

Chapter 5 – Purchase Orders

*Note: To advance from slide to slide press your **Page Down** key
Or the right button on your mouse*

Purchase Orders

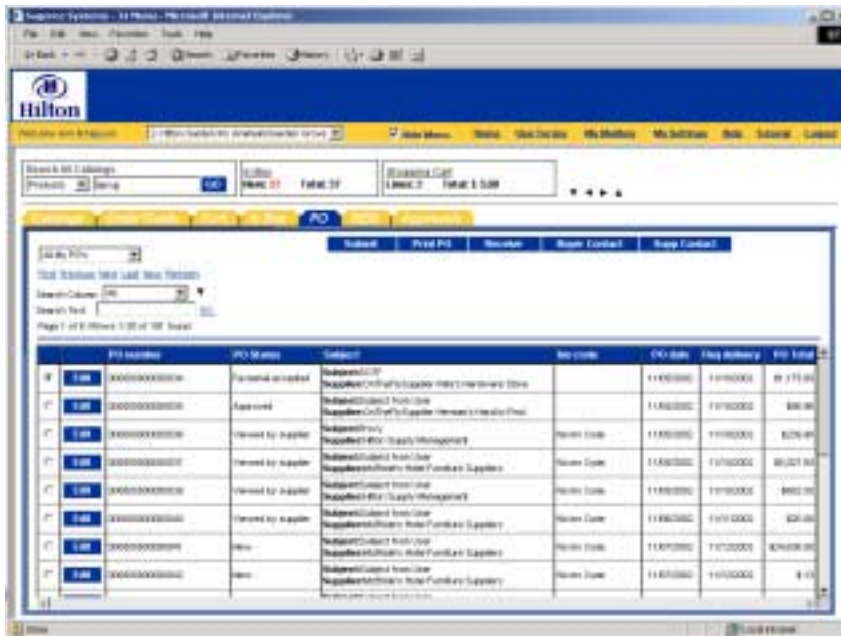
- Tab vs Entry Screen
- The Purchase Order Tab
 - ▶ Screen Description
 - ▶ Functionality Description
- The Purchase Order Entry Screen
 - ▶ Manually Creating Purchase Orders (PO's)
 - ▶ Editing PO's
 - ▶ Adding Notes & Attachments
 - ▶ Adding Non-Catalog Items
 - ▶ Adding a Supplier on the Fly
 - ▶ Proxy Suppliers



Purchase Orders > PO Tab vs Entry Screen

PO TAB

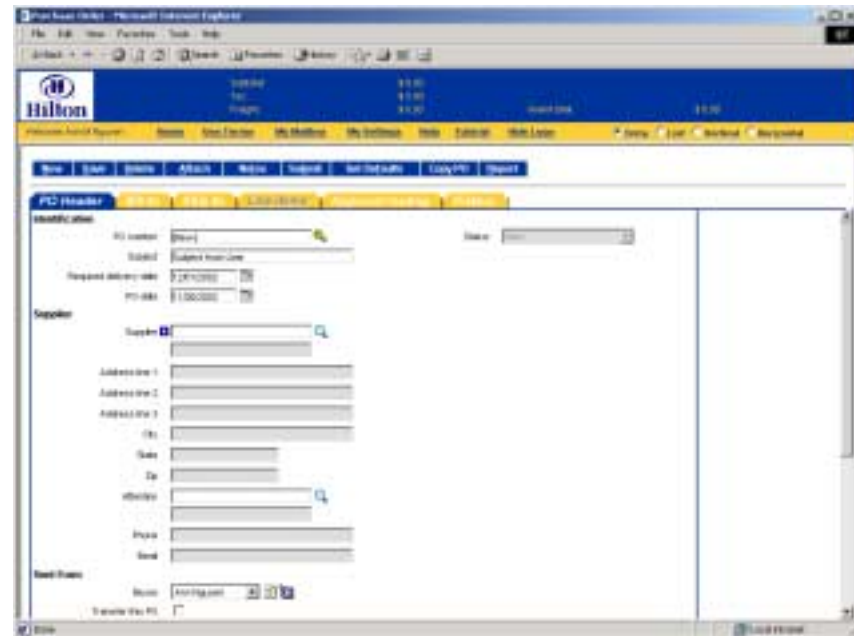
Within the typical shopping process, you will manage POs from the PO Tab, accessed by clicking the PO tab on the FrontPage. It features basic processing capabilities such as Submitting and Printing. If a PO needs to be edited, you will visit the PO entry screen (explained later)



	PO number	PO Status	Subject	PO code	PO date	Flag	PO total
1	100000000000	Personal or supplier	Supplies for the Supply Management		11/01/00	11/01/00	\$1,175.00
2	100000000000	Approved	Supplies for the Supply Management		11/01/00	11/01/00	\$80.00
3	100000000000	Entered by supplier	Supplies for the Supply Management	Master Code	11/01/00	11/01/00	\$274.00
4	100000000000	Entered by supplier	Supplies for the Supply Management	Master Code	11/01/00	11/01/00	\$1,027.00
5	100000000000	Entered by supplier	Supplies for the Supply Management	Master Code	11/01/00	11/01/00	\$402.00
6	100000000000	Entered by supplier	Supplies for the Supply Management	Master Code	11/01/00	11/01/00	\$24.00
7	100000000000	None	Supplies for the Supply Management	Master Code	11/01/00	11/01/00	\$1,048.00
8	100000000000	None	Supplies for the Supply Management	Master Code	11/01/00	11/01/00	\$ 0.00

PO ENTRY SCREEN

If a PO needs to be edited, you will visit the PO entry screen. All aspects of the PO can be influenced here. Access the Entry Screen by clicking the Edit button from the PO Tab or go through the Menu panel on your FrontPage (explained later). The entry screen will always open in a new window



PO Header

PO number: [text] PO date: [text]

PO code: [text] PO total: [text]

Supplier: [text]

Address line 1: [text]

Address line 2: [text]

Address line 3: [text]

City: [text]

State: [text]

Zip: [text]

Phone: [text]

Fax: [text]

Item Code: [text] Item Name: [text] Quantity: [text]



Purchase Orders > The PO Tab

Within the typical shopping process, you will manage POs from the PO Tab. It features basic processing capabilities. If a PO needs to be edited, you will visit the PO entry screen (explained later)

Predefined filters

These filters are based on the Status of the PO. Select a filter from the Drop down menu to process the PO list.

Browse and Search

Browse pages by clicking on the links and/or search the entire list of POs for keywords.

The screenshot shows the Hilton Supply Management web application interface. The top navigation bar includes the Hilton logo and user information. Below the navigation bar, there are search and shopping cart options. The main content area is titled "PO" and contains a table of purchase orders. A red box highlights the search filters and the table header.

#	PO number	PO Status	Subject	Inn code	PO date	Req. delivery	PO Total
Edit	0000000000000034	Failed/accepted	Subject: SOTF Supplier: On The Fly Supplier Pet's Hardware Store		11/05/2002	11/10/2002	\$1,175.00
Edit	0000000000000035	Approved	Subject: Subject from User Supplier: On The Fly Supplier Herman's Hard to Find		11/05/2002	11/10/2002	\$90.96
Edit	0000000000000036	Viewed by supplier	Subject: Proxy Supplier: Hilton Supply Management	No Inn Code	11/05/2002	11/10/2002	\$239.90
Edit	0000000000000037	Viewed by supplier	Subject: Subject from User Supplier: McOsde's Hotel Furniture Suppliers	No Inn Code	11/05/2002	11/10/2002	\$5,027.60
Edit	0000000000000039	Viewed by supplier	Subject: Subject from User Supplier: Hilton Supply Management	No Inn Code	11/05/2002	11/10/2002	\$992.50
Edit	0000000000000040	Viewed by supplier	Subject: Subject from User Supplier: McOsde's Hotel Furniture Suppliers	No Inn Code	11/06/2002	11/11/2002	\$20.00
Edit	0000000000000041	New	Subject: Subject from User Supplier: McOsde's Hotel Furniture Suppliers	No Inn Code	11/07/2002	11/12/2002	\$24,638.00
Edit	0000000000000042	New	Subject: Subject from User Supplier: McOsde's Hotel Furniture Suppliers	No Inn Code	11/07/2002	11/12/2002	\$1.13

Purchase Orders > The PO Tab > PO List

PO Number

Shows the system generated PO number.

PO Status

Displays the current status of the PO. For a list of all possible status codes, please refer to the User Manual

Subject

Displays the PO subject and the supplier

Inn Code - the Inn code of the company whose registration record this is

Dates and Total

Shows Creation and requested delivery date as well as the Grand total of the PO

	PO number	PO Status	Subject	Inn code	PO date	Req. delivery	PO Total
<input type="checkbox"/>	0000000000000034	Partially accepted	Subject:SOFF Supplier:OnTheFlySupplier Pet's Hardware Store		11/05/2002	11/11/2002	\$1,175.00
<input type="checkbox"/>	0000000000000035	Approved	Subject:Subject from User Supplier:OnTheFlySupplier Herman's Hard to Find		11/05/2002	11/11/2002	\$90.96
<input type="checkbox"/>	0000000000000036	Viewed by supplier	Subject:Proxy Supplier:Hilton Supply Management	No Inn Code	11/05/2002	11/11/2002	\$239.90
<input type="checkbox"/>	0000000000000037	Viewed by supplier	Subject:Subject from User Supplier:McDade's Hotel Furniture Suppliers	No Inn Code	11/05/2002	11/11/2002	\$5,027.60
<input type="checkbox"/>	0000000000000039	Viewed by supplier	Subject:Subject from User Supplier:Hilton Supply Management	No Inn Code	11/05/2002	11/11/2002	\$692.50
<input type="checkbox"/>	0000000000000040	Viewed by supplier	Subject:Subject from User Supplier:McDade's Hotel Furniture Suppliers	No Inn Code	11/05/2002	11/11/2002	\$20.00
<input type="checkbox"/>	0000000000000041	New	Subject:Subject from User Supplier:McDade's Hotel Furniture Suppliers	No Inn Code	11/07/2002	11/11/2002	\$24,638.00
<input type="checkbox"/>	0000000000000042	New	Subject:Subject from User Supplier:McDade's Hotel Furniture Suppliers	No Inn Code	11/07/2002	11/11/2002	\$1.13

Purchase Orders > The PO Tab > Submit

Select

Select the PO you want the action to apply to by activating the corresponding radio button

Submit

Click here to submit a PO. Depending on the Approval settings the PO goes to the Approver or directly to the Supplier (approvals explained later)

The screenshot shows the Hilton Supply Management web application interface. The top navigation bar includes the Hilton logo and user information. The main content area features a search bar, a shopping cart summary, and a navigation menu with tabs for 'Orders', 'Order Guide', 'Cart', 'In Box', 'PO', 'REQ', and 'Approvals'. The 'PO' tab is active, displaying a list of purchase orders. A red box highlights the 'Submit' button in the top right of the PO list area. A red arrow points from the 'Submit' button to the 'Submit' text in the instructions. A red box also highlights the first column of the PO list table, which contains radio buttons for selecting a PO.

#	PO number	PO Status	Subject	Inn code	PO date	Req delivery	PO Total
<input type="radio"/>	0000000000000034	Failed/accepted	Subject:SOTF Supplier:On TheFlySupplier Pet's Hardware Store		11/05/2002	11/10/2002	\$1,175.00
<input type="radio"/>	0000000000000035	Approved	Subject:Subject from User Supplier:On TheFlySupplier Herman's Hard to Find		11/05/2002	11/10/2002	\$90.96
<input type="radio"/>	0000000000000036	Viewed by supplier	Subject:Proxy Supplier:Hilton Supply Management	No Inn Code	11/05/2002	11/10/2002	\$239.90
<input type="radio"/>	0000000000000037	Viewed by supplier	Subject:Subject from User Supplier:McDade's Hotel Furniture Suppliers	No Inn Code	11/05/2002	11/10/2002	\$5,027.60
<input type="radio"/>	0000000000000039	Viewed by supplier	Subject:Subject from User Supplier:Hilton Supply Management	No Inn Code	11/05/2002	11/10/2002	\$992.50
<input type="radio"/>	0000000000000040	Viewed by supplier	Subject:Subject from User Supplier:McDade's Hotel Furniture Suppliers	No Inn Code	11/05/2002	11/11/2002	\$20.00
<input type="radio"/>	0000000000000041	New	Subject:Subject from User Supplier:McDade's Hotel Furniture Suppliers	No Inn Code	11/07/2002	11/12/2002	\$24,638.00
<input type="radio"/>	0000000000000042	New	Subject:Subject from User Supplier:McDade's Hotel Furniture Suppliers	No Inn Code	11/07/2002	11/12/2002	\$1.13

Purchase Orders > The PO Tab > Print

Print PO

Click here to Print a copy of the PO

The screenshot shows the Sagece Systems web application interface. The top navigation bar includes buttons for 'Print PO', 'Receive', 'Buyer Contact', and 'Supp Contact'. A red box highlights the 'Print PO' button. A callout box points to this button with the text 'Click here to Print a copy of the PO'. Below the navigation bar, there is a search bar and a shopping cart summary showing 'In Box: New: 27 Total: 37' and 'Shopping Cart: Lines: 2 Total: \$ 3.00'. The main content area displays a 'PURCHASE ORDER' preview window. The preview window shows the following information:

PURCHASE ORDER
NUMBER: 00000000000003 Status: Approved
PO Date: 11/03/2002

Supplier:
Hilton Garden Inn Anaheim/Garden Grove
11777 Harbor Blvd,
Garden Grove, TX, 92840, US
Attn: Finance Department

Ship To:
Hilton Garden Inn Anaheim/Garden Grove
11777 Harbor Blvd,
Garden Grove, TX, 92840, US
Attn: Receiving Department

Send From:
Hilton Garden Inn Anaheim/Garden Grove
Mr. Ann Nguyen
Title: Purchasing Agent
Phone: (909) 423-4567
Fax: (933) 887-4567
Email: annnguyen@sagece.com

Terms:
Subject: Subject from User
Required Delivery Date: 11/03/2002
Partial Order Accepted: Yes
Payment Method: Check
Ship Via: UPS
POB: Distribution Center
Payment Terms:

Notes And Attachments: Show inline notes
Header Notes:
No Notes

The main content area also displays a list of items with columns for 'Product', 'Description', 'Quantity', and 'Price'. A callout box points to the preview window with the text 'This preview of the selected purchase order will open. It can now be printed from the browser'.



Purchase Orders > The PO Tab > Contact Info

Buyer Contact

When the goods relating to a specific PO arrive, click here to go through the Receiving procedure (explained later)

Supplier Information

Displays buyer/supplier contact information in a pop up window

The screenshot shows the Sage Systems web interface for purchase orders. At the top, there's a navigation bar with 'PO' selected. Below it, a table lists POs with columns for PO number and PO Status. A pop-up window titled 'Contact person' is open, displaying contact details for Ann Nguyen. Red arrows point from the callout boxes to the 'Buyer Contact' button and the pop-up window.

#	PO number	PO Status
Edit	0000000000000034	Failed/accept
Edit	0000000000000035	Approved
Edit	0000000000000036	Viewed by supp
Edit	0000000000000037	Viewed by supp
Edit	0000000000000039	Viewed by supp
Edit	0000000000000040	Viewed by supp
Edit	0000000000000041	New
Edit	0000000000000042	New

PO delivery	PO Total
1/10/2002	\$1,175.00
1/10/2002	\$90.96
1/10/2002	\$239.90
1/10/2002	\$5,027.60
1/10/2002	\$992.50
1/11/2002	\$20.00
1/12/2002	\$24,638.00
1/12/2002	\$13

Purchase Orders > Entry Screen

Access from PO TAB

You can launch the PO entry screen from the PO TAB if you need to modify an existing PO.

Click the Edit button of the corresponding PO.

The screenshot displays the Hilton Supply Management web application. The top navigation bar includes the Hilton logo and user information. Below the navigation bar, there are search and shopping cart options. The main content area features a series of tabs: Catalog, Order Guide, Cart, In Box, PO, POQ, and Approvals. The PO tab is currently selected. Below the tabs, there are buttons for Submit, Print PO, Receive, Buyer Contact, and Supp Contact. A search section includes a dropdown for 'All My POs', a search column selector, and a search text input. Below the search section is a table of purchase orders with columns for PO number, PO Status, Subject, Inn code, PO date, Reg delivery, and PO Total. A red box highlights the 'Edit' buttons in the table, and a red arrow points from the text box to the first 'Edit' button.

#	PO number	PO Status	Subject	Inn code	PO date	Reg delivery	PO Total
1	0000000000000034	Full/entl accepted	Subject:SOTF Supplier:OnTheFlySupplier Pet's Hardware Store		11/05/2002	11/10/2002	\$1,175.00
2	0000000000000035	Approved	Subject:Subject from User Supplier:OnTheFlySupplier Herman's Hard to Find		11/05/2002	11/10/2002	\$90.96
3	0000000000000036	Viewed by supplier	Subject:Proxy Supplier:Hilton Supply Management	No Inn Code	11/05/2002	11/10/2002	\$239.90
4	0000000000000037	Viewed by supplier	Subject:Subject from User Supplier:McDade's Hotel Furniture Suppliers	No Inn Code	11/05/2002	11/10/2002	\$5,027.60
5	0000000000000039	Viewed by supplier	Subject:Subject from User Supplier:Hilton Supply Management	No Inn Code	11/05/2002	11/10/2002	\$992.50
6	0000000000000040	Viewed by supplier	Subject:Subject from User Supplier:McDade's Hotel Furniture Suppliers	No Inn Code	11/05/2002	11/11/2002	\$20.00
7	0000000000000041	New	Subject:Subject from User Supplier:McDade's Hotel Furniture Suppliers	No Inn Code	11/07/2002	11/12/2002	\$24,638.00
8	0000000000000042	New	Subject:Subject from User Supplier:McDade's Hotel Furniture Suppliers	No Inn Code	11/07/2002	11/12/2002	\$1.13

Purchase Orders > Entry Screen

Access from FrontPage

You can launch the PO entry screen your FrontPage Menu Panel

Click the 'Create PO' link in the V7 Procurement menu

Purchase Orders > Creating a New PO

PO Header

This section contains general information about the PO such as:

- PO Number & Status
- Delivery Dates
- Supplier Information
- Buyer Information
- Terms and Conditions

Identification

The PO number will be created by the system. Type a Subject (we will use 'Coffee Makers' for this example) and determine when you need the products delivered. The system will default the status of the PO to 'NEW'.

Important
Remember that there is field help available by right clicking in the corresponding field

Purchase Orders > Creating a New PO > Header

Supplier

This is a mandatory field. Either type a Supplier ID in the field or click on the magnifying glass to pick from a list of available Suppliers

The screenshot shows the 'Purchase Order - Microsoft Internet Explorer' window. The main form is titled 'PO Header' and includes fields for 'PO number' (set to '[New]'), 'Subject' (set to 'Coffee Makers'), 'Required delivery date' (set to '12/02/2002'), and 'PO date' (set to '11/07/2002'). A red box highlights the 'Supplier' field, which is currently empty. To the right, a pop-up window titled 'Supplier List Lookup - Microsoft Internet Explorer' displays a table of available suppliers. A red arrow points from the text box to the 'Supplier' field in the main form.

Company Name	Fax number	OT line	Contact	Company ID	Buyer Name
(Click here to add a Supplier)		No		99999	No
A.M. Briggs Inc.	12022695034	No	John De Joyce	30	No
Display Systems International	57142154575	Yes	Polly Jaegers	30	No
Eventful Holders	8607548941	No	Patt Oestrie	12	No
Franklin's Food and Beverage	19607548591	No	Gene Lindray	21	No
Harold & Cruz's Hardware	848513884	Yes	Harold Harold	99999	No
Hilton Supply Management		No	Pam Townsend	1	Yes
Hotel Food Service Supplies		No	Mike Mitchell	14	No
Hotel Lendocoking Supplies		No	Victor Morales	20	No
John's Steak House	7602232294	Yes	John Anderson	99999	No
Margaret	448959688	Yes	Deag		No
Hilton's Hotel Furniture Supplier		No	Larry Nelson	12	No
Paul's Poultry Parity		Yes	Paul Peters	22	No
Seals Steak House	5213653656	No	Sam O'Brien	29	No
test 68344	3336666665	Yes		99999	No
test2	3556667777	Yes		99999	No
	3336666668	Yes		99999	No



Purchase Orders > Creating a New PO > Header

Supplier

The Supplier information will be populated based on your choice.

Scroll down to see the remainder of the PO Header Screen

The screenshot shows the 'Purchase Order - Microsoft Internet Explorer' window. The top navigation bar includes 'Home', 'Use Terms', 'My Mailbox', 'My Settings', 'Web', 'Tutorial', 'Hide Logo', 'Entry', 'List', 'Vertical', and 'Horizontal'. Below this is a toolbar with 'New', 'Save', 'Delete', 'Attach', 'Notes', 'Submit', 'Set Defaults', 'Copy PO', and 'Report'. The main content area is titled 'PO Header' and has tabs for 'Bill to', 'Ship to', 'Line items', 'Approval routing', and 'History'. The 'Identification' section contains fields for PO number (set to '[New]'), Subject ('Coffee Makers'), Required delivery date ('12/02/2002'), and PO date ('11/07/2002'). The 'Supplier' section is highlighted with a red box and contains the following fields: Supplier (dropdown menu showing '14' and 'Hotel Food Service Supplies'), Address line 1 ('3994 Backbird Rd'), Address line 2, Address line 3, City ('Boston'), State ('MA'), Zip ('02101'), Attention, Phone ('8001234567'), and Email ('abc@abc.com'). The 'Ship from' section includes a Buyer dropdown menu ('Ann Nguyen') and a 'Transfer this PO' checkbox.

Purchase Orders > Creating a New PO > Header

Sent From

Buyer information defaults to the login profile but can be changed if the security settings permit it

Terms

Specify Shipping and Payment terms here. The section changes based on the Payment method you choose.

Shared Notes

Check the box to display the message field. If there is a message or note attached to the PO it will indicate it here.

Click on the magnifying glass to change the default payment method.

Purchase Orders > Creating a New PO > Bill to

Bill to

Enter or search for the company location to which any invoices associated with the purchase order should be delivered. The system will determine a default bill to location based on the user profile.

The screenshot shows a web browser window titled "Purchase Order - Microsoft Internet Explorer". The page header includes the Hilton logo and navigation links. The main content area has a menu bar with "New", "Save", "Delete", "Attach", "Notes", "Submit", "Set Defaults", "Copy PO", and "Export". Below this is a tabbed interface with "Bill to", "Ship to", "Line Items", "Approval routing", and "History". The "Bill to" tab is active and circled in red. A red arrow points from the text box on the left to this tab. The form fields are as follows:

Bill to Location	<input type="text"/>
Company name	Hilton Garden Inn Anaheim/Garden Grove
Address line 1	11777 Harbor Blvd
Address line 2	<input type="text"/>
Address line 3	<input type="text"/>
City	Garden Grove
State	CA
Zip	92840
Attention	Ann Nguyen

Purchase Orders > Creating a New PO > Ship to

Ship to

Enter or search for the company location to which products associated with the selected purchase order should be delivered. The system will determine a default ship to location based on the user profile.

Check this box if billing and shipping locations are the same

Subtotal	\$ 0.00	Grand total	\$ 0.00
Tax	\$ 0.00		
Freight	\$ 0.00		

Buttons: New, Save, Delete, Attach, Notes, Submit, Set Defaults, Copy PO, Export

Navigation: PO Printing, **Ship to**, Line Items, Approval routing, History

Ship Information

Ship to same as Bill

[Ship to location](#)

Bill To Location

Company name: Hilton Garden Inn Anaheim/Garden Grove

Address line 1: 11777 Harbor Blvd

Address line 2:

Address line 3:

City: Garden Grove

State: CA

Zip: 92840

Attention: Ann Nguyen

Ship via: UPS

Purchase Orders > Creating a New PO > Line Items

Line Items

This tab is used to identify individual line items associated with a selected purchase order, including buyer. On a new PO there will be no line items...

Add Row

Click this button to add Line Items to your PO.

The screenshot shows a web browser window titled "Purchase Order - Microsoft Internet Explorer". The page header includes the Hilton logo and a navigation menu with options like "Home", "Use Terms", "My Mailbox", "My Settings", "Web", "Tutorial", and "Hide Logo". Below the header, there are buttons for "New", "Save", "Delete", "Attach", "Notes", "Submit", "Set Defaults", "Copy PO", and "Report". The "Line Items" tab is selected and circled in red. Below the tabs, there is an "Add Row" button, also circled in red, and a search bar with "Search Column: Line" and "Search Text: ". A table with columns "Line", "Item #", "Product name", "Qty", "Unit", "Price", and "Extension" is visible, with a total of "\$ 0.00" shown at the bottom right of the table.

Purchase Orders > Creating a New PO > Line Items

The line item section will appear

Line Type

The line type defines what type of line item you are adding. You can either choose 'Free Form' or 'Catalog Item'. Free Form lets you add an item that is not included in the supplier's catalog (explained later). Choose Catalog Item from the list.

The screenshot shows the 'Purchase Order - Microsoft Internet Explorer' window. The main content area is titled 'Line Items' and contains a table with columns: Line, Item #, Product name, Qty, Unit, Price, and Extension. Below the table is a form for adding a new line item. The form includes a 'Line type' dropdown menu with options: 'Catalog Item', 'Select Entry', 'Catalog Item', and 'Free form'. The 'Catalog Item' option is circled in red. Other fields in the form include 'Item #', 'Product name', 'Unit', 'Qty', 'Price', 'Price UOM code', 'Qty ordered by price UOM', 'Price by price uom', 'Minimum order quantity', 'Quantity breaks', 'Tax amount', 'Estimated freight amount', and 'Buyer Classification'.

Purchase Orders > Creating a New PO > Line Items

Add Products

Click this button to get a list of available products from this supplier.

The screenshot shows the Hilton Supply Management web application. The 'Purchase Order' interface is displayed, with the 'Line Items' tab selected. The 'Add Products' button is highlighted with a red box. A red arrow points from the 'Add Products' button to the 'Item #' field in the 'Item' form below. Another red arrow points from the 'Add Products' button to the 'Add Products' button itself. The 'Item' form includes fields for Line type, Item #, Product name, Unit, Qty, Price, and various codes and amounts.

Item

As an alternative to using the Add Products Button: If you know the Item's SKU, you can type it in this field.

Under construction

Purchase Orders > Creating a New PO > Line Items

Subtotal: \$ 0.00
Tax: \$ 0.00
Freight: \$ 0.00
Grand total: \$ 0.00

Welcome Alice Vanderpool

Home My Settings Help Tutorial Info Logs Entry List Vertical Horizontal

New Save Delete Attach Notes Submit Set Defaults Copy PO Report

PO Header Bill to Ship to Line Items Approval routing History

Add Row Search Column: Line Search Text: 00 page 0 of 0 Rows per page 5

Line	Item #	Product name	Qty	Unit	Price	Extension
						\$ 0.00

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

Item

Line: 1
Line type: Catalog Item
Item #: SKU130015
Product name: Menu Stand, 2" diameter tube, 11.47" x 11.47"
Unit: EA
Qty: **Qty**
Price: \$ 20.15
Minimum order quantity: 1
Quantity breaks: EA, 50, 100, 200, 300
Tax amount:
Estimated freight amount:
Buyer Classification
Department:

Quantity

Indicate the quantity by units of measure here. This is a required field.

Purchase Orders > Creating a New PO > Line Items

Once you have completed all form, please press OK to confirm your entries.

Tax & Freight
Optionally you can manually calculate appropriate tax and freight charges for this specific line item.

Department
Click on the magnifying glass to display the department lookup window. Select a department from the list.

The screenshot displays the 'Purchase Order - Microsoft Internet Explorer' window. The main form is titled 'Line Items' and contains a table with columns: Line, Item #, Product name, Qty, Unit, Price, and Extension. Below the table, there are several input fields: Line (1), Line type (Catalog Item), Item # (SH13-016), Product name (Menu Stand, 27 diameter tube, 11.14" x 11.14"), Unit (EA), Qty (?), Price (\$ 23.15), Minimum order quantity (1), and Quantity breaks (EA 100, 200, 300). There are also fields for Tax amount and Estimated freight amount, each with a magnifying glass icon. At the bottom, there is a 'Buyer Classification' section with a 'Department' field and a magnifying glass icon. A 'Department Code Lookup' window is open on the right, showing a list of departments with columns for Dept code, Dept name, and Dept GL code. The list includes departments like Super User, F&M - Beverly Hills, F&M - Beverly Hills, F&M - Regional Offices, Senior Vice President, Area Vice President, Banquets, Beverage, Carriage or Towers Lounge, Culinary, Employee Feeding Operations, Engineering, Executive Office, Finance, Food and Beverage, Food Office, Gift Shop / Retail Operations, Golf Course / Grounds Maintenance, Housekeeping, and Human Resources. The 'OK' button in the main form is highlighted with a red box. Red arrows point from the text boxes to the 'OK' button, the 'Tax amount' and 'Estimated freight amount' fields, and the 'Department' field.

Purchase Orders > Creating a New PO > Line Items

Note that the system updates the totals in the logo pane as you add more products or change quantities.

The line item you just created is added to the PO.
To add more, just click on Add Row

Line	Item #	Product name	Qty	Unit
1	SKU130016	Menu Stand, 2\"/>		

Purchase Orders > Creating a New PO > Approval

Approval Routing

Define Approval settings here

Notification

Check the boxes if you want to receive a message when the approver either approves or disapproves your PO or both

Approver

The approver is defaulted according to your personal settings. To change, insert a new code or click on the magnifying glass to display a lookup list. To see contact details of the approver, click the flashlight icon on the right.

IMPORTANT!
If the approver field is empty, the PO will go straight to the Supplier.

Purchase Orders > Creating a New PO > History

History

Define Approval settings here

Subtotal \$ 68.45
Tax \$ 0.00
Freight \$ 0.00
Grand total \$ 68.45

Welcome Alice Vanderpool Home My Settings Help Tutorial Help 008 Entry List Vertical Horizontal

New Save Delete Attach Notes Submit Set Defaults Copy/PO Report

PO Header Bill to Ship to Line items Approval routing **History**

Search Column: Row Search Text page 0 of 0 Rows per page 5

Row	Changed by	Date changed	Field changed	Before	After
-----	------------	--------------	---------------	--------	-------

Done Internet

Purchase Orders > > Action Buttons

Save

Once you're done with creating or changing your PO, click the save button. At this point the system will assign a new PO number.

Delete

Delete the PO you're currently working on. Note: The PO will not be physically deleted but moved into the recycle bin. It can be restored from there at any time

Attach & Notes

Click here to add an attachment or a Note to the PO (explained later on)

Submit

Click here to submit your PO. Depending on your settings the PO will go to the specified approver or directly to the supplier.

Set Defaults

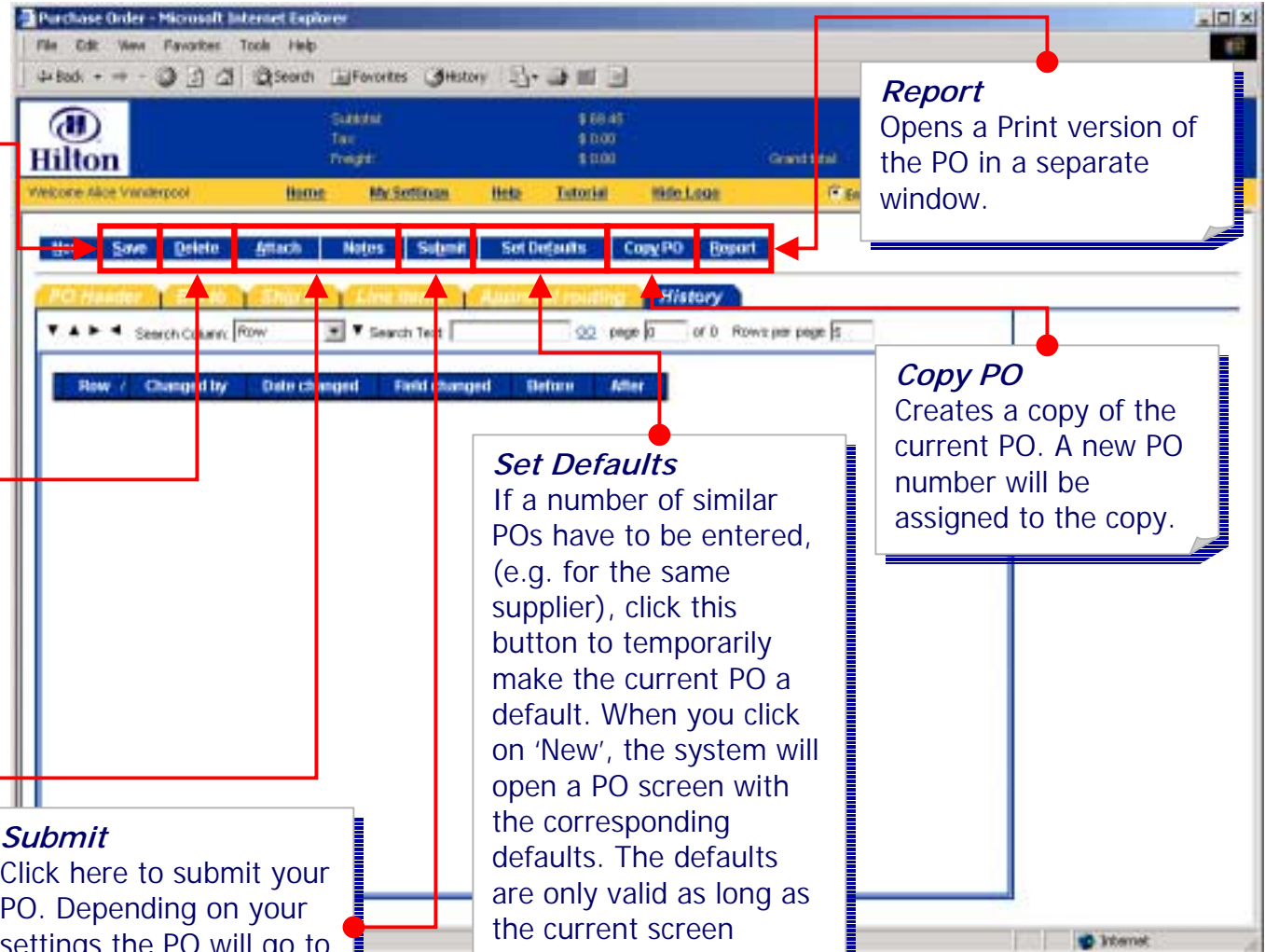
If a number of similar POs have to be entered, (e.g. for the same supplier), click this button to temporarily make the current PO a default. When you click on 'New', the system will open a PO screen with the corresponding defaults. The defaults are only valid as long as the current screen session is active, i.e. if you close the PO screen window, the defaults will be cleared

Report

Opens a Print version of the PO in a separate window.

Copy PO

Creates a copy of the current PO. A new PO number will be assigned to the copy.



Purchase Orders > Editing existing POs

Access from PO TAB
Select the PO you want to modify from the list of POs on the PO Tab by clicking the 'Edit' button

The screenshot shows the Hilton Supply Management web application interface. At the top, there is a navigation bar with the Hilton logo and user information. Below this, there are search and navigation options. The main content area is titled 'PO' and contains a table of Purchase Orders. The table has columns for PO number, PO Status, Subject, Inn code, PO date, Reg. delivery, and PO Total. Each row in the table has an 'Edit' button next to the PO number. A red box highlights these 'Edit' buttons, and a red arrow points from the text box on the left to the first 'Edit' button.

#	PO number	PO Status	Subject	Inn code	PO date	Reg. delivery	PO Total
0	0000000000000034	Favorite! accepted	Subject:SOTF Supplier:OnTheFlySupplier Pet's Hardware Store		11/05/2002	11/10/2002	\$1,175.00
0	0000000000000035	Approved	Subject:Subject from User Supplier:OnTheFlySupplier Herman's Hard to Find		11/05/2002	11/10/2002	\$90.96
0	0000000000000036	Viewed by supplier	Subject:Proxy Supplier:Hilton Supply Management	No Inn Code	11/05/2002	11/10/2002	\$239.90
0	0000000000000037	Viewed by supplier	Subject:Subject from User Supplier:McDade's Hotel Furniture Suppliers	No Inn Code	11/05/2002	11/10/2002	\$5,027.60
0	0000000000000039	Viewed by supplier	Subject:Subject from User Supplier:Hilton Supply Management	No Inn Code	11/05/2002	11/10/2002	\$692.50
0	0000000000000040	Viewed by supplier	Subject:Subject from User Supplier:McDade's Hotel Furniture Suppliers	No Inn Code	11/05/2002	11/11/2002	\$20.00
0	0000000000000041	New	Subject:Subject from User Supplier:McDade's Hotel Furniture Suppliers	No Inn Code	11/07/2002	11/12/2002	\$24,638.00
0	0000000000000042	New	Subject:Subject from User Supplier:McDade's Hotel Furniture Suppliers	No Inn Code	11/07/2002	11/12/2002	\$13

Purchase Orders > Editing existing POs

The PO screen will open in a new window

Data in the 'PO Header', 'Bill to' and 'Ship to' section will be pre-populated based the information specified during the PO creation and default settings for properties and suppliers.

Purchase Order - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Hilton Summary: \$ 142.29 Tax: \$ 11.74 Freight: \$ 14.33 Grand Total: \$ 142.29

Welcome Alex Vanderpool Home My Settings Help Tutorial Help Lists Entry List Vertical Horizontal

New Save Delete Attach Notes Submit Set Defaults Copy PO Export

PO Header Bill to Ship to Line Items Approval routing History

Identification

PO number: 00000000000191 Status: [Dropdown]

Subject: Lamp Test PO

Required delivery date: 01/03/2003

PO date: 12/01/2002

Supplier

Supplier: [Dropdown] Hilton Supply Management

Proxy supplier: 13 McBride's Hotel Furniture

Address line 1: 11 Hilton Way

Address line 2: [Text]

Address line 3: [Text]

City: Houston

State: TX

Zip: 77002

Attention: [Dropdown] Men Townsend

Phone: 8001234567

Email: [Text]

Sent From

Buyer: Alex Vanderpool

Transfer this PO:

Purchase Orders > Editing existing POs

Editing Line Items

If you need to change quantities or delivery dates of specific line items, click the Line items tab.

Select the corresponding line item by clicking the Edit button.

The screenshot shows the Hilton Purchase Order system interface. At the top, there is a summary section with the following values:

Subtotal	\$ 142.29
Tax	\$ 11.74
Freight	\$ 14.33
Grand Total	\$ 142.29

Below the summary, there is a navigation bar with tabs: PO Header, Edit PO, Ship to, **Line Items**, Approval routing, and History. The 'Line Items' tab is selected and highlighted with a red box. Below the navigation bar, there is a search area with 'Search Country: Line' and 'Search Text:'. Below the search area, there is a table of line items:

Line	Item #	Product name	Qty	Unit
<input type="button" value="Edit"/>	1	SKU130016 Menu Stand, 2" diameter tube, 11.8" x 11.8" angle frame, 12" diameter base, 14 1/2" H x 19" 1/2"W, display area, felt lined,	2	EA
<input type="button" value="Edit"/>	2	SKU130017 Floor Lamp 3003SM 50" Polished Brass	4	EA
<input type="button" value="Edit"/>	3	FREIGHTTAX	0	EA

The 'Edit' buttons for the first three line items are highlighted with red boxes. The 'FREIGHTTAX' line item is also highlighted with a red box. A red arrow points from the 'Line Items' tab to the table, and another red arrow points from the 'Edit' buttons to the table. A red box highlights the 'FREIGHTTAX' line item, and a red arrow points from a note box below to it.

A Note on Freight & Tax:
Based on percentages specified for freight and tax in your personal settings, the system will calculate the amount of freight and tax based on the total of the PO and add a separate line item.

Purchase Orders > Editing existing POs

The selected line item will be shown in detail and can be modified. Click OK to confirm your changes

The screenshot displays the Hilton Purchase Order system interface. At the top, the Hilton logo is visible, along with summary statistics: Subtotal: \$142.20, Tax: \$11.74, Freight: \$14.33, and Grand Total: \$142.20. The interface includes a navigation menu with options like Home, My Settings, Help, Tutorial, and My Lists. Below this, there are buttons for New, Save, Delete, Attach, Notes, Submit, Set Defaults, Copy PO, and Export. The main area shows a 'Line Items' tab with a table of items:

Line	Item #	Product name	Qty	Unit
1	SKU130016	Menu Stand, 2" diameter tube, 11.8" x 11.8" angle frame, 12" diameter base, 14 1/2" H x 19" 1/2" W, display area, felt lined,	2	EA
2	SKU130017	Floor Lamp 3003EM 50" Polished Brass	4	EA
3		FREIGHT&TAX	0	EA

Below the table, there are buttons for 'OK', 'Cancel', 'Copy as New Row', 'Delete Row', 'Notes', 'Attach', and 'Add Products'. A red box highlights the 'OK' button. A detailed view of the selected item (Line 2) is shown below, with fields for Line, Line type, Item #, Product name, Unit, Qty, Price, Minimum order quantity, Quantity breaks, Tax amount, and Estimated freight amount. A red box highlights this detailed view.

Purchase Orders > Editing existing POs

Copy As New Row

Click on this button if you want to create a copy of the active line item and add it to the PO

Delete Row

Click here to discard the active line item

Notes and Attachments

You can add notes and attachments on line item level (explained later)

The screenshot shows the Hilton Purchase Order system interface. At the top, there is a summary of the purchase order: **Summary** with values: **Subtotal** \$142.20, **Tax** \$11.74, **Freight** \$14.33, and **Grand Total** \$178.27. Below this is a navigation bar with buttons: **New**, **Save**, **Delete**, **Attach**, **Notes**, **Submit**, **Set Defaults**, **Copy PO**, and **Export**. The main area is titled **Line Items** and contains a table with columns: **Line**, **Item #**, **Product name**, **Qty**, and **Unit**. The table has three rows:
1. Line 1, Item # SKU130016, Product name Menu Stand, 2" diameter tube, 11.8" x 11.8" angle frame, 12" diameter base, 14 1/2" H x 19" 1/2" W, display area, full hood, Qty 2, Unit EA.
2. Line 2, Item # SKU130017, Product name Floor Lamp 3003EM 50" Polished Brass, Qty 4, Unit EA.
3. Line 3, Item # NIGHTSTAX, Product name NIGHTSTAX, Qty 0, Unit EA.
Below the table is a detailed view of the selected item (Line 2). It includes fields for: **Line** (2), **Line type** (Catalog Item), **Item #** (SKU130017), **Product name** (Floor Lamp 3003EM 50" Polished Brass), **Unit** (EA), **Qty** (4), **Price** (\$23.93), **Minimum order quantity** (1), **Quantity breaks**, **Tax amount**, and **Estimated freight amount**. A toolbar below the table contains buttons: **OK**, **Cancel**, **Copy as New Row**, **Delete Row**, **Notes**, **Attach**, and **Add Products**. Red arrows point from the text boxes on the left to the corresponding buttons in the interface.

Purchase Orders > Editing existing POs

Important Note!

Once you're done adding items, editing existing ones or doing other modifications to your PO, always click the 'Save' button to make your changes permanent.

The screenshot shows the Hilton Purchase Order system interface. At the top, there is a summary bar with the following information:

Subtotal	\$ 142.20
Tax	\$ 11.74
Freight	\$ 14.33
Grand Total	\$ 142.20

Below the summary bar, there is a navigation menu with buttons for New, Save, Delete, Attach, Notes, Submit, Set Defaults, Copy PO, and Export. The 'Save' button is highlighted with a red box and a red arrow pointing to it from the 'Important Note' box.

The main content area shows a table of items:

Line	Item #	Product name	Qty	Unit
1	SKU130016	Menu Stand, 2" diameter tube, 11.8" x 11.8" angle frame, 12" diameter base, 14 1/2" H x 19" 1/2" W, display area, felt lined,	2	EA
2	SKU130017	Floor Lamp 3003EM 50" Polished Brass	4	EA
		FREIGHT&TAX	0	EA

Below the table, there is a detailed view of item 2:

Item:
Line: 2
Line type: Catalog Item
Item #: SKU130017
Product name: Floor Lamp 3003EM 50" Polished Brass
Unit: EA
Qty: 4
Price: \$ 23.93
Minimum order quantity: 1
Quantity breaks:
Tax amount:
Estimated freight amount:

Purchase Orders > Adding Notes and Attachments

Notes and Attachments

Important to know is that they can be applied at the PO level or at the line item Level

Add PO Level Notes and Attachments here

Add Line Item Notes and Attachments here

The screenshot shows the Hilton Purchase Order system interface. At the top, there is a header with the Hilton logo and a summary table:

Summary	\$ 142.20
Tax	\$ 11.74
Freight	\$ 14.33
Grand Total	\$ 142.20

Below the header is a navigation bar with buttons: New, Save, Delete, **Attach**, **Notes**, Submit, Set Defaults, Copy PO, Export. The **Attach** and **Notes** buttons are highlighted with a red box. A red arrow points from this box to the **Notes** and **Attach** buttons in the line item detail view.

The main table shows the following line items:

Line	Item #	Product name	Qty	Unit
1	SKU130016	Menu Sign, 2" diameter tube, 11.8" x 11.8" angle frame, 12" diameter base, 14 1/2" H x 19" 1/2" W, display area, felt lined,	2	EA
2	SKU130017	Floor Lamp 30038H 50" Polished Brass	4	EA
3		FREIGHT TAX	0	EA

The line item detail view for line 2 shows the following fields:

Line: 2
Line type: Catalog Item
Item #: SKU130017
Product name: Floor Lamp 30038H 50" Polished Brass
Unit: EA
Qty: 4
Price: \$ 23.93
Minimum order quantity: 1
Quantity breaks: [empty]
Tax amount: [empty]
Estimated freight amount: [empty]

The **Notes** and **Attach** buttons in the detail view are also highlighted with a red box. A red arrow points from this box to the **Notes** and **Attach** buttons in the main table's header area.

Purchase Orders > Adding Notes and Attachments

The screenshot shows the Hilton Purchase Order system interface. At the top, there is a header with the Hilton logo and navigation links. Below the header, there is a menu bar with buttons for 'New', 'Save', 'Delete', 'Attach', 'Notes', 'Submit', 'Set Defaults', 'Copy PO', and 'Export'. The 'Attach' button is highlighted with a red box. Below the menu bar, there is a table with columns for 'Line', 'Item #', and 'Product name'. The table contains three rows: Line 1 (SKU130016), Line 2 (SKU130017), and Line 3 (FREIGHT&TAX). Below the table, there is a form for adding an attachment. The form has fields for 'Line', 'Line type', 'Item #', 'Product name', 'Unit', 'Qty', 'Price', 'Minimum order quantity', 'Quantity breaks', 'Tax amount', and 'Estimated freight amount'. The 'Add' button is highlighted with a red box. A 'Select Upload File' dialog box is open, showing a file selection interface with a 'Submit' button highlighted by a red box.

Click the PO level 'Attach' button to start

Click the 'Add' button in the Attachment list window that pops up

Locate your file and click Submit. If this is an internal document, i.e. is not to be shared with suppliers, please check the corresponding box. The supplier will then not be able to view the attachment

Purchase Orders > Adding Notes and Attachments

Please note that the number of attached documents is displayed on the 'Attach' button.

The attachment is added to the list.
To remove it, click delete.
To leave the attachment list, close the window

The screenshot displays the Hilton Purchase Order system interface. At the top, there is a header with the Hilton logo and navigation tabs: Home, My Settings, Help, Tutorial, and Info Links. Below this is a menu bar with buttons: New, Save, Delete, **1 Attach**, Notes, Submit, Set Defaults, Copy PO, and Export. The main content area shows a table of purchase order items with columns: Line, Item #, Product name, Qty, and Unit. The table contains three rows: Line 1 (SKU130016, Menu Stand, 2" diameter tube, 11.8" x 11.8" angle frame, Qty 1, Unit EA), Line 2 (SKU130017, Floor Lamp 3003BN 5P Polished Brass, Qty 4, Unit EA), and Line 3 (FREIGHT/STAX). A red box highlights the '1 Attach' button. A red arrow points from this button to a secondary window titled 'Attachment list - Microsoft Internet Explorer'. This window shows a table with one row: 'New Test Document.txt' with a 'Yes' checkbox. A red box highlights this row, and a red arrow points from it back to the 'Attach' button in the main window. Below the table, there are buttons: OK, Cancel, Copy as New Row, Delete Row, Notes, and Attach. A 'Notes' section is visible below the table with fields for Line, Line type, Item #, Product name, Unit, Qty, Price, Minus order quantity, Quantity breaks, Tax amount, and Potential freight amount.

Purchase Orders > Adding Notes and Attachments

Click on the Notes button to add a Note to the PO

The screenshot displays the Hilton Purchase Order system interface. At the top, the Hilton logo is visible. Below it, a navigation bar contains buttons for 'New', 'Save', 'Delete', '1 Attach', 'Notes', 'Submit', 'Set Defaults', 'Copy PO', and 'Export'. The 'Notes' button is highlighted with a red box. A red arrow points from a text box on the left to this button. Below the navigation bar, there are tabs for 'PO Header', 'Bill to', 'Ship to', 'Line Items', 'Approval routing', and 'History'. The 'Line Items' tab is active, showing a table with columns for Line, Item #, Product name, Qty, and Unit. The table contains three rows: Line 1 (SKU130016, Menu Stand), Line 2 (SKU130017, Floor Lamp), and Line 3 (FREIGHT/TAX). Below the table, there are buttons for 'OK', 'Cancel', 'Copy as New Row', 'Delete Row', 'Notes', 'Attach', and 'Add Products'. The 'Notes' button is highlighted. Below these buttons, there is a form for editing a line item, with fields for Line, Line type, Item #, Product name, Unit, Qty, Price, Minus order quantity, Quantity breaks, Tax amount, and Estimated freight amount.

Line	Item #	Product name	Qty	Unit
1	SKU130016	Menu Stand, 2" diameter tube, 11.8" x 11.8" angle frame, 12" diameter base, 14 1/2" H x 19" 1/2" W, display area, full insert,	2	EA
2	SKU130017	Floor Lamp 30030M 5P Polished Brass	4	EA
3		FREIGHT/TAX	0	EA

Purchase Orders > Adding Notes and Attachments

The notes section will open in a new window

Click Save to add the note to the PO. The system will assign it a Note ID

Type your text here

Note Type
Select what type of note this is:

- Buyer Note
- Supplier Note
- Billing Note or
- Shipping Note

The screenshot shows the 'Notes' section of the Hilton Supply Management system. The browser window title is 'Notes - Microsoft Internet Explorer'. The page has a blue header with the Hilton logo and a yellow navigation bar. The main content area is titled 'Notes' and contains a search bar, a 'Save' button, a text area for the note, a 'Note type' dropdown menu, and a checkbox for 'Notes viewed internally only'. Red arrows point from callout boxes to these elements.

If this is an internal note that is not supposed to be shared with the supplier, check the box

Purchase Orders > Adding Notes and Attachments

The new note is displayed in the list section of the screen

Save As

If you do not want the system to assign a Note ID when you save, click Save As in order to specify a name for the note

Delete

Delete the active Note

Print

Opens a printer friendly html version of the note in a separate window

Audit Trail

Info on who created/edited the note on what date

Close the browser window when you are done to get back to the PO entry screen

Notes - Microsoft Internet Explorer

Hilton

Welcome Alice Vanderpool

Home My Settings Help Tutorial Info Log

Entry List Vertical Horizontal

Advanced Search

First Previous Next Last New Refresh

Search Column: All

Search Text: []

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

Note type	Note date/time
	12/04/2002

Notes

Notes viewed internally only

Note ID: []

Date is a note

Note:

Note date / time: 12/04/2002 09:55:00

Note type: select entry

Update user: AliceV

Update date: 12/04/2002 10:13:59

Creation user: AliceV

Creation date: 12/04/2002 10:13:59

Buttons: Save, Save As, Delete, Print, Set Defaults

Set Defaults

If you need to create multiple similar notes, click this button to make the current note a template for all new notes as long as this screen session is active, i.e. you do not close the browser window.



Purchase Orders > Adding Notes and Attachments

The number of attached notes is displayed here now.

Notes & Attachments on Line Item Level

The process of adding notes and attachments on line item level is identical to the one on PO level.

The screenshot displays the Hilton Supply Management web application interface. At the top, there is a header with the Hilton logo and navigation links. Below this is a summary section showing Subtotal (\$142.26), Tax (\$11.74), Freight (\$14.33), and Grand Total (\$178.33). A toolbar contains buttons for New, Save, Delete, 1 Attach, 1 Notes, Submit, Set Defaults, Copy PO, and Export. The main content area is divided into tabs: PO Header, Bill to, Ship to, Line Items, Approval routing, and History. The Line Items tab is active, showing a table with columns for Line, Item #, Product name, Qty, and Unit. The table contains three rows: Line 1 (SKU# 0016, Menu Stand), Line 2 (SKU# 0017, Floor Lamp), and Line 3 (FREIGHT/TAX). Below the table is a toolbar with buttons for OK, Cancel, Copy as New Row, Delete Row, Notes, Attach, and Add Products. A detailed view of the selected line item (Line 2) is shown below, with fields for Line type (Catalog Item), Item # (SKU#0017), Product name (Floor Lamp 3003BN 50" Polished Brass), Unit (EA), Qty (4), Price (\$23.93), Minus order quantity (1), Quantity breaks, Tax amount, and Estimated freight amount. Red arrows point from the text boxes to the '1 Notes' button in the toolbar and the 'Notes' button in the detailed view.

Line	Item #	Product name	Qty	Unit
1	SKU# 0016	Menu Stand, 2" diameter tube, 11.8" x 11.8" angle frame, 12" diameter base, 14 1/2" H x 19" 1/2" W, display area, felt insert,	2	EA
2	SKU# 0017	Floor Lamp 3003BN 50" Polished Brass	4	EA
3		FREIGHT/TAX	0	EA

Purchase Orders > Adding Non-Catalog Items

By supplier you can add non-catalog items to a PO. Click on Add Row.

The screenshot shows the Hilton Purchase Order system interface. The header includes the Hilton logo and a navigation bar with buttons: New, Save, Delete, Attach, Notes, Submit, Set Defaults, Copy PO, Report. Below the navigation bar, there are tabs for PO Header, Bill to, Ship to, Line Items, Approval routing, and History. The 'Line Items' tab is active, and the 'Add Row' button is highlighted in a red box. A callout box points to this button with the text 'By supplier you can add non-catalog items to a PO. Click on Add Row.' The main area displays a table of line items:

Line	Item #	Product name	Qty	Unit
1	SKU130016	Menu Stand, 2" diameter tube, 11.8" x 11.8" angle frame, 12" diameter base, 14 1/2" H x 19" 1/2" W, display area, felt insert,	2	EA
2	SKU130017	Floor Lamp 3003EM 60" Polished Brass	4	EA
3		FREIGHT&TAX	0	EA

Purchase Orders > Adding Non-Catalog Items

Select 'Free Form' from the Line Type pull down list.

The screenshot displays the Hilton Purchase Order system interface. The main window is titled 'Purchase Order - Microsoft Internet Explorer'. The interface includes a header with the Hilton logo and navigation tabs for 'New', 'Save', 'Delete', 'Attach', 'Notes', 'Submit', 'Set Defaults', 'Copy PO', and 'Export'. Below the header, there are tabs for 'PO Header', 'Bill to', 'Ship to', 'Line Items', 'Approval routing', and 'History'. The 'Line Items' tab is active, showing a table with columns for 'Line', 'Item #', 'Product name', 'Qty', and 'Unit'. Two items are listed: 'Menu Stand, 2" diameter tube, 11.8" x 11.8" angle frame, 12" diameter base, 14 1/2" H x 19" 1/2" W, display area, full insert,' and 'Rope Lamp 300394 50" Polished Brass'. A modal window is open for adding a new item, with the 'Line type' dropdown menu set to 'Free Form'. The dropdown menu is highlighted with a red box, and a red arrow points from the text box on the left to this dropdown. Other fields in the modal include 'Product name', 'Unit', 'Qty', 'Price', 'Manufacturer', 'Mfg part number', 'Brand name', 'Model', 'Weight', and 'Dimensions'.

Line	Item #	Product name	Qty	Unit
1	SKU130016	Menu Stand, 2" diameter tube, 11.8" x 11.8" angle frame, 12" diameter base, 14 1/2" H x 19" 1/2" W, display area, full insert,		EA
2	SKU130017	Rope Lamp 300394 50" Polished Brass		EA

Purchase Orders > Adding Non-Catalog Items

Define the non-catalog item using this form. However, only three fields are mandatory:

- Unit of measure
- Quantity and
- Price

Click OK when you're done

The screenshot shows the 'Purchase Order - Microsoft Internet Explorer' window. The main content area is the 'Line Items' form. The form has a header with 'OK', 'Cancel', 'Copy as New Row', 'Delete Row', 'Notes', 'Attach', and 'Add Products' buttons. Below the header, there are several sections:

- Line Information:** Line (4), Line type (Free form), Product name (Power Cable).
- Quantity and Price:** Unit (EA), Qty (6), Price (\$5). These three fields are highlighted with a red box.
- Manufacturer and Product Details:** Manufacturer (Power Inc.), Mfg part number (729003), Brand name (Powerband), Model (23wgt5), Weight (05 lbs), Dimensions (12 ft), Commodity code (123gt7).
- Financials:** Tax amount, Estimated freight amount.
- Buyer Classification:** Department.

Purchase Orders > Adding Non-Catalog Items

SAVE!

Remember to always save any changes

The non-catalog item you just created will be added to the PO.

The screenshot shows the Hilton Purchase Order system interface. At the top, there is a header with the Hilton logo and navigation links. Below the header, there is a summary section showing Subtotal (\$146.26), Tax (\$11.74), Freight (\$14.33), and Grand Total (\$146.26). A toolbar contains buttons for Save, Delete, Attach, Notes, Submit, Set Defaults, Copy PO, and Export. The 'Save' button is highlighted with a red box. Below the toolbar, there are tabs for PO Header, Bill to, Ship to, Line Items, Approval routing, and History. The 'Line Items' tab is active, showing a table with columns for Line, Item #, Product name, Qty, and Unit. The table contains four rows: Line 1 (SKU130016 Menu Stand), Line 2 (SKU130017 Floor Lamp), Line 3 (FREIGHT/TAX), and Line 4 (Power Cable). The 'Power Cable' row is highlighted with a red box. A red arrow points from the 'Save' button to the 'Power Cable' row, and another red arrow points from the 'Power Cable' row to the text box on the left.

Line	Item #	Product name	Qty	Unit
1	SKU130016	Menu Stand, 2" diameter tube, 11.8" x 11.8" angle frame, 12" diameter base, 14 1/2" H x 19" 1/2" W, display area, felt insert,	2	EA
2	SKU130017	Floor Lamp 3003EM 58" Polished Brass	4	EA
3		FREIGHT/TAX	0	EA
4		Power Cable	5	EA

Purchase Orders > Adding a Supplier on the Fly

Click on the NEW button

The screenshot displays the Hilton Purchase Order system interface. At the top, there is a header with the Hilton logo and navigation links. Below this is a toolbar with buttons for 'New', 'Save', 'Delete', 'Attach', 'Notes', 'Submit', 'Set Defaults', 'Copy PO', and 'Export'. The 'NEW' button is highlighted with a red box, and a red arrow points to it from a callout box on the left that says 'Click on the NEW button'. Below the toolbar is a section for 'Line Items' with a search bar and a table of items. The table has columns for 'Line', 'Item #', 'Product name', 'Qty', and 'Unit'. The table contains four rows of data:

Line	Item #	Product name	Qty	Unit
1	SKU130016	Menu Stand, 2" diameter tube, 11.8" x 11.8" angle frame, 12" diameter base, 14 1/2" H x 19" 1/2" W, display area, felt insert,	2	EA
2	SKU130017	Floor Lamp 3003EM 50" Polished Brass	4	EA
3		FREIGHT&TAX	0	EA
4		Power Cable	5	EA

Purchase Orders > Adding a Supplier on the Fly

Click on the magnifying glass. The supplier lookup window will pop up

Click this link to add a supplier that is not on the list

The screenshot displays the Hilton Supply Management web application interface. The main window is titled "Purchase Order - Microsoft Internet Explorer" and shows a form for creating a purchase order. The form includes fields for PO number, subject, required delivery date, and PO date. A red box highlights the "Supplier" field, which has a magnifying glass icon next to it. A red arrow points from a text box to this magnifying glass icon.

A secondary window titled "Supplier: Fax Lookup - Microsoft Internet Explorer" is open, showing a search results table. A red circle highlights a link in the table that says "Click here to add a Supplier". A red arrow points from a text box to this link.

Company name	Fax number	Off line	Contact
A.M. Briggs Inc.	12002890534	No	John De Joyce
Display Systems International	87142154875	Yes	Polly Jaegers
Excellent Hoteliers	9607540541	No	Kurt Gardner
Franston's Food and Beverage	19607540541	No	Gene Lindsey
Hilton Supply Management		No	Kee Townsend
Hotel Food Service Supplies		No	Mike Mitchell
Hotel Landscaping Supplies		No	Victor Morales
Irvine Seafood	9425677044	Yes	Mike Stevens
Jim's Steak House	7802232254	Yes	John Anderson
McBride's Hotel Furniture Supplies		No	Larry Hanson
Paul's Poultry Pantry		Yes	Paul Peters
Pelican Signs & Engineering	9957854785	Yes	Kalle Muly
Sam's Steak House	8213653656	No	Sam O'Brien

Purchase Orders > Adding a Supplier on the Fly

The supplier section of the PO Header screen turns into a free form with two mandatory fields

- Supplier Name and
- Fax (as key identifier)

The procedure to complete the PO is the same as described under creating a new PO. Note that only free form line items can be added to this type of PO.

The screenshot shows the 'Purchase Order - Microsoft Internet Explorer' window. The top navigation bar includes 'Home', 'My Settings', 'Help', 'Tutorial', and 'Help Links'. The main content area is titled 'PO Header' and contains several sections: 'Identification', 'Supplier', and 'Sent From'. The 'Supplier' section is highlighted with a red box and contains the following fields: Supplier name, Fax, Address line 1, Address line 2, Address line 3, City, State, Zip, Attention, Phone, and Email. The 'Identification' section includes PO number (set to [New]), Subject (PO Co Sub), Required delivery date (12/06/2002), and PO date (12/03/2002). The 'Sent From' section includes Buyer (Alice Vanderpool), Title (Purchasing Agent), and Department (Super User). The status is set to 'Open'.

Purchase Orders > Proxy Suppliers

