Hilton
Supply Management

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

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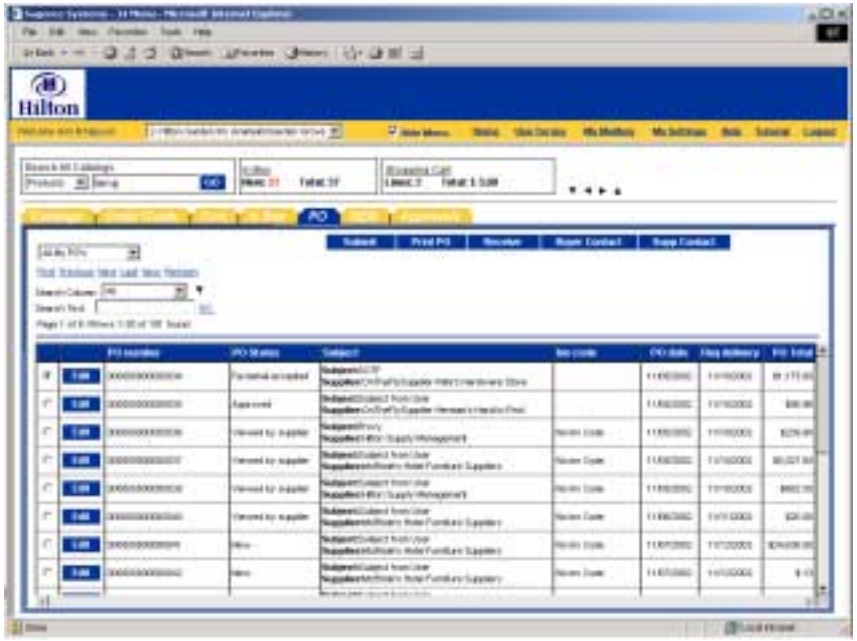
Purchase Orders > PO Tab vs Entry Screen

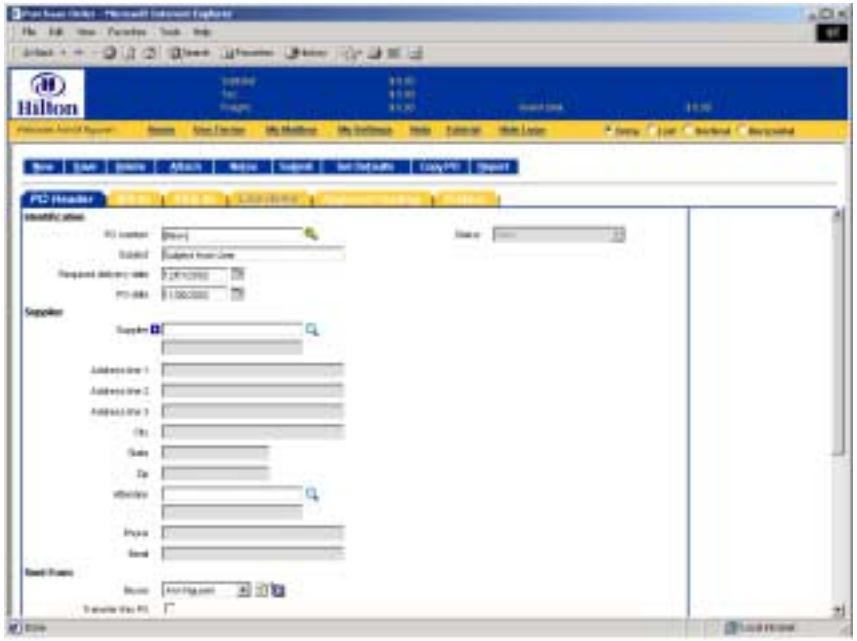
PO TAB

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 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





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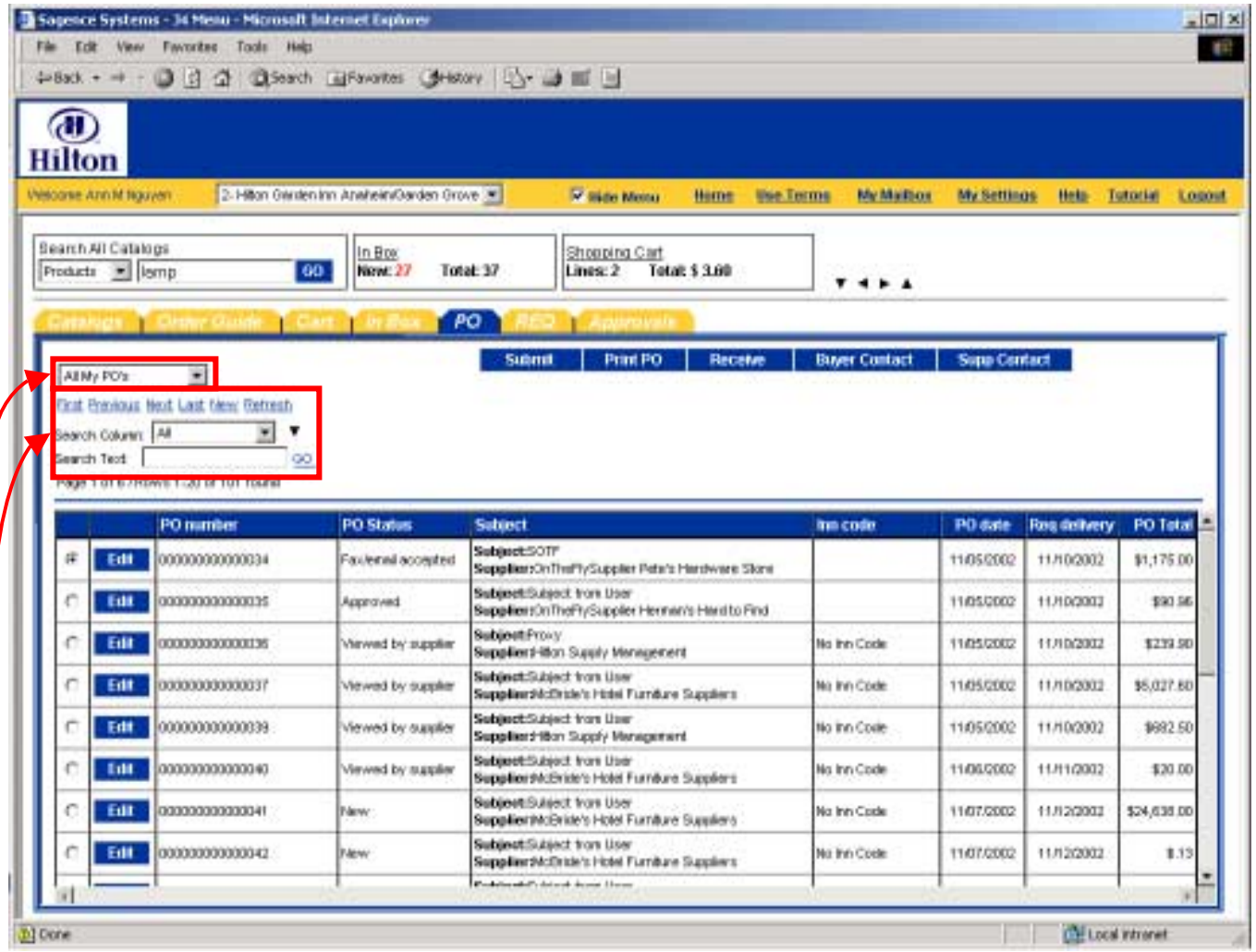
Purchase Orders > The PO Tab

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.



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Purchase Orders > The PO Tab > PO List

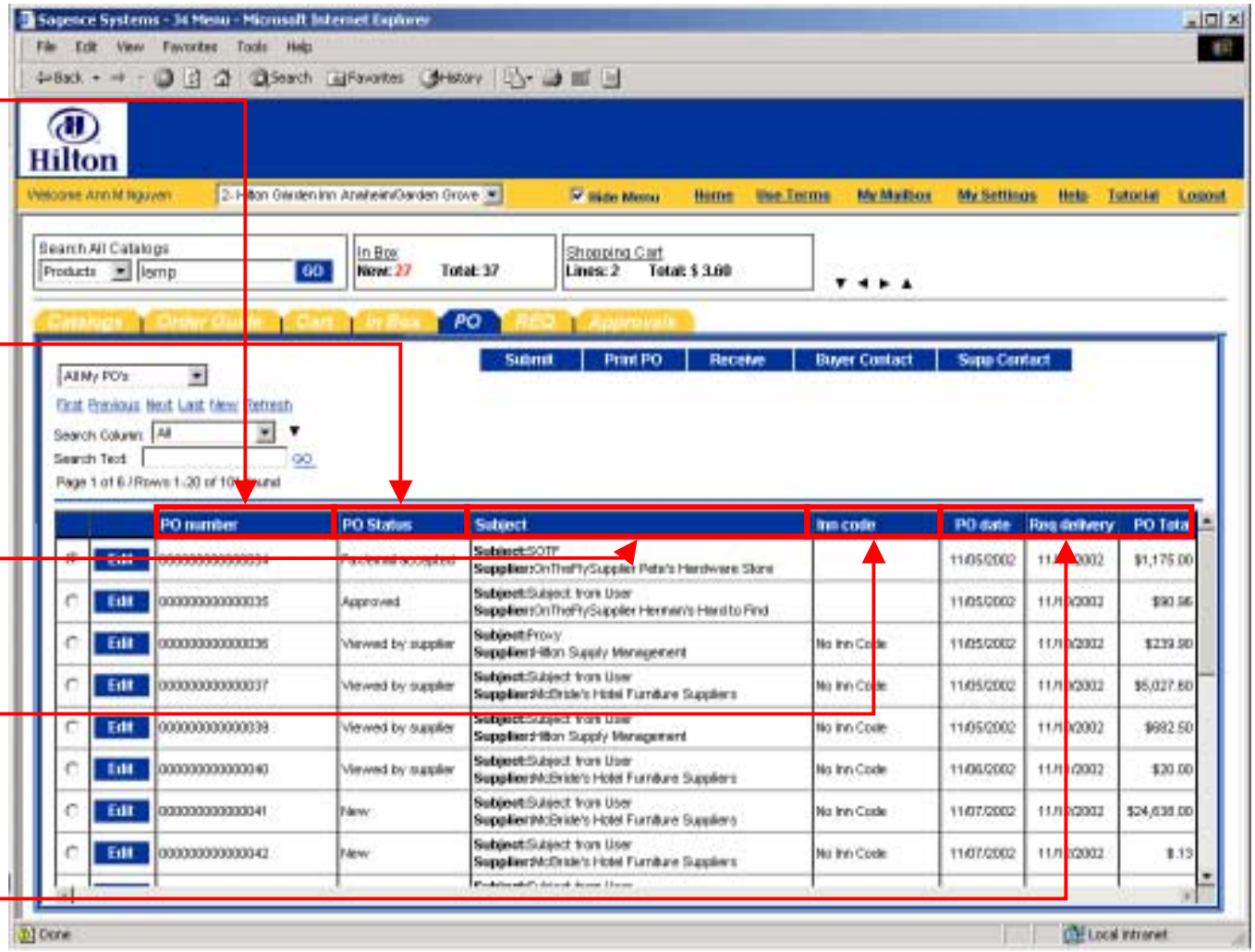
PO Number
Shows the system generated PO number.

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



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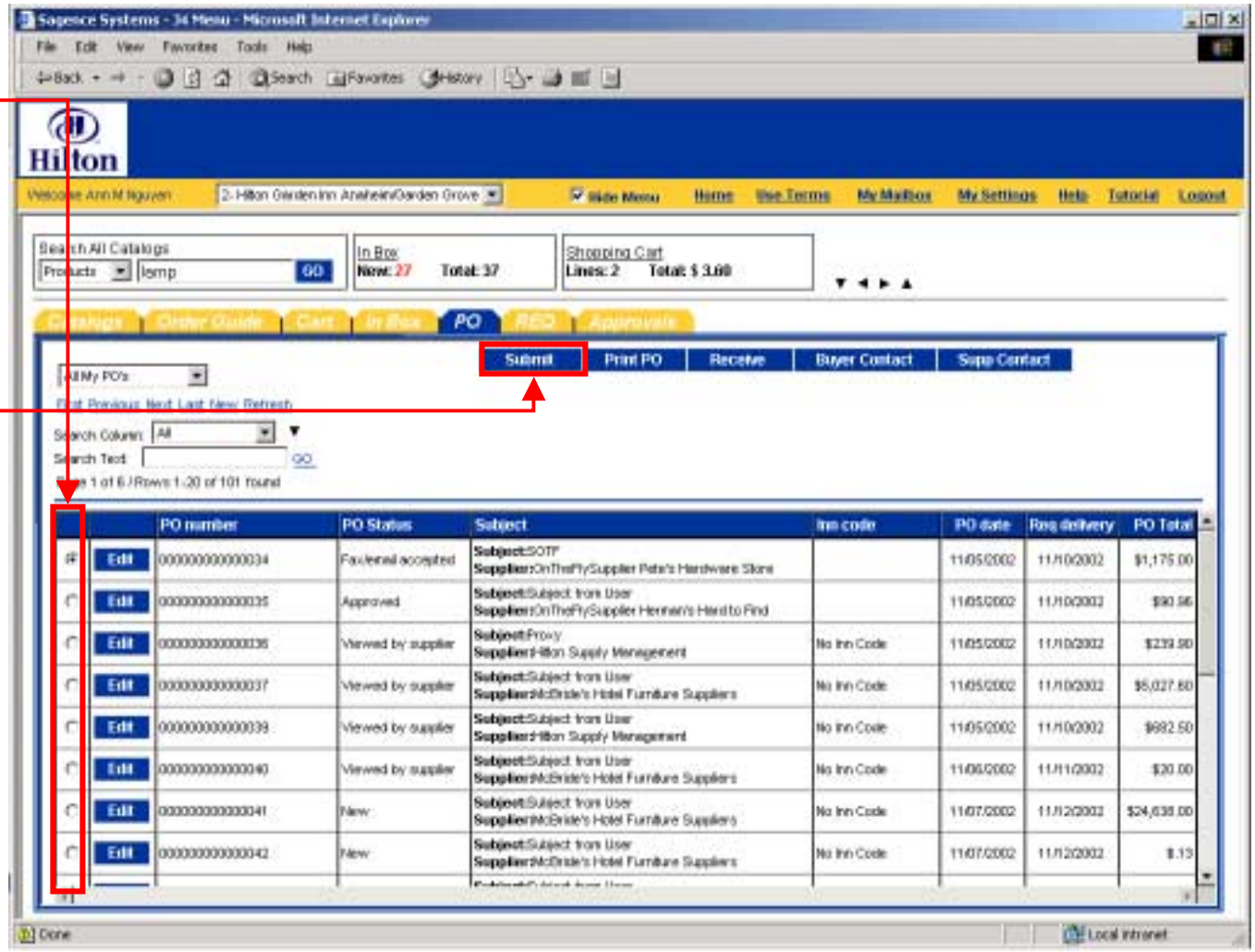
Purchase Orders > The PO Tab > Submit

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)



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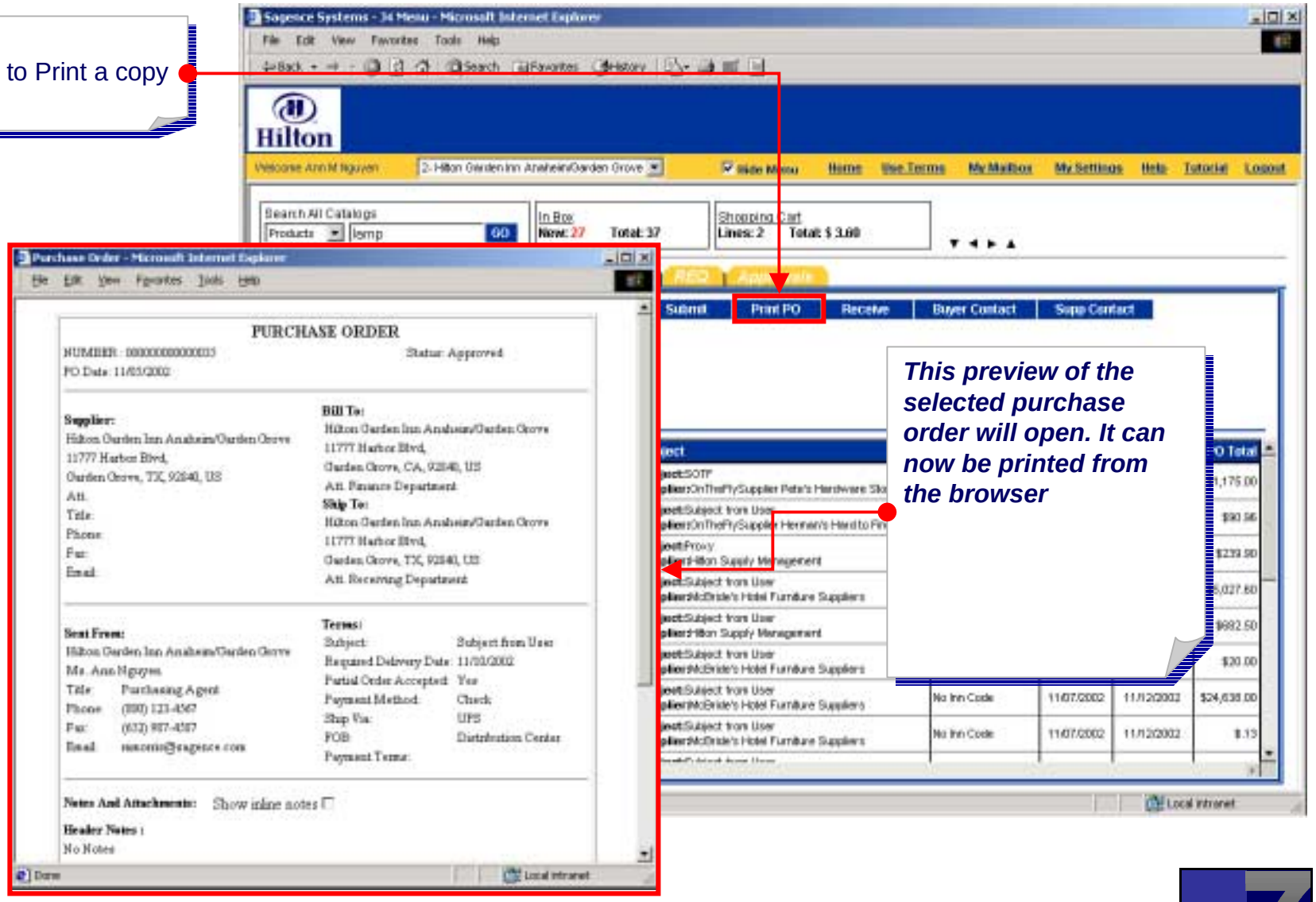
Purchase Orders > The PO Tab > Print

Print PO
Click here to Print a copy of the PO



This preview of the selected purchase order will open. It can now be printed from the browser

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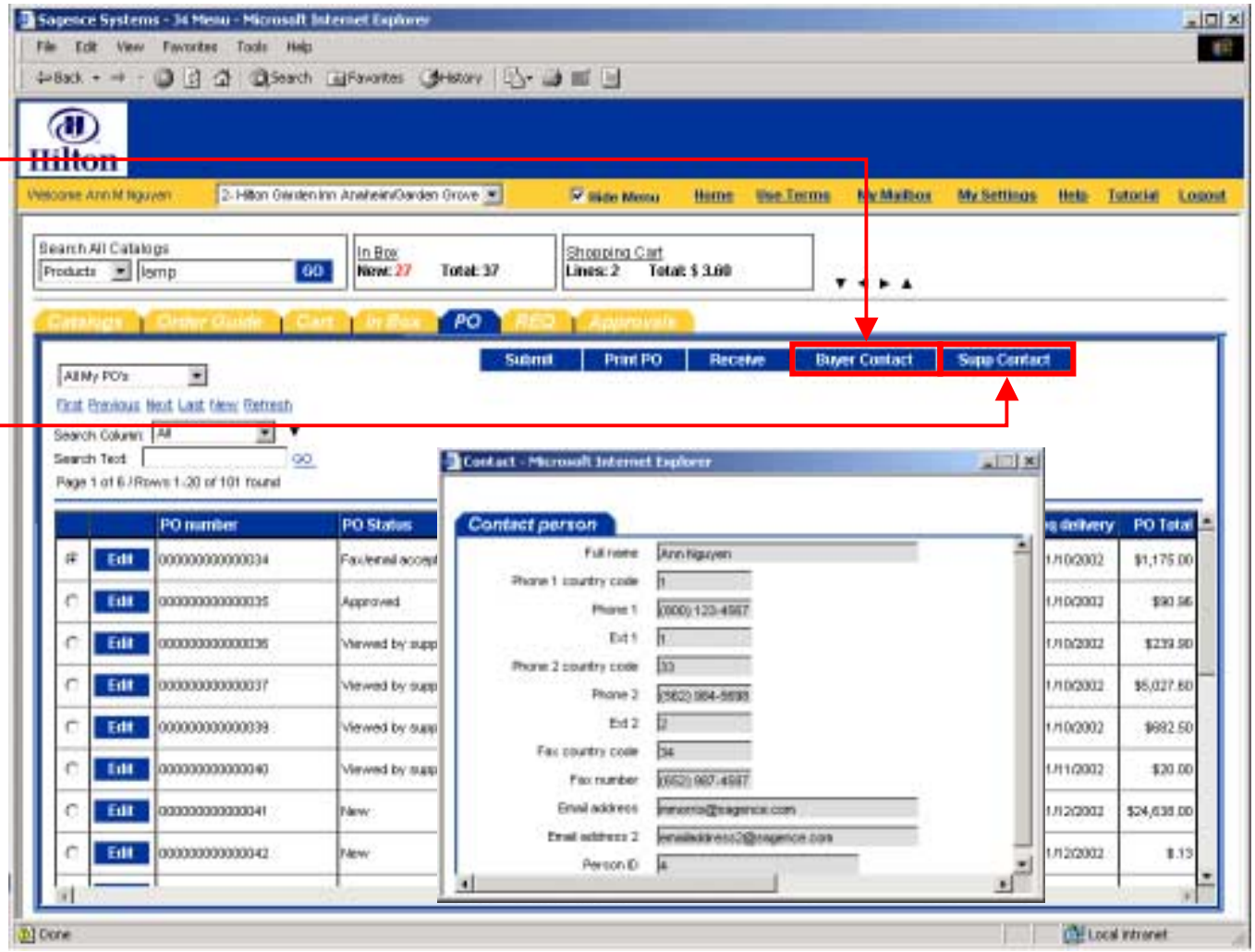
Purchase Orders > The PO Tab > Contact Info

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



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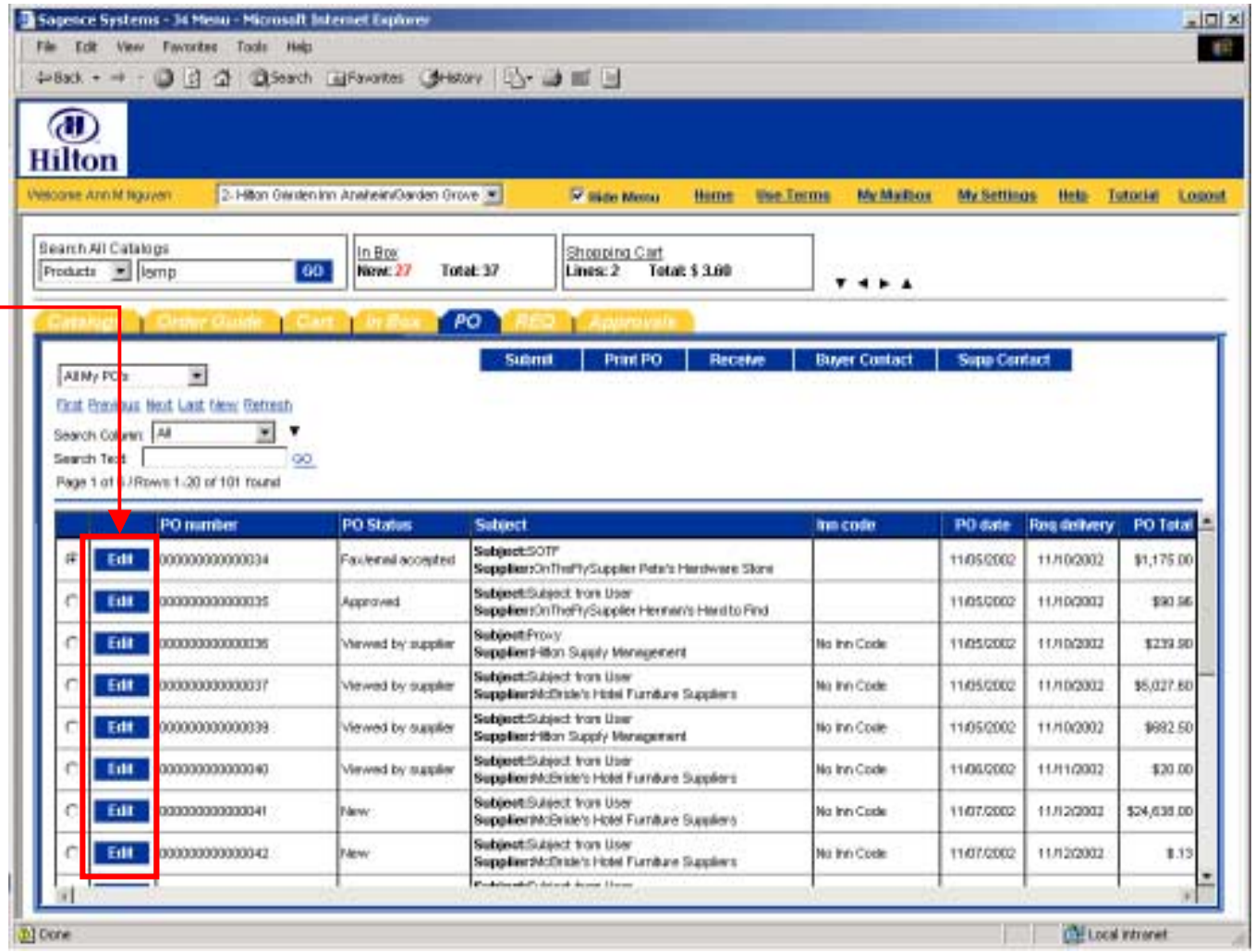
Purchase Orders > Entry Screen

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.



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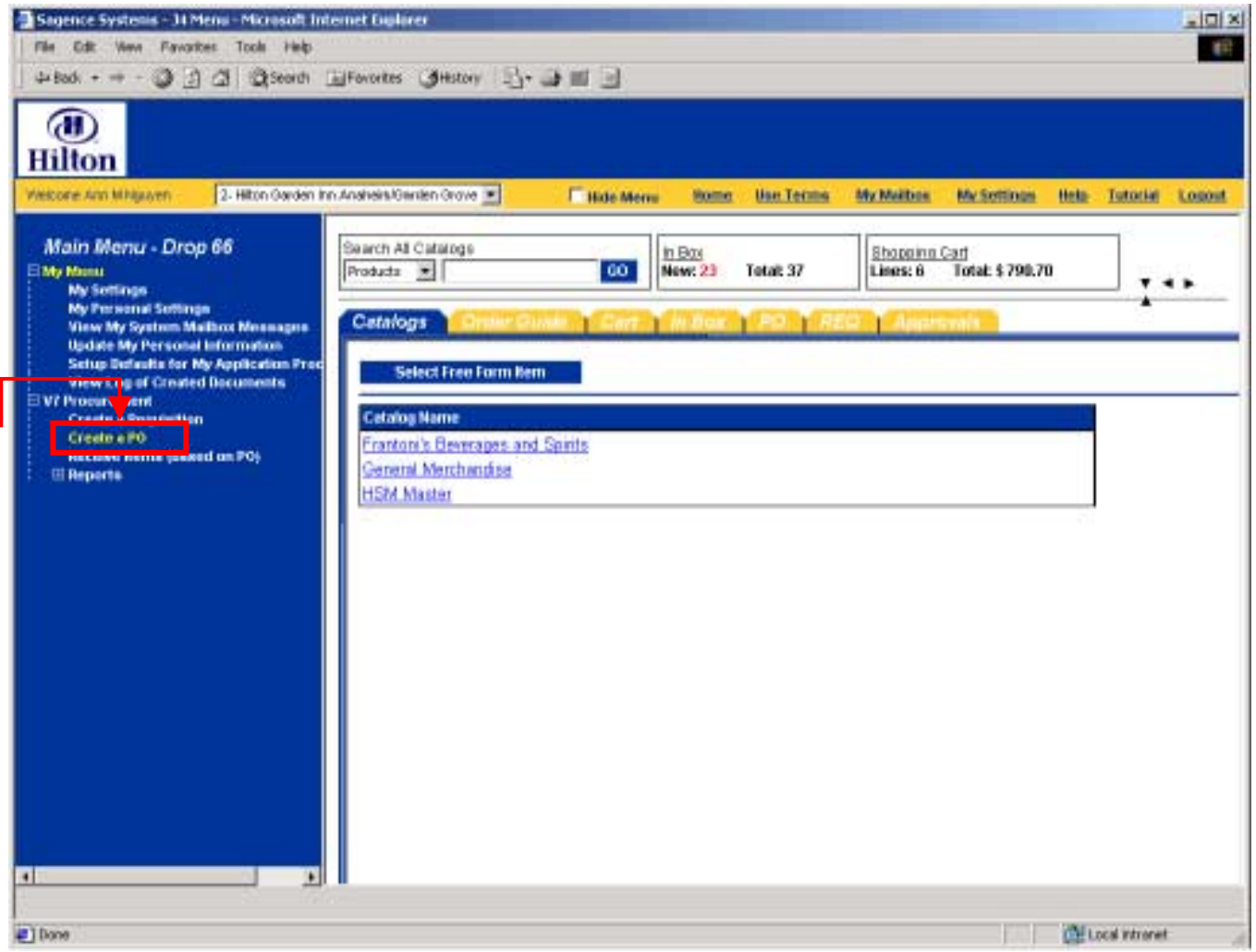
Purchase Orders > Entry Screen

Access from FrontPage
You can launch the PO entry screen your FrontPage Menu Panel

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



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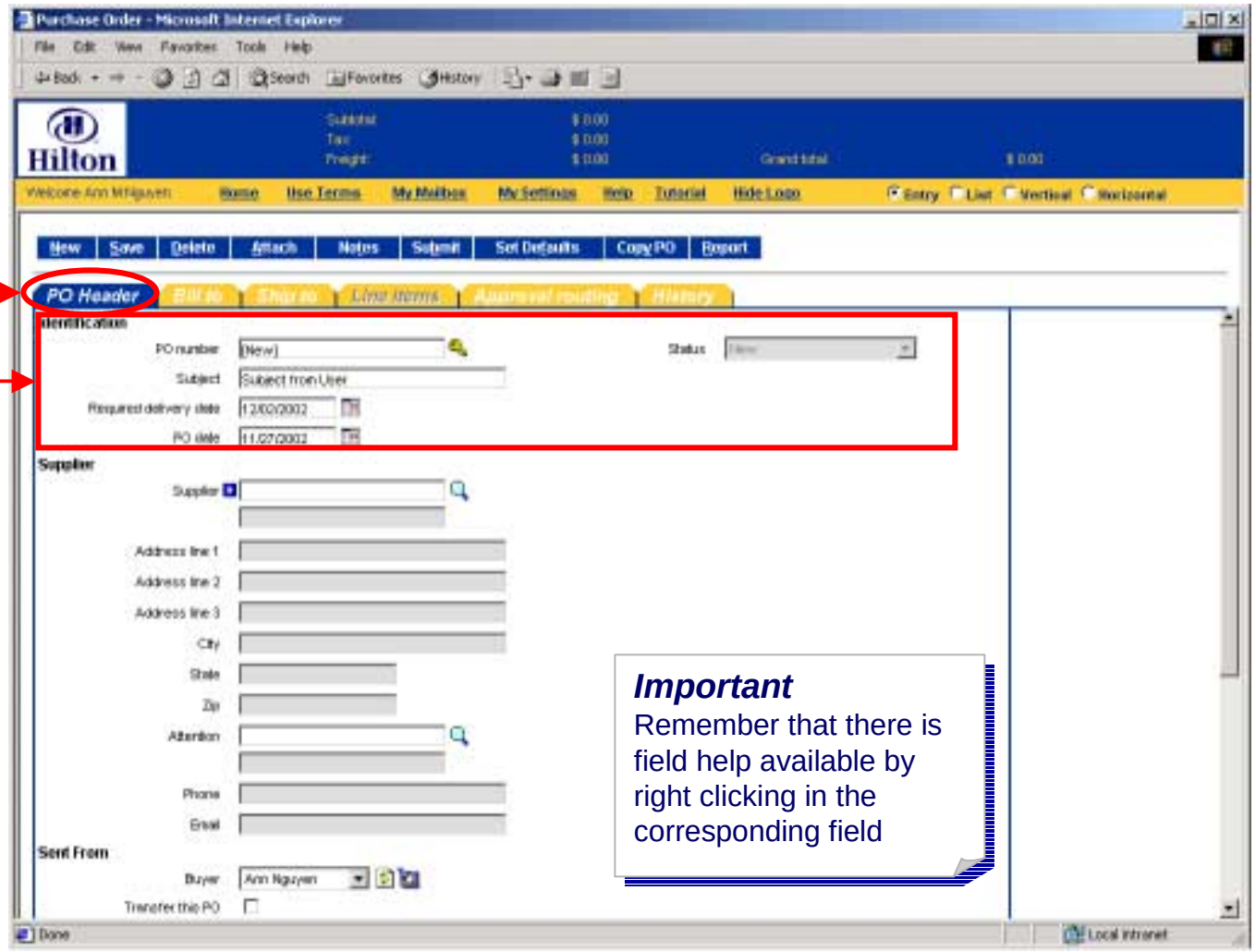
Purchase Orders > Creating a New PO

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 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

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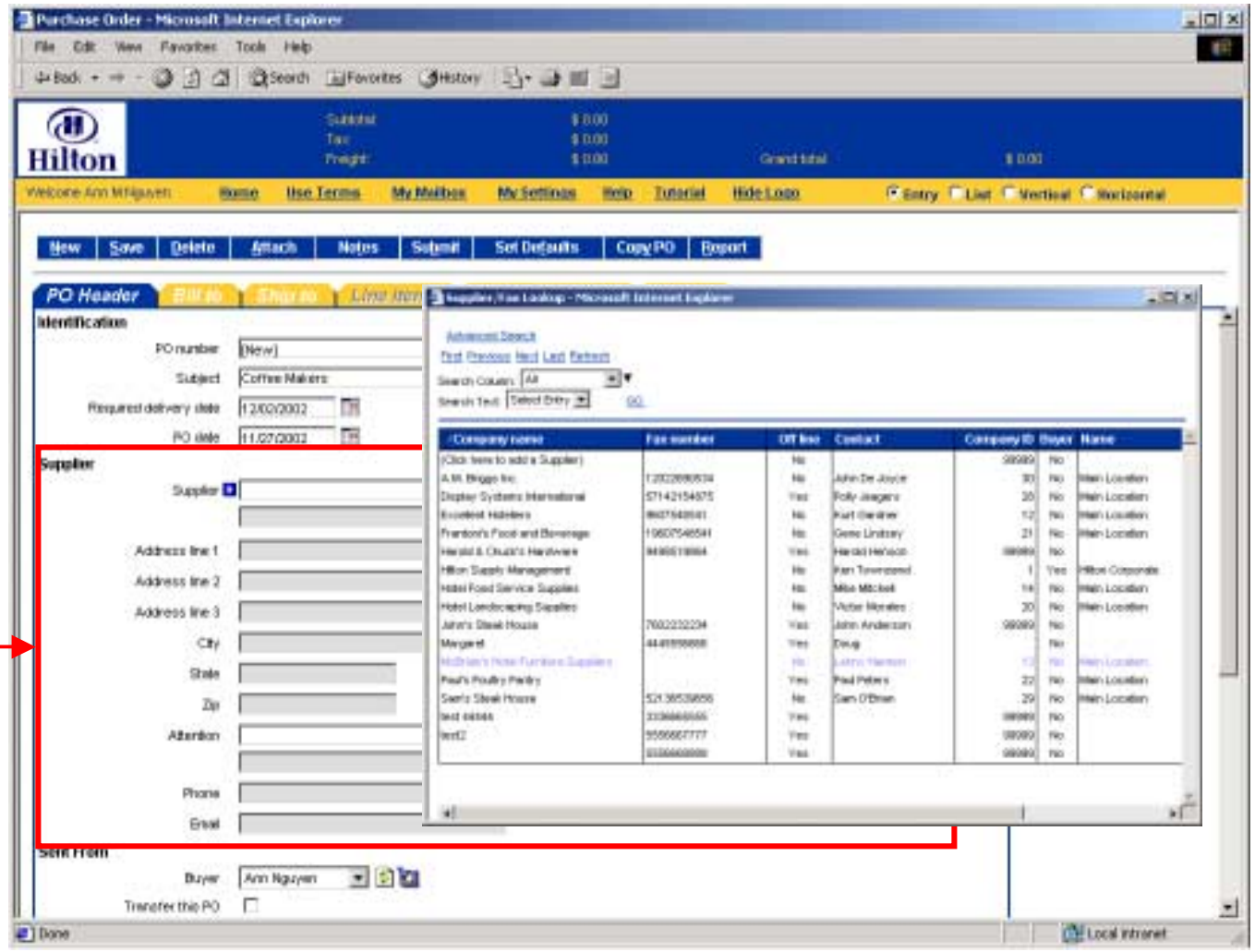
Purchase Orders > Creating a New PO > Header

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



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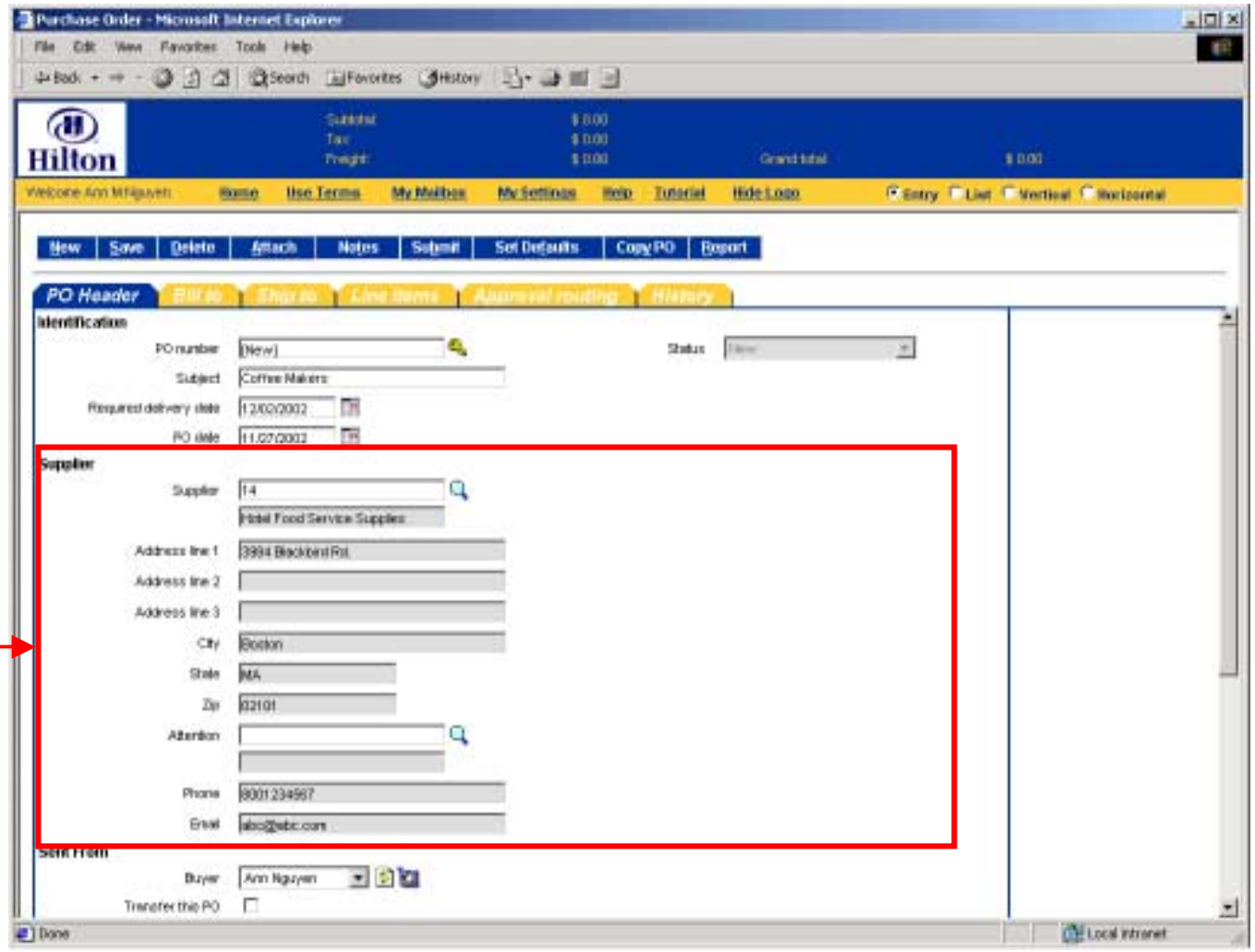
Purchase Orders > Creating a New PO > Header

Supplier
The Supplier information will be populated based on you choice.

Scroll down to see the remainder of the PO Header Screen



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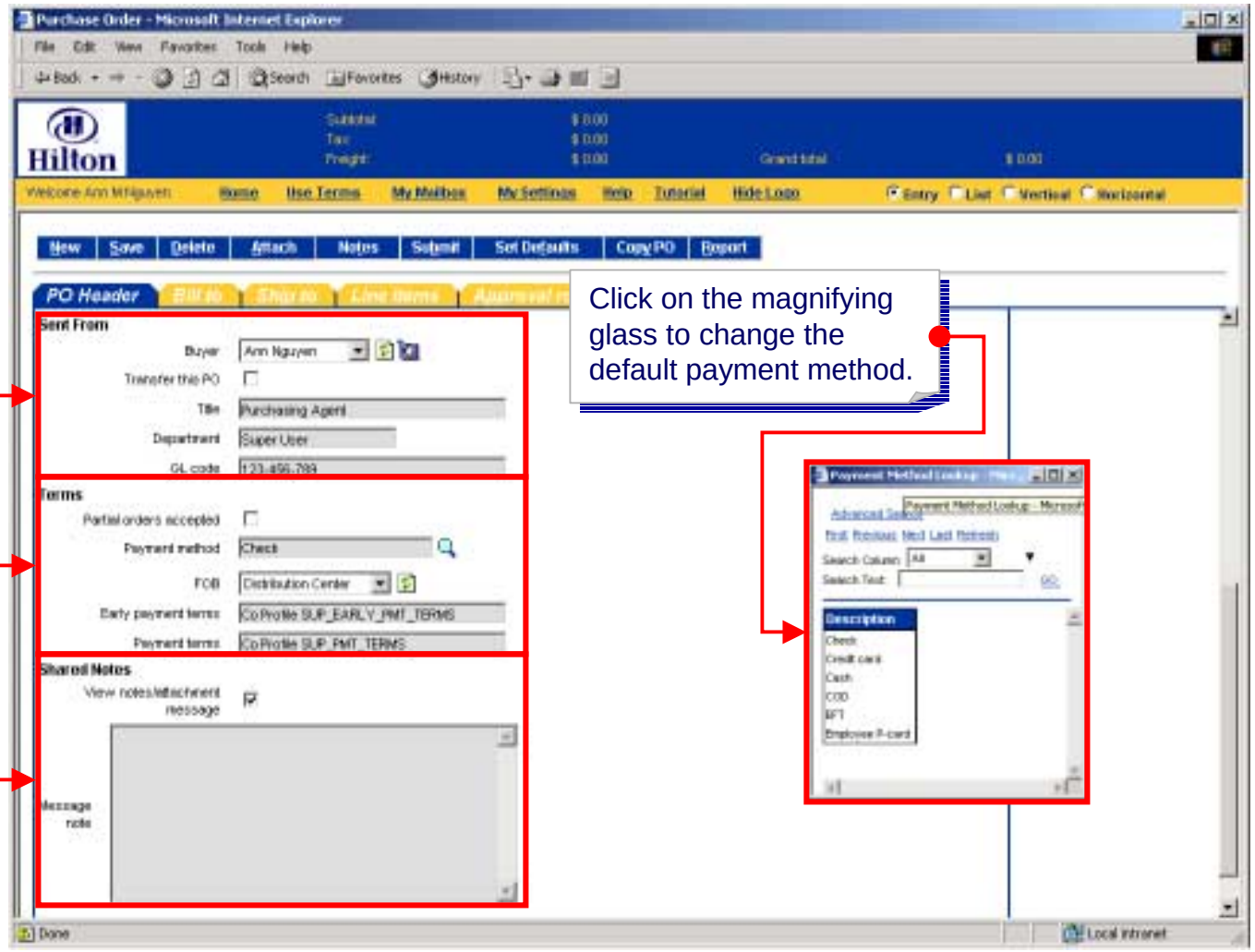
Purchase Orders > Creating a New PO > Header

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.

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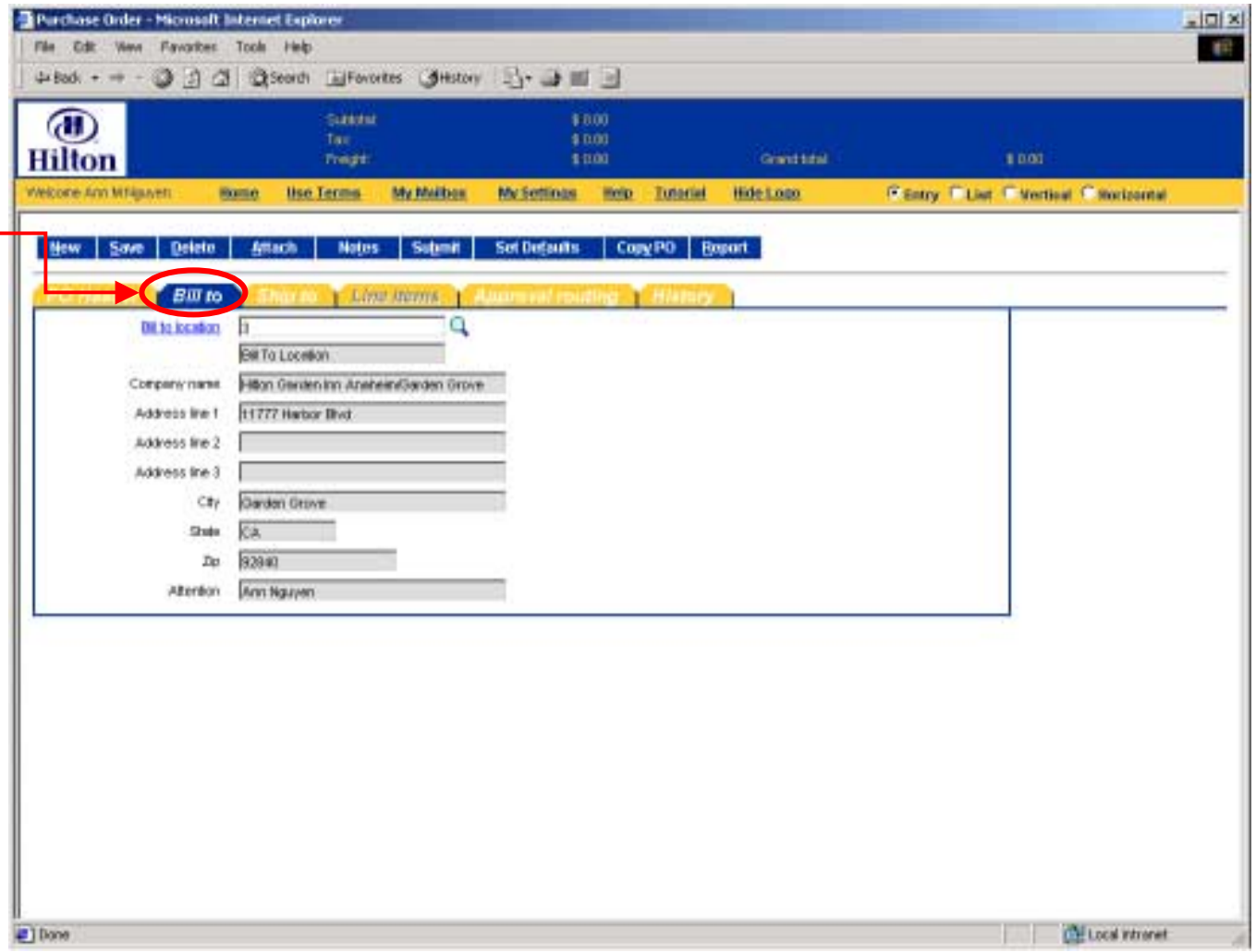
Purchase Orders > Creating a New PO > Bill to

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.



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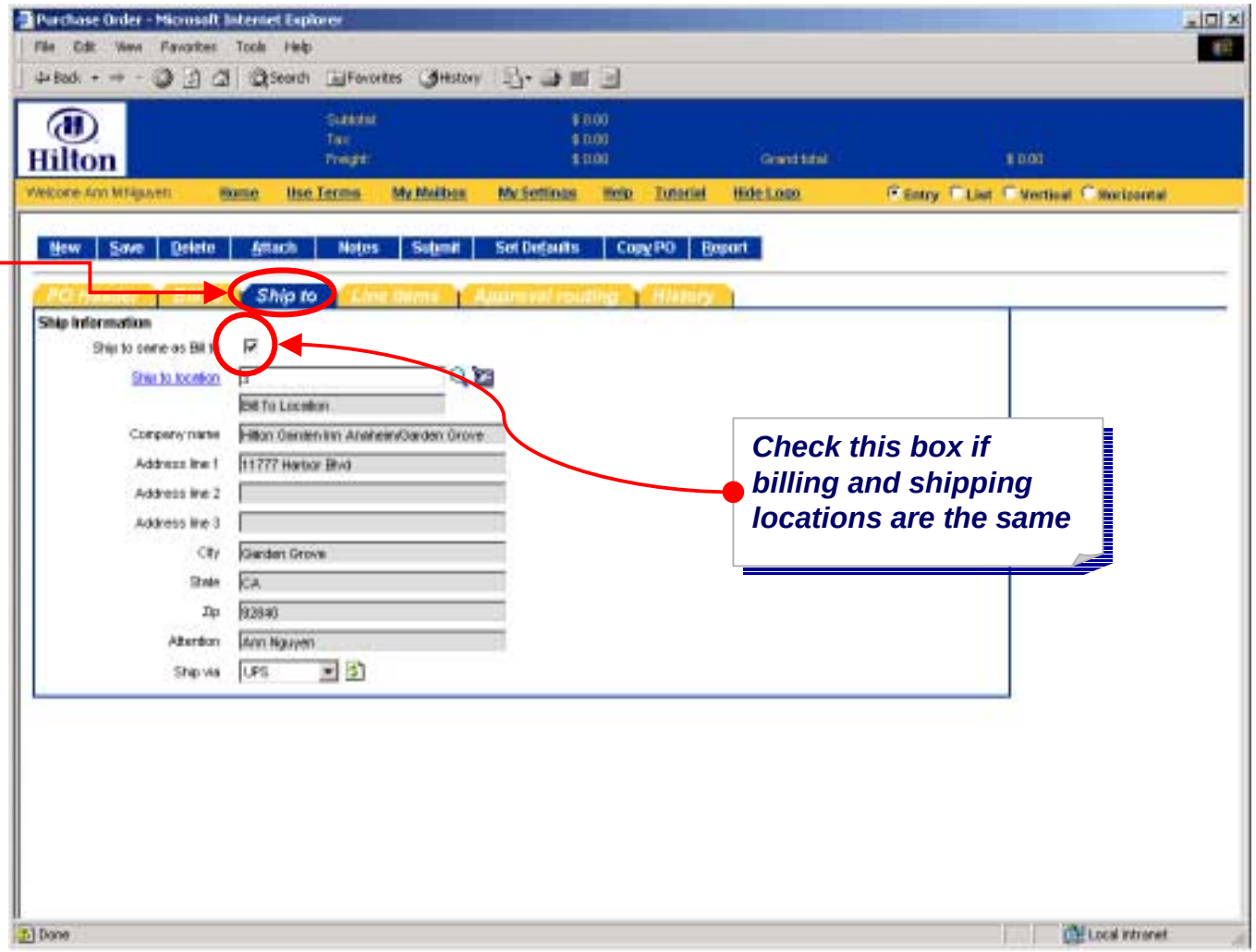
Purchase Orders > Creating a New PO > Ship to

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.



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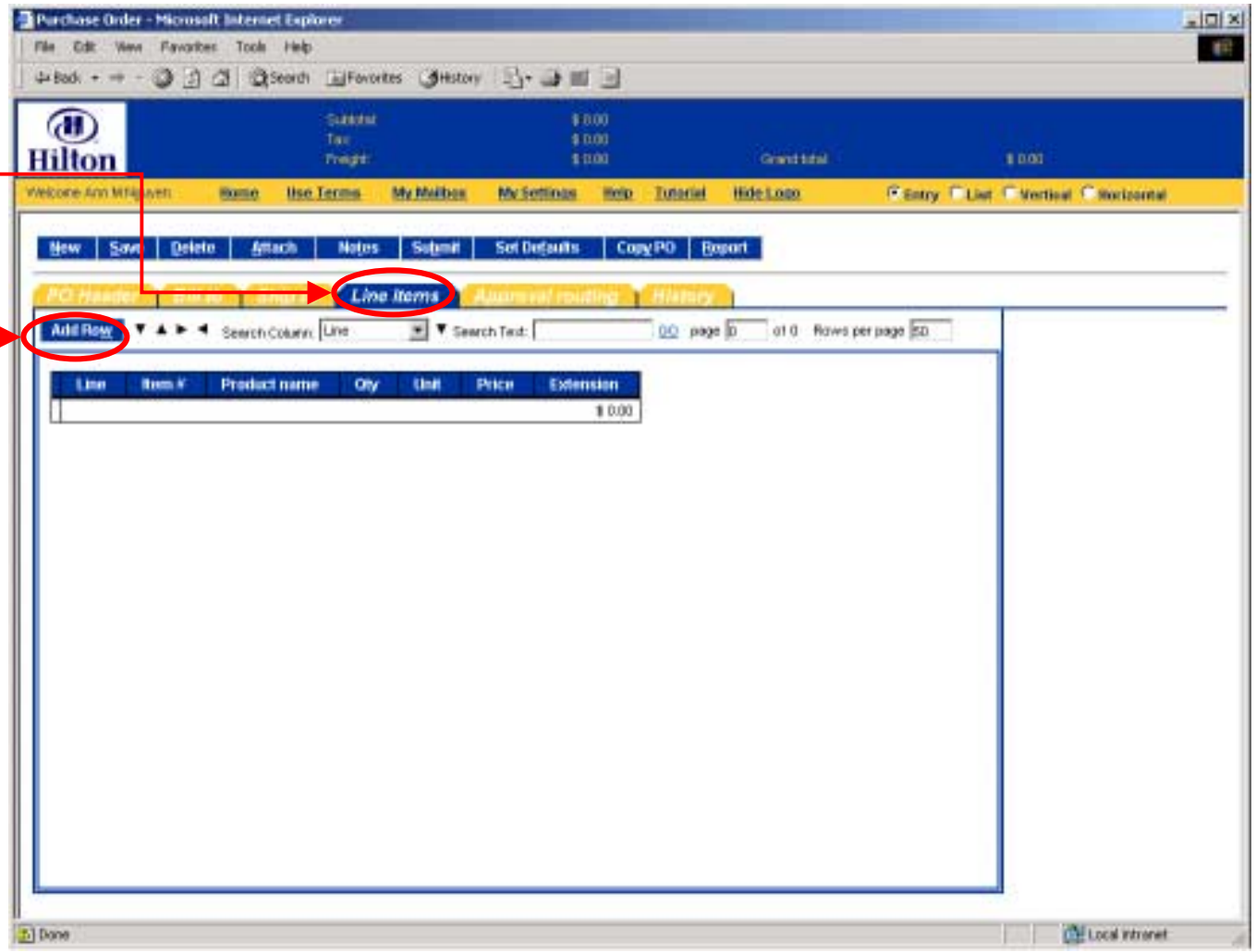
Purchase Orders > Creating a New PO > Line Items

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.



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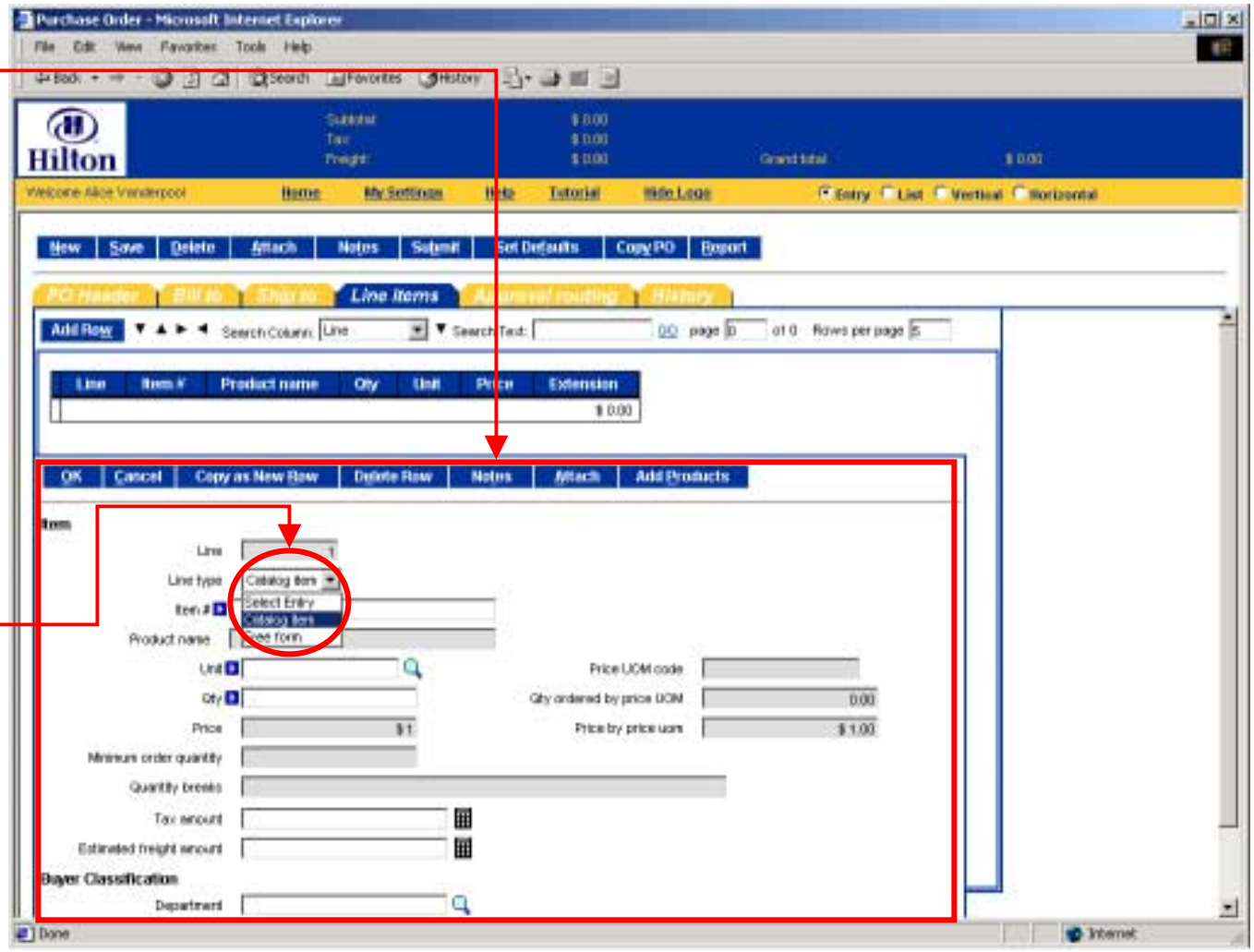
Purchase Orders > Creating a New PO > Line Items

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.



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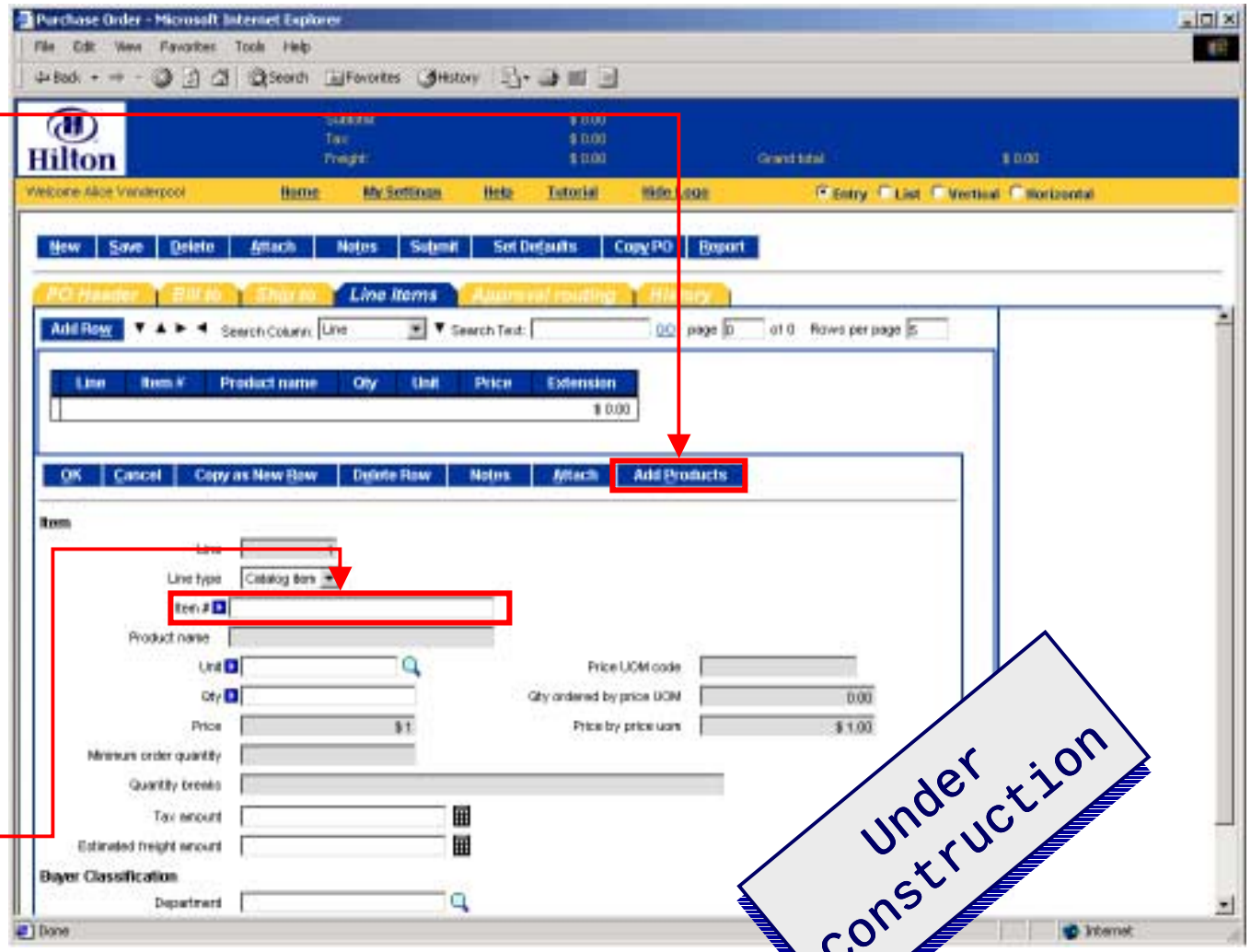
Purchase Orders > Creating a New PO > Line Items

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

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



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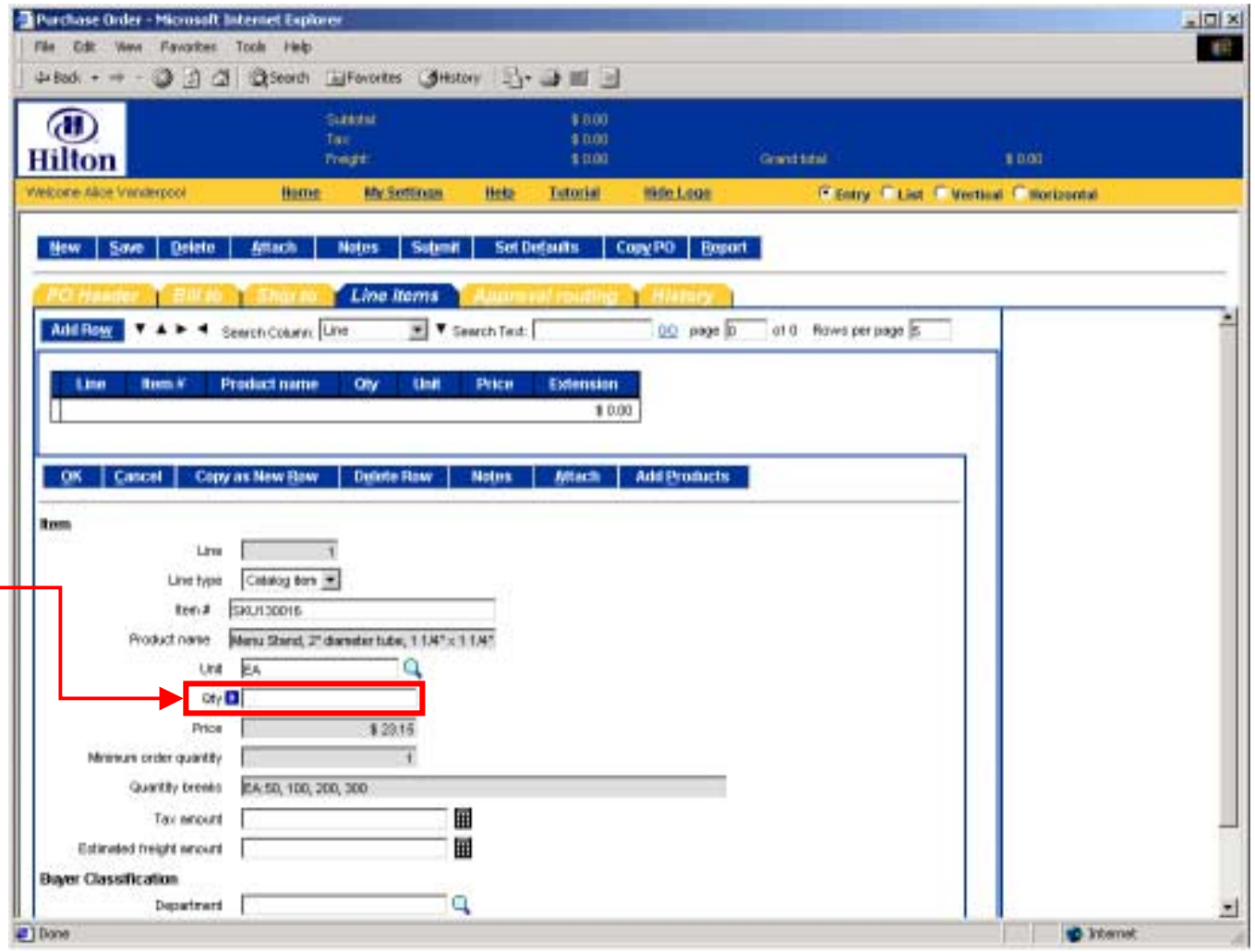
Purchase Orders > Creating a New PO > Line Items

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



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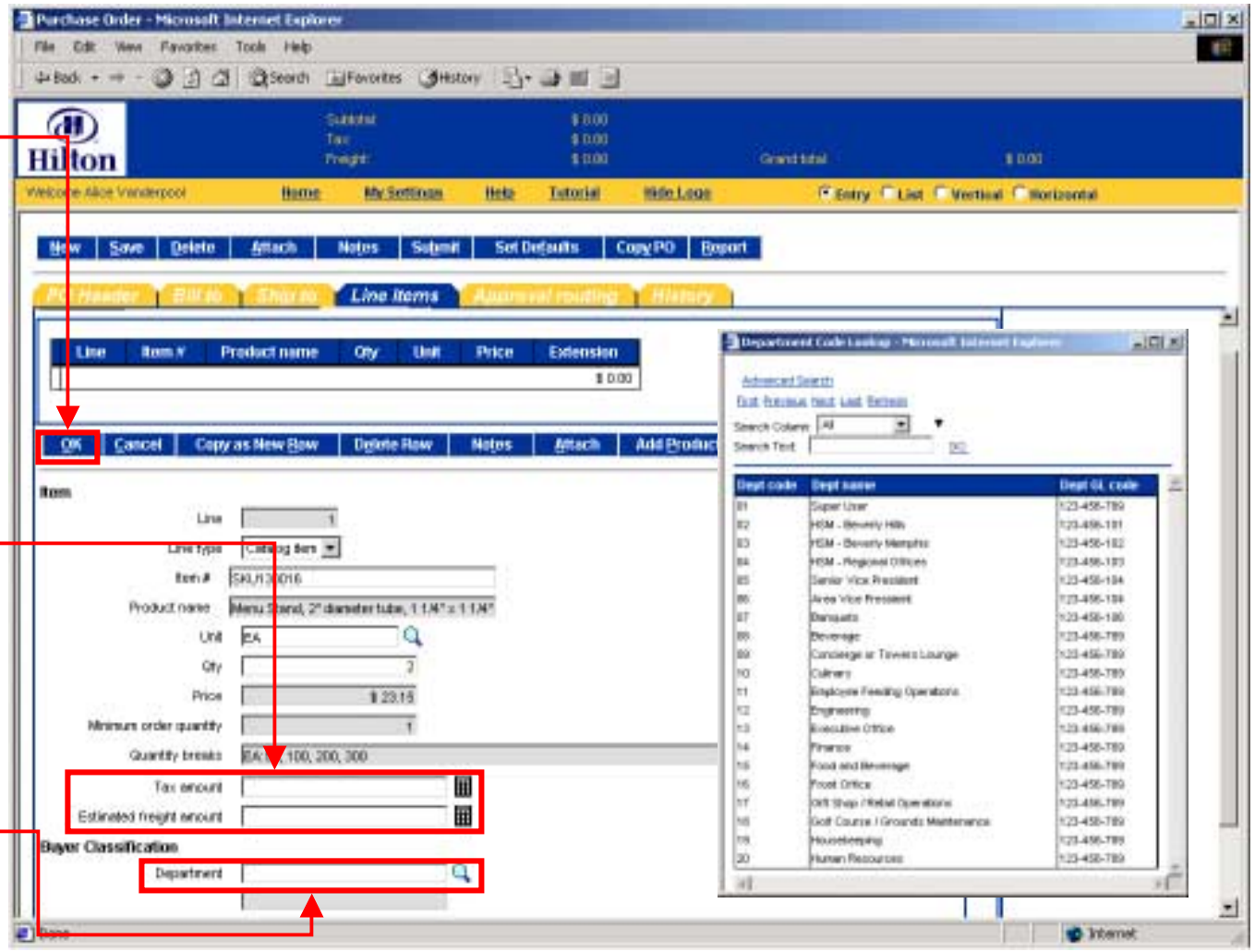
Purchase Orders > Creating a New PO > Line Items

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.



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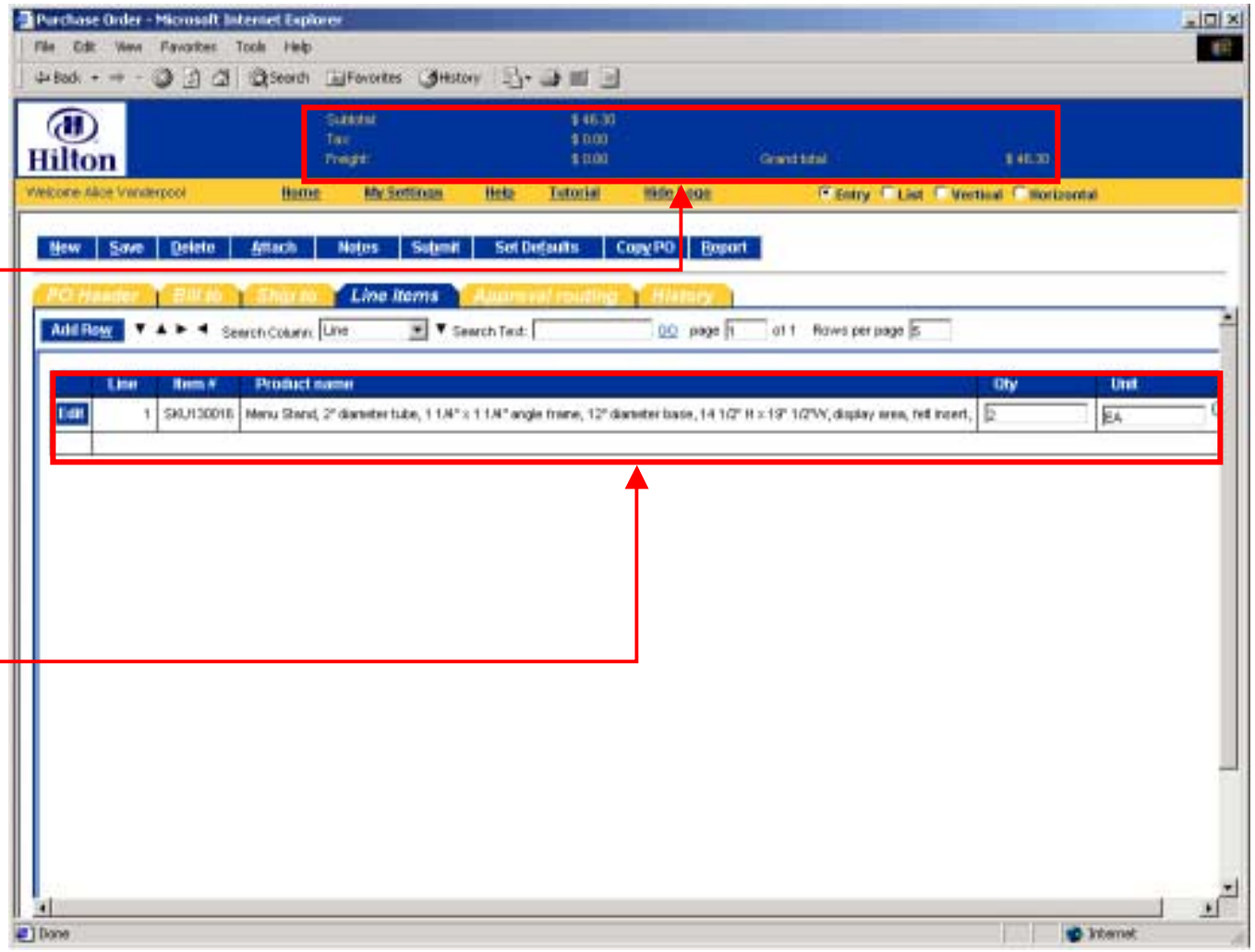
Purchase Orders > Creating a New PO > Line Items

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



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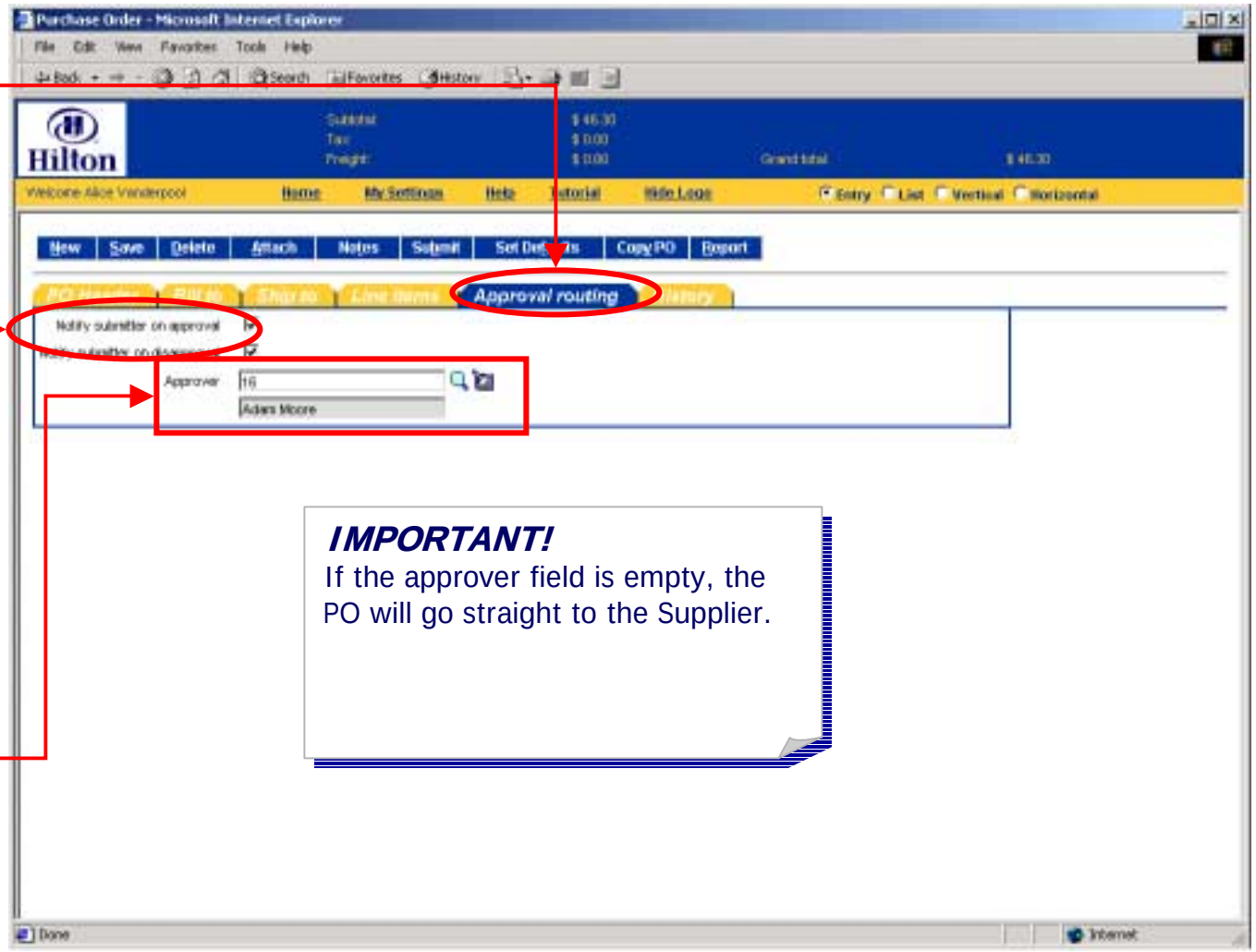
Purchase Orders > Creating a New PO > Approval

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.

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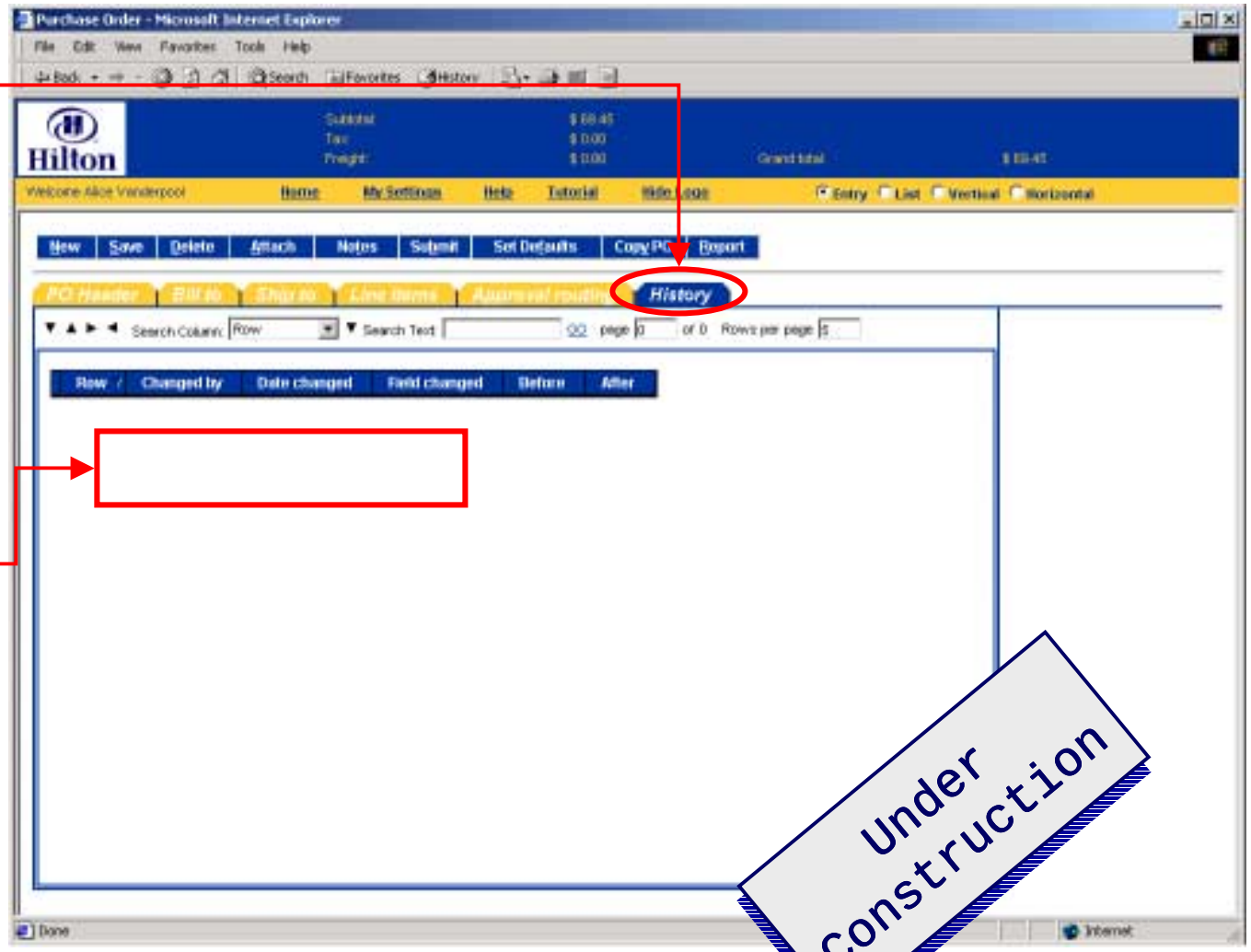
Purchase Orders > Creating a New PO > History

History
Define Approval settings here



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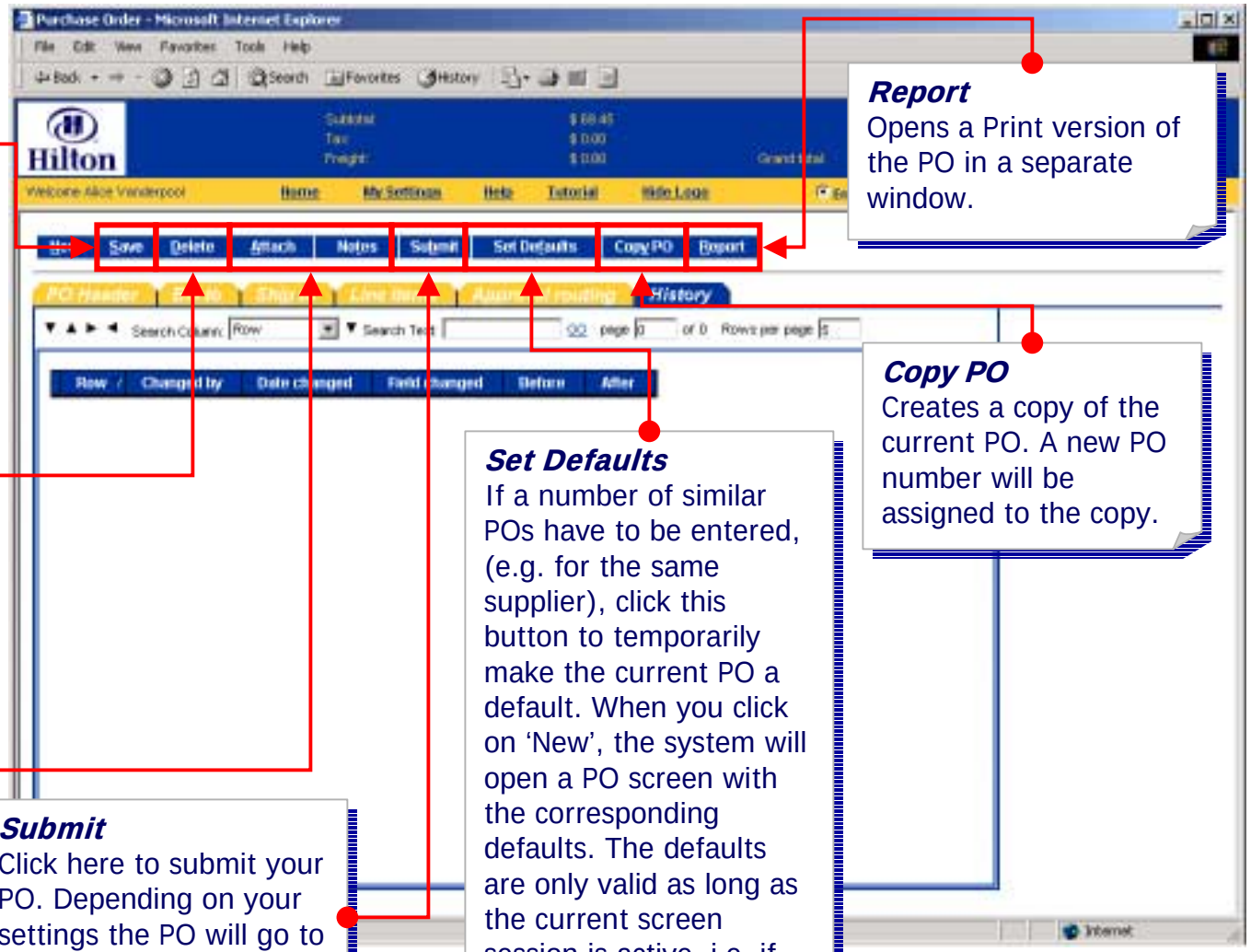
Purchase Orders > >Action Buttons

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.

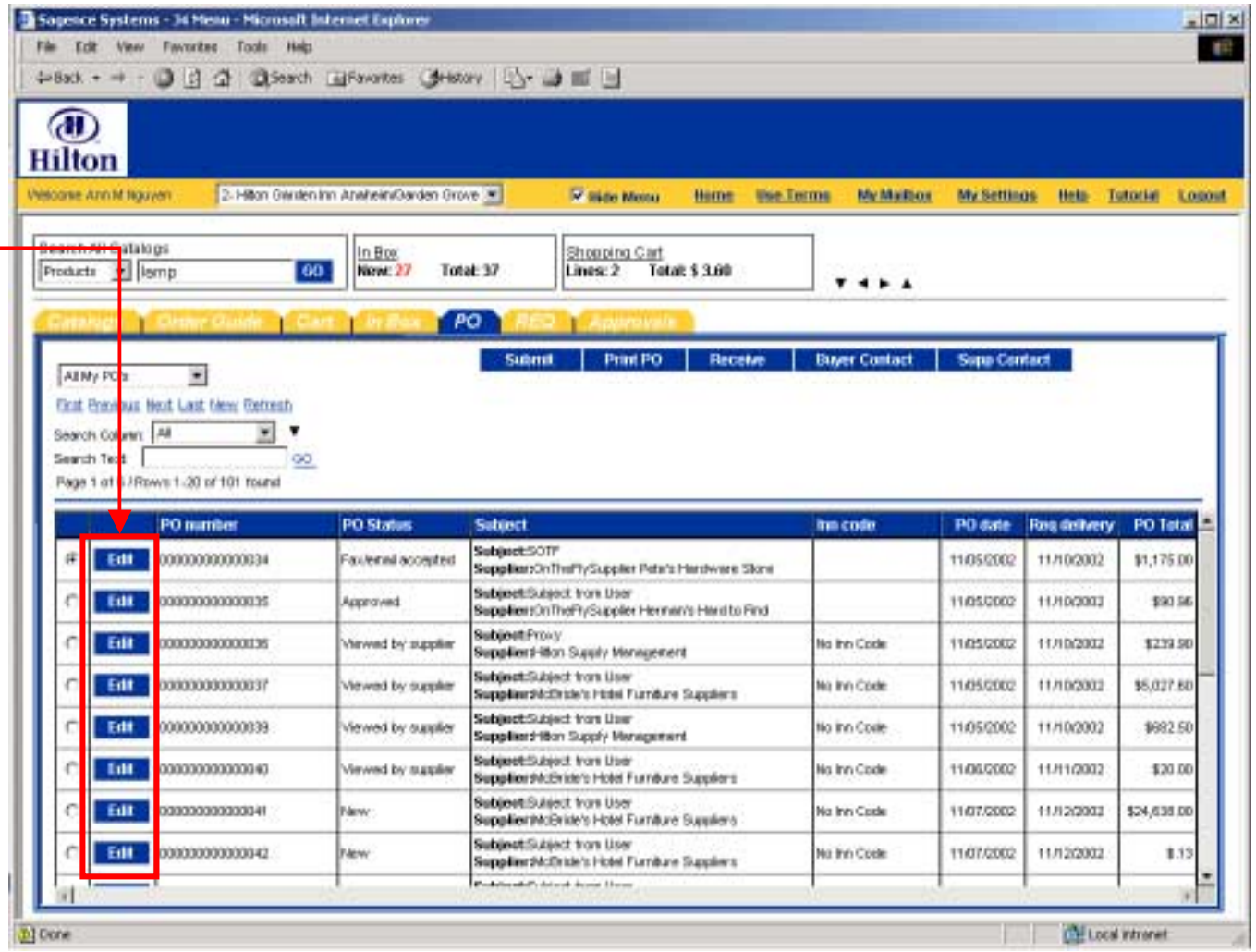
Report
Opens a Print version of the PO in a separate window.

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

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

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



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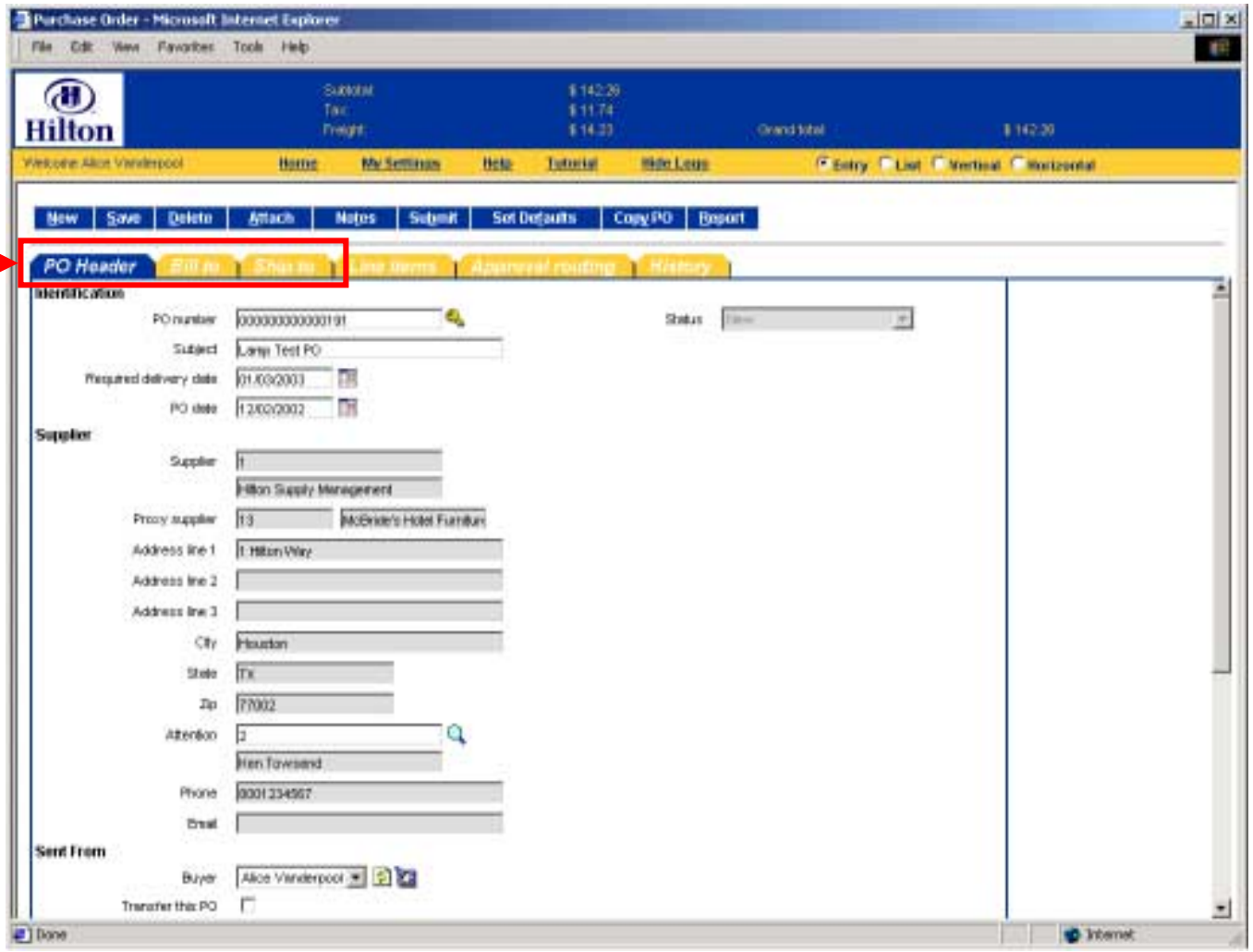
Purchase Orders > Editing existing POs

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.



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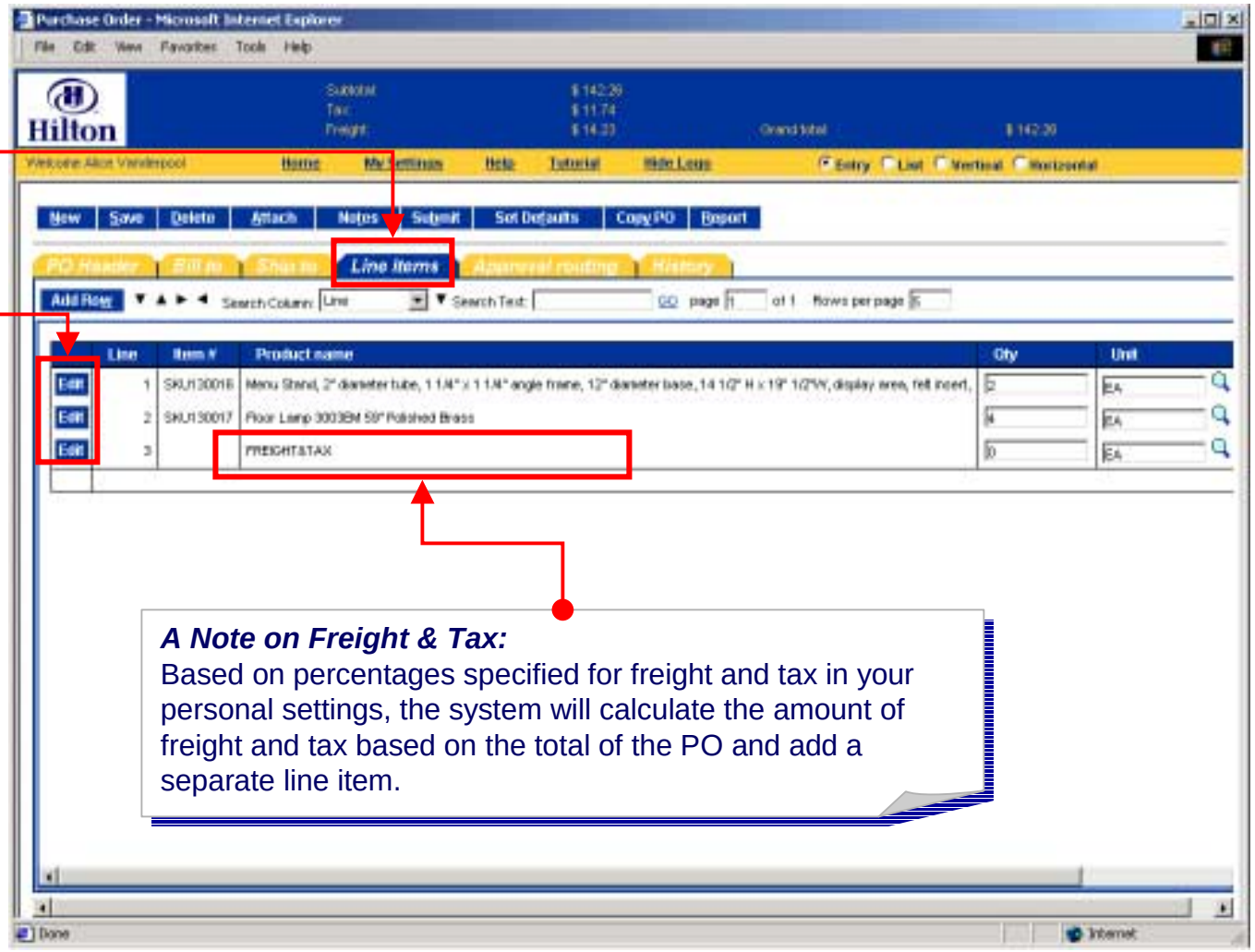
Purchase Orders > Editing existing POs

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.



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.

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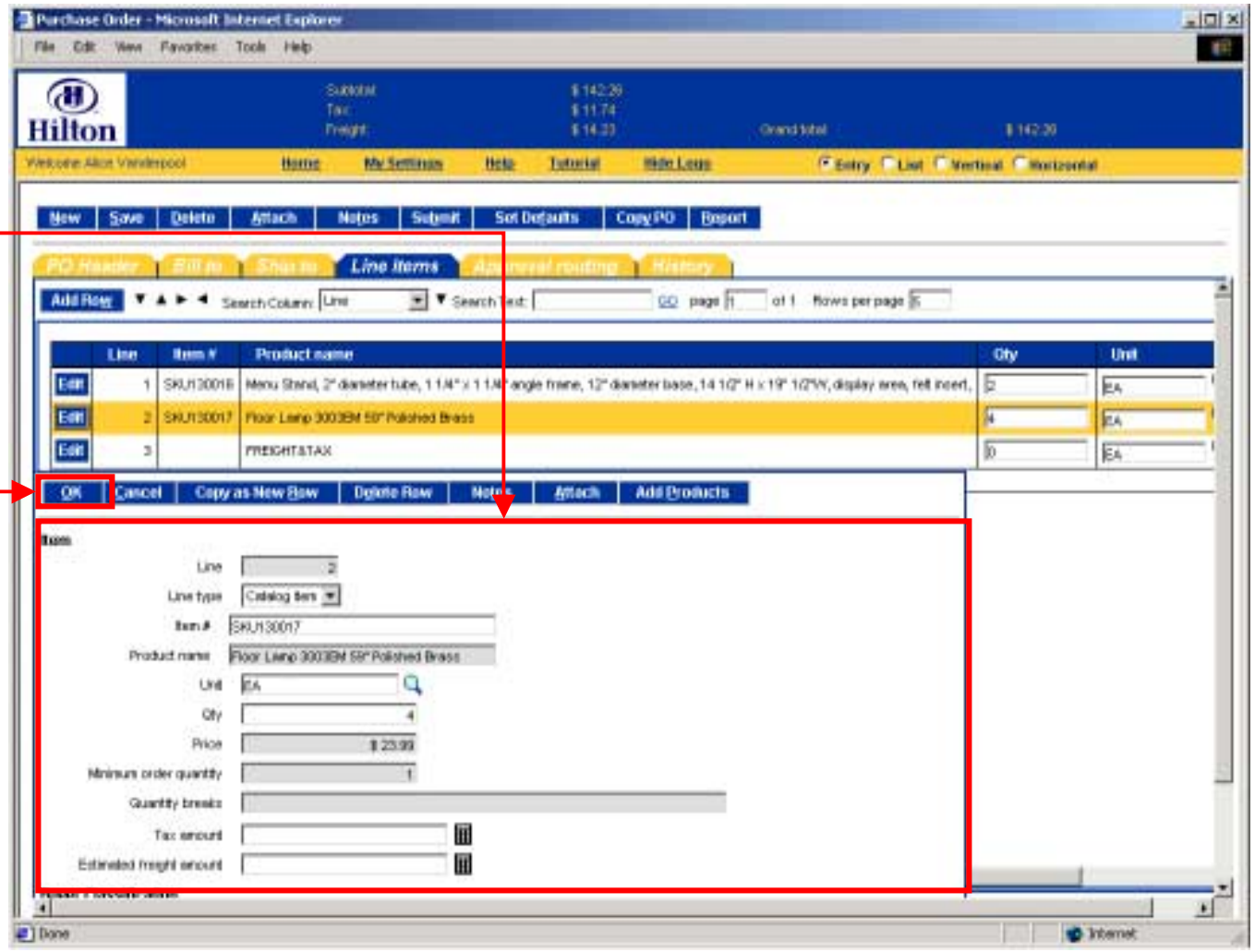
Purchase Orders > Editing existing POs

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



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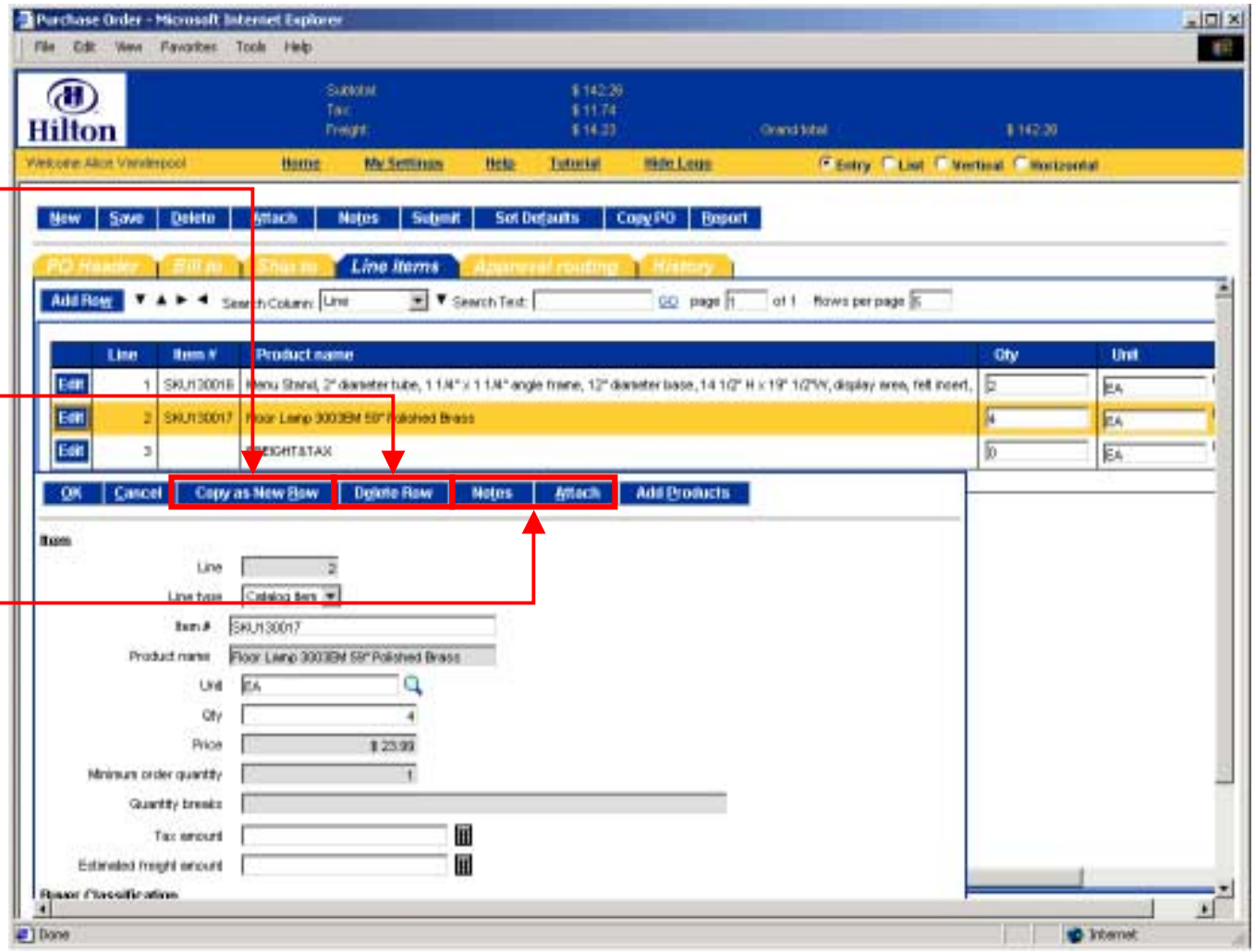
Purchase Orders > Editing existing POs

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)



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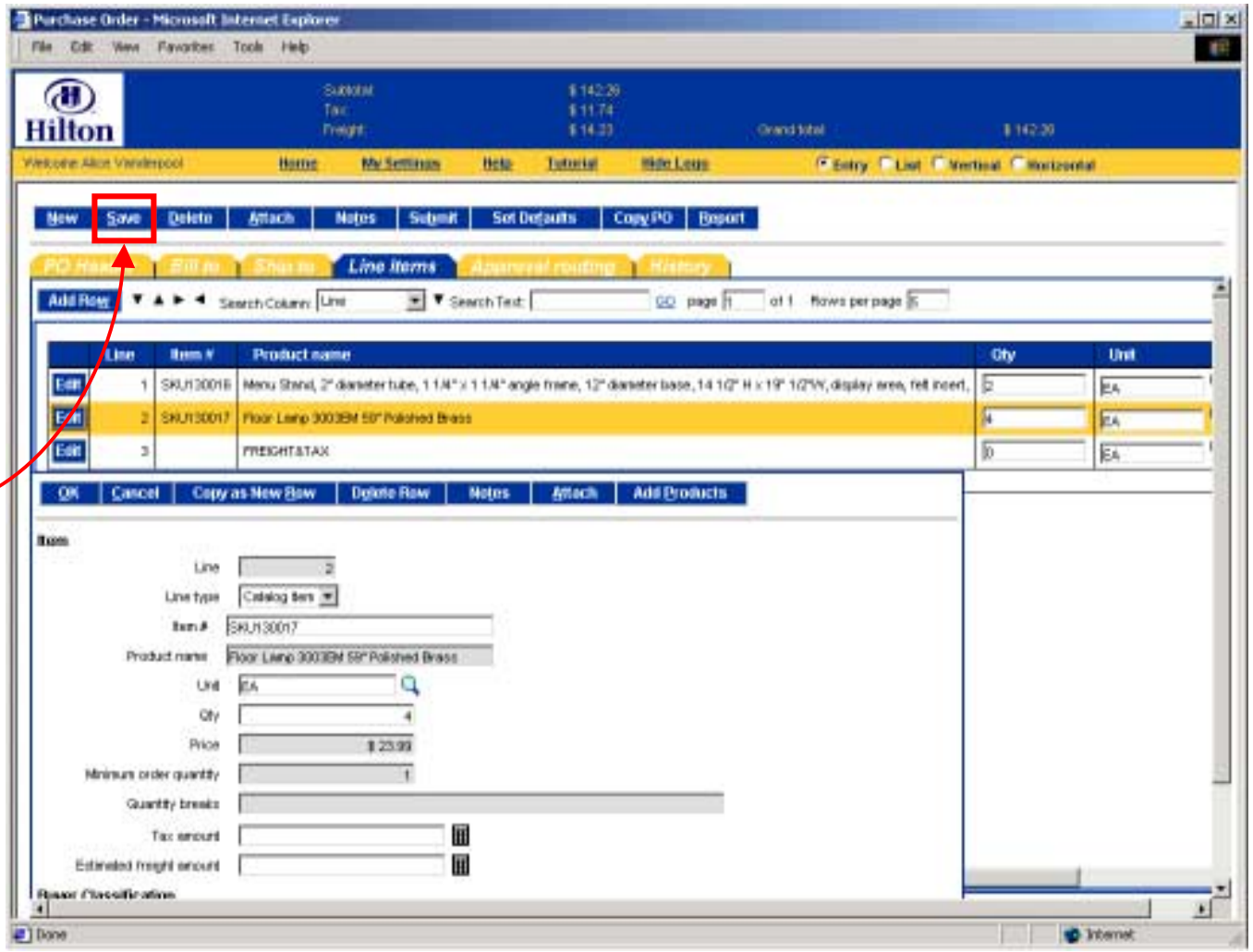
Purchase Orders > Editing existing POs

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.



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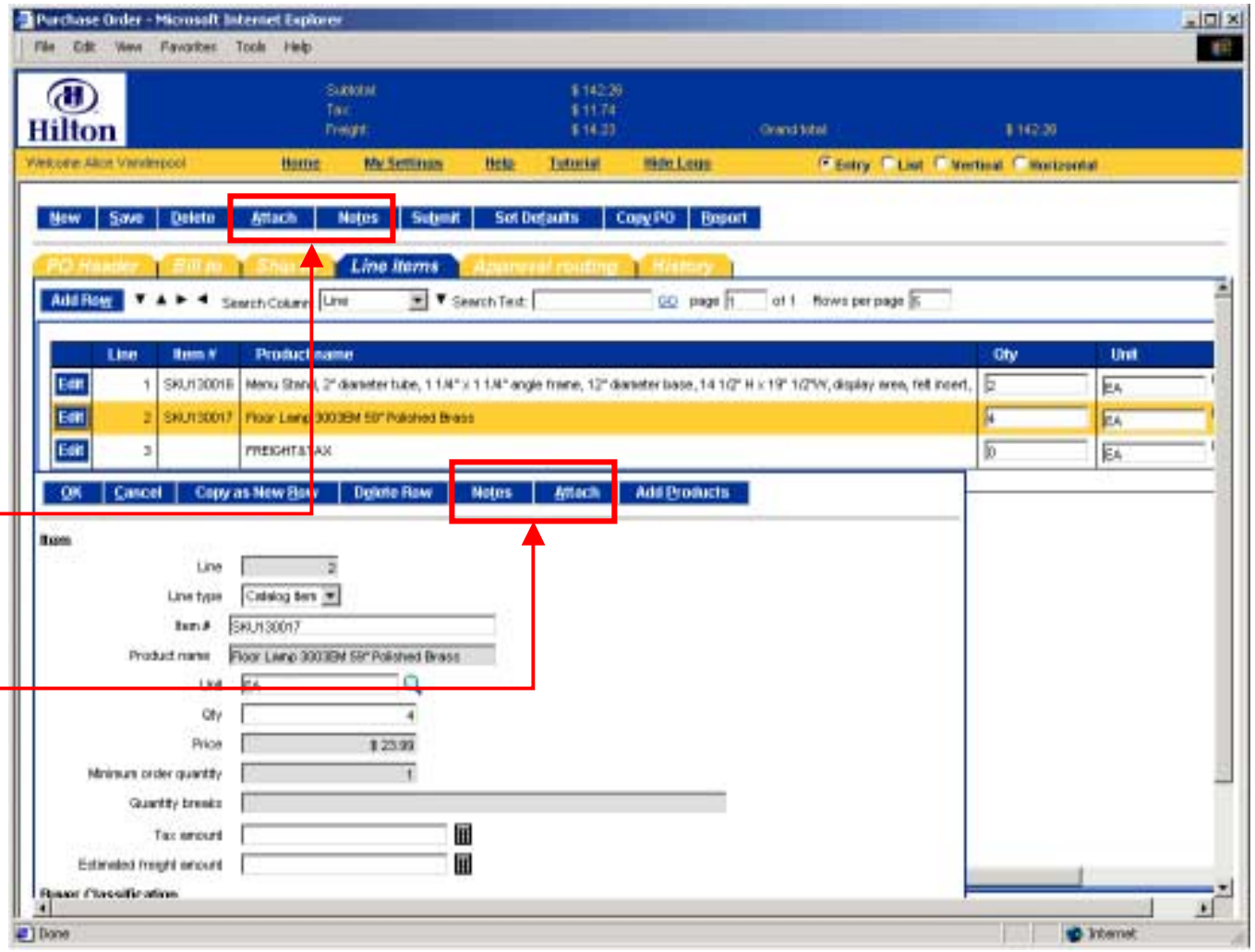
Purchase Orders > Adding Notes and Attachments

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



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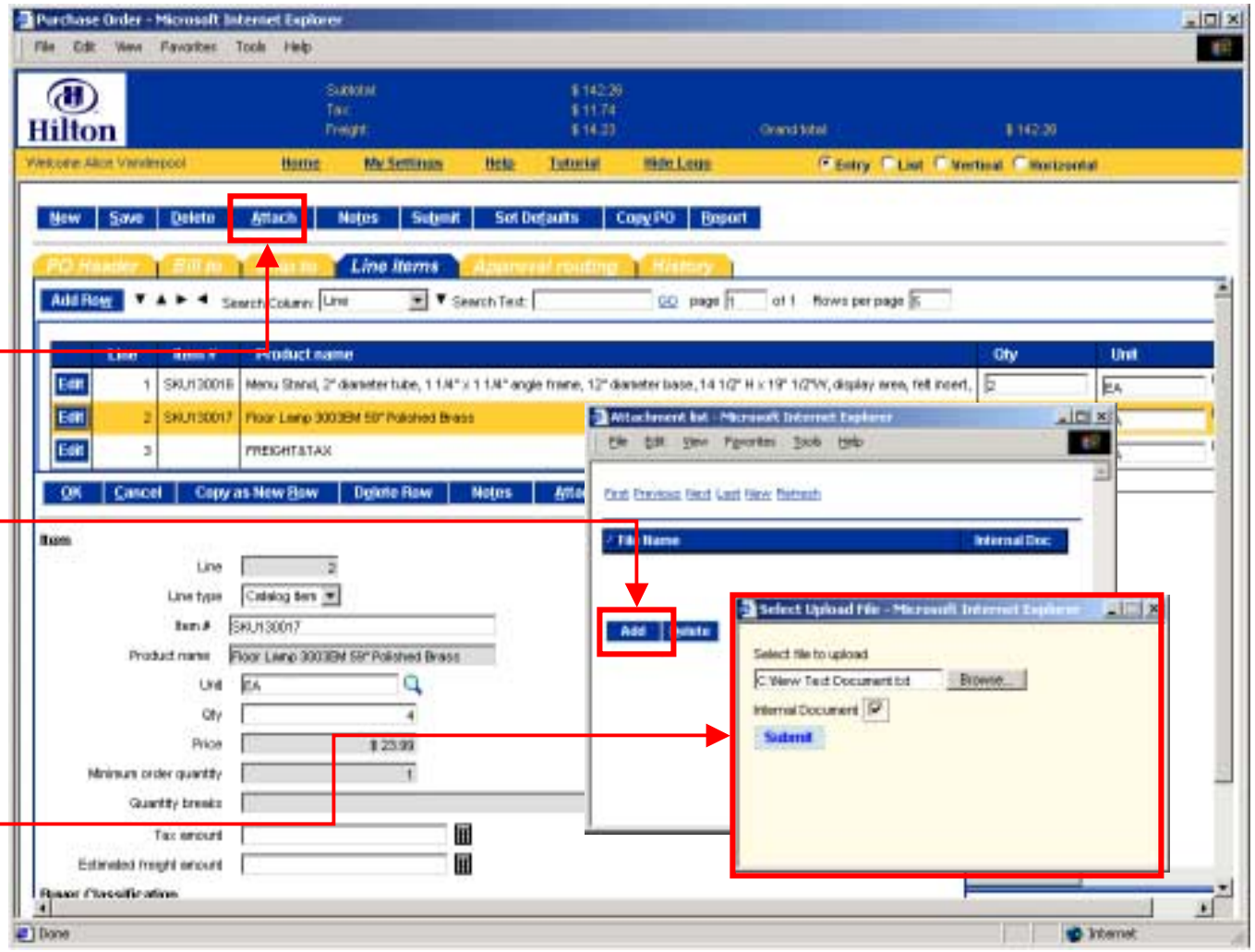
Purchase Orders > Adding Notes and Attachments

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



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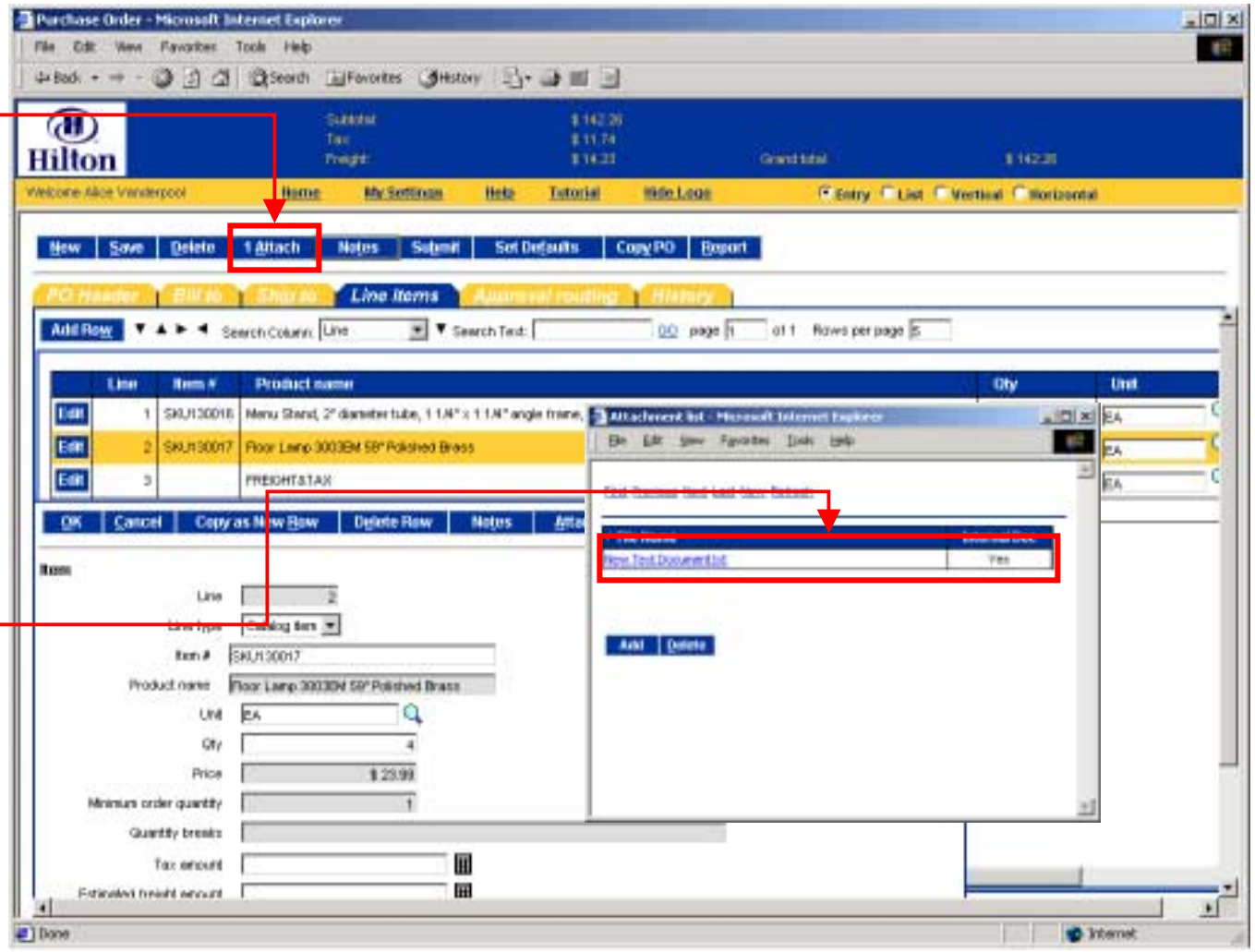
Purchase Orders > Adding Notes and Attachments

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



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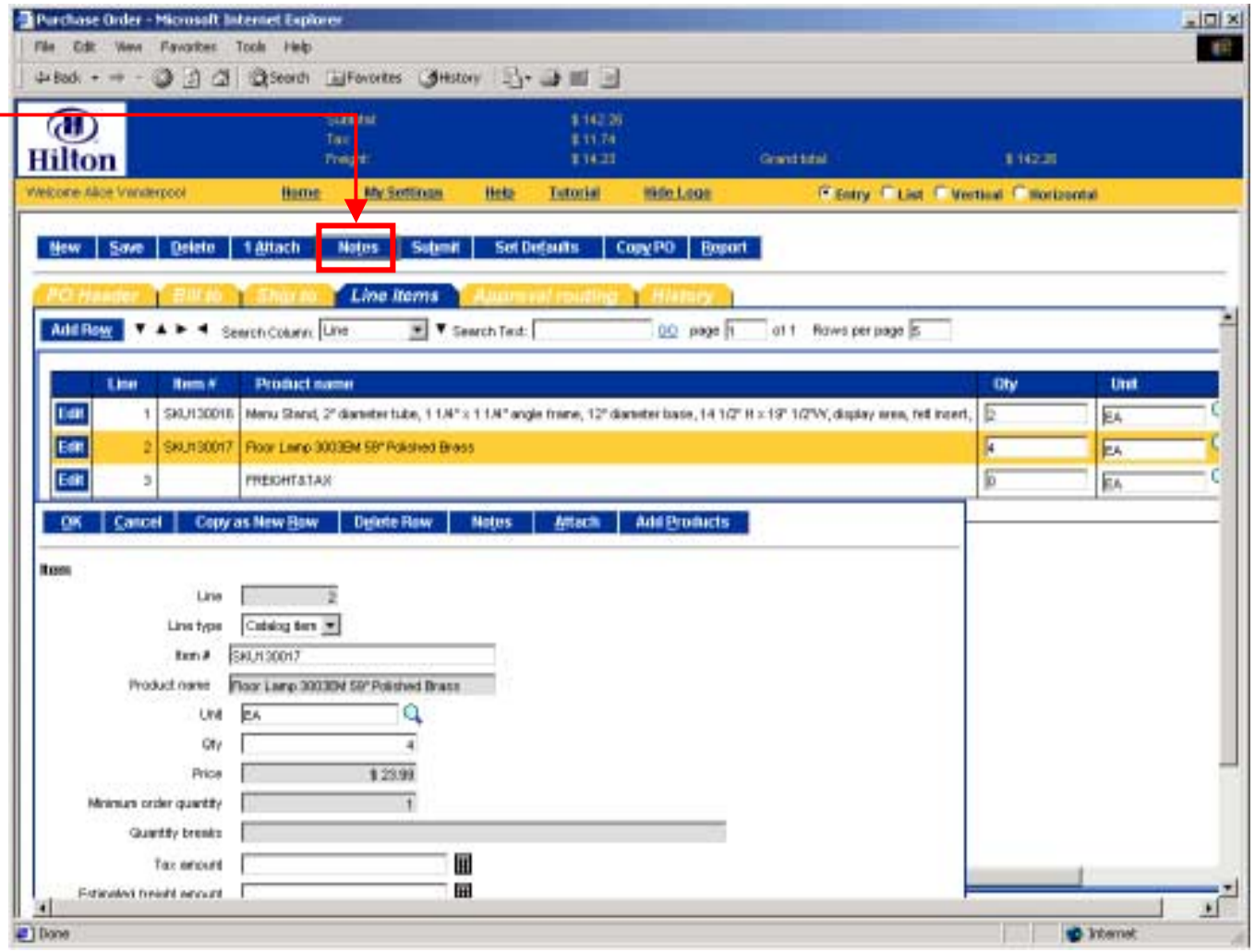
Purchase Orders > Adding Notes and Attachments

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



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Purchase Orders > Adding Notes and Attachments

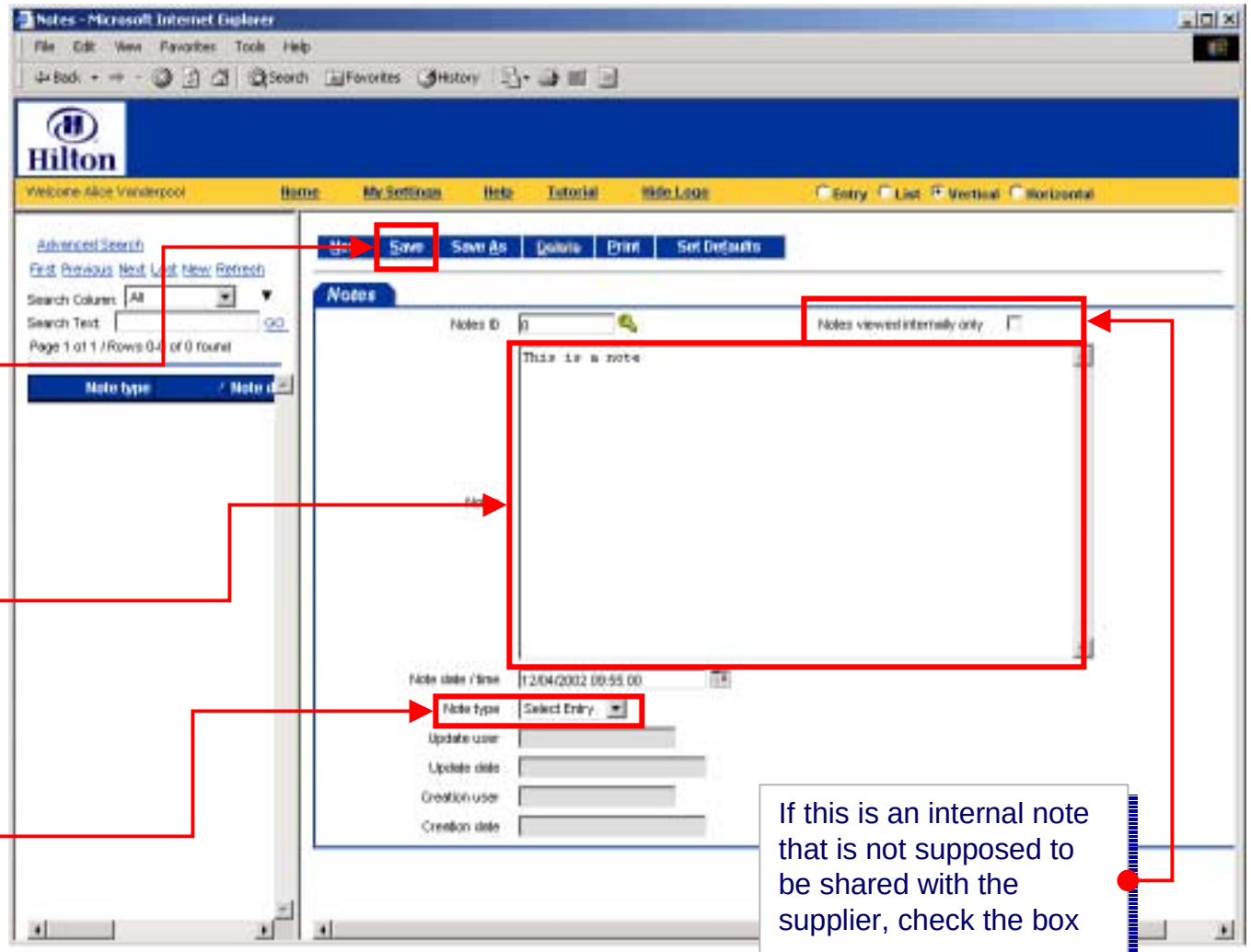
The notes section will open in a new window

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 not this is:

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



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

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Purchase Orders > Adding Notes and Attachments

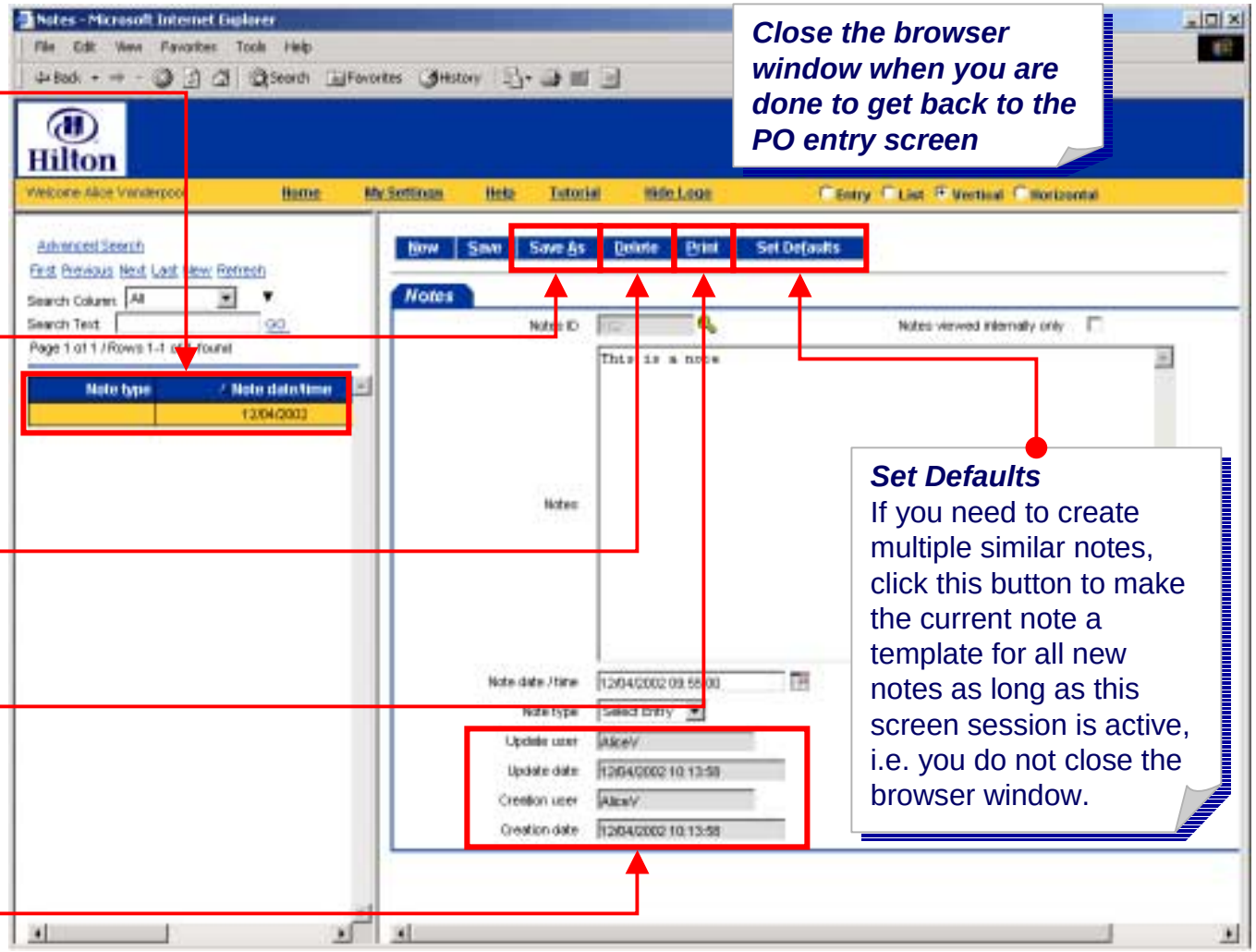
The new note is displayed in the list section of the screen

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/editied the note on what date



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

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.

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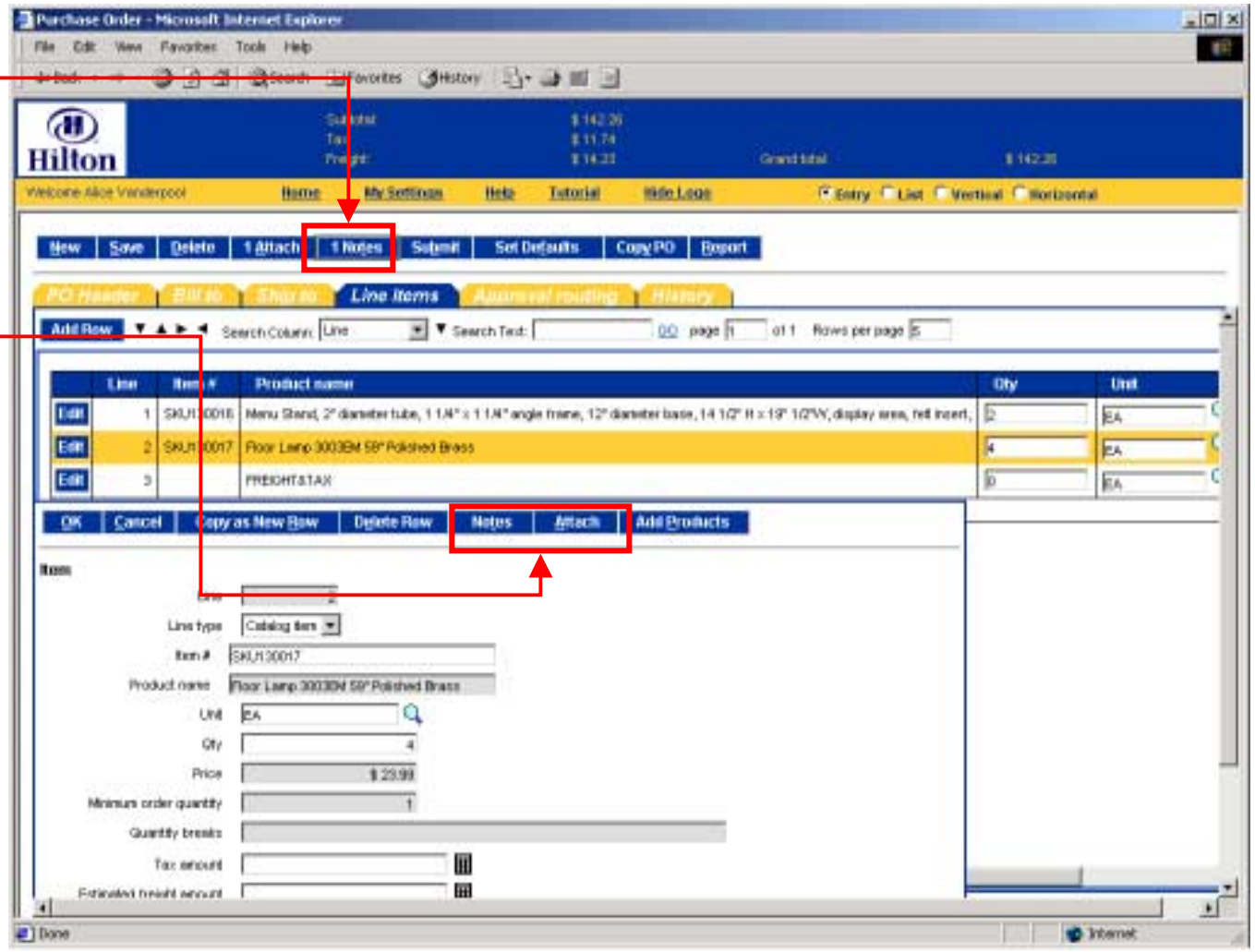
Purchase Orders > Adding Notes and Attachments

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.



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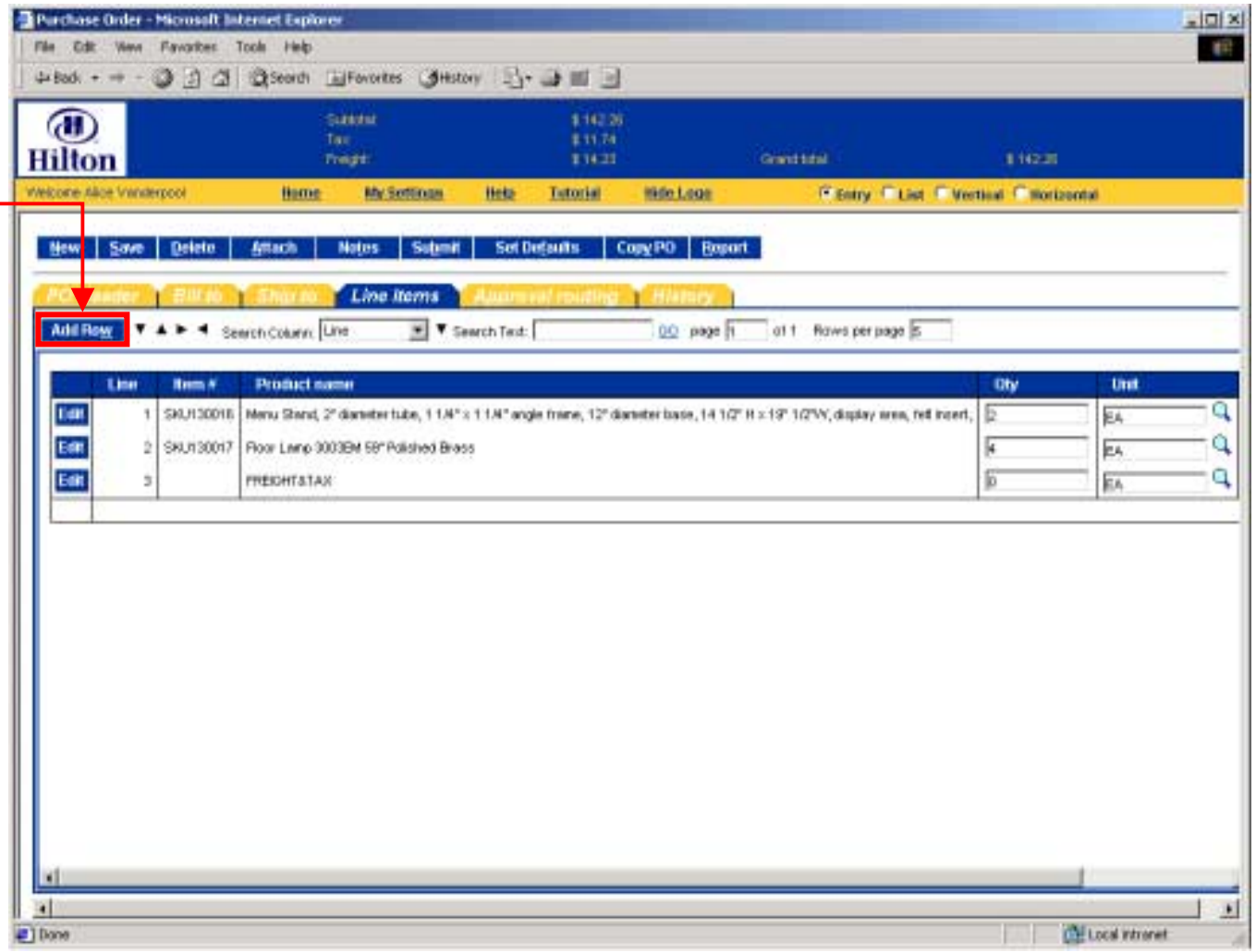
Purchase Orders > Adding Non-Catalog Items

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



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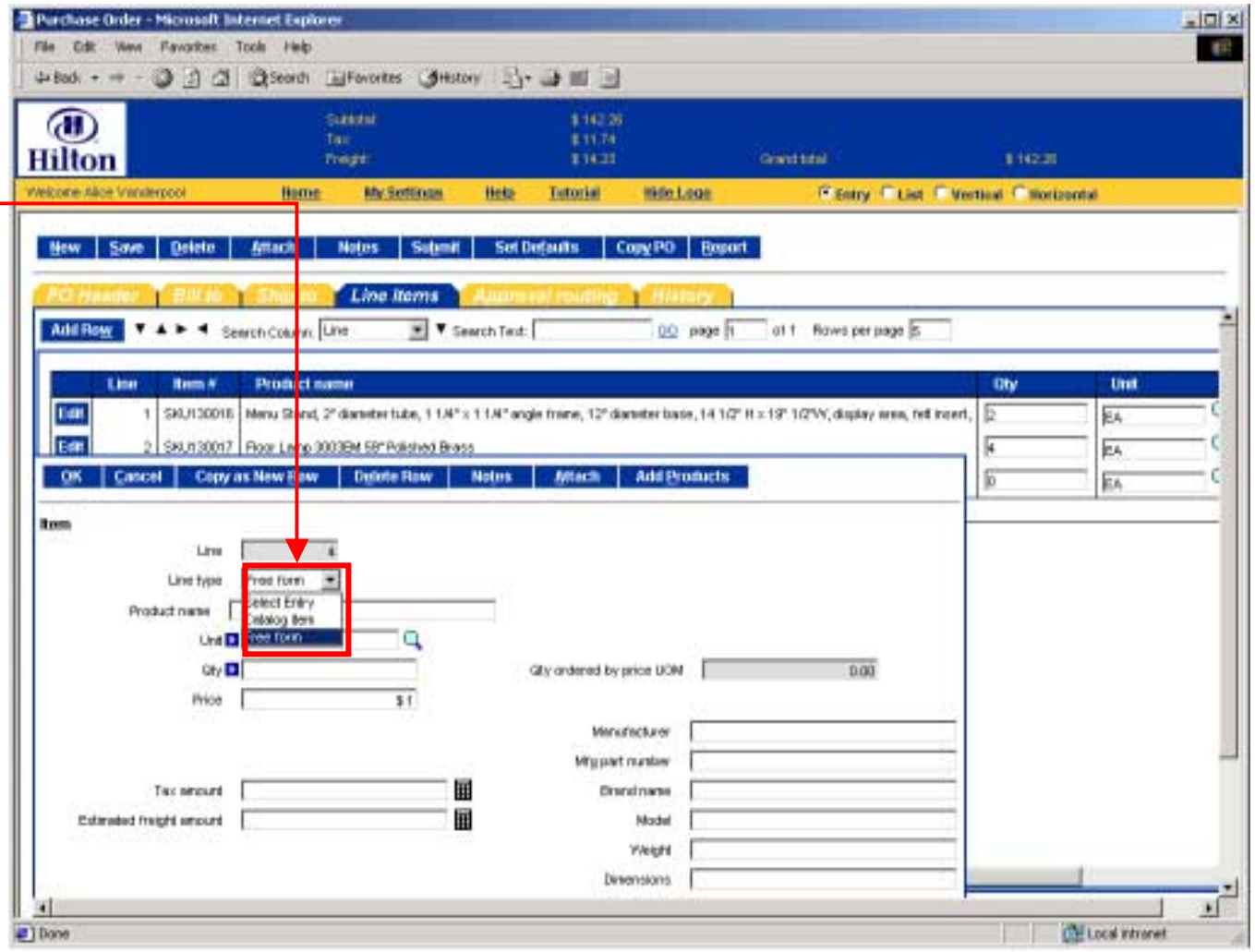
Purchase Orders > Adding Non-Catalog Items

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



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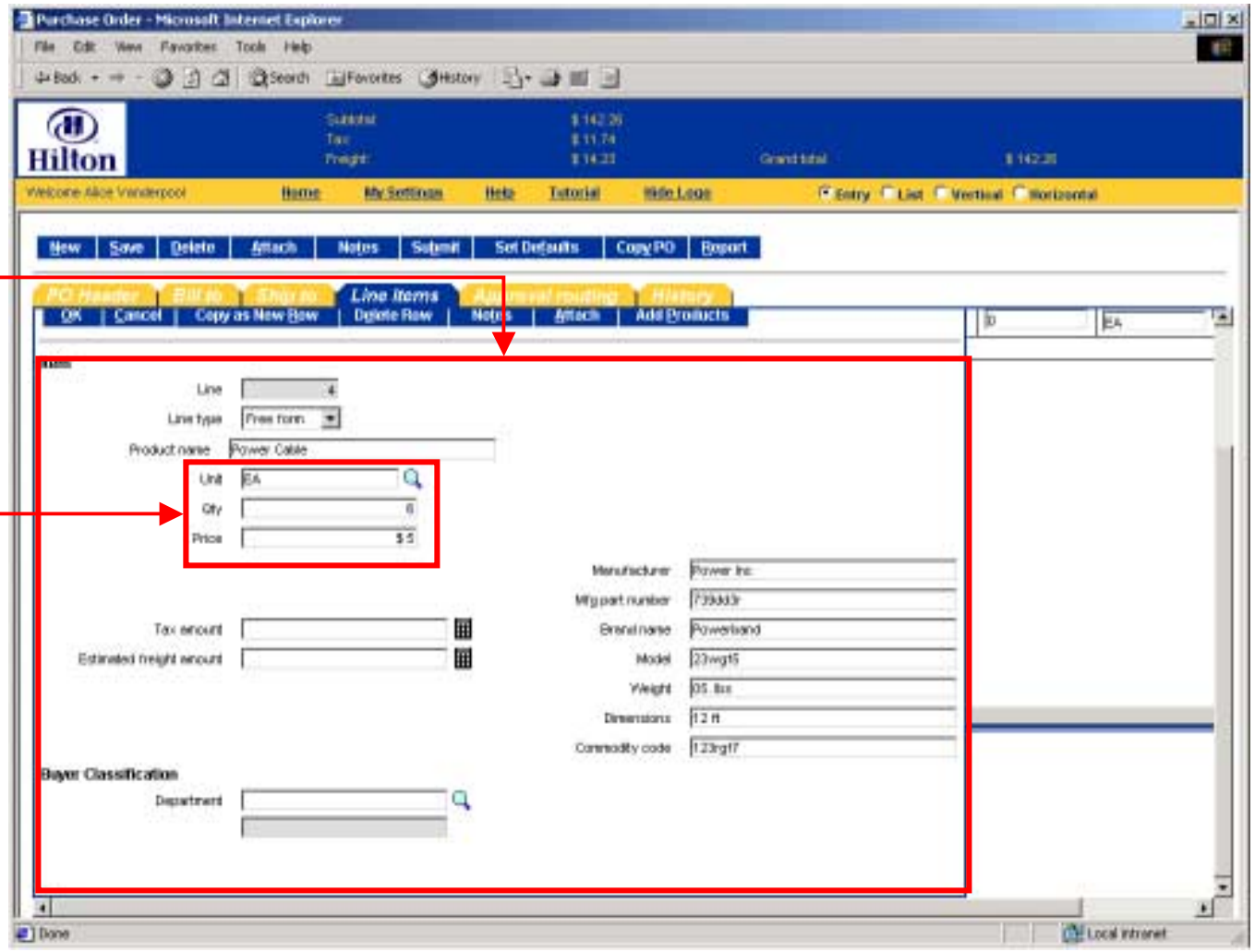
Purchase Orders > Adding Non-Catalog Items

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



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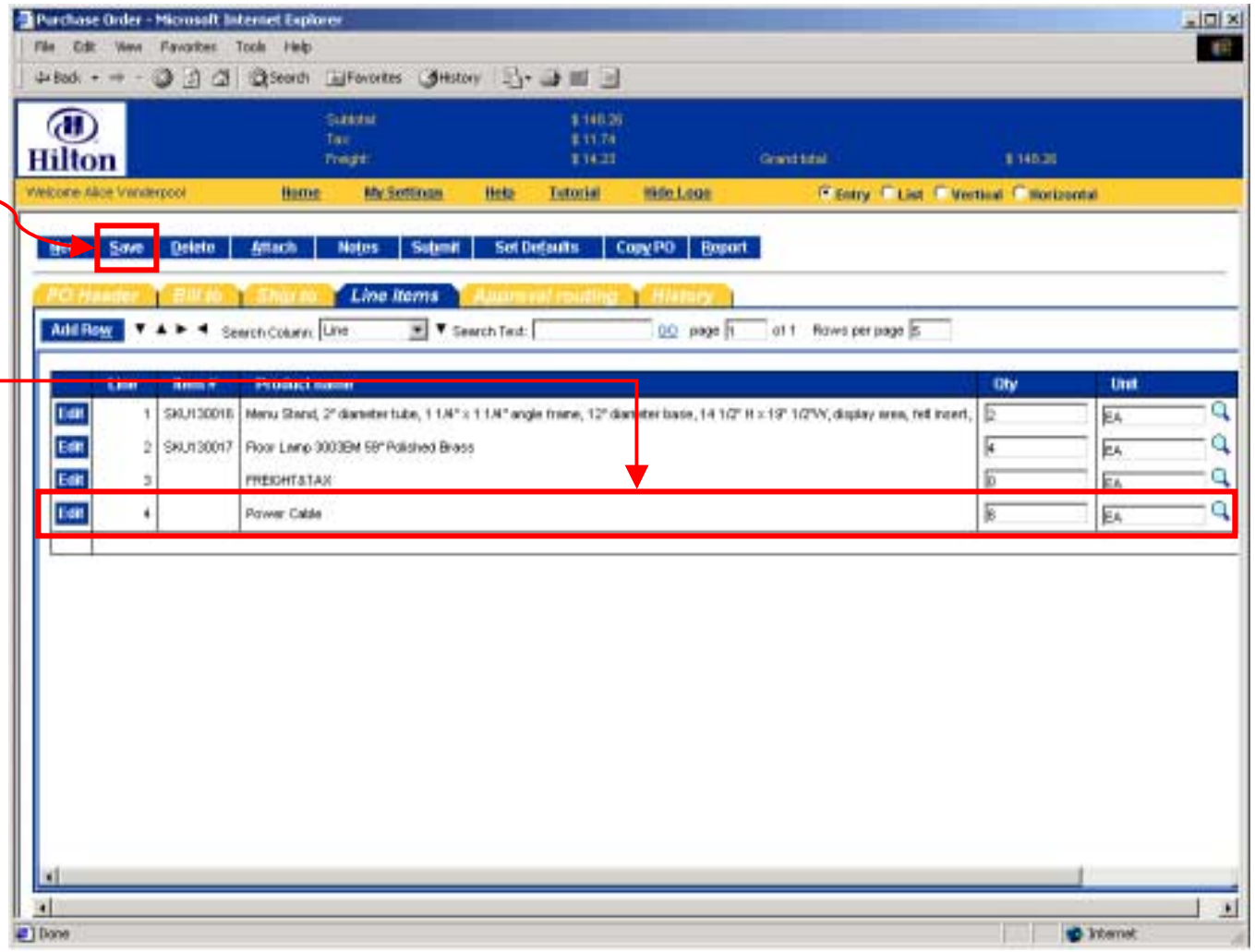
Purchase Orders > Adding Non-Catalog Items

SAVE!
Remember to always save any changes

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



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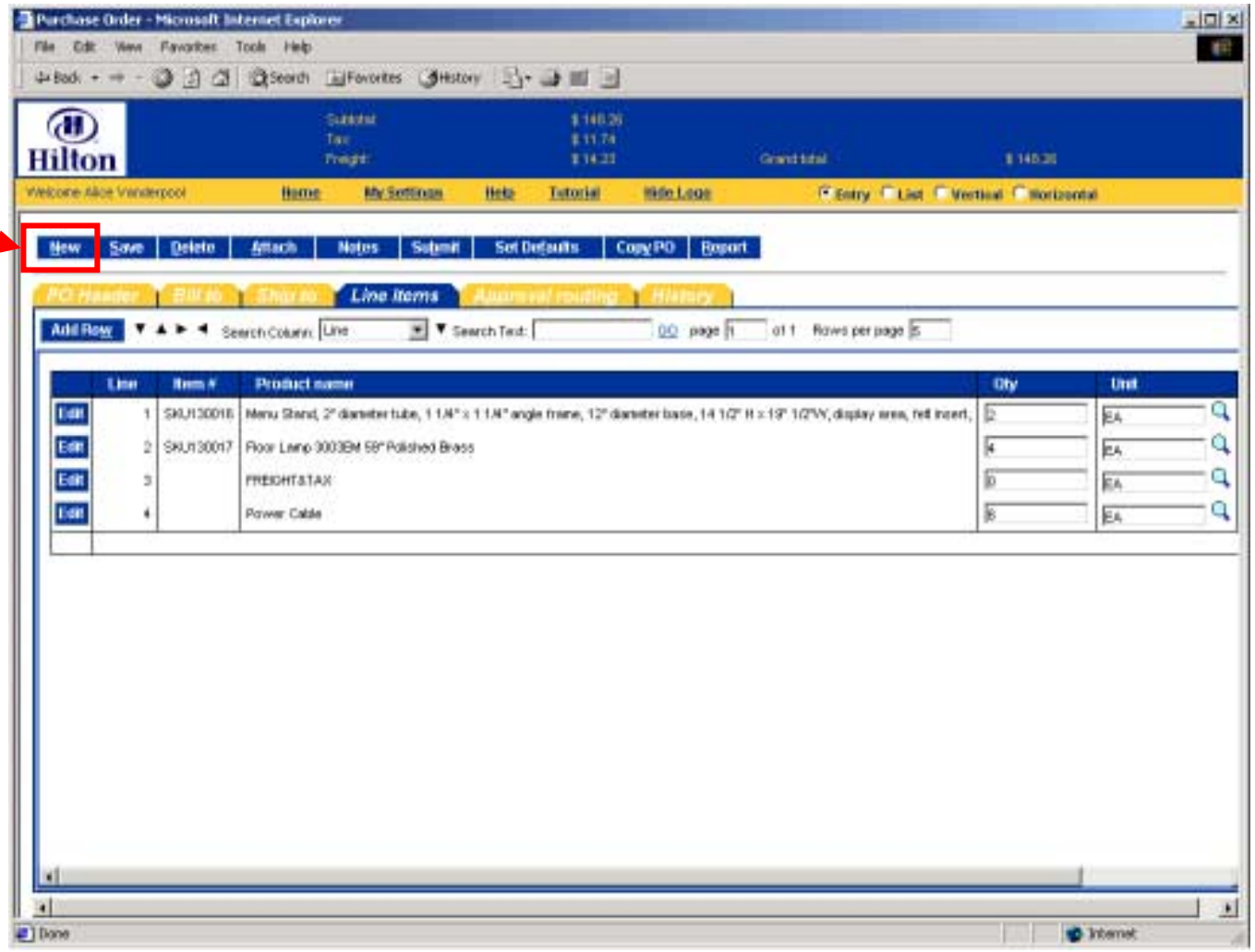
Purchase Orders > Adding a Supplier on the Fly

Click on the NEW button



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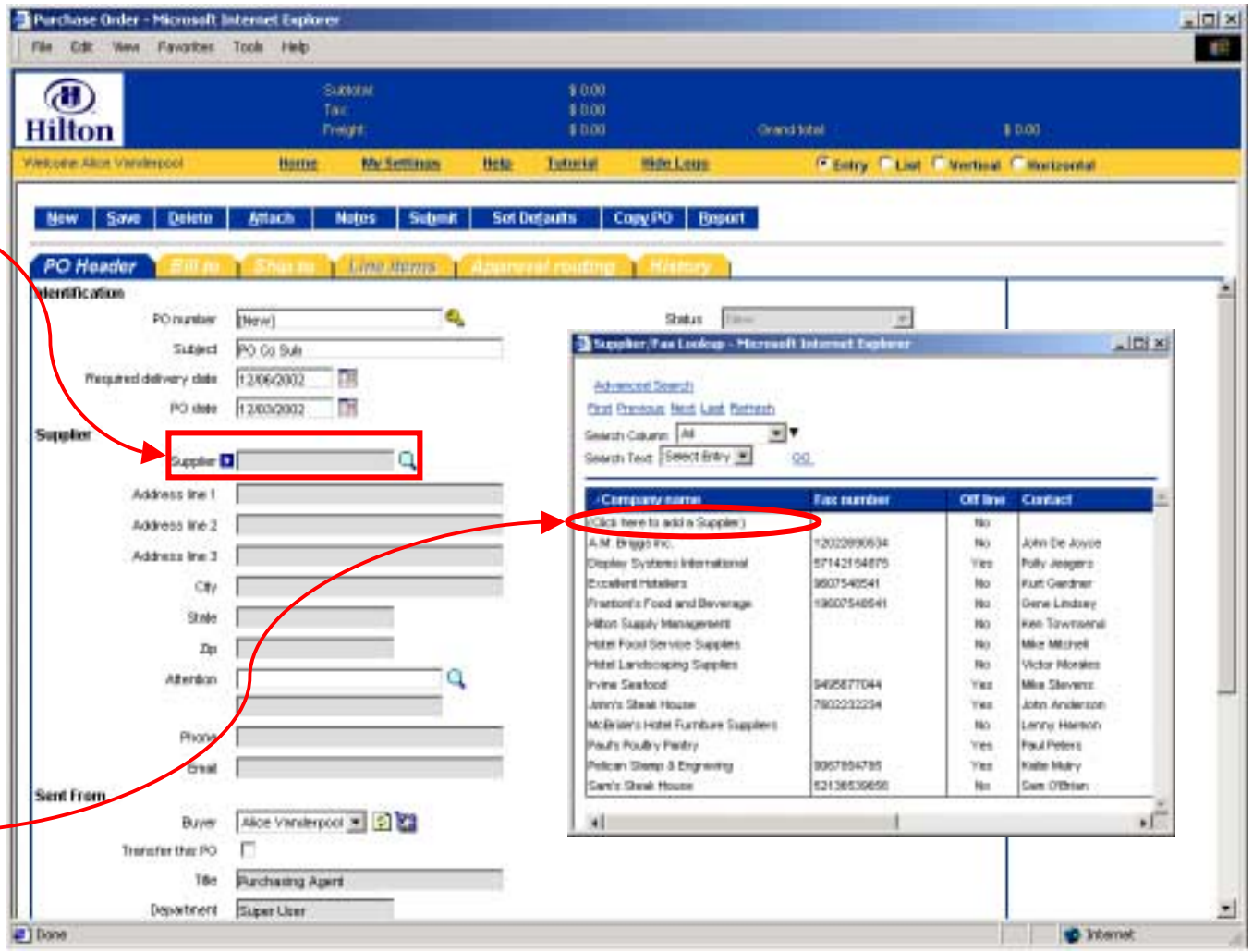
Purchase Orders > Adding a Supplier on the Fly

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



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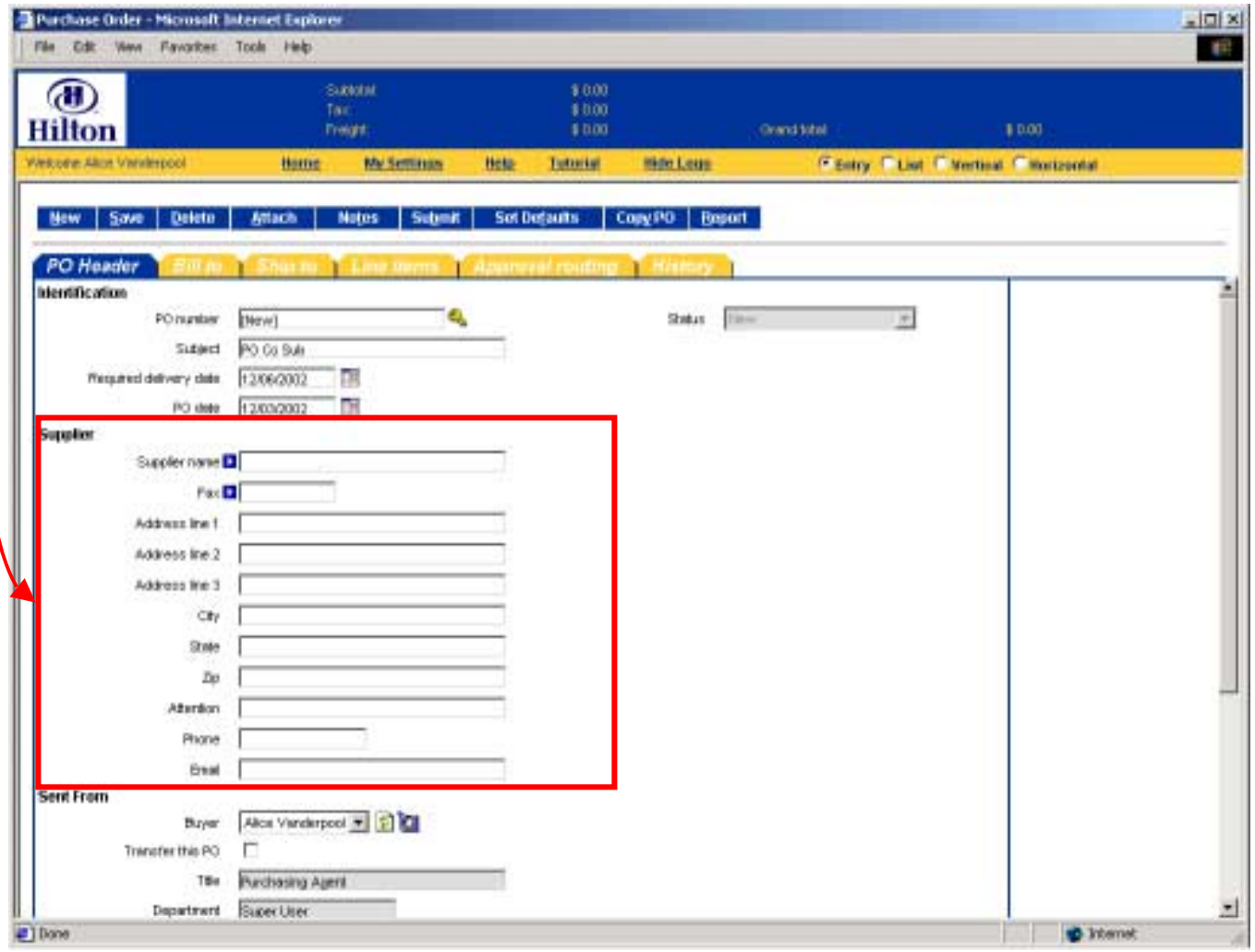
Purchase Orders > Adding a Supplier on the Fly

The supplier section of the PO Header screen turns into a free from 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.



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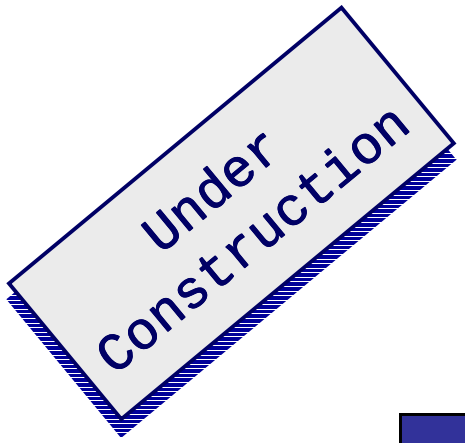
Purchase Orders > Proxy Suppliers

Proxy Suppliers



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