Page St. Louis MO 63114 (Direct) (Regional) (Product)	
DEEN SUM INTERNATIONAL INC. dba YANK SING	
Contact: JOY LI Ext:8219 Fax:(415)957-9899 sales2@yanksing.com 1 RINCON CENTER SAN FRANCISCO CA 94105 (On the Fly)	

All Suppliers with the same text you entered are returned.

Chapter 3 - Searching Catalogs

4. Supplier Classifications

National – The classification for any Supplier who has a ‘**National**’ contract with Hilton Hotels Corporation and has the ability to service multiple geographic markets and/or hotel brands.

Or

Regional – A Regional Supplier is managed by a HSM Regional Office and only services a specific geographic market.

And

Proxy - A ‘**Proxy Supplier**’ is a Supplier who does not sell directly to hotels. Hilton Supply Management (HSM) takes “Title” to the transaction when you create a Purchase Order for the Proxy Supplier. The Birch Street system will automatically transfer the PO to HSM.

Or

Direct - Opposite of a Proxy Supplier. A ‘**Direct Supplier**’ sells products directly to a hotel. The submitted PO goes directly to the supplier.

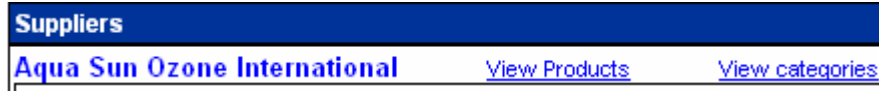
In addition...

On The Fly - The term ‘**Supplier-On-The-Fly**’ (S-O-T-F) denotes when a new Supplier account is created by the Buyer. The (S-O-T-F) Supplier has not been adopted into the Private Marketplace. All PO’s created for the S-O-T-F Supplier will contain non-catalog content and the orders will be sent to the Supplier via the Birch Street fax server. Supplier-On-The-Fly (S-O-T-F) Suppliers do not have catalog content.

Suppliers	
Aqua Sun Ozone International	View Products View categories
Contact: Matthew Pabor (800)500-5144 Fax:(800)500-5144 asoipure@aol.com 723 Eugene Road Palm Springs CA 92264 (Proxy) (National) (Product)	
Artex International, Inc.	View Products View categories
Contact: Kim Hagler (618)654-0296 Fax:(618)654-0200 kimh@artex-int.com 1405 Walnut Highland IL 62249 (Direct) (National) (Product)	
Morey's Seafood International	View Products View categories
Contact: James Hill (314)428-7777 Ext:10 Fax:(314)428-0751 jhill@moreys.com 8501 Page St. Louis MO 63114 (Direct) (Regional) (Product)	
DEEN SUM INTERNATIONAL INC. dba YANK SING	
Contact: JOY LI Ext:8219 Fax:(415)957-9899 sales2@yanksing.com 1 RINCON CENTER SAN FRANCISCO CA 94105 (On the Fly)	

Chapter 3 - Searching Catalogs

5. View Products



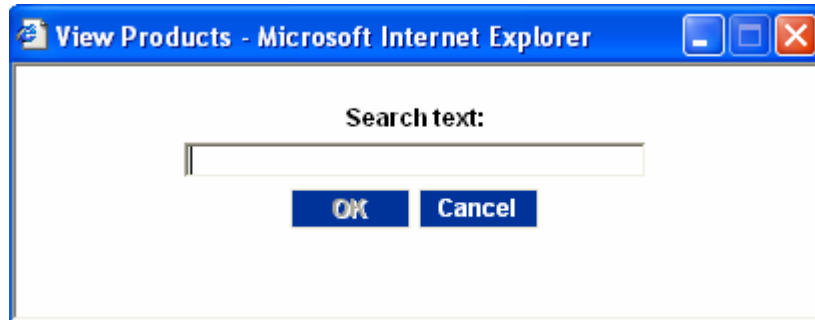
Click on the **View Products** link.

The system will display all products associated to that Supplier, if the Supplier has less than 1,000 products. The products displayed will look similar to the Product search result.

Item #	Product Name Supplier Name	Manufacturer	PackSize	UOM	Min qty	Ord Qty Price	Select
MOD. 300 More Product Info	Air & fabric purification system, Ozone sanitizer, "in-room" unit -model 300 Aqua Sun Ozone International	Aqua Sun Ozone	1 / 5.5 x 4 x 3	EA	1	\$136.31	<input type="checkbox"/>
MOD. 2500 More Product Info	Air & fabric purification system, Ozone sanitizer, model 2500 Aqua Sun Ozone International	Aqua Sun Ozone	1 / 8 x 6 x 13.5	EA	1	\$321.04	<input type="checkbox"/>
MOD. 5000 More Product Info	Air & fabric purification system, Ozone sanitizer, model 5000 Aqua Sun Ozone International	Aqua Sun Ozone	1 / 9 x 16 x 18	EA	1	\$627.61	<input type="checkbox"/>

Or

A **Search Text** box is displayed for Suppliers with greater than 1,000 products in their catalog. An additional search feature is provided to narrow the result set for the search.



Chapter 3 - Searching Catalogs

6. View Categories

Click on the **View Categories** link.

Artex International, Inc. [View Products](#) [View categories](#)

Contact: Kim Hagler (618)654-0296 Fax:(618)654-0200 kimh@artex-int.com

1405 Walnut
 Highland IL 62249
 (Direct) (National) (Product)

The system will display all of the categories that contain the Supplier's products. The Categories displayed will look similar to the Category search result.

Categories Found:3 **Up**

Category name
HSMMASTER / Linen Bibs, Napkins & Placemats
HSMMASTER / Skirting, Padding & Runners
HSMMASTER / Table Covers & Mommie Cloths

Clicking on any of the Categories will either display any existing Sub-Categories or the product(s) within the Category.

Catalog:**HSMMASTER**
 Category: [Linen Bibs, Napkins & Placemats](#) **UP**
 Products: 186
 Pages: 1

Item #	Product Name Supplier Name	Manufacturer	Pack/Size	UOM	Min qty	Ord Qty Price	Select
A117x1700000 More Product Info	Napkin, 17X17 White Carousel 100% Spun Poly XI 550 Artex International, Inc.	Artex	50 / 17"x17"	DZ	5	<input type="text"/> \$7.78	<input type="checkbox"/>
A117x1700029 More Product Info	Napkin, 17X17 Cadet Blue Carousel 100% Spun Poly XI 550 Artex International, Inc.	Artex	50 / 17"x17"	DZ	5	<input type="text"/> \$9.39	<input type="checkbox"/>
A117x1701351 More Product Info	Napkin, 17X17 Black Carousel 100% Spun Poly XI 550 Artex International, Inc.	Artex	50 / 17"x17"	DZ	5	<input type="text"/> \$9.39	<input type="checkbox"/>
A117x1702500 More Product Info	Napkin, 17X17 Teal Carousel 100% Spun Poly XI 550 Artex International, Inc.	Artex	50 / 17"x17"	DZ	5	<input type="text"/> \$9.39	<input type="checkbox"/>

Chapter 4 - Order Guides

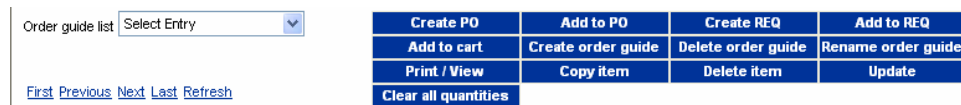
The 'Order Guide' tab allows for the creation, maintenance and use of Order Guides, which contain catalog content for those products purchased on a repetitive basis. Buyers can also Sort, Add Par Values and a select other functions driven by Action buttons within the Order Guide tab. This tab allows a user to group a list of items for frequent use. The user can copy items between order guides, as well as rename or delete order guides.

1. Create an Order Guide

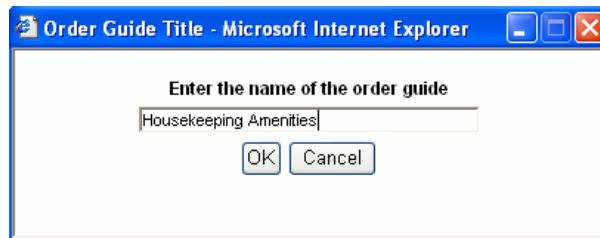
Step 1: Select the Order Guide tab on the Front Page.



Step 2: Click on the blue Action button "Create Order Guide"



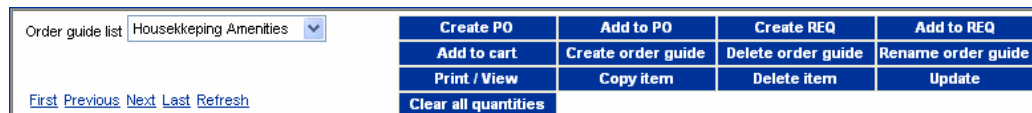
Step 3: Create a name for your Order Guide and click "OK"



The system will automatically prompt you when the Order Guide has been created.



The Order Guide you just created is displayed in the Order Guide list window.



A Buyer may create an unlimited number of Order Guides.

Chapter 4 - Order Guides

2. Add Products to an Order Guide

Step 1: From the Catalog tab, search for products - Exemplified used: **Mouthwash**

Search All Catalogs
 Products

Catalogs | Order Guide | Cart | REQ | PO | In Box | Supplier PO

Catalog: **Various**
 Products: 2
 Pages: 1

Item #	Product Name Supplier Name	Manufacturer	Pack/Size	UOM	Min qty	Ord Qty Price	Select
30516 More Product Info	Hilton Listermint Mouthwash 1.75 oz. Guest Supply, Inc.	Guest Supply, Inc.	180 / 2oz	CS	1	<input type="text" value=""/> \$62.53	<input type="checkbox"/>
30517 More Product Info	Hilton Neutrogena Mouthwash 1 oz. Guest Supply, Inc.	Guest Supply, Inc.	210 / 1oz	CS	1	<input type="text" value=""/> \$43.77	<input type="checkbox"/>

Step 2: Check the “**Select**” box on the far right column to “**Select**” the desired item(s).

Item #	Product Name Supplier Name	Manufacturer	Pack/Size	UOM	Min qty	Ord Qty Price	Select
30516 More Product Info	Hilton Listermint Mouthwash 1.75 oz. Guest Supply, Inc.	Guest Supply, Inc.	180 / 2oz	CS	1	<input type="text" value=""/> \$62.53	<input checked="" type="checkbox"/>
30517 More Product Info	Hilton Neutrogena Mouthwash 1 oz. Guest Supply, Inc.	Guest Supply, Inc.	210 / 1oz	CS	1	<input type="text" value=""/> \$43.77	<input checked="" type="checkbox"/>

Step 3: Click the blue Action button, “**Add to Order Guide**”.

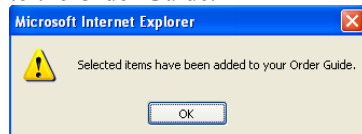
Step 4: Select the desired Order Guide from the list of Order Guides. Please note that you will not have any Order Guides when you first start using the system.

Order guide - Microsoft Internet Explorer

[Advanced Search](#)
[First](#) [Previous](#) [Next](#) [Last](#) [Refresh](#)
 Search Column:
 Search Text:

<input type="button" value="v"/>	Order guide	Updated on
<input type="button" value="Select"/>	Dry Grocery	04/07/2003 13:49:15
<input type="button" value="Select"/>	Fluid Dairy	04/07/2003 13:50:02
<input type="button" value="Select"/>	Guest Room Amenities	04/07/2003 13:48:38

The Buyer will receive a confirmation message prompt when the selected items have been added to the Order Guide.



Chapter 4 - Order Guides

3. Sort Order Guide

Step 1: Select an Order Guide from the Order Guide list window. Use the down arrow to display all Order Guides in your account.

The screenshot shows the 'Order Guide' tab selected. Below the navigation tabs, there is a dropdown menu for 'Order guide list' set to 'Produce'. To the right are several action buttons: 'Create PO', 'Add to PO', 'Create REQ', 'Add to REQ', 'Add to cart', 'Create order guide', 'Delete order guide', 'Rename order guide', 'Print / View', 'Copy item', 'Delete item', and 'Update'. Below these is a 'Clear all quantities' button. At the bottom of the button area are checkboxes for 'Sort' and 'Par values'. The main table below has the following data:

All	Item #	Product Name	Pack/Size	Req UOM	Min order qty	Quantity	Price	Extension
<input type="checkbox"/>	00015 More Product Info	Avocados B Grade 48/60ct Case L.A. Specialty Produce	48/48 ct.	CS Change UOM	1	0	\$18.40	\$0.00
<input type="checkbox"/>	00010 More Product Info	Avocados Calif. 32ct 2 Layer Case L.A. Specialty Produce	32/32 ct.	CS Change UOM	1	0	\$20.90	\$0.00
<input type="checkbox"/>	00012 More Product Info	Avocados Calif. 40/48 Count Case L.A. Specialty Produce	40/40/48 ct.	CS Change UOM	1	0	\$64.65	\$0.00
<input type="checkbox"/>	00017 More Product Info	Avocados Chile/New Zealand 2 Layer Case L.A. Specialty Produce	48/2 lyr.	CS Change UOM	1	0	\$48.15	\$0.00
<input type="checkbox"/>	00011 More Product Info	Avocados Hass 40 ct Cs L.A. Specialty Produce	40/40 ct.	CS Change UOM	1	0	\$0.00	\$0.00
<input type="checkbox"/>	00013 More Product Info	Avocados Hass 40/48 ct 2-layer Cs L.A. Specialty Produce	40/40/48 ct.	CS Change UOM	0	0	\$53.15	\$0.00

Step 2: Click within the “Sort” check box, directly below the blue “Clear all Quantities” Action button.

The image shows a close-up of the 'Clear all quantities' button, which is highlighted in blue. Below it, the 'Sort' checkbox is checked, and the 'Par values' checkbox is unchecked.

The ‘Sort’ check box is available within all Order Guides and is used to rearrange the sequence of product rows. Selecting the ‘Sort’ check box will launch a ‘Sort’ column (second column from left) on the Order Guide screen.

The screenshot shows the 'Order Guide' list window after the 'Sort' checkbox has been checked. A new 'Sort order' column has been added to the table, containing empty input boxes for each row. The 'Sort' checkbox is now checked, and the 'Par values' checkbox remains unchecked.

All	Sort order	Item #	Product Name	Pack/Size	Req UOM	Min order qty	Quantity	Price	Extension
<input type="checkbox"/>	<input type="text"/>	00015 More Product Info	Avocados B Grade 48/60ct Case L.A. Specialty Produce	48/48 ct.	CS Change UOM	1	0	\$18.40	\$0.00
<input type="checkbox"/>	<input type="text"/>	00010 More Product Info	Avocados Calif. 32ct 2 Layer Case L.A. Specialty Produce	32/32 ct.	CS Change UOM	1	0	\$20.90	\$0.00
<input type="checkbox"/>	<input type="text"/>	00012 More Product Info	Avocados Calif. 40/48 Count Case L.A. Specialty Produce	40/40/48 ct.	CS Change UOM	1	0	\$64.65	\$0.00

Step 3: Enter a numeric value in each row, based on the sequence desired and then clicks ‘Update’. The Order Guide will be ‘sorted’ accordingly. A Buyer may also elect to use decimals to sub sort within whole number sequences.

Chapter 4 - Order Guides

4. Adding Par Values

Step 1: Select an Order Guide from the Order Guide list window. Use the down arrow to display all Order Guides in your account.

All	Item #	Product Name	Pack/Size	Req UOM	Min order qty	Quantity	Price	Extension
<input type="checkbox"/>	00015 More Product Info	Avocados B Grade 48/60ct Case L.A. Specialty Produce	48/48 ct.	ICS Change UOM	1	0	\$18.40	\$0.00
<input type="checkbox"/>	00010 More Product Info	Avocados Calif. 32ct 2 Layer Case L.A. Specialty Produce	32/32 ct.	ICS Change UOM	1	0	\$20.90	\$0.00
<input type="checkbox"/>	00012 More Product Info	Avocados Calif. 40/48 Count Case L.A. Specialty Produce	40/40/48 ct.	ICS Change UOM	1	0	\$64.65	\$0.00
<input type="checkbox"/>	00017 More Product Info	Avocados Chile New Zealand 2 Layer Case L.A. Specialty Produce	48/2 lyr.	ICS Change UOM	1	0	\$48.15	\$0.00
<input type="checkbox"/>	00011 More Product Info	Avocados Hass 40 ct Cs L.A. Specialty Produce	40/40 ct.	ICS Change UOM	1	0	\$0.00	\$0.00
<input type="checkbox"/>	00013 More Product Info	Avocados Hass 40/48 ct 2-layer Cs L.A. Specialty Produce	40/40/48 ct.	ICS Change UOM	0	0	\$53.15	\$0.00

Step 2: Click within the “Par Values” check box, directly below the blue “Clear all Quantities” Action button.



A Buyer can elect to add a Minimum (Min) and/or Maximum (Max) ‘Par Value’ for each item contained in their Order Guides. When a Buyer checks the ‘Par Values’ check box, the system launches 2 new columns within the Order Guide grid (**Min Qty**) and (**Max Qty**).

Page 1 of 1 / Rows 1-6 of 6 found Sort Par values

All	Item #	Product Name	Pack/Size	Req UOM	Min order qty	Quantity	Min qty	Max qty	Price	Extension
<input type="checkbox"/>	00015 More Product Info	Avocados B Grade 48/60ct Case L.A. Specialty Produce	48/48 ct.	ICS Change UOM	1	0			\$18.40	\$0.00
<input type="checkbox"/>	00010 More Product Info	Avocados Calif. 32ct 2 Layer Case L.A. Specialty Produce	32/32 ct.	ICS Change UOM	1	0			\$20.90	\$0.00
<input type="checkbox"/>	00012 More Product Info	Avocados Calif. 40/48 Count Case L.A. Specialty Produce	40/40/48 ct.	ICS Change UOM	1	0			\$64.65	\$0.00

Step 3: The Buyer populates the fields with the desired Min and Max Par quantities. Please note that the (Min) Par Qty must equal to or greater than the supplier’s minimum order quantity. Conversely, the (Max) Par Qty must also be equal to or greater than the supplier’s minimum order qty.

Step 4: Upon completion, the Buyer must click the ‘Update’ button to save their Par values.

Chapter 4 - Order Guides

5. Print / View

Step 1: The “**Print/View**” Action button is also located within Order Guide tab and performs differently than the PO Print/View process. Select an Order Guide from the Order Guide list window. Use the down arrow to display all Order Guides in your account.

The screenshot shows the 'Order Guide' tab in a software interface. At the top, there are navigation tabs: Catalogs, Order Guide (selected), Cart, REQ, PO, In Box, and Supplier PO. Below the tabs, there is a search bar with 'Produce' entered. To the right of the search bar are several action buttons: Create PO, Add to PO, Create REQ, Add to REQ, Add to cart, Create order guide, Delete order guide, Rename order guide, Print / View, Copy item, Delete item, and Update. Below these buttons is a 'Clear all quantities' button. The main area contains a table with columns: All, Item #, Product Name, Pack/Size, Req UOM, Min order qty, Quantity, Price, and Extension. The table lists several avocado products with their respective details and a 'Change UOM' button for each row. At the bottom of the table, there are checkboxes for 'Sort' and 'Par values'.

All	Item #	Product Name	Pack/Size	Req UOM	Min order qty	Quantity	Price	Extension
<input type="checkbox"/>	00015 More Product Info	Avocados B Grade 48/48 Count Case L.A. Specialty Produce	48/48 ct.	CS Change UOM	1	0	\$18.40	\$0.00
<input type="checkbox"/>	00010 More Product Info	Avocados Calif. 32ct 2 Layer Case L.A. Specialty Produce	32/32 ct.	CS Change UOM	1	0	\$20.90	\$0.00
<input type="checkbox"/>	00012 More Product Info	Avocados Calif. 40/48 Count Case L.A. Specialty Produce	40/40/48 ct.	CS Change UOM	1	0	\$64.65	\$0.00
<input type="checkbox"/>	00017 More Product Info	Avocados Chile New Zealand 2 Layer Case L.A. Specialty Produce	48/2 lyr.	CS Change UOM	1	0	\$48.15	\$0.00
<input type="checkbox"/>	00011 More Product Info	Avocados Hass 40 ct Cs L.A. Specialty Produce	40/40 ct.	CS Change UOM	1	0	\$0.00	\$0.00
<input type="checkbox"/>	00013 More Product Info	Avocados Hass 40/48 ct 2-Layer Cs L.A. Specialty Produce	40/40/48 ct.	CS Change UOM	0	0	\$53.15	\$0.00

Step 2: Click the “Print/View” Action button.



Step 3: If the below File Download message appears, click “Open”.

The screenshot shows a 'File Download' dialog box with a warning icon. The text inside reads: 'Some files can harm your computer. If the file information below looks suspicious, or you do not fully trust the source, do not open or save this file.' Below this, the file details are listed: File name: ...GuideRpt_1067281402750.xls, File type: Microsoft Excel Worksheet, and From: 216.154.238.116. At the bottom, there is a question: 'Would you like to open the file or save it to your computer?' with four buttons: Open, Save, Cancel, and More Info. A checkbox at the bottom is checked and labeled 'Always ask before opening this type of file'.

Chapter 4 - Order Guides

5. Print / View

Step 4: When a Buyer selects an existing Order Guide and clicks on the “**Print/View**” button, the system creates a copy of the Order Guide in Microsoft Excel. The Excel Order Guide can then be “saved” to the Buyer’s computer.

#	ITEM#	PRODUCT NAME	SUPPLIER	UOM	LIST PRICE	MIN	MAX	PACK	SIZE	
1		Order Guide: Produce								
2										
3		Subject: _____								
4										
5		User Name: HSMCA109								
6										
7										
8										
9		Print Date: 10/27/2003				PAR				
10										
11										
12	1	15	Avocados B Grade 48/60ct Case	L.A. Specialty Produce	CS	18.4		48	48 ct.	
13	2	10	Avocados Calif. 32ct 2 Layer Case	L.A. Specialty Produce	CS	20.9		32	32 ct.	
14	3	12	Avocados Calif. 40/48 Count Case	L.A. Specialty Produce	CS	64.65		40	40/48 ct.	
15	4	17	Avocados Chile/New Zealand 2 Layer Case	L.A. Specialty Produce	CS	48.15		48	2 lyr.	
16	5	11	Avocados Hass 40 ct Cs	L.A. Specialty Produce	CS	0		40	40 ct.	
17	6	13	Avocados Hass 40/48 ct 2-layer Cs	L.A. Specialty Produce	CS	53.15		40	40/48 ct.	
18										

The Order Guide (now an Excel Spreadsheet) has a row titled, “Forecast Count”. The Buyer may elect to populate these fields with forecast information (House Count, Occupancy Rate, etc.) in which formulas can be used to determine optimum ordering quantities. There is also a date field that can be used to denote the date or day of the week. The system also creates seven (7) Inventory / Order (Inv/Ord) columns for the purpose tracking existing quantities on hand.

Forecast Count:

Date:

INV	ORD	INV	ORD	INV	ORD	INV	ORD	INV	ORD	INV	ORD	INV	ORD

IMPORTANT ORDER GUIDE INFORMATION – THINGS YOU SHOULD KNOW:

- When a supplier updates pricing for a product, your **Birch Street** Order Guide will automatically be updated as well.
- When you select “Print/View” and create a Excel Spreadsheet version of the Order Guide, the Spreadsheet is now divorced for the Birch Street application. All future supplier updates will **NOT** be reflected in the Spreadsheet version of the order Guide.
- Product Names displayed in Red text in existing Birch Street Order Guide indicate that the Supplier has discontinued selling the item. The discontinued item(s) can **NOT** be selected to create a future PO. The discontinued products will remain in the Order Guide until the Buyer deletes them.

Chapter 5 – Purchase Orders

Creating Purchase Orders can be achieved from multiple places within the application. PO's can be created from the results of Catalog Searches, from Order Guides, even from existing PO's.

1. Create a Purchase Order – From an Order Guide

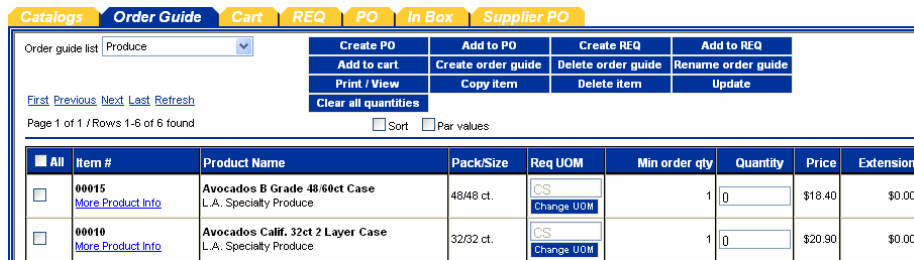
Step 1: From the Front Page, click on the **Order Guide** tab.




Step 2: Select an **Order Guide** from the Order Guide list.



Step 3: Enter the desired order quantity for each desired item(s).



Remember to Tab off of each field. Notice that by changing the quantity the line has been automatically selected for action (i.e. the checkbox is checked). Notice also that the select checkbox for Order Guide Items is on the far left while the catalog tab has the select checkbox on the far right. Select Check boxes and/or Radio buttons will always be on either end of the grid, depending on which Front Page Tab you are working from.

Step 4: Click on the blue **“Create PO”** Action button. 
The **Create Document** window opens for entering the purchase order header information for this PO.

Chapter 5 – Purchase Orders

1. Create a Purchase Order – From an Order Guide

- Step 5:** Create the **PO Header** by entering data into the following fields:
- **Subject:** Give the PO a subject for reference
 - **Req'd Del. Date:** Enter date product is needed hotel
 - **Approver:** Leave as “No Approver”
 - **Note to Supplier:** Enter a Note to the Supplier, if desired
 - **Cost Center:** Enter your Department Name
 - **Source Doc:** Leave this field blank
 - **Use Tax %:** Accept the Default
 - **Tax:** Accept the Default

Create Document - Microsoft Internet Explorer

Subject

Required delivery date

Approver No Approver

Note to Supplier

Cost center

Source Document

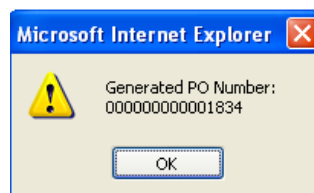
Use Tax %
(Uncheck to add flat amts)

Tax

Use Freight %
(Uncheck to add flat amts)

Freight

- Step 6:** Click **OK** to create the PO. A popup message box displays the number of the PO created.



- Ste 7:** Click **OK** again. The application will take you directly to the PO Tab and load PO that was just created, displaying the PO for further action.

Chapter 5 – Purchase Orders

2. Create a Purchase Order – From a Catalog Search

Step 1: On the Front Page, in the **Search All Catalog** section of the Summary Panel, select **All Suppliers** from the drop down list.


Step 2: In the field immediately to the Right of the **Suppliers** drop down list, type in the Supplier Name you wish to find.

Step 3: Click on the “Go” button.

Step 4: Click on the **View Products** link. The system will display all products associated to that Supplier, if the Supplier has less than 1,000 products. The products displayed will look similar to the Product search result.

Item #	Product Name Supplier Name	Manufacturer	Pack/Size	UOM	Min qty	Ord Qty Price	Select ■
MOD. 300 More Product Info	Air & fabric purification system, Ozone sanitizer, "in-room" unit -model 300 Aqua Sun Ozone International	Aqua Sun Ozone	1 / 5.5 x 4 x 3	EA	1	<input type="text"/> \$136.31	<input type="checkbox"/>
MOD. 2500 More Product Info	Air & fabric purification system, Ozone sanitizer, model 2500 Aqua Sun Ozone International	Aqua Sun Ozone	1 / 8 x 6 x 13.5	EA	1	<input type="text"/> \$321.04	<input type="checkbox"/>
MOD. 5000 More Product Info	Air & fabric purification system, Ozone sanitizer, model 5000 Aqua Sun Ozone International	Aqua Sun Ozone	1 / 9 x 16 x 18	EA	1	<input type="text"/> \$627.61	<input type="checkbox"/>

Step 5: Enter the desired quantities for each item in the Ord Qty column. Use the “Tab” key once you have entered a quantity and the row will be selected and the “Select” box will be tagged accordingly.

Step 6: Click on the blue “**Create PO**” Action button.  The **Create Document** window opens for entering the purchase order header information for this PO.

Step 5: Create the **PO Header** by entering data into the following fields:

- **Subject:** Give the PO a subject for reference
- **Req'd Del. Date:** Enter date product is needed hotel
- **Approver:** Leave as “No Approver”
- **Note to Supplier:** Enter a Note to the Supplier
- **Cost Center:** Enter your Department Name
- **Source Doc:** Leave this field blank
- **Use Tax %:** Accept the Default
- **Tax:** Accept the Default

See next page for screen shot of **PO Header fields**.

Chapter 5 – Purchase Orders

2. Create a Purchase Order – From a Catalog Search

Create Document - Microsoft Internet Explorer

Subject

Required delivery date

Approver

Note to Supplier

Cost center

Source Document

Use Tax % (Uncheck to add flat amts)

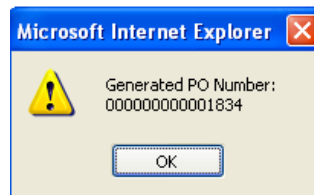
Tax

Use Freight % (Uncheck to add flat amts)

Freight

OK **Cancel**

Step 6: Click **OK** to create the PO. A popup message box displays the number of the PO created.



Ste 7: Click **OK** again. The application will take you directly to the PO Tab and load PO that was just created, displaying the PO for further action.

Chapter 5 – Purchase Orders

3. Create a Purchase Order – From a Copied PO

Creating a new Purchase Order by copying an existing Purchase Order. In the below example, we create a new Purchase Order from a PO that was submitted and then Rejected by the Supplier.

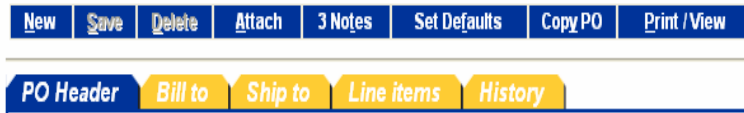
Step 1: From the Front Page, click on the **PO** tab.



Step 2: Select any existing PO, regardless of its PO status by clicking the Round Radio button on the far left column. Click the blue **“Edit”** Action button to the right of the Radio button.

		PO number	PO Status	Subj / Supplier
<input type="radio"/>	Edit	000000000003755	Submitted	Subject: Wednesday Supplier: Alpha Baking Company

Step 3: Select the blue **“Copy PO”** Action button to create a copy of the PO.



Step 4: The screen will automatically refresh itself and prompt you when the processing is done. Click **“OK”** to continue.



Chapter 5 – Purchase Orders

3. Create a Purchase Order – From a Copied PO

Step 5: The below screen illustrates the copied PO. Please note that when you copy an existing PO to create a new PO, the following changes occur:

- The new PO is given a new PO Number
- The Status of the newly created PO is “New”
- ***The Unit Price and Extension is updated for all Catalog items***
- All other information is exactly the same as on the original PO:
 - Subject
 - Required Delivery Date
 - Supplier Name
 - Supplier Address
 - PO Line Items
 - Order Quantities

The screenshot shows a web-based Purchase Order form. At the top, there is a navigation bar with buttons: New, Save, Delete, Attach, Notes, Set Defaults, Copy PO, and Print / View. Below this is a tabbed interface with 'PO Header' selected. The form is divided into three main sections: Identification, Supplier, and Sent From. The Identification section includes fields for PO number (0000000001836), Subject (Test - please reject), Required delivery date (10/27/2003), and PO date (10/27/2003). The Supplier section includes fields for Supplier (Hilton Supply Management), Proxy supplier (1), Address line 1 (9336 Civic Center Dr.), City (Beverly Hills), State (CA), Zip (90210), Attention (Hilton Administration), Phone (8884325620), and Email (hsm@hilton.com). The Sent From section includes a Buyer field (James J. O'Quinn) and a checkbox for 'Transfer this PO'.

Step 6: Modify or change the data on the PO Header of the newly created PO.

This screenshot shows the same Purchase Order form as in Step 5, but with the 'Sent From' section expanded. It shows the Buyer field (James J. O'Quinn) and a checkbox for 'Transfer this PO'. Below this, there are fields for Title (Corporate Director, e-Procurement), Cost center, and Source document number. The top navigation bar and tabs are also visible.

Chapter 5 – Purchase Orders

3. Create a Purchase Order – From a Copied PO

The Buyer can click on any of the tabs but can only change information on the PO Header, Ship To, and Line Items tabs.

Step 7: Changes to the Attention and Ship Via can be made on the Ship To tab. The Ship Via is the method in which you want your order to ship.

New Save Delete Attach 1 Notes Set Defaults Copy PO Print / View

PO Header Bill to Ship to Line items History

Ship Information

Ship to same as Bill to

Ship to location

Company name

Address line 1

Address line 2


Address line 3

City

State

Zip




Attention

Ship via  

Inn code

Step 8: The Line Items tab has its own “Edit” button, which when selected launches the screen that contains all of the information about the PO line item. Changes to the line item information can be made here.

PO Header Bill to Ship to Line items History

Add Row    Search Column: Search Text: **GO** page 1 of 1 Rows per page 50

	Line	Item #	Product name	Qty	Unit	Price	Extension
Edit	1	111	widgit	1	lea	\$0.01	\$0.01
							\$0.01

GO Cancel Copy as New Row Delete Row Notes Attach Add Products

Item

Line

Line type

Item #

Product name

Unit

Qty

Price

Lead time in days


Manufacturer


Mfg part number

Brand name

Model


Size

Tax amount 

Estimated freight amount 

Chapter 5 – Purchase Orders

3. Create a Purchase Order – From a Copied PO

Step 9: Once the Buyer has completed all of the desired changes, click the blue “Save” Action button to save the changes.  Click the blue “Close” Action button in the far upper right corner of your screen.

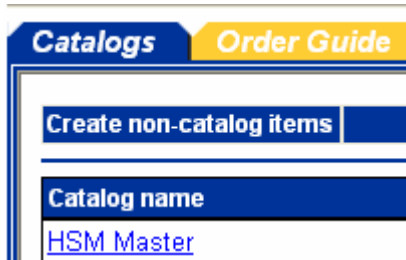
Chapter 5 – Purchase Orders

4. Create a Purchase Order – From a Spot Buy

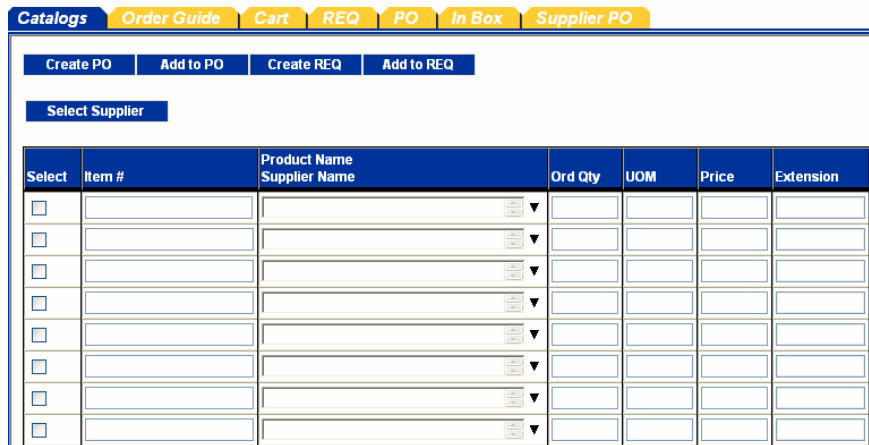
Creating a Spot Buy from a Supplier with Catalog Content on the system.

Step 1: From the Front Page, click on **Home** link on the Logo Panel at the top of the Front Page screen. This takes the user to the Main Catalog Tab.

Step 2: Click on the blue “**Create Non-Catalog Items**” Action button. This action will launch a blank product grid, where the Buyer can free-form product information.



Step 3: The blank product grid is designed to provide structure for free-form or “Spot Buy” product data. **The Buyer must manually “Select” each row in the far left check box, prior to completing the other product attribute fields.** At this point, we have indicated **WHAT** we want to purchase.



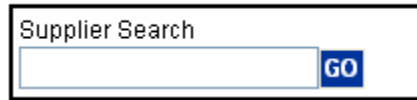
Step 4: Now we need to identify **WHO** we want to purchase these items from. Click on the blue “**Select Supplier**” Action button.



Chapter 5 – Purchase Orders

4. Create a Purchase Order – From a Spot Buy

Step 5: When you click on the “**Select Supplier**” Action button, the system launches a Supplier Name search window.



A screenshot of a web form titled "Supplier Search". It features a text input field and a blue "GO" button to its right.

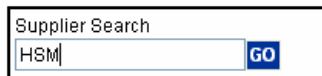
Suppliers

Type the name of the Supplier into the “**Supplier Search**” window. **IMPORTANT INFORMATION** – A Buyer can search for Hilton Supply Management using the following conventions:

- Hilton Supply Management
- HSM
- Hilton Hotels Corporation
- HEC
- Hilton

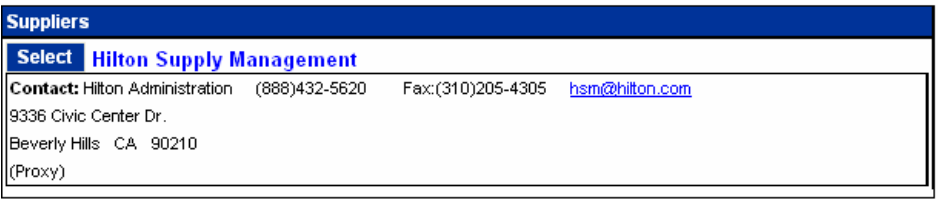
All of the above examples will return a positive match.

Step 6: Click on the blue “**Select**” Action button to the left of the Supplier Name. We have now identified **WHO** we want to purchase the “Spot Buy” products from.



A screenshot of the "Supplier Search" form with "HSM" entered in the text field and the "GO" button highlighted.

1 Supplier(s) Found



A screenshot of the "Suppliers" list. The first entry is "Hilton Supply Management" with a blue "Select" button to its left. Below the name, contact information is displayed: "Contact: Hilton Administration (888)432-5620 Fax:(310)205-4305 hsm@hilton.com 9336 Civic Center Dr. Beverly Hills CA 90210 (Proxy)".

Add New Supplier

Chapter 5 – Purchase Orders

4. Create a Purchase Order – From a Spot Buy

Step 7: Select the blue “**Create PO**” Action button to initiate the PO creation process. A Buyer may also elect to add the content to an existing PO.

At this point, the PO creation process is exactly the same as if we had selected content from a Catalog search or created the PO from an Order Guide.

Create PO	Add to PO	Create REQ	Add to REQ
-----------	-----------	------------	------------

Select Supplier	Hilton Supply Management	Clear
-----------------	--------------------------	-------

Select	Item #	Product Name Supplier Name	Ord Qty	UOM	Price	Extension
<input checked="" type="checkbox"/>	123	Enter Product Name Here	12	EA	1.50	18
<input type="checkbox"/>						
<input type="checkbox"/>						

Chapter 5 – Purchase Orders

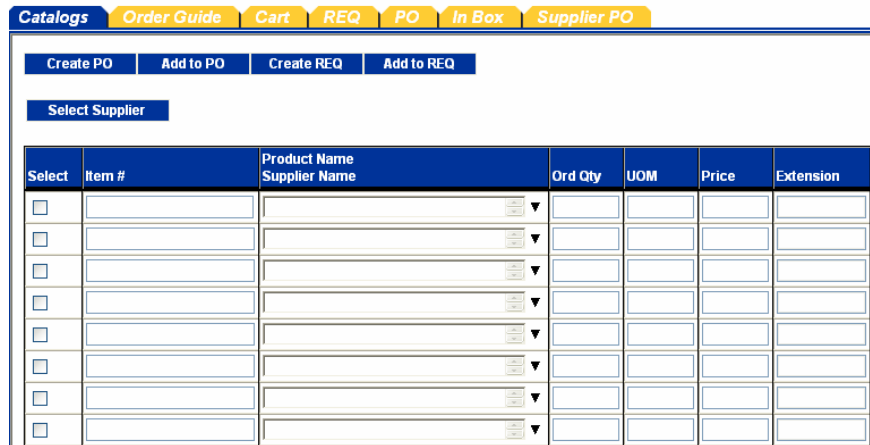
5. Create a Purchase Order – From a Supplier-On-The-Fly (S-O-T-F)

Step 1: From the Front Page, click on **Home** link on the Logo Panel at the top of the Front Page screen. This takes the user to the Main Catalog Tab.

Step 2: Click on the blue “**Create Non-Catalog Items**” Action button. This action will launch a blank product grid, where the Buyer can free-form product information.



Step 3: The blank product grid is designed to provide structure for free-form or “Spot Buy” product data. **The Buyer must manually “Select” each row in the far left check box, prior to completing the other product attribute fields.** At this point, we have indicated **WHAT** we want to purchase.



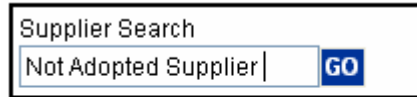
Step 4: Now we need to identify **WHO** we want to purchase these items from. Click on the blue “**Select Supplier**” Action button.



Chapter 5 – Purchase Orders

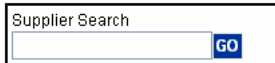
5. Create a Purchase Order – From a Supplier-On-The-Fly (S-O-T-F)

Step 5: When you click on the “**Select Supplier**” Action button, the system launches a Supplier Name search window. Type the name of the Supplier into the “**Supplier Search**” window.



Suppliers

Step 6: The below screen is displayed when no Supplier Name match was found. Click on the blue “**Add New Supplier**” Action button to proceed to the next step. As step one in the Supplier validation process, Birch Street first searches for the Supplier by name. When no match is found...



No Supplier Found

Suppliers

Add New Supplier

Step 7: Birch Street searches for the Supplier via their Fax number. The fax number search is important because all PO’s will be sent to the Supplier via the Birch Street fax server. Please note that the Supplier does not have a Birch Street account in which to retrieve electronic Purchase Orders. **Enter the Supplier’s Fax Number in the field below.**

Step 8: Birch Street performs the second validation process by search for Fax Number match. No two suppliers can ever have the same Fax Number. If no Fax Number match was found, the system will launch the following screen:

Chapter 5 – Purchase Orders

5. Create a Purchase Order – From a Supplier-On-The-Fly (S-O-T-F)

Step 9: Enter the new Supplier (S-O-T-F) information in the appropriate fields. Fields with a blue box and white triangle are “required” fields and must be completed before the Buyer can complete the process of creating a new Supplier account.

Add Supplier On Fly - Microsoft Internet Explorer

Please Enter Fax number **Search**
Enter a ten digit number only.

No Supplier Found Enter the following values to add a new supplier
Fax number (301)887-5566

Supplier name

Contact name

Title

Salutation


Phone

Email


Address line 1

Address line 2

Address line 3

Zip 

City

State 

Save **Cancel**

Chapter 5 – Purchase Orders

5. Create a Purchase Order – From a Supplier-On-The-Fly (S-O-T-F)

Please Enter Fax number **Search**
Enter a ten digit number only.

No Supplier Found Enter the following values to add a new supplier
Fax number (301)887-5566

Supplier name Non Adopted Supplier

Contact name Robert Jones

Title President

Salutation Mr.


Phone 3018875565

Email bob_jones@supplier.com


Address line 1 1234 Main Street

Address line 2 P.O. Box 345

Address line 3

Zip 22150 

City Bethesda

State MD 

Save **Cancel**

Step 10: Click the blue “Save” Action button to complete the process.

Chapter 6 - Submitting Purchase Orders to Suppliers

1. Purchase Order Status Definitions

The Birch Street application tracks the Purchase Order from the moment it is created through the final step of the transaction cycle. As the Purchase Order moves through the purchasing cycle, its “Status” will change when each milestone is passed. A few Purchase Order ‘Status’ examples are as follows:

New	PO has been created. The PO may also go through several “edits” but is still considered a new PO. The PO has <u>NOT</u> been submitted to the Supplier.
Submitted	The PO has been submitted but <u>NOT</u> Viewed <u>OR</u> Accepted by the Supplier.
Fax in Line to be Sent	A PO with this status is in a Queue or electronic waiting line and will soon be dispatched to the supplier by the Birch Street fax server.
Viewed	Supplier has received and opened or viewed the PO only. The Supplier has <u>NOT</u> accepted the PO.
Accepted	The Supplier has agreed to the terms of the PO and <u>HAS</u> accepted the order.
Fax/E-mail Accepted	The PO was sent to the Supplier via the Birch Street fax server. All Supplier-On-The-Fly (S-O-T-F) PO’s and PO’s to Fax Enabled Suppliers (<i>see Glossary of Terms for definition</i>) are considered <u>AUTOMATICALLY ACCEPTED</u> , once the fax has been transmitted successfully.
Fax/E-mail Failed	The PO was sent to the Supplier via the Birch Street fax server, BUT – either the fax number provided on the PO Header was invalid or the Supplier’s fax machine may have been out of order. The PO was <u>NOT</u> transmitted to the Supplier and has <u>NOT</u> been automatically accepted. The Birch Street System will make up to 5 attempts to send the order via their fax server before giving the PO a Fax/E-mail Failed status. Once the PO has Fax Failed status, the transaction is considered void. At that point, the Buyer must Copy the PO to a new PO and obtain a valid Supplier fax number and resubmit the new PO the supplier.
Rejected	The Supplier has declined the order and has rejected the PO with a Note which explains the reason for the rejection.

IMPORTANT – ONLY PO’S THAT HAVE BEEN EITHER ‘ACCEPTED’ OR ‘FAX/E-MAIL ACCEPTED’ ARE CONSIDERED VALID TRANSACTIONS AND WILL BE SHIPPED BY THE SUPPLIER.

Chapter 6 - Submitting Purchase Orders to Suppliers

2. Purchase Order Filter / Views

Over time, Buyers will create hundred, if not thousands of Purchase Orders in their Birch Street account. To assist in managing such a large volume of data, Birch Street provides “Filters” on the PO Tab.

The screenshot shows the 'PO' tab in a web application. At the top, there are navigation tabs: 'Catalogs', 'Order Guide', 'Cart', 'PO', and 'In Box'. Below these are several buttons: 'Submit', 'Receive', 'Buyer Contact', 'Supp Contact', 'Notes', 'Attachment', 'History', and 'Send Message'. A search area includes a dropdown for 'All My PO's', a search column dropdown set to 'All', a search text input field, and a 'GO' button. Below the search area, it says 'Page 1 of 2 / Rows 1-350 of 641 found'. The main part of the screenshot is a table with the following data:

			PO number	PO Status	Subject
<input checked="" type="radio"/>	Edit		00000000002267	Accepted by supplier	Subject: Sysco Order Confirmation Supplier: SYSCO Food Services of San Francisco
<input type="radio"/>	Edit		00000000002266	Accepted by supplier	Subject: Sysco Order Confirmation Supplier: SYSCO Food Services of San Francisco
<input type="radio"/>	Edit		00000000002265	Accepted by supplier	Subject: Sysco Order Confirmation Supplier: SYSCO Food Services of San Francisco
<input type="radio"/>	Edit		00000000002233	Fax/email accepted	Subject: HR/45156 Supplier: SUNDANCE FLORAL DESIGN
<input type="radio"/>	Edit		00000000002232	Fax in line to be sent	Subject: HR/45156 Supplier: SUNDANCE FLORAL DESIGN
<input type="radio"/>	Edit		00000000002220	Fax/email accepted	Subject: TELECOM/419948 Supplier: DATANAMICS
<input type="radio"/>	Edit		00000000002202	Viewed by supplier	Subject: CS/07965 Supplier: Hilton Supply Management

Each Buyer can elect to view all Purchase Orders by “PO Status”. Changing the Search Column from “All” to “PO Status” will allow the Buyer to define which PO Status code they would like displayed in the below PO grid.

This screenshot shows the same interface as the previous one, but with the search column dropdown set to 'PO Status'. The search text input field now contains 'Select Entry'. The rest of the interface, including the navigation tabs and buttons, remains the same.

Chapter 6 - Submitting Purchase Orders to Suppliers

2. Purchase Order Filter / Views

In the below example, we changed the PO Filter to all PO's that have only been "Viewed" by the Supplier. **REMEMBER** – PO's in Viewed status have **NOT** been "Accepted" by the Supplier.

All My PO's

[First](#) [Previous](#) [Next](#) [Last](#) [Refresh](#)

Search Column: PO Status

Search Text: Viewed by supplier

Page 1 of 1 / Rows 1-2 of 2 found

All Purchase Orders in Supplier Viewed Status – These Orders have not been "Accepted"

		Submit	Receive	Buyer Contact	Supp Contact	Print / View	Header Update		
		Notes	Attachment	History	Send Message				
All My PO's <input type="button" value="v"/> First Previous Next Last Refresh Search Column: PO Status <input type="button" value="v"/> Search Text: Viewed by supplier <input type="button" value="v"/> <input type="button" value="GO"/> Page 1 of 1 / Rows 1-2 of 2 found									
			/ PO number	PO Status	Subject	Inn code	PO date	Req delivery	PO Total
<input checked="" type="radio"/>	<input type="button" value="Edit"/>	<input type="button" value="v"/>	000000000002202	Viewed by supplier	Subject:CS:07965 Supplier: Hilton Supply Management	SFOFH	10/23/2003	10/31/2003	\$2,673.01
<input type="radio"/>	<input type="button" value="Edit"/>	<input type="button" value="v"/>	000000000002193	Viewed by supplier	Subject:HSK(P44687 Supplier: Hilton Supply Management	SFOFH	10/22/2003	10/31/2003	\$5,533.50

All Purchase Orders in Supplier Rejected Status – These Orders have been voided by the Supplier when they were "Rejected".

		Submit	Receive	Buyer Contact	Supp Contact	Print / View	Header Update		
		Notes	Attachment	History	Accept CO	Reject CO	Send Message		
All PO's <input type="button" value="v"/> First Previous Next Last Refresh Search Column: PO Status <input type="button" value="v"/> Search Text: Rejected by supplier <input type="button" value="v"/> <input type="button" value="GO"/> Page 1 of 1 / Rows 1-20 of 20 found									
			/ PO number	PO Status	Subject	Inn code	PO date	Req delivery	PO Total
<input checked="" type="radio"/>	<input type="button" value="Edit"/>	<input type="button" value="v"/>	000000000001782	Rejected by supplier	Subject:CAL MIL#15649 Supplier: Hilton Supply Management	LAXAH	10/21/2003	11/03/2003	\$392.37
<input type="radio"/>	<input type="button" value="Edit"/>	<input type="button" value="v"/>	000000000001677	Rejected by supplier	Subject:Test - please reject Supplier: Hilton Supply Management	LAXAH	10/06/2003	10/06/2003	\$0.01
<input type="radio"/>	<input type="button" value="Edit"/>	<input type="button" value="v"/>	000000000001568	Rejected by supplier	Subject:GROEN#15294 Supplier: Hilton Supply Management	LAXAH	09/19/2003	10/03/2003	\$7,851.45
<input type="radio"/>	<input type="button" value="Edit"/>	<input type="button" value="v"/>	000000000001565	Rejected by supplier	Subject:MAINTENANCE WAREHOUSE#15064 Supplier: Hilton Supply Management	LAXAH	09/19/2003	10/03/2003	\$1,201.25

IMPORTANT INFORMATION – ALL BUYERS SHOULD CHECK THEIR PO STATUSES DAILY TO ENSURE THAT THE SUPPLIERS HAVE RECEIVED, VIEWED AND ACCEPTED THE ORDER(S).

Chapter 6 - Submitting Purchase Orders to Suppliers

3. Proxy Suppliers

Please note that directly to the right of the Supplier's Name on the below PO Header is displayed the word "Proxy". Directly below the Supplier's Name Cardinal Glassware is "Hilton Supply Management". The Buyer searched for Cardinal Glassware (Supplier search), clicked on viewed products, selected the products, and created a PO. **AT NO TIME WAS HILTON SUPPLY MANAGEMENT SELECTED AS THE SUPPLIER.** There is a special feature in Birch Street which recognizes when Hilton Supply Management takes "Title" to the transaction through a "Proxy" Supplier.

PURCHASE ORDER	
Hilton Hotels	
PO NUMBER : 00000000001176	Status: Viewed by supplier
Required Delivery Date : 10/31/2003	PO Submit Date: 10/22/2003
Supplier: (Proxy)Cardinal Glassware Hilton Supply Management 9336 Civic Center Dr. Beverly Hills, CA, 90210, US Att. Cherrie Crisologo Title: Buyer - Strategic Sourcing Phone: (310) 205-4564 Fax: (310) 205-4305 Email: cherrie_crisologo@hilton.com	Bill To: Hilton Hotels PORTLAND-EXECUTIVE TOWER, OR 921 SW Sixth Avenue Portland, OR, 97204, US Att. Finance Department Ship To: Hilton Hotels PORTLAND-EXECUTIVE TOWER, OR 921 SW Sixth Avenue Portland, OR, 97204, US Att. Receiving Department
Sent From: Hilton Hotels PORTLAND-EXECUTIVE TOWER, OR Stuart Harris Title: Director of Purchasing Phone: (503) 220-2557 Fax: Email: stuart_harris@hilton.com	Terms: Subject: wineglass102203 Partial Order Accepted: Yes Payment Method: Purchase order Ship Via: Best Route Payment Terms: Net 30 Early Payment Terms: None

The only time Hilton Supply Management should be "Selected" as the Supplier is when a non-catalog content PO "**Spot Buy**" is created **AND** the Buyer knows that Hilton Supply management should receive the order.

Chapter 6 - Submitting Purchase Orders to Suppliers

4. Submitting the Purchase Order

Step 1: Select the ‘**PO Tab**’ from the Front Page.



Step 2: Select a “New” Status PO that is ready to be submitted to the Supplier.

		Submit	Receive	Buyer Contact	Supp Contact	Print / View	Header Update	
		Notes	Attachment	History	Accept CO	Reject CO	Send Message	
All PO's								
First Previous Next Last Refresh								
Search Column: PO Status								
Search Text: New								
Page 1 of 1 / Rows 1-136 of 136 found								
		PO number	PO Status	Subject	Inn code	PO date	Req delivery	PO Total
<input checked="" type="radio"/>	Edit	000000000001838	New	Subject:Test - please reject Supplier:Hilton Supply Management	LAXAH	10/27/2003	10/27/2003	\$0.01
<input type="radio"/>	Edit	000000000001836	New	Subject:Test - please reject Supplier:Hilton Supply Management	LAXAH	10/27/2003	10/27/2003	\$0.01
<input type="radio"/>	Edit	000000000001833	New	Subject:HOUSEKEEPING Supplier:Goldberg and Solovy Foods	LAXAH	10/27/2003	10/27/2003	\$79.34
<input type="radio"/>	Edit	000000000001766	New	Subject:GEN. STRM Supplier:Goldberg and Solovy Foods	LAXAH	10/17/2003	10/17/2003	\$26.73

Step 3: Click on the blue “Submit” Action button.

Submit

THE EXACT SAME PROCESS IS REPEATED FOR ALL TYPES OF PURCHASE ORDERS.

- From Order Guides
- From Catalog
- From Spot Buy
- From S-O-T-F

Chapter 7 - Add / Edit New Suppliers

1. Add New Supplier

Step 1: Click on the “**Home**” link on the Logo Panel

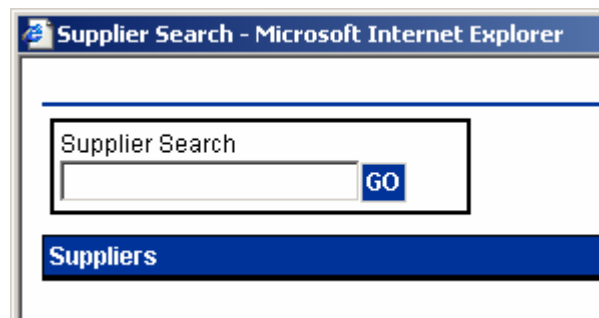
Step 2: Click on the “Create non-catalog items” button.



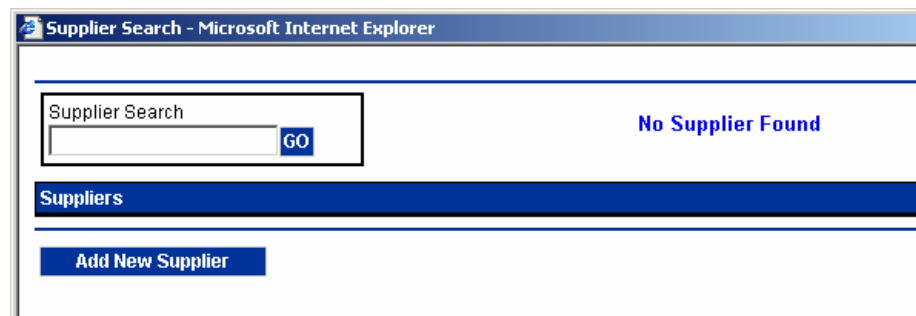
Step 3: Click on the “Select Supplier” button.



Step 4: Type the name of the supplier you need to add under the “Supplier Search” box.



Step 5: Since the supplier doesn't exist in Birch Street, you will see “No Supplier Found.” Click on the “Add New Supplier” button.

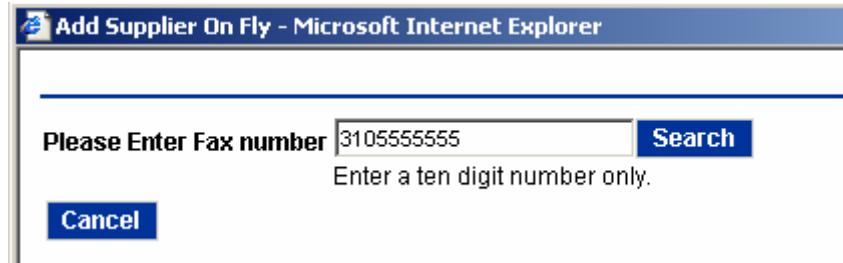


Chapter 7 - Add / Edit New Suppliers

1. Add a New Supplier

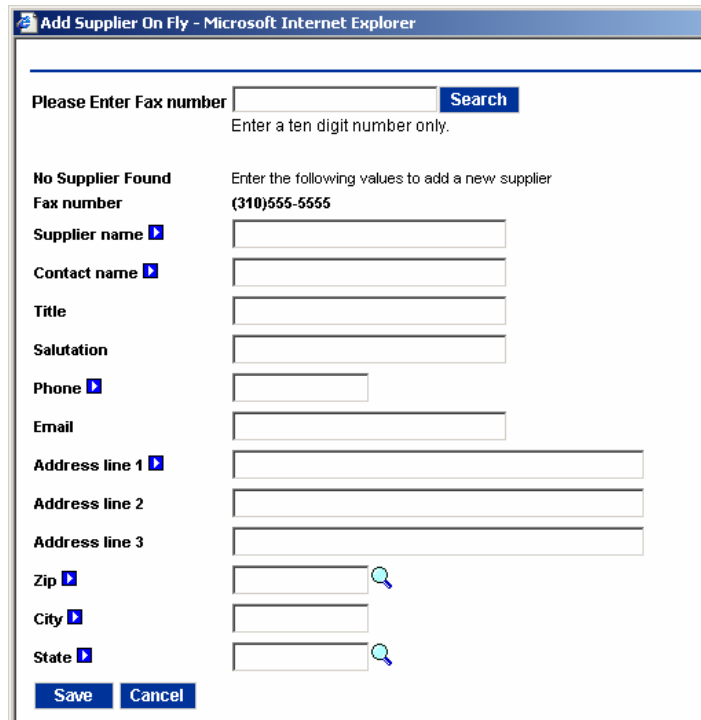
Step 6: Enter the supplier's fax number, without dashes "-" or parentheses "()", and click on the "Search" button.

Note: The fax number you enter here is the number where Birch Street POs will be faxed.



The screenshot shows a web browser window titled "Add Supplier On Fly - Microsoft Internet Explorer". The main content area contains the text "Please Enter Fax number" followed by a text input field containing "3105555555". To the right of the input field is a blue "Search" button. Below the input field is the instruction "Enter a ten digit number only." To the left of the input field is a blue "Cancel" button.

Step 6: Enter the supplier's contact information.



The screenshot shows the same web browser window. The "Please Enter Fax number" field is now empty, and the "Search" button is still present. Below this, the text "No Supplier Found" is displayed, followed by the instruction "Enter the following values to add a new supplier". The form contains the following fields:

- Fax number: (310)555-5555
- Supplier name: [input field]
- Contact name: [input field]
- Title: [input field]
- Salutation: [input field]
- Phone: [input field]
- Email: [input field]
- Address line 1: [input field]
- Address line 2: [input field]
- Address line 3: [input field]
- Zip: [input field] with a magnifying glass icon
- City: [input field]
- State: [input field] with a magnifying glass icon

At the bottom of the form are "Save" and "Cancel" buttons.

Step 7: Click on the "Save" button.

Chapter 8 – Receiving a Purchase Order

1. Receiving a Purchase Order.

IMPORTANT - Please skip this section if you do not currently have rights to receive.

Birch Street also allows a buyer to receive against a purchase order that has been submitted to a supplier and has been accepted by the supplier. By receiving the purchase order the buyer is telling their finance department when it is okay to pay an invoice.

Step 1: From the Main Menu, select **v7 Procurement**, than select **Receive Items (Based on PO)** option.

On the left side of the Receive Items (Based on PO) screen is a navigation list with a list of all PO's that have a status of **Open**. A PO status may not show **Open** but a PO is considered **Open** until it has been received complete or **Partially Received**.

A buyer can also narrow their search by changing the Search Column from "All" to "PO Number" for example. This will allow the buyer to define which PO they would like to have displayed. A buyer can also search by **Buyer Name**, **Invoice number**, **PO Status**, **PO date**, **PO Number**, **Received Date** and **Supplier Name**.

On the right side of the screen are the receiving tabs. These tabs will allow you to perform the receiving function on both the PO Header and PO Line(s).

The screenshot shows the Hilton procurement system interface. On the left, there is a search area with a dropdown menu set to "Open" and a search column dropdown set to "All". Below this is a table listing purchase orders with columns for "PO number" and "PO Status". The table contains several rows, with the last row highlighted in yellow. On the right, the "PO Header - Receiving" tab is active, displaying details for a specific PO. The PO number is 000000000000507, the PO date is 01/23/2003, and the PO status is "Accepted by supplier". Other fields include "Supplier" (Excellent Hoteliers), "Received date" (with a calendar icon), "Invoice number" (10), and "Buyer" (Ann Nguyen). There are also buttons for "Save", "Print", "Update", "Cancel/RemainQty", "Attach", and "1 Notes".

PO number	PO Status
000000000000224	Accepted by supplier
000000000000243	Accepted by supplier
000000000000273	Accepted by supplier
000000000000277	Accepted by supplier
000000000000420-001	Accepted by supplier
000000000000451	Accepted by supplier
000000000000453	Accepted by supplier
000000000000485	Accepted by supplier
000000000000504	Accepted by supplier
000000000000507	Accepted by supplier

Step 3: To begin receiving search for the PO you would like to receive. Select the PO by clicking on the PO Number. Once the system is done loading you will see that the PO Header – Receiving tab has been populated with the PO Number, PO Status (current), PO Date, the date the PO Status was changed, Buyer and Supplier. All of these fields are for viewing only. A buyer will not be able to edit these fields.

Step 4: Change the PO Status to either Partially Received or Fully Received.

Update PO status to

- Select Entry
- Partially received
- Fully received

Step 5: Add the Received Date. Click on the calendar and select the date the PO was received.

Received date

Chapter 8 – Receiving a Purchase Order

1. Receiving a Purchase Order.

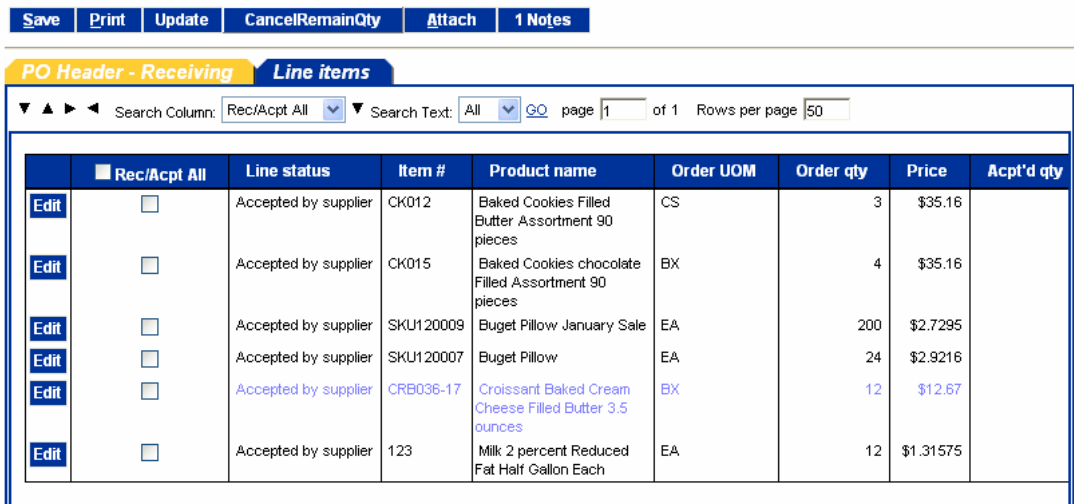
Step 6: If you have an invoice number you can enter that number into the Invoice Number field.

Invoice number

Step 7: Click the Line Items Tab. You have a few options for receiving at the line level. You can receive all lines at one time, you can receive each line separately or you can cancel a remaining quantity on a line.



Step 8: If you have received all lines on the PO complete select “Rec/Acpt All”. By doing this the system will receive complete all items. Click “Save”. Your order has now been received complete.



Step 9: To select a particular line, select the line and click on the blue edit button to the left of the check box. By clicking on the “Edit” button you will be able to see the ordering and receiving information for that item.

You will only need to populate 3 fields: the Receive By field (only if the item is sold by more than one UOM), the Accepted quantity and the Reason.

Chapter 8 – Receiving a Purchase Order

1. Receiving a Purchase Order.

Save Print Update CancelRemainQty Attach 1 Notes

PO Header - Receiving Line items

Search Column: Rec/Acpt All Search Text: All GO page 1 of 1 Rows per page 50

Rec/Acpt All	Line status	Item #	Product name	Order UOM	Order qty	Price	Acpt'd qty
<input type="checkbox"/>	Accepted by supplier	CK012	Baked Cookies Filled Butter Assortment 90 pieces	CS	3	\$35.16	
<input type="checkbox"/>	Accepted by supplier	CK015	Baked Cookies chocolate	CS	4	\$35.16	

OK Cancel Check All Uncheck All Notes

Item

Line 1

Line status Accepted by supplier

Item # CK012

Product name Baked Cookies Filled Butter Assortment 90 pi

Order Unit of Measure

Order quantity 3

Order UOM CS

Accepted quantity 0.0000

Remaining open quantity 3.0000

Price \$35.16

Extension

Receiving Unit of Measure

Receive by Price UOM

Receive UOM CS

Accepted quantity

Variance 3.0000

Price \$35.1600

Extension

Reason

Reason

Step 10: In the Accepted quantity field enter the number of items you are accepting. Although the supplier shipped the item in full you may choose to only accept a partial due to breakage, defects, etc. If I enter 1 in the Accepted quantity field and the order quantity is 3 the Accepted quantity will read 1. The new Remaining Open Quantity and the Variance is now 2. You will also notice the

Step 11: To enter the Reason click on the magnifying glass to view the receiving options. Click Select. Your reason will now show up in the Reason field.

	Reason code	Description
Select	PARTIAL	Partial shipment / back order
Select	REJCONCEAL	Rejected - Concealed damaged / spoiled
Select	REJDAMAGE	Rejected - Damaged / Spoiled
Select	REJDELDATE	Rejected - Did not meet required delivery date
Select	REJDELTIME	Rejected - Did not meet required delivery time
Select	REJSPECS	Rejected - Did not meet specifications
Select	NOTORDER	Rejected - Did not order
Select	NOTNEEDED	Rejected - No longer needed
Select	OVERSHIP	Rejected - Over shipped quantity
Select	REJWRONG	Rejected - Wrong item sent / substitution not approved
Select	SHORT	Short on truck

Step 12: Click **OK**. The system will take you back to the lines. Once you have finished your receiving for this order click **Save**. The system will prompt you when it is done processing.

Chapter 8 – Receiving a Purchase Order

1. Receiving a Purchase Order.

Step 13: Reload the record to refresh. If you scroll the screen to the right you will be able to view the current receiving for your PO.

PO Header - Receiving		Line items						
Search Column: <input type="button" value="Rec/Acpt All"/> Search Text: <input type="text" value="All"/> GO page 1 of 1 Rows per page 50								
Product name	Order UOM	Order qty	Price	Acpt'd qty	Rec'd to date	Open qty	Reason	
Baked Cookies Filled Butter Assortment 90 pieces	CS	3	\$35.16	1		2	PARTIAL	Partial shipment / back order
Baked Cookies chocolate Filled Assortment 90 pieces	BX	4	\$35.16	4		0		
Budget Pillow January Sale	EA	200	\$2.7295	150		50	PARTIAL	Partial shipment / back order
Budget Pillow	EA	24	\$2.9216	24		0		
Croissant Baked Cream Cheese Filled Butter 3.5 ounces	BX	12	\$12.67	6		6	REJDAMAGE	Rejected - Damaged / Spoiled
Milk 2 percent Reduced Fat Half Gallon Each	EA	12	\$1.31575					

Step 14: To complete the receiving for your PO, select the PO from the list of PO's on the left side of the screen. Note: To find your PO you will need to change the PO Status from Open to Partially Received. Once the PO has been selected it will populate.

Step 15: On the PO Header – Receiving tab, enter the Received date, Invoice # (if provided) and update the PO Status.


Step 16: On the Line Items tab you can select **Rec/Acpt All** radio button and click **Save**. This will receive the balance of each line on the PO. Your PO will now be Received Complete.

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1. Symbols (Icons) and Definitions

Active Radio Buttons =  Entry  List  Vertical  Horizontal

Active Text “clickable” Links = [First](#) [Previous](#) [Next](#) [Last](#) [New](#) [Refresh](#)

Attachments (Paperclip) = 

Calendar = 

Check Box = 

Drop Down Menu = 

Expandable Field = 

Magnifying Glass = 

Non-Catalog Content = *

Notes = 

Product Image Available for View = 

Required Field = 

Flashlight = 

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Action Buttons ‘Action’ buttons can be found behind each of the **Front Page** tabs. The below Action buttons are specific to the **Order Guide** tab. Other tabs, (**Catalog, Cart, In Box** and **PO** have their own ‘unique’ Action buttons.


Create PO	Add to PO	Create REQ	Add to REQ
Add to cart	Create order guide	Delete order guide	Rename order guide
Print / View	Copy item	Delete item	Update
Clear all quantities			

Active Text Link

[First](#) [Previous](#) [Next](#) [Last](#) [New](#) [Refresh](#)

Text that is displayed with an underline typically indicates that it is an ‘**Active Text Link**’ and can be selected by using your left mouse button.

Attachments

 A Buyer can add an ‘**Attachment**’ to a Purchase Order. The attachment process works the same way as attaching a file to an e-mail.


Attributes

‘**Attributes**’ are fields that contain information about the product. The Birch Street application only displays a specific amount of product information during your initial product view. Additional product ‘Attributes’ or information is available under the link, ‘More Product Info’. Below are examples of product attributes.

Item #	610042-050
Product Name	Bed Set, queen, 60"x80", Suite Dreams II
Supplier	Serta, Inc. Hilton Supply Management
Lead Time (Days)	15
UOM	EA
Case Pack	
Will Break Case	0
FOB	Delivered
Dimension	
Min Order Qty	1
Manufacturer	Serta Mattress Co.
Mfg Part Number	610042-050
Brand Name	Serta
Model	
Size	60" x 80" x 20"
Portion Size	
Commodity	
Quantity Break	
Description	Mattress & Box Spring Queen 2 pc set, 6 sets or more no freight charge



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Bill To	The ' Bill To ' tab is displayed when you select the 'Edit' button on the PO list grid within the PO tab. The 'Bill To' screen displays the hotel information in "grayed-out" fields. The 'Bill To' information is also displayed on the PO. These fields are NOT editable by the Buyer or Supplier.
Brand Name	One of the available product attributes a Supplier can populate with relevant data. <i>Heinz</i> is an example of a ' Brand Name '.
Calendar	 The ' Calendar ' icon provides the Buyer with the ability to select a date (present and future), which will be displayed in the PO Required Delivery Date field. Calendar icons are available for all fields that require 'date' information. Additional short-cuts for creating 'date' information can be found under Q-Tips on the Summary Panel of the Front Page.
Cart (Shopping)	The ' Cart ' provides summary information of the number of items (Lines) and the total dollar value (Total) in the Cart. The Cart is accessible via the Front Page Tabs. Products may be added to your 'Cart' from the 'Catalog' tab. You can create a PO from items placed in your Cart, and you can also add 'Cart' items to an existing Order Guide.
Catalogs	The ' Catalog Tab ' provides access to the following functionality: <ul style="list-style-type: none">• Accessing Catalogs directly through the Category Structure• Adding Non-Catalog Content to PO's• Displays the Results from any Catalog Searches initiated through the Search All Catalogs functionality. ALL OF YOUR AVAILABLE SUPPLIERS AND THEIR PRODUCTS ARE FOUND ON THE CATALOG TAB. <u>MOST SUPPLIERS AND THEIR PRODUCTS CAN BE FOUND IN A SINGLE CATALOG CALLED "HSM MASTER"</u>.
Categories	All suppliers products are assigned to a ' Category ' before they are loaded into Birch Street. The same product may also be found under <u>multiple</u> categories. Hilton Supply Management manages the category creation process at all times.
Check Box	<input checked="" type="checkbox"/> A ' Check Box ' is another form of action button. Selecting or de-selecting a check box will provide different results, depending on the check box placement within the application or screens. Check boxes are used throughout the application as a means to reduce the amount instructions required, which helps make the software easier to use.
Clear All Quantities	' Clear All Quantities ' is an Action button on the Order Guide tab, that when selected will change or 'clear' all of the existing order 'Quantities'. This feature is used to create a new order or PO.
Description	One of the available attributes a Supplier is required to populate with relevant data about their product. The ' Description ' field is different than the 'Product Name' field. The 'Description' field can contain up to 3,000 characters of text. Suppliers use this long description field to provide additional information about their product.
Dimension	One of the available product attributes a Supplier can populate with relevant data
Direct Supplier	Opposite of a Proxy Supplier. A ' Direct Supplier ' sells products directly to a hotel. The submitted PO goes direct to the Supplier.


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Drop Down Menu		A Drop-Down Menu contains additional options for that field. Drop-down menus are used throughout the application.
Edit		Within the application, ' Edit ' is always an ' Action ' button. Selecting ' Edit ' opens hidden screens, which allows a Buyer to access additional information that can be changed or edited.
FAQ/Q-Tips		This link displays ' Frequently Asked Questions ' and ' Quick-Tips '. ALL BUYERS ARE STRONGLY ENCOURAGED TO PERIODICALLY REVIEW THIS INFORMATION, AS IT IS UPDATED ON A CONTINUOUS BASIS. FAQ's and Q-TIPS are located on the Summary Panel on the Front Page.
Fax Enabled		' Fax Enabled ' is a classification given to a Supplier who elects to receive ALL electronic Purchase Orders created by Buyers via Birch Street's fax server. The Supplier maintains an electronic Birch Street account solely for the purpose of managing catalog content.
Flashlight		The ' Flashlight ' icon denotes when there is additional information available. Clicking on the Flashlight icon will launch a separate screen.
FOB		' FOB ' is an acronym, which stands for 'Free on Board'. FOB information is controlled by the Supplier, and indicated where freight costs are incurred by the hotel. Examples are as follows: <ul style="list-style-type: none">• FOB: Manufacturer's Facility - Hotels are responsible for any freight costs once the product leaves the Manufacturer's Facility.• FOB: Distribution Center - Hotels are responsible for any freight costs once the product leaves the Distribution center. The Manufacturer has paid the freight cost between their Facility and the Distribution Center. The hotel may be responsible for any freight cost between the Distribution Center and the hotel.• FOB: Delivered - The Manufacturer or Distributor has paid the freight cost to ship the product to the hotel. The hotel is not responsible for any freight cost.
Front Page Tabs		The ' Front Page Tabs ' provide for convenient navigation between the major System components. The Front Page Tabs are as follows: <ul style="list-style-type: none">• Catalogs• Order Guides• Cart (Shopping cart)• PO (Purchase Orders)• In Box
Help		The ' Help ' link displays application Help resources. ALL BUYERS ARE STRONGLY ENCOURAGED TO PERIODICALLY REVIEW THIS INFORMATION, AS IT IS UPDATED ON A CONTINUOUS BASIS. The ' Help ' link is located on the Summary Panel on the Front Page.
Hide Logo		Clicking on this link hides the ' Logo ' section of the Logo Panel. Re-clicking this link will display the Logo Panel. Hiding the Logo panel will create additional screen space to display other information.
Hide Menu		Checking this box hides the ' Main Menu '. Un-checking it displays the Main Menu. Hiding the Main Menu will create additional screen space to display other information.


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Hide Summary	Checking this box hides the ‘ Summary/Search ’ panel. Un-checking the box displays the Summary/Search Panel. Checking the Hide Summary panel will create additional screen space to display other information.
History	‘ History ’ is an ‘Action’ button which contains a date and time stamp for all activity since the PO was created. The ‘History’ button displays who accessed the PO, when the PO was changed and any status changes that have been made (New - Submitted - Viewed - Accepted).
Home	The ‘ Home ’ link refreshes the Front Page Tabs and takes the Buyer to their Catalog tab. You may select Home link at anytime within the application, which will always take you back to the Catalog tab.
Images	 The computer monitor icon, within the Item Number column, is used to denote products that have an ‘ Image ’ available for view. The icon is displayed when product search results are returned on the Catalog tab and is also displayed next to products within Order Guides.
In Box	This summary information provides the number of new messages (NOT new PO’s) and total message count in the Birch Street ‘ In Box ’. The In Box is accessible via the Front Page tabs. The In Box tab maintains a list of all system generated notifications delivered to Buyers and Suppliers. The Buyer will receive notifications within their In Box only if the Message Delivery setting on the My Settings Screen includes delivery to the “Birch Street In Box only” or “Birch St Msg inbox and e-mail”.
Item Number	One of the available product attributes a Supplier is required to populate with relevant data. The ‘ Item Number ’ is the product number the Supplier uses to reference their product number to the general public.
Lead Time (Days)	‘ Lead Time ’ is one of the available product attributes a Supplier is required to populate with relevant data. The Supplier controls the Lead-Time data for each product they sell. A Buyer may create a PO with a Required Delivery Date Lead Time that is <u>SHORTER THE PRODUCT LEAD TIME</u> indicates, but will be prompted with an alert message accordingly. Creating a PO with a Required Delivery Date that is shorter than the product’s Lead Time does <u>NOT</u> prevent the Buyer from completing the PO and submitting the PO to the Supplier. Please note that the Supplier <u>may</u> elect to reject your if they are unable to deliver the product in time to meet the Hotel’s Required Delivery Date deadline.
Line Items	The term ‘ Line Items ’ is used to describe each product row on a Purchase Order or Order Guide.
Logo Panel	The ‘ Logo Panel ’ provides access to program maintenance, configuration and Help functionality. Display items and links available from the Logo panel are as follows: <ul style="list-style-type: none">• Hide Menu ✓ Box• Hide Summary ✓ Box• Hide Logo• Home• My Settings• Help• FAQ/Q-Tips• Logout


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Logout	The ‘ Logout ’ link logs the Buyer out of the application and returns the Buyer to the www.hsm-online.com Home Page. DO NOT CLICK ON THE RED ‘X’ IN THE UPPER RIGHT SCREEN CORNER TO EXIT THE BIRCH STREET APPLICATION. ALWAYS USE THE LOGOUT LINK WHEN YOU ARE READY TO EXIT THE SYSTEM.
Magnifying Glass	 The ‘ Magnifying Glass ’ icon is used to denote when you are able to LOOK-UP information. Clicking on the icon will launch a new screen with additional data to select.
Main Menu	Accessing the ‘ Main Menu ’ is achieved by un-checking the Hide Menu checkbox on the Logo Panel. The Main Menu’ is used to navigate and access additional features that are not typically required to manage the purchasing cycle. You will need to access the Main Menu to create your Sysco Punchout Profile account and edit Supplier-On-The-Fly (S-O-T-F) records.
Manufacturer	One of the available product attributes a Supplier can populate with relevant data. A Distributor may elect to provide the ‘ Manufacturer’s Name ’ for that product.
Mfg Part Number	One of the available product attributes a Supplier can populate with relevant data. The ‘ Mfg Part Number ’ may often be different from a Distributor’s Item Number. The Mfg Part # represents the <u>Manufacturer’s</u> number for the product. The Item # may represent the <u>Distributor’s</u> product number for the same item.
Min. Qty.	One of the available product attributes a Supplier is required to populate with relevant data. The ‘ Minimum Quantity ’ data is controlled by the Supplier and indicates the minimum order quantity required to purchase the product. A Buyer may elect to purchase LESS THAN THE MINIMUM QTY. , but will be prompted with an alert message accordingly. Creating a PO with a less than the minimum quantity does NOT prevent the Buyer from completing the PO and submitting the PO to the Supplier. Please note that the Supplier <u>may</u> elect to reject your PO if they are unable to ship less than the minimum quantity displayed.
Model	One of the available product attributes a Supplier can populate with relevant data.
More Product Info	‘ More Product Info ’ is an active text link, that when clicked will launch a separate screen to display additional product attributes (<i>see Attributes for a list of fields contained within the More Product Info link.</i>)
My Settings	This link displays the ‘ My Settings ’ screen for adjustment of personal contact information and your individual application settings.
Non-Catalog Item	* This symbol is displayed on the Print/View screens for both Purchases Orders and Order Guides when a line item was created from ‘ Non-Catalog ’ content.
National Supplier	The classification for any Supplier who has a ‘ National ’ contract with Hilton Hotels Corporation and has the ability to service multiple geographic markets.

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Notes	 The ' Notes ' icon indicates to both Buyers and Suppliers that the PO contains Note(s). There is also an ' Notes ' Action button that can be selected when creating a PO. Selecting the Notes button allows a Buyer to create a note, which is visible to the Supplier. Additionally, every Supplier has the ability to add a ' Note ' to the submitted PO if the Supplier elects to reject the order. Notes created by a Supplier are visible to the Buyer once the PO has been rejected.
Notifications	' Notifications ' are received and stored in the Buyer's or Supplier's Birch Street In Box only. A Buyer or Supplier can configure their personal Birch Street account to receive notifications when: A PO Has Been Accepted A PO Has Been Rejected Use the My Settings screen to manage your Notification options.
Order Guides (O/G)	The ' Order Guide ' tab allows for the creation, maintenance and use of Order Guides, which contain catalog content for those products purchased on a repetitive basis. Buyers can also Sort, Add Par Values and a select other functions driven by Action buttons within the Order Guide tab.
Ord Qty	The ' Ord Qty ' field is displayed on all product views (Catalog, Cart and Order Guides). This is the field the Buyer enters the desired order quantity.
Pack/Size	One of the available product attributes a Supplier is required to populate with relevant data. 24/12oz. is an example of ' Pack/Size '.
Par Values	<input checked="" type="checkbox"/> Par Values - A Buyer can elect to add a Minimum (Min) and/or Maximum (Max) ' Par Value ' for each item contained in their Order Guides. When a Buyer checks the ' Par Values ' check box, the system launches 2 new columns within the Order Guide grid (Min Qty) and (Max Qty). The Buyer can then populate the fields with the desired Par quantities. Upon completion, the Buyer must click on the ' Update ' button to save their Par values.
Portion Size	One of the available product attributes a Supplier can populate with relevant data.
PO Date	The ' PO Date ' is the date that the PO was created and is displayed on the PO Print/View screen accordingly. The PO Date is <u>NOT</u> the PO Required Delivery Date.
PO Header	The ' PO Header ' is the term used to describe the PO fields that contain the following information: <ul style="list-style-type: none">• PO Subject• Required Delivery Date• Note to Supplier• Tax• Freight• ...More The PO Header screen is launched when a Buyer selects the Create PO Action button.



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PO Status	The 'PO Status' indicated where the PO is within the transaction cycle. A few 'Status' examples are as follows:
New	PO has <u>NOT</u> been submitted to the Supplier.
Submitted	PO has been submitted but <u>NOT</u> Viewed <u>OR</u> Accepted by the Supplier.
Viewed	Supplier has received and opened or viewed the PO only. The Supplier has <u>NOT</u> accepted the PO.
Accepted	The Supplier has agreed to the terms of the PO and <u>HAS</u> accepted the order.
Fax/E-mail Accepted	The PO was sent to the Supplier via the Birch Street fax server. All Supplier-On-The-Fly (S-O-T-F) PO's and PO's to Fax Enabled Suppliers are considered <u>AUTOMATICALLY ACCEPTED</u> once the fax is transmitted successfully.
Fax/E-mail Failed	The fax number provided on PO Header was either invalid or the Supplier's fax machine may have been out of order. The PO was <u>NOT</u> transmitted to the Supplier and has <u>NOT</u> been automatically accepted.
Rejected	The Supplier has declined the order and has rejected the PO with a Note which explains the reason for the rejection. IMPORTANT – ONLY PO'S THAT HAVE BEEN EITHER 'ACCEPTED' OR 'FAX/E-MAIL ACCEPTED' ARE CONSIDERED VALID TRANSACTIONS AND WILL BE SHIPPED BY THE SUPPLIER.
PO Tab	The ' PO Tab ' lists every PO created. A variety of options can be initiated against PO's from this tab (Submit to Supplier, Update PO Header Information, View PO History...more).
Print/View	Print/View (PO tab) - The " Print/View " Action button is located within PO tab. Buyers and Suppliers can click the Print/View button anytime they wish to review or print a Purchase Order, regardless of the PO status (New, Submitted, View, Accepted or Rejected).
Print/View	Print/View (Order Guide tab) – The " Print/View " Action button is also located within Order Guide tab and performs differently than the PO Print/View process. When a Buyer selects an existing Order Guide and clicks on the Print/View button, the system creates a copy of the Order Guide in Microsoft Excel. The Excel Order Guide can then be "saved" to the Buyer's computer.
Product Name	The ' Product Name ' is the short description for the product and is displayed on all product information screens (Catalog, Order Guide, PO's...more)
Proxy Supplier	A ' Proxy Supplier ' is a Supplier who does not sell directly to hotels. Hilton Supply Management (HSM) takes "Title" to the transaction when you create a Purchase Order for the Proxy Supplier. The Birch Street system will automatically transfer the PO to HSM.

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Punch-out Catalog	
Punch-out Supplier	The term ' Punch-out Supplier ' applies to a select group of Suppliers that have a HSM approved direct link between Birch Street and their Internet site.
Quantity Break	A Supplier may elect to offer volume discounts, based on the quantity purchased. The ' Quantity Break ' field can be viewed under the 'More Product Info' link. The quantity 'brackets' are displayed as numbers within this field and are also display on the initial product view. Although the discounted price is not visible in the 'Quantity Break' field, when products are tagged or selected to create a PO, the cost is recalculated, based on the quantity ordered for that product when the PO has been created.
Red Text Product	Product Names displayed in Red text in existing Order Guide indicate that the Supplier has discontinued selling the item. The discontinued item(s) can NOT be selected to create a future PO. The discontinued products will remain in the Order Guide until the Buyer deletes them.
Refresh	Refresh - Use the ' Refresh ' link to update various screens.
Regional Supplier	A ' Regional Supplier ' is managed by a HSM Regional Office and only provides product or services for a specific geographic market.
Required Delivery Date	The Date that the hotel required delivery. The ' Required Delivery Date ' is entered on the PO Header, which is displayed after the Buyer selects Create PO.
Required Field	 The ' Required Field ' icon indicates that data must be entered before a Buyer can go to the next step or screen.
Save	The ' Save ' function is different from the 'Update' function. The 'Save' button saves your work within your screen. When you select 'Update' the Birch Street system (database) receives the updated information and the Buyer's screen(s) change accordingly. The 'Save' button <u>ONLY</u> saves your work within your screen.
Search	The ' Search ' panel provides high level summary information from the application as well as catalog search functionality. The search panel provides different information depending on the Tab the users is in at the time: <ul style="list-style-type: none">• Catalog Tab – Search options for Products, Categories and Suppliers.• Order Guide Tab – Search options for Order Guides and Product information.• Cart Tab – Search options for Products placed in the Shopping Cart.• PO Tab – Search options for New PO's, Submitted PO's, Accepted PO's, PO Number, PO Subject...more.• In Box Tab - Search options for Messages and Notifications.
Search (Catalogs)	Search (All Catalogs) functionality provides catalog searches based upon 3 criteria: <ul style="list-style-type: none">• Product - Searches allow the user to search by any descriptive criteria including product number and Mfg. product number.• Category - Searches allow the user to search by product category name.

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- **Supplier** - Searches allow the user to search by Supplier Name.

Ship To	The ' Ship To ' tab is displayed when you select the 'Edit button on the PO list grid within the PO tab. The 'Ship To' screen displays the hotel information in "grayed-out" fields. The 'Ship To' information is also displayed on the PO. These fields are NOT editable by the Buyer or Supplier.
Show Field Help	Many fields within the application have a hidden 'Help' feature. Place your mouse within a field and 'right click' to display the 'Show Field Help'. The Field Help provides a brief explanation of the field.
Sort	<input type="checkbox"/> Sort – The ' Sort ' check box is available within all Order Guides and is used to rearrange the sequence of product rows. Selecting the 'Sort' check box will launch a 'Sort' column on the left edge of the Order Guide screen. A Buyer then enters a numeric value in each row, based on the sequence desired and then clicks 'Update'. The Order Guide will be 'resorted' accordingly.
Spot Buy	The term ' Spot Buy ' denotes when a PO is created from non-catalog content. The Supplier selected HAS been adopted in the Hilton Private Marketplace.
Select	' Select ' is always an Action button and is used to pick information within a list of options.
Subject	' Subject ' is a field available on the PO Header, which a Buyer can type any combination of characters to give the PO a 'Subject'. The 'Subject' field is displayed on the Buyer and Supplier copy of the PO.
Supplier-On-The-Fly (S-O-T-F)	The term ' Supplier-On-The-Fly ' denotes when a new Supplier account is created by the Buyer. The (S-O-T-F) Supplier has NOT been adopted into the Private Marketplace. All PO's created for the S-O-T-F Supplier will contain non-catalog content and the orders will be sent to the Supplier via the Birch Street fax server.
Symbols (Icons)	See Symbols (Icons) and Definitions
Tutorials	Buyer and Supplier ' Tutorials ' are available on the hsm-online.com Home page. The Tutorials are a self-paced on-line learning tool, which provides the 'student' with an overview of each core component or process of the software. ALL BUYERS ARE STRONGLY ENCOURAGED TO REVIEW THIS INFORMATION.
Up	The ' Up ' Action button is displayed when searching by Category on the Catalog tab. Selecting 'Up' will take the Buyer back "Up" one level within the category hierarchal structure.
UOM	Unit of Measure (UOM) is one of the available attributes a supplier is required to populate with relevant data. Examples of UON are: Case, Box, Each. etc. Many Suppliers sell their products by multiple UOM's.
Update	The ' Update ' function is different from the 'Save' function. When you select 'Update' the Birch Street system (database) receives the updated information and the Buyer's screen(s) change accordingly. The 'Save' button only saves your work within your screen.
Will Break Case	One of the available product attributes a supplier can populate with relevant data. The ' Will Break Case ' is a field within the 'More Product Info' screen and when populated with a 'Yes',

indicates when a supplier is willing to sell the item fraction quantities. A Buyer may enter (.5) in the Ord Qty field to indicate a half case.