



## **MARRIOTT US PROCUREMENT ONLINE GUIDE**

INTRODUCTION, **Page 2**

IDENTIFY YOUR SUPPLIER TYPE, **Page 3**

LOGIN SCREEN, **Page 4**

FRONT PAGE, **Page 5**

LOGO PANEL, **Page 5**

SEARCH/SUMMARY PANEL, **Page 6-8**

FRONT PAGE TABS, **Page 8**

CATALOG TAB , Including Supplier of the Fly (SOTF), Punch-out Suppliers, Create non-catalog items, **Page 8-11**

THE ORDER GUIDE TAB, **Page 11**

CREATING A NEW ORDER GUIDE, **Page 12**

ADDING CATALOG ITEMS TO AN ORDER GUIDE, **Page 13**

ADDING NON-CATALOG ITEMS TO AN ORDER GUIDE, **Page 13**

THE USE OF THE SORT FUNCTION & PAR VALUES, **Page 14-15**

EDITING ITEMS IN THE ORDER GUIDE, **Page 16**

TARGET PRICE, **Page 16**

'MORE PRODUCT INFO' AND PICTURE LINKS, **Page 17**

UOM (UNIT OF MEASURE), **Page 18**

COPY ITEM, **Page 19**

DELETE ITEM / DELETE ORDER GUIDE, **Page 19**

IMPORT OG / OG TEMPLATE, **Page 20**

CREATING A PURCHASE ORDER, **Page 22-24**

HEADER UPDATE, **Page 24**

VIEWING MORE THAN ON PO, **Page 25**

PRINT / VIEW / EDIT A PO, **Page 25**

NOTES/ATTACHMENTS, **Page 25-26**

EDITING LINE ITEMS, **Page 27-28**

COPY PO, **Page 29**

SUBMIT PO, **Page 29**

RECEIVING FROM A PO, **Page 30**

RECEIVING INDIVIDUAL LINE ITEMS, **Page 31-33**

RECEIVING HISTORY, **Page 33-36**

## INTRODUCTION

Welcome to the Marriott US e-Procurement Marketplace powered by Birch Street Systems! This manual has been designed as a step-by-step guide through the application.

A **NOTE** , in **bold**, indicates a point of particular importance

The Marketplace will allow you to automate many of your purchasing related tasks. You will be able to:

- create and track Purchase Orders,
- create and organize Order Guides (Order Guides are lists of items ordered often),
- receive and reconcile purchase orders as shipments arrive at your loading dock.

Purchase Orders can contain content from Marketplace catalog data, as well as non-catalog or “freeform” items not available in the catalogs. Purchase Orders can be placed to both Adopted Suppliers (Suppliers with catalog data in the Marketplace), as well as suppliers that you add to the system yourself.

**NOTE:** Access to all functionality within the application is security driven. If some functionality described in this manual does not appear to be available to you, then it is likely restricted by the security position that has been assigned to your login. Please contact your Hotel Administrator.

### Assistance Options Contact Information:

- If you need assistance please ask a Birch Street Power User at your hotel, which may be your Purchasing Manager/Agent, Housekeeping Manager/Supervisor, or Engineering Director.
- Your Hotel Administrator, which is your hotel’s Director of Finance/Assist Director of Finance.
- Birch Street Support at [support@birchstreet.net](mailto:support@birchstreet.net) or (949) 567-7030
- Marriott US’s contact for further assistance is Margaret Anne Beitzel, Supplier Relations Analyst, and she can be reached at [margaret.anne.beitzell@marriott.com](mailto:margaret.anne.beitzell@marriott.com) or (301) 380-9403
- ExecuStay’s contact for further assistance is Stephanie Miller, Regional Director of Operations – Western Mountain Pacific, and she can be reached at [stephanie.l.miller@marriott.com](mailto:stephanie.l.miller@marriott.com) or (916) 870-8919

## Identify your Supplier Type

### 1.) Punch-out Suppliers

The suppliers have a logo, click on that logo to shop, after checking out Birchstreet will capture the spend and create a PO, last step click on **\*submit** (\*one exception)

<ul style="list-style-type: none"><li>➤ Chef Works</li><li>➤ Cintas</li><li>➤ Wasserstrom</li><li>➤ Courtesy Products</li></ul>	<ul style="list-style-type: none"><li>➤ Grainger – Coming Soon</li><li>➤ Corporate Express – Coming Soon</li><li>➤ American Hotel Register (no additional log in required, if you are asked for one please call BirchStreet support)</li><li>➤ USFoods *you will <b>not</b> need to click on submit as their orders show up in the PO tab after they have entered the invoice which is usually the delivery day.</li></ul>
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### 2.) Adopted Suppliers – Catalog Content Loaded

- Supplier maintains their contact information, phone number, fax, email etc
- These suppliers log into the system and update prices, item descriptions, UOM etc
- These suppliers log into the system and accept orders
- An email notification is sent to the supplier indicating an order is awaiting for their acceptance
- Keep in mind, even if the supplier does not have a particular product loaded into their catalog guide you still have the ability to Create Non-Catalog Item.

<ul style="list-style-type: none"><li>➤ Caldwell Foods</li><li>➤ Keaney Produce</li><li>➤ Coastal Produce</li><li>➤ Acme Paper</li></ul>	<ul style="list-style-type: none"><li>➤ ProFish</li><li>➤ Metropolitan</li><li>➤ Maryland Quality Meats</li><li>➤ Progressive Gourmet</li></ul>
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### 3.) Adopted Suppliers – No Catalog Content - i.e., Pepsi, H&S Bakery

- Supplier maintains their contact information, phone number, fax, email etc
- These suppliers only receive orders per their established settings method of transmission, either fax or email, you cannot change this
- You must enter non-catalog items and maintain prices, item descriptions, UOM etc via “Create Non-catalog” Item box. These items will show up in purple in your order guide as an indicator that you need to make all the updated changes.
  - Pepsi
  - H&B Bakery

### 4.) Supplier On The Fly (SOTF) - i.e., Adams Burch

- You control all supplier information, supplier name, address, fax, phone
- You control all the prices, item descriptions, UOM etc via “Create Non-catalog” Item box
- You control the method of transmission of ordering, only two options - fax or email
- You will need their fax number regardless of transmission method as their fax number is like their account number of thumb print in BirchStreet.
- Please confirm receipt of all first time orders through Birchstreet SOTF to explain your new ordering system and to ensure they received the order.

## LOGIN SCREEN

Logging into Birch Street: <http://marriottus.birchstreet.net> (Add this page to your Browser Favorites)

Click the link 'Login to Marriott US Procurement Online'



- Enter your Login ID as provided to you which should be your Marriott EID.
- Please note that the Log in ID is case-sensitive.
- Enter your password – upon initial log in the password is “password”.
- Once you enter your Login and password and click ‘Login’, you will be prompted to change your password to one of your choice.
- Should you ever forget your password, just click ‘[Forgot Password?](#)’ and follow the steps



## FRONT PAGE

1. Panel Summary

2. Search/ Summary Panel

3. Tabs

There are 3 main areas on the Front Page screen 1) Logo Panel 2) Search/Summary Panel and 3.) Tabs

No. 1 - The **Logo Panel** displays your name, the Company you are logged in as and a series of links, which allow you to change your personal settings, as well as the look of the Marketplace screen.

- a. Note that the Welcome message is user name-specific.
- b. Next to the Welcome, you will see two checkboxes **Checking/Un-checking as follows:**
  - i. **Hide Menu** - displays/hides the Main Menu on the left side of the screen. The Menu is hidden by default, as it is used primarily for Maintenance tasks or accessing reports and is hidden in order to maximize screen on the front page.
  - ii. **Hide Summary** - displays/hides the Search/Summary Panel.
- c. Next to the checkboxes are a series of links:
  - i. **Hide Logo** - hides the Logo Panel and once selected shows a link **show logo** in its place
  - ii. **Home** - takes the user to the Catalogs Tab reset with punch-out suppliers view also used as **RESET**
- d. **My Settings** - opens up a new window (**important-please open this for your initial login-see next page**)
- e. **Help** - loads a separate window. Please take a minute to browse the Help files, as you will find the answers to most questions there.
- f. **FAQ – Q Tips:** - Similar to HELP, but with a series of Frequently Asked Questions.
- g. **Logout** - closes the application especially important when two users use the same computer.

## My Setting (important-please open this during your initial login)

This is where the user can edit his/her personal settings. Most of the fields are self-explanatory.

Welcome Emily Park   Home   Help   Hide Logo   Entry   List   Vertical   Horizontal   Close

Save   Print

**My settings**   Regional

Login name: epark271

Password: [masked]

Verify password: [masked]

Salutation: [empty]

First name: Emily

Middle initial: [empty]

Last name: Park

Full name: Emily Park

Message delivery option: Birch Street Msg inbox and email

Phone 1 country code: 1

Phone 1: (703) 318-6227

Ext 1: [empty]

Fax number: (703) 661-8714

Email address: emily.park@marriott.com

Job title: [empty]

Department: Kitchen

Default tab for front page: Order guide

Hide menu upon login:

**Message Delivery Option:** User selects 1 of 3 options: Birch Street Msg Inbox, Email, or Both.

**NOTE:** Birch Street Inbox is a light email client internal to the e-Procurement application and designed to accommodate those users whom do not have an email account at the property and light supplier communication.

**Phone:** The format is important. No hyphens or parentheses. The correct format to enter, is 5551234567

**Email field:** needs to be filled out if Email has been selected in Message Delivery Option

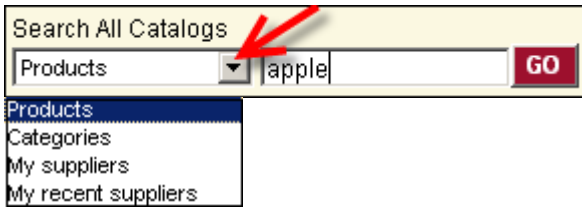
**Default Tab for Front Page:** use the dropdown to select which Tab should be opened upon each log in. For example, if you are a Purchasing Agent that uses primarily Order Guides to place orders then Order Guides will be the default tab for front page.

Click on **Save** if any changes were made and click on **Close**.

No. 2 - The **Search/Summary Panel** contains the Search window, used to search the Catalog. It also displays information on the contents of the Inbox and the Shopping Cart.

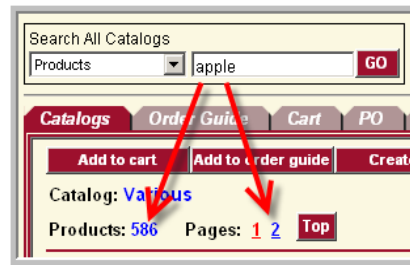
The functionality of the Search/summary Panel will become clearer after we discuss the panel below, the Front Page Tabs Panel

Search All Catalogs. Use the dropdown menu and you will see which search criteria are available; products, categories, my suppliers, or my recent suppliers. These will narrow the search.



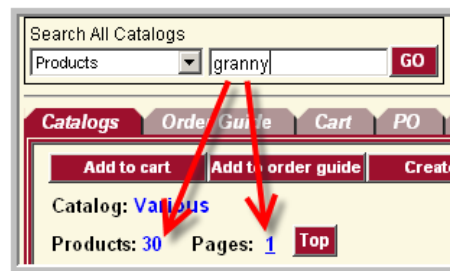
Example:

Use the dropdown to change the search by Products and type 'apple'. Click 'Go'. The system returns all items with the key word apple anywhere in the data.

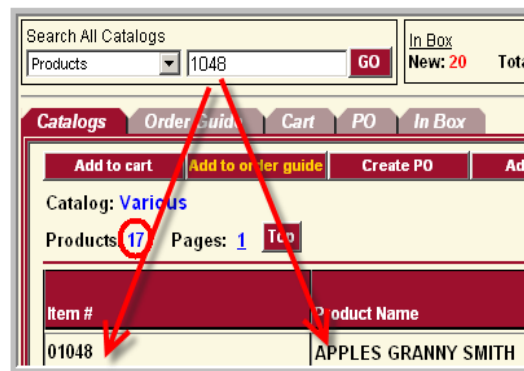


There are [586 products](#), [2 pages](#) of data with the key word apple.

Type in a more specific word when searching for a product for example, 'granny' instead of apple to give you a small list of products.



You can also use the supplier's item code number for example 1048 and click 'Go'. The system returns all items containing 1048.



Use the dropdown menu to switch to Categories and enter produce and click Go. The system returns all items containing produce.

You can also search quicker one particular supplier's catalog instead of the entire marketplace only when the supplier's catalog contains more than 1000 products. Use the dropdown menu to switch to 'my suppliers' and enter the supplier's name. If the supplier has a catalog you will see the link in blue [View Products](#). Click on that link. A search text will appear and you can enter the key word or product item number.

From here, you can select items by entering quantity, the system will automatically select that line items check box, or you can leave the quantity blank however you will need to check mark the select box.

From here search for your action boxes to determine your next move:

- Add items to cart
- Add items to an Order Guide (OG) that you have already created. If you forgot to create an OG you can click on the OG tab (your Catalog tab information will not change) and create an OG (see OG section). Click back on the Catalog tab and proceed.
- Add items to a PO that you have already created but it is still in the NEW status aka SUBMIT was used.
- Report a price issue.

No. 3 - The **Front Page Tabs** contains the Catalogs and the functionality needed to order items. The maroon colored tab indicates which tab you are currently working under while all other tabs will be in gray.

- **Catalogs:** search and browse the catalog
- **Order Guide:** view or create Order Guides
- **Cart:** mostly used as a holding place or you are not ready to place in an order yet or comparisons
- **PO:** View, Create, Submit and Track the progress of Purchase Orders (PO's)
- **In Box:** View incoming message
- **Approvals** (only available to certain users): View, Edit, and Approve PO's

## CATALOG TAB

The Catalog tab contains **Punch-out Suppliers**, **Category Search** "[Marriott US](#)", and **Create non-catalog items**.

### Punch-out Suppliers

As of July 2009, the Punch-out Suppliers are listed below. Once you click on the logo the system will bring up the supplier's web ordering page. **If the system asks for your log in ID and password please call Birch Street Support. As there is a problem with your security settings. If you have an IT department please have them correct this issue.** Once you check out within the punch-out the system will automatically change to the PO tab where you have the ability to choose your approver if applicable, and finally click on 'submit'.



The only exception, USFoods will 'not' require the final step of click on submit because USFoods' PO's will show up in the PO tab once they have invoiced your order which will most likely be your delivery day.



Final step – click on Submit (except USFoods).

### Category Search

Under the Catalog heading will be a link labeled [Marriott US](#) which links to the Adopted Supplier's Catalog content. This content is owned and maintained by the suppliers that have been formally adopted into Birch Street.

You can view and access products in the catalogs either directly by drilling down into the categories and browse or by using Search All Catalogs.

### Create non-catalog items

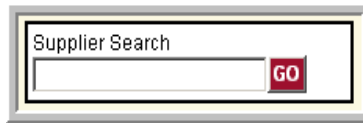
#### Create non-catalog items

– allows for free-form entry of items which are not in the Adopted Suppliers Catalog.

This functionality allows you to enter items which are not in the adopted supplier's catalog i.e. Adopted Supplier with NO catalog or when using a Supplier on the Fly, using a freeform. Within the catalog tab click on the action box 'create non-catalog items'. This brings up the following screen.

A screenshot of a web application interface. At the top, there are tabs for 'Catalogs', 'Order Guide', 'Cart', 'PO', and 'In Box'. Below the tabs, there are four buttons: 'Create PO', 'Add to PO', 'Add to order guide', and 'Add to cart'. Below these buttons is a 'Select Supplier' button, which is highlighted with a red arrow pointing to it from the left. Below the 'Select Supplier' button is a table with the following columns: 'Select', 'Item #', 'Product Name', 'Order Qty', 'UOM', 'PackSize', 'Price', 'Extension', and 'Category'. The table has two rows of input fields, each with a search icon in the 'Category' column.

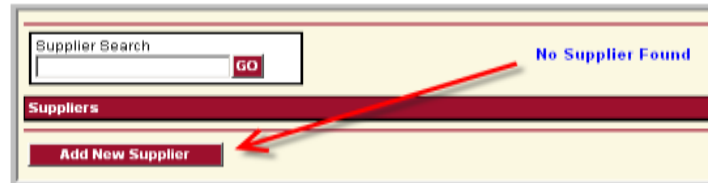
You must first identify what supplier these items will be purchased from so click 'select supplier'. This opens the Supplier Search box.

A screenshot of a 'Supplier Search' form. It features a text input field with the label 'Supplier Search' and a red 'GO' button to its right.

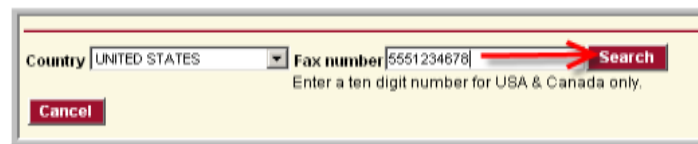
Type in a key word within the supplier's name i.e. Produce and click Go. Try to pick a broad key word like produce, just in case you spelled the descriptive name incorrectly.

If it is an Adopted Supplier with NO catalog click on the supplier that matches your product.

If your supplier is not found it is a SOTF click 'Add Supplier'.

A screenshot of the search results page. At the top left is the 'Supplier Search' form with a 'GO' button. To the right, the text 'No Supplier Found' is displayed in blue. Below this is a red header bar labeled 'Suppliers'. Underneath, there is a red button labeled 'Add New Supplier'. A red arrow points from the 'No Supplier Found' text to the 'Add New Supplier' button.

Next, type in the SOTF's fax number with no dashes or parenthesis. In case you spelled the name wrong the system will try to find the supplier by the fax number. The fax number acts as a thumb print or account number for each supplier. Click on 'Search'.

A screenshot of a search form for a SOTF. It includes a 'Country' dropdown menu set to 'UNITED STATES', a 'Fax number' text field containing '5551234678', and a red 'Search' button with a white arrow pointing to it. Below the 'Fax number' field is the instruction 'Enter a ten digit number for USA & Canada only.' A red 'Cancel' button is located at the bottom left.

The search will come back 'No Supplier Found'.

SOTF can choose transition method either fax or email you need to ask the supplier which is best.

Contact Name: Most likely the order will go to an order department, add your account number here.

Fill in all the required fields as indicated by the blue box with white arrow.

Click on Save.

Country: UNITED STATES Fax number: Search

Enter a ten digit number for USA & Canada only.

**No Supplier Found**

Enter the following values to add a new supplier  
(555)123-4678

Fax number: (555)123-4678

Transmission method: Fax

Supplier name: [ ]

Contact name: Order Dept Cust Acct# 1234

Title: [ ]

Salutation: [ ]

Phone: [ ] **Required Fields**

Email: [ ]

Address line 1: [ ]

Address line 2: [ ]

Address line 3: [ ]

Zip: [ ]

City: [ ]

State: [ ]

Country: UNITED STATES

Save Cancel

Click on Select Supplier for the SOTF that you just created.

**Select** Yum Yum Bakery

Contact: Order Dept Cust Acct#1234 Phone:(555)456-7891 Fax:(555)123-4678 Email:

1234 School Street

Scottsdale AZ 85258

(On the Fly)

Now you can fill out the fields, using free form information.

Create PO Add to PO Add to order guide Add to cart **Action Boxes**

Select Supplier Yum Yum Bakery Clear

**Zoom icon to search for more UOM "Unit of Measures".**

Select	Item #	Product Name	Order Qty	UOM	Pack/Size	Price	Extension
<input checked="" type="checkbox"/>	1234	Croissant Butter 2oz Sliced	10.00	EA	1	0.2500	2.50

The system automatically selects the checkbox when you enter data. You do not need to enter quantity when simply setting up an order guide. When you do enter a quantity the system also calculates the total price at the far right. Category on the far right is not a required field however you can use this information in the future when running a report. Once you have completed the form you can look for the action boxes to determine your next move.

Note: Non-Catalog items will show up in purple within order guides and will include a \* next to the item code number on a PO when the supplier or you view the PO. This is an indicator that you are the owner of all information, description, item code, UOM, pack size, and prices. The supplier will NOT update these items. You can always change this information at anytime. If your property uses the receiving process the price will automatically update on your order guide.

## The Order Guide Tab

Click on the order Guide tab to bring up the screen below. Order Guides are very useful for recurring orders. Use the drop down menu for the 'Order guide list' already created by you or someone within the hotel.

The screenshot shows the 'Order Guide' tab selected in a navigation bar. Below the tabs is a dropdown menu for 'Order guide list' with 'Select Entry' selected. To the right is a grid of action buttons: 'Create PO', 'Add to PO', 'Add to cart', 'Create OG', 'Delete OG', 'Rename OG', 'Print / View', 'Copy item', 'Remove Item', 'Update', 'Clear all qty', 'Change Supp', 'Edit item', 'Import OG', 'OG Template', 'Create items', 'Rpt Price Issue', 'Item history', and 'Price history'. Below the buttons are navigation links: 'First', 'Previous', 'Next', 'Last', 'Search', and 'Refresh'. A status bar shows 'Page 1 of 1 / Rows 0-0 of 0 found' and a 'Sort' checkbox. At the bottom is a table header with columns: 'All', 'Item #', 'Prod / Supplier', 'Pack/Size', 'UOM', 'Min order qty', 'Order Qty', 'Price', and 'Extension'.

### Creating a new OG:

Remember as mentioned previously, when you want to add products to an OG you need to first create the OG. Click on the 'Order Guide' tab and click on the action box 'Create OG'.

This brings up the following window:

The dialog box has a label 'Order Guide Name:' and a text input field containing '\*F&B - Yum Produce'. Below the input field are two buttons: 'OK' and 'Cancel'. A red arrow points to the 'OK' button.

You can enter any name you want, up to 50 characters. NOTE: use your 2-3 letter of your departments abbreviation ie. HSKP for Housekeeping, ENG for Engineering, F&B for Food and Beverage, Purch for Purchasing. This will help when located your order guides. You can call your order guide by the supplier name or by location for example freezer no.1 because you can have more than one supplier within one order guide and the system automatically splits up the orders into the appropriate supplier and creates separate PO's.

You can share your order guides with everybody on property or keep private to yourself; only two options, everybody or just you. Other users can purchase through your order guide however they cannot make any edits/additions/removals. To share an order guide insert a\* before the name of the order guide. You can always rename the order guide if you change your mind by clicking on action box 'Rename OG'.

Name the OG and click OK. This brings you back to the previous screen, now showing the empty, new OG.

## Adding catalog items to an Order Guide:

To add Catalog items to an OG, click on the Catalog Tab, search using several different ways as mentioned previously and select the line item and then the appropriate action box 'Add to OG'.

The screenshot shows a web interface for searching catalogs. At the top, there are search filters: 'Search All Catalogs' with a dropdown for 'Products' and a text input '1048', a 'GO' button, and status boxes for 'In Box' (New: 20, Total: 34) and 'Shopping Cart' (Lines: 0, Total: 00). Below the search area are tabs for 'Catalogs', 'Order Guide', 'Cart', 'PO', and 'In Box'. A row of action buttons includes 'Add to cart', 'Add to order guide' (highlighted with a red arrow), 'Create PO', 'Add to PO', 'Rpt Price Issue', 'Item history', and 'Price history'. Below the tabs, it says 'Catalog: Various' and 'Products: 17 Pages: 1 Top'. A table of search results is shown below:

Item #	Product Name	Manufacturer/ Part Number	Pack/Size	UOM	Min qty	Order Qty/ Price	Select
01048 <a href="#">More Product Info</a>	APPLES GRANNY SMITH Yum Produce	/	/ 56/64 CT	CS	1	<input type="text"/> \$34.03	<input checked="" type="checkbox"/>

This loads the following window:

The screenshot shows an 'Advanced Search' window. It has a search column dropdown set to 'Order guide' and a search text input. Below the search area, it says 'Page 1 of 1 / Rows 1-18 of 18 found'. A table of search results is shown below:

Select	Order guide	Updated on
Select	*F&B - Gourmet Kitchen	07/15/2009 18:0
Select	*F&B - H and S Bread	07/29/2009 08:0
Select	*F&B - Honolulu Fish	07/15/2009 18:0
Select	*F&B - Metropolitan	07/28/2009 09:2
Select	*F&B - Milk	07/29/2009 13:0
Select	*F&B - ProFish	07/15/2009 17:5
Select	*F&B - Soft Stuff	07/29/2009 13:3
Select	*F&B - Uncle Ralph's Co	07/19/2009 20:4
Select	*F&B - Yum Produce	08/02/2009 08:4

Click the 'Select' box next to the OG you want to add the items to.

Now, click on the OG tab. It will show the selected OG with the items you just added. NOTE: If you click back on the Catalog tab it still shows your selected items. This is done on purpose, to allow you to move back and forth within the tabs without losing your work. Only when you perform a new catalog search or click HOME link up at the top right link on the logo panel will the Catalog tab's content be cleared.

## Adding Non-Catalog items to an order guide:

First, click HOME link to bring you back to the original Front Page, Catalog Tab. Within the catalog tab click Create non-catalog items. Click 'Select Supplier'. Search for your supplier and click on 'select' if your supplier is not found please follow the SOTF steps previously mentioned.

Fill out freeform information as previously described.

Click on 'Add to Order Guide' select the order guide you created earlier. This will take you to the OG selection.

Search All Catalogs  
 Products   In Box  
New: 20 Total: 34 Shopping Cart  
Lines: 0 Total: 00

**Catalogs** | Order Guide | Cart | PO | In Box

1. Select Supplier   3. Click 'Add to Order Guide'

2. Enter Free Form

Select	Item #	Product Name	Order Qty	UOM	Pack/Size	Price	Extension
<input checked="" type="checkbox"/>	1234	Specialty Purple Star Fruit	1.00	CS	1/12ct	100.0000	100.00

## Sort Order and Par Values:

Search All Catalogs  
 Products   In Box  
New: 20 Total: 34 Shopping Cart  
Lines: 0 Total: 00

**Catalogs** | **Order Guide** | Cart | PO | In Box

Order guide list: \*F&B - Yum Produce

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

Page 1 of 1 / Rows 1-3 of 3 found

Sort  Par values

All	Item #	Prod / Supplier	Pack/Size	UOM	Min order qty	Order Qty	Price	Extension
<input type="checkbox"/>	1234	<b>Specialty Purple Starfruit</b> Supplier on the fly Yum Produce	1/12ct	CS		1	\$100.00	\$100.00
<input type="checkbox"/>	789	<b>Blood Orange peeled</b> Supplier on the fly Yum Produce	1/50lb	CS		1	\$100.00	\$100.00
<input type="checkbox"/>	4567	<b>Banana sliced</b> Supplier on the fly Yum Produce	1/25lbs	CS		1	\$100.00	\$100.00

There are two boxes unchecked called Sort and Par Values. These features are to match the sort order with the layout of the shelves in your stock room and provide your staff with Min and Max Par Value on your printed Order Guide Lists for use in taking an inventory court for ordering.

### Sort

Click on the Sort Check Box, a new column appears 'Sort Order'. Enter sort numbers, Select line items, Click "Update" now your order guide will match the orders of your shelves.

Search All Catalogs  
Products 1048 GO

In Box  
New: 20 Total: 34

Shopping Cart  
Lines: 0 Total: 00

Catalogs **Order Guide** Cart PO In Box

Order guide list \*F&B - Yum Produce

Purple=Non catalog item / Red=Discontinued

First Previous Next Last Search Refresh

Page 1 of 1 / Rows 1-3 of 3 found

Sort  Par values

1. Click on Sort box

2. Enter sort order

3. Select all

4. Click Update

All	Sort order	Item #	Prod / Supplier	Pack/Size	UOM	Min order qty	Order Qty	Price	Extension
<input checked="" type="checkbox"/>	1.00	1234	Specialty Purple Starfruit Supplier on the fly Yum Produce	1/12ct	CS		1	\$100.00	\$100.00
<input checked="" type="checkbox"/>	3.00	789	Blood Orange peeled Supplier on the fly Yum Produce	1/50lb	CS		1	\$100.00	\$100.00
<input checked="" type="checkbox"/>	2.00	4567	Banana sliced Supplier on the fly Yum Produce	1/25lbs	CS		1	\$100.00	\$100.00

When viewing the Order Guide you can also click on the column headers; Prod/Supplier to alphabetize the order, Item # to sort by numerical, you will need to click on the column header each time you open and close the Order Guide.

### Par Value:

Check the Par Values box, two new columns appear, 'Min qty' and Max qty'. Enter the minimum quantity allowed on the shelf, Enter the maximum quantity allowed on the shelf, click 'all', click 'Update'. This helps your supervisors to place orders in your absence by seeing your preferred stock levels.

Search All Catalogs  
Products 1048 GO

In Box  
New: 20 Total: 34

Shopping Cart  
Lines: 0 Total: 00

Catalogs **Order Guide** Cart PO In Box

Order guide list \*F&B - Yum Produce

Purple=Non catalog item / Red=Discontinued

First Previous Next Last Search Refresh

Page 1 of 1 / Rows 1-3 of 3 found

Sort  Par values

1. Click on Par Values box

2. Enter Min Qty

3. Enter Max Qty

4. Select All

5. Click Update

All	Item #	Prod / Supplier	Pack/Size	UOM	Min order qty	Order Qty	Min qty	Max qty	Price	Extension
<input checked="" type="checkbox"/>	1234	Specialty Purple Starfruit Supplier on the fly Yum Produce	1/12ct	CS		1	1.00	3.00	\$100.00	\$100.00
<input checked="" type="checkbox"/>	4567	Banana sliced Supplier on the fly Yum Produce	1/25lbs	CS		1	1.00	3.00	\$100.00	\$100.00
<input checked="" type="checkbox"/>	789	Blood Orange peeled Supplier on the fly Yum Produce	1/50lb	CS		1	1.00	3.00	\$100.00	\$100.00





<b>Select Supplier</b>	Yum Produce	
<b>Item #</b>	1234	
<b>Product Name</b>	Specialty Purple Starfruit	
<b>Quantity</b>	1.00	
<b>UOM</b>	CS	
<b>Price</b>	\$100.0000	
<b>Target price</b>		
<b>Extension</b>	\$100.00	
<b>Items per case</b>	1.00	
<b>Size</b>	12ct	
<b>Category ID</b>		
<b>Sub-category ID</b>		
<b>Tax exempt</b>	<input type="checkbox"/>	
	<b>Save</b>	<b>Cancel</b>

## Target Price:

You can enter a Target price for non-catalog items and catalog items by using the edit item action box. The difference in the edit item for non-catalog items and catalog items are that you can only add/change target price for catalog items you cannot change any other sections like product name, quantity, price etc. Target price is useful for seasonal produce which can fluctuate widely in price.

Click on 'Edit Item' and enter a target price. Click 'save'. Click on OK in the message box. This brings you back to your Order Guide. Once the price is at or above the target price the price will show up highlighted in Yellow. You will still be able to order this product.

## 'More Product Info' and picture links:

Adopted Suppliers with catalog can provide more information that described in a line item as well as provide pictures when available.

Search All Catalogs

Products  **GO**

In Box **New: 20 Total: 34**

Shopping Cart **Lines: 0 Total: 00**

---

**Catalogs**
Order Guide
Cart
PO
In Box

**Add to cart**
**Add to order guide**
**Create PO**
**Add to PO**
**Rpt Price Issue**
**Item history**
**Price history**

Catalog: **Various**

Products: 1 Pages: 1 **Top** Click on More Product Info for further information

Item #	Product Name	Manufacturer/ Part Number	Pack/Size	UOM	Min qty	Order Qty/ Price	Select
10486-06	Chicken Cordon Bleu Yum Foods	/ 10486	64 / 5oz	CS	1	<input type="text" value=""/> \$280.20	<input type="checkbox"/>

[More Product Info](#)

If a picture is available click on the monitor icon.

Chicken Cordon Bleu	
Item #	10486-06
Product Name	Chicken Cordon Bleu
Supplier	Yum Foods
Lead Time (Days)	1
UOM	CS
Case Pack	64
Will Break Case	No
FOB	Destination
Dimension	
Min Order Qty	1
Manufacturer	Good Food Inc.
Mfg Part Number	10486
Brand Name	
Model	
Product origin	USA
Size	5oz
Portion Size	5
Commodity	
Quantity Break	
Tax exempt	Yes
Description	Chicken Cordon Bleu, Boneless / Skinless Breast 5 oz (6 and 7 oz portions also available - call for pricing) (****)

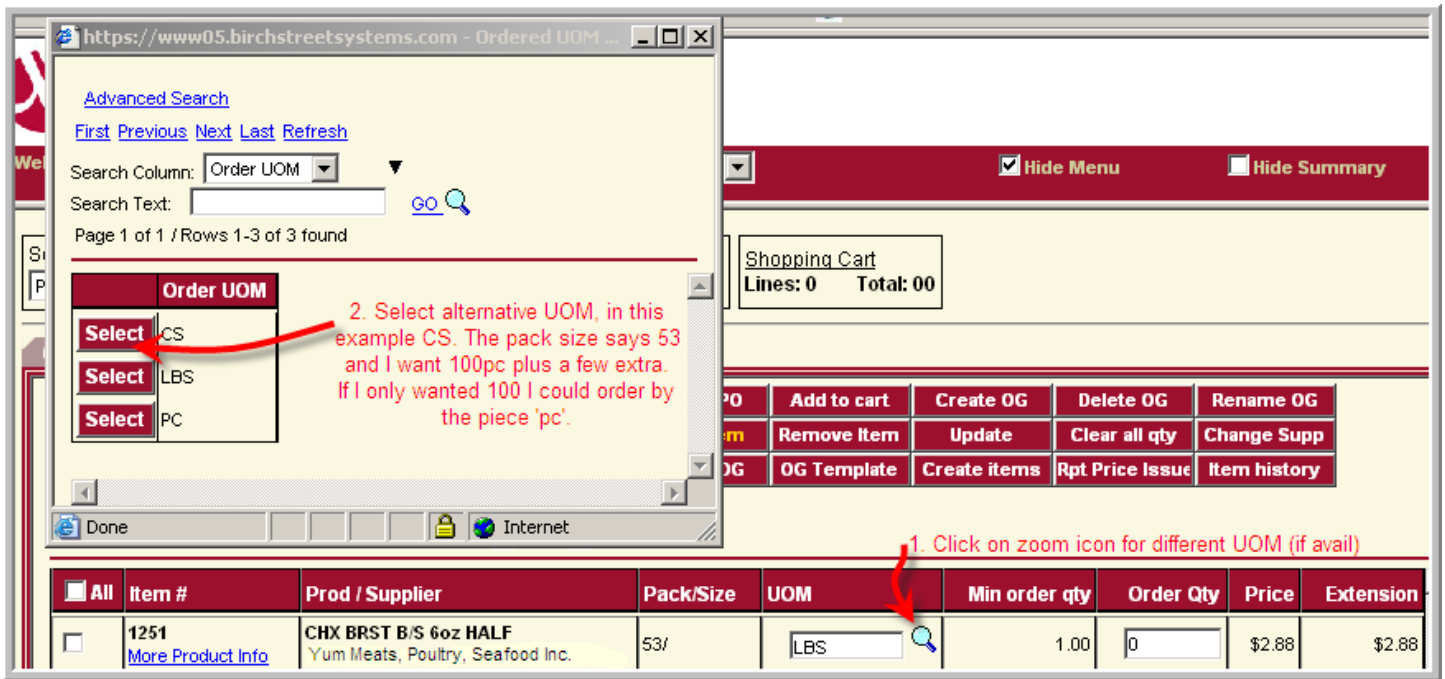
When you click on the Monitor Icon, it loads a picture of the item (where available).



## UOM (Unit of Measure):

Suppliers can offer multiply UOM for ordering, this is up to the supplier and how they have set up their catalog.

In this example for Chicken 6oz, select your preferred UOM and then enter your Order Qty.



## Copy Item:

**Copy item**

Click the check box next to an item and click on 'Copy Item'. This brings up a window listing all your Order Guides. You can copy a product line from one Order Guide to another, for example in Order Guide named Freezer #1 you have the same product in Freezer #2 you can copy one line and add it to other order guide.

## Delete Item/Delete Order Guide:

**Edit item**

Click the checkbox next to an item and click on 'Delete Item'. Click 'OK' to confirm you want to delete the item. The item is now deleted from the Order Guide. To delete the entire Order Guide, click the 'Delete

**Delete OG**

OG' action box. NOTE: This is not reversible. Once you delete the Order Guide, it cannot be recovered. Remember you can only delete Order Guides you own. Birch Street will let you know when you are unable to delete and it will show you the owner's name.

## Import OG/OG Template:

The system allows for the import of Order Guides, which is especially useful if you wish to create large numbers of sizable order guides. Before you can import an Order Guide, you must first fill out the template. Click the action box 'OG Template'.

The screenshot shows a web-based interface with a search bar at the top left, an 'In Box' summary (New: 20, Total: 34), and a 'Shopping Cart' summary (Lines: 0, Total: 00). Below these are tabs for 'Catalogs', 'Order Guide', 'Cart', 'PO', and 'In Box'. The 'Order Guide' tab is active, displaying a list of order guides. A table of actions is visible, with 'OG Template' highlighted in a red box and a red arrow pointing to it. Other actions include 'Create PO', 'Add to PO', 'Add to cart', 'Create OG', 'Delete OG', 'Rename OG', 'Print / View', 'Copy item', 'Remove Item', 'Update', 'Clear all qty', 'Change Supp', 'Edit item', 'Import OG', 'Create items', 'Rpt Price Issue', 'Item history', and 'Price history'. Below the actions is a 'Sort' checkbox and a table header with columns: All, Item #, Prod / Supplier, Pack/Size, UOM, Min order qty, Order Qty, Price, and Extension.

You will see the following message:

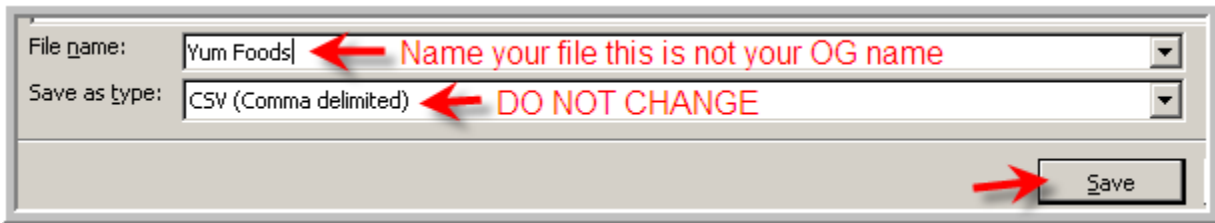


Click 'Open' and the following CSV file will load:

The screenshot shows a Microsoft Excel spreadsheet titled 'OG\_Template [Read-Only] - Microsoft Excel'. The spreadsheet has columns A through O. The first row (A1) contains the header 'SUPPLIER\_SKU'. The second row (A2) contains the following headers: 'SUPPLIER', 'ORDER\_Q', 'REQUESTE', 'UNIT\_TRX', 'ITEM\_DES', 'SORT\_ORD', 'MINIMUM', 'MAXIMUM', 'DEPARTM', 'GL\_ACCO', 'TARGET\_T', 'ITEMS\_PEI', 'PACK\_SIZE', 'TAX\_EXEMPT'. The third row (A3) contains the following formulas: 'STRING(50 NUMBER(:', 'STRING(20 NUMBER(:', 'STRING(40 NUMBER(:', 'NUMBER(:', 'NUMBER(:', 'NUMBER(:', 'STRING(28 NUMBER(:', 'STRING(10 NUMBER(:', 'NUMBER(:', 'String(128 NUMBER(1)'. The spreadsheet is displayed in a grid format with row numbers 1 through 7 and column letters A through O.

Fill out the columns with the information you wish to import. **NOTE:** The first three columns are required fields: supplier SKU#, Quantity, and Requested UOM. You can set the quantity to zero 0 if you prefer not to use a pre-set quantity.

Once you have entered the information, save the file on your PC in a place where you can easily retrieve it. DO NOT change the type of file or format from CSV to anything else.



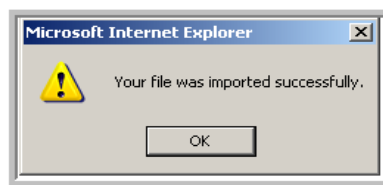
Now, click on 'Import OG' (next to OG Template). The following pop-up window appears: Click on New Order Guide box or if you wish to import using an existing Order Guide name, select the supplier and click the zoom next to the field 'Select Order Guide'

First select your supplier:



NOTE: Importing to an existing Order Guide will add the imported items to the existing ones and nothing will be changed or deleted. If an item SKU# on the import already exists in the Order Guide, the system will ignore that portion of the import.

You will see the following message:



**Your changes will be available tomorrow. This is an overnight process.**

# Creating a PO (Purchase Order)

There are several methods for creating PO's.

- Browse off-site content via a "punch-out supplier"
- Select an Order Guide, Create a PO or add it to a PO that you have already created but not yet submitted
- Select items from the catalog, Create a PO or add them to a PO that you have already created but not yet submitted
- Add items to a Cart, Create a PO, or add it to a PO that you have already created but not yet submitted
- Create non-catalog items and create a PO, or add it to a PO that you have already created but not yet submitted
- Copy the contents of an existing PO over into a new PO

Sample of PO using Order Guide:

1. Select your Order Guide List

2. Type in your order quantity

3. Select the line items you want

4. Click here

All	Item #	Prod / Supplier	Pack/Size	UOM	Min order qt.	Order Qty	Price	Extension
<input checked="" type="checkbox"/>	1234	Specialty Purple Starfruit Supplier on the fly Yum Produce	1/12ct	CS		1	\$100.00	\$100.00
<input checked="" type="checkbox"/>	4567	Banana sliced Supplier on the fly Yum Produce	1/25lbs	CS		1	\$100.00	\$100.00
<input checked="" type="checkbox"/>	789	Blood Orange peeled Supplier on the fly Yum Produce	1/50lb	CS		1	\$100.00	\$100.00

If you have a large number of items in an Order Guide you can click on the link 'Search' which allows you to enter a key word, again main word like 'Blood' for Blood Orange instead of orange, click on OK, enter the quantity you would like to order, click on 'Refresh' to bring your original order guide back.

1. After entering Qty

2. Enter keyword

3. Click OK

All	Item #	Prod / Supplier	Pack/Size	UOM	Min order qty	Order Qty	Price	Extension
<input type="checkbox"/>	1234	Specialty Purple Starfruit Supplier on the fly Yum Produce	1/12ct	CS		1	\$100.00	\$100.00
<input type="checkbox"/>	4567	Banana sliced Supplier on the fly Yum Produce	1/25lbs	CS		1	\$100.00	\$100.00
<input type="checkbox"/>	789	Blood Orange peeled Supplier on the fly Yum Produce	1/50lb	CS		1	\$100.00	\$100.00

After you click on 'Create PO' you will see this screen pop up:

The fields in the above screen:

**Confirming PO:** Check this box if this is a PO for a purchase already made for expense purposes. By checking this box the supplier will not receive this order as that would cause a duplication. Once checking this box the top of the PO will say "Confirming Purchase Order – Do NOT Duplicate"

**Subject:** This is where you typically give your PO a name which is meaningful to you.

**Required Delivery Date:** This is the date by which you want to receive the items.. This is a required field. You can enter the date in multiple ways; type the date manually 7/1/09, click the calendar icon and select a day and click OK, or you can use a shortcut, by typing something like +1 for tomorrow.

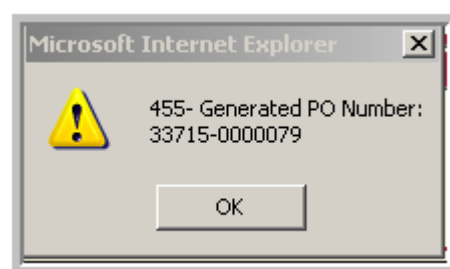
**Note to Supplier:** Self-explanatory. Freeform note field that will provide a note on the PO to the supplier.

**Allow Partial Ship:** When this box is checked, the supplier has the option to ship part of your order.

**Ship to Attn Name:** Pre-populated with the default contact for the property. Can be overwritten.

**Tax/Freight:** Enter numeric values on the right. If the box on the left is checked, the value is a percentage. If the box is unchecked, the value is a flat amount.

**Less Discount Amount:** Value entered is flat dollar amount, to be taken off the total PO value, after Tax and Freight were added. Click 'OK'



Now the system will turn over to the PO tab, notice the Order Guide is now in grey and the PO is now Maroon indicating it is now the active tab.

The screenshot shows the 'PO' tab selected in a navigation bar. Below the navigation bar is a search area with a dropdown menu set to 'My Last 30 Days PO's', search columns set to 'PO number', and search text '33715-0000079'. A grid of action buttons is visible, including 'Submit', 'Buyer Contact', 'Supp Contact', 'Print / View / Edit', 'Print w/Details', 'Header Update', 'Notes', 'Attachment', 'History', 'Send Message', 'Add to OG', 'Add to cart', 'Copy PO', 'Delete PO', 'Create items', 'PO Recall', 'Approval Details', 'Transfer', and 'Add Add'l Info'. A table below shows one PO entry with PO number '33715-0000079', status 'New', confirm 'No', and supplier 'Yum Produce'. Red arrows and text annotations highlight the 'Submit' button and the 'Header Update' button, with a note: 'Last step click on' pointing to 'Submit' and 'If you wish to change the payment to P-Card click on Header Update' pointing to 'Header Update'.

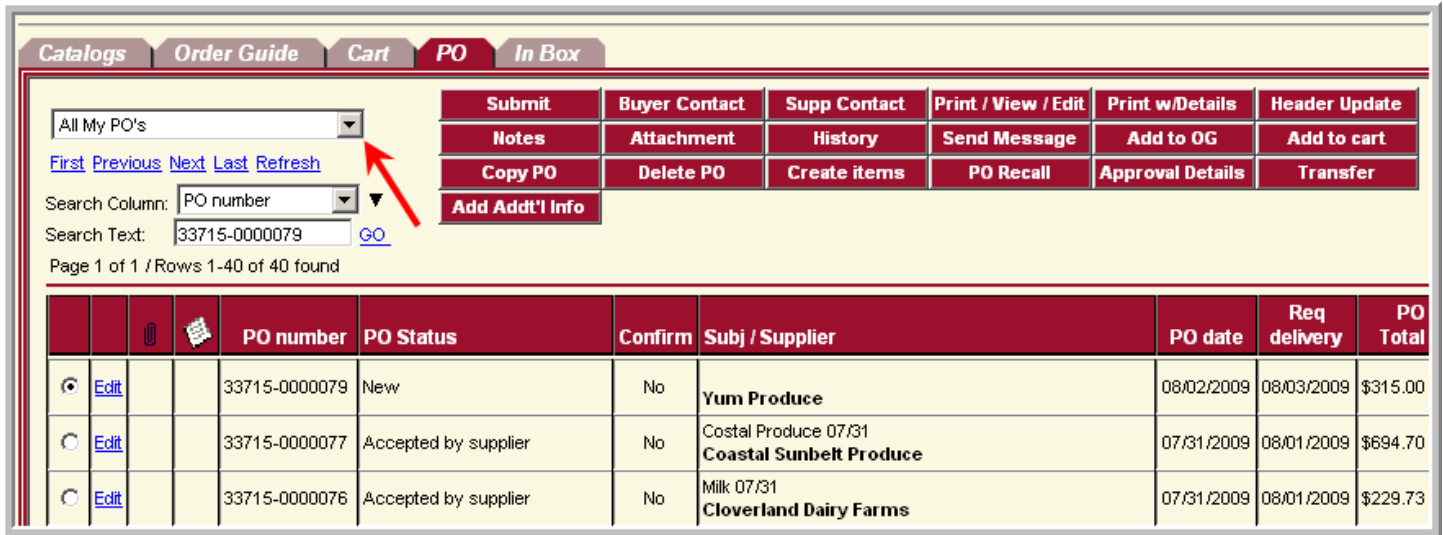
The default method of payment is Purchase Order or billable net terms with the contract or you can choose P-Card. Birch Street does not charge the P-Card it simply notifies the supplier to use the P-card on file. **BEFORE** clicking on 'Submit' click on the action box **'Header Update'**. Here you can also change the required delivery date, and any other information on this screen, again before you click on submit.

The 'Header Update' form contains several fields: 'Select Supplier' (Yum Produce), 'Confirming PO' (checkbox), 'Subject', 'Required delivery date' (08/03/2009), 'Approver' (No Approver), 'Purchase type' (General), 'Allow partial ship' (checkbox), 'Ship via' (Best Route), 'Ship to Attn Name' (Receiving Dock), 'Payment Method' (Employee P-card), 'Credit Card' (Select Entry), 'Fax Number' (5551234678), 'Cost Center', and 'Source Document'. At the bottom, there are 'Use Tax %' (checked, 5%), 'Use Freight %' (unchecked, 0.00), and 'Less Discount Amount' (0.00) fields. Red arrows and text annotations highlight the 'Payment Method' dropdown menu with the note 'Change payment method by using the drop down menu' and the 'Credit Card' dropdown menu with the note 'Choose credit card'. 'Save' and 'Cancel' buttons are at the bottom.



## Viewing more than one PO:

Using the drop down menu, you can bring up a larger selection of your PO's, by selecting "All My PO's"



The screenshot shows a web application interface for PO management. At the top, there are navigation tabs: Catalogs, Order Guide, Cart, PO, and In Box. Below the tabs, there is a search area with a dropdown menu set to "All My PO's", a search column dropdown set to "PO number", and a search text field containing "33715-0000079". A red arrow points to the search column dropdown. To the right of the search area is a grid of action buttons: Submit, Buyer Contact, Supp Contact, Print / View / Edit, Print w/Details, Header Update, Notes, Attachment, History, Send Message, Add to OG, Add to cart, Copy PO, Delete PO, Create items, PO Recall, Approval Details, Transfer, and Add Add'l Info. Below the search area, it says "Page 1 of 1 / Rows 1-40 of 40 found". The main part of the screenshot is a table with the following data:

			PO number	PO Status	Confirm	Subj / Supplier	PO date	Req delivery	PO Total
<input checked="" type="radio"/>	<a href="#">Edit</a>		33715-0000079	New	No	Yum Produce	08/02/2009	08/03/2009	\$315.00
<input type="radio"/>	<a href="#">Edit</a>		33715-0000077	Accepted by supplier	No	Costal Produce 07/31 Coastal Sunbelt Produce	07/31/2009	08/01/2009	\$694.70
<input type="radio"/>	<a href="#">Edit</a>		33715-0000076	Accepted by supplier	No	Milk 07/31 Cloverland Dairy Farms	07/31/2009	08/01/2009	\$229.73

The PO we just created is at the top of the list. It is in New Status; the last step is to click 'SUBMIT'.



### Attachment and Notes Columns:

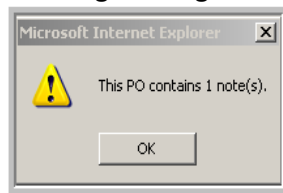
The Column with the Paper Clip icon (next to Edit) indicates if there are any file attachments to the PO. The column with the Note icon indicates whether there are any notes with this PO.



### Print/View/Edit a PO:

To view the PO we just created, select the line by clicking on the circle on the far left, now click on the action box.

If there are any notes attached to the PO the following message will pop-up:



Click OK to load the PO in a separate window. This screen shows the detailed information of what the supplier will see. You may add a note or attach a file by click the **Notes** or **Attachment** action boxes.

Print

Close

Notes

Attachments



### PURCHASE ORDER

Washington Dulles Airport Marriott  
Marriott US Marketplace

**PO NUMBER :** 33715-0000079  
**Required Delivery Date :** 08/03/2009  
**Source Document :**  
**Internal PO No.:**  
**PO Type:** Standard  
**Purchase type :** General

**Status:** New  
**PO Submit Date:**  
**Next Approver:**

**Supplier:** Yum Produce  
1234 School Street  
Scottsdale, AZ, 85258  
**Attn:** Order Dept Cust Acct#1234  
**Title:**  
**Phone:** 5554567891  
**Fax:** 5551234678  
**Email:** CharlieA@yumproduce.com  
**DBA:**

**Bill To:** Washington Dulles Airport Marriott  
45020 Aviation Drive  
Dulles, VA, 20166, US  
**Attn:** Accounts Payable

**Ship To:** Washington Dulles Airport Marriott  
45020 Aviation Drive  
Dulles, VA, 20166, US  
**Attn:** Receiving Dock

**Sent From:** Washington Dulles Airport Marriott  
**Name:** Emily Park  
**Title:**  
**Phone:** (703) 318-6227  
**Fax:** (703) 661-8714  
**Email:** emily.park@marriott.com  
**Cost Center:**

**Terms:**  
**Subject:**  
**Partial Order Accepted:** No  
**Ship via:** Best Route  
**Payment Terms:**  
**Payment Method:** Purchase order

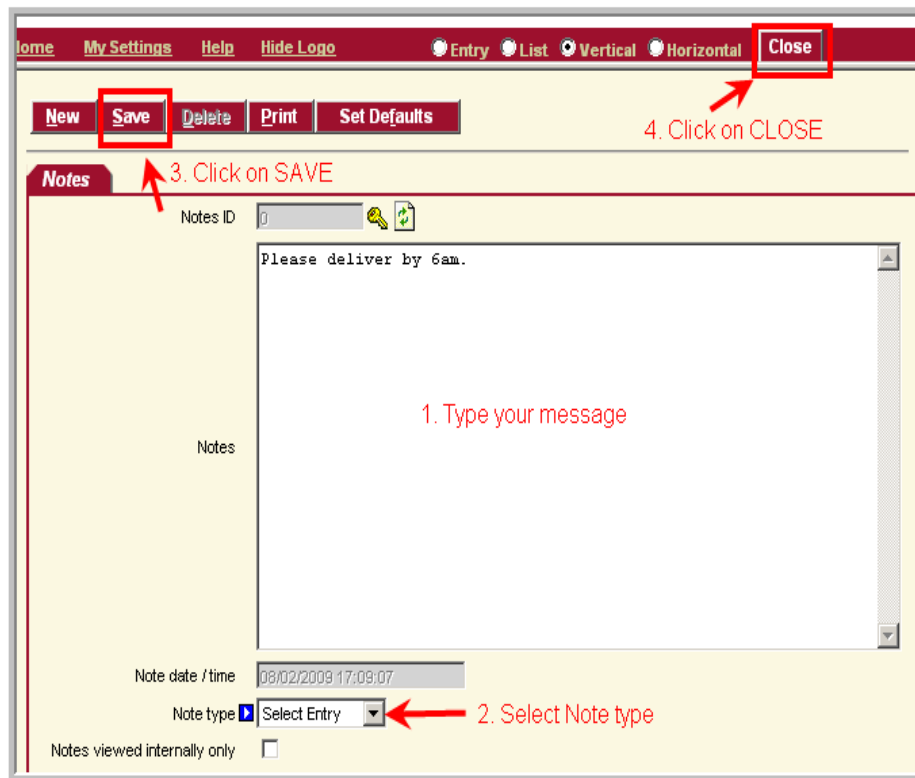
**Notes and Attachments :**

**Header Notes :**  
No Notes  
This Purchase Order has **0** Attachments

#	Item SKU	Product Desc.	Qty	UOM	Price	Extension
1	1234 *	Specialty Purple Starfruit	1.00	CS	\$100.0000	\$100.00 <a href="#">Edit Line</a>
2	4567 *	Banana sliced	1.00	CS	\$100.0000	\$100.00 <a href="#">Edit Line</a>
3	789 *	Blood Orange peeled	1.00	CS	\$100.0000	\$100.00 <a href="#">Edit Line</a>

\* - Non catalog item

<b>Sub Total:</b>	\$300.00
<b>Freight:</b>	\$0.00
<b>Tax Amount:</b>	\$15.00
<b>Less Discount:</b>	\$0.00
<b>Total amount due:</b>	\$315.00



You can enter free form text in the main field. The date of the note is pre-populated, but can be changed. The Note type drop down field is a required field. The Note type should indicate who is writing the note, not whom the note is intended. The check box 'Notes viewed internally only' ensure that the note is only viewable by your company when check. Click 'Save' to add the note to the PO. You will see it added in the left hand column. Click 'Close' to close the window and go back to the PO screen.


You are now back in the View/Print/Edit screen. If you refresh your browser window, you will now see a message that this PO contains 2 notes.

## Editing Line Items

In the Print/View/Edit screen, scroll down to view the line items:

#	Item SKU	Product Desc.	Qty	UOM	Price	Extension	
1	1234 *	Specialty Purple Starfruit	1.00	CS	\$100.0000	\$100.00	<a href="#">Edit Line</a>
2	4567 *	Banana sliced	1.00	CS	\$100.0000	\$100.00	<a href="#">Edit Line</a>
3	789 *	Blood Orange peeled	1.00	CS	\$100.0000	\$100.00	<a href="#">Edit Line</a>
* - Non catalog item							
					<b>Sub Total:</b>	\$300.00	
					<b>Freight:</b>	\$0.00	
					<b>Tax Amount:</b>	\$15.00	
					<b>Less Discount:</b>	\$0.00	
					<b>Total amount due:</b>	\$315.00	

Click on '[Edit Line](#)'. This will bring up a separate window:

1234	
<b>Item #:</b>	1234
<b>Product name:</b>	Specialty Purple Starfruit
<b>Lead time in days:</b>	
<b>Order quantity:</b>	1.00
<b>UOM:</b>	CS <span>Change UOM</span>
<b>Price:</b>	\$100.0000
<b>Extension:</b>	\$100.00
<b>Tax exempt:</b>	<input type="checkbox"/> <i>You cannot change greyed areas.</i>
<b>Case pack:</b>	1
<b>Dimensions:</b>	
<b>Min order qty:</b>	
<b>Manufacturer:</b>	
<b>Mfg part number:</b>	
<b>Brand name:</b>	
<b>Model:</b>	
<b>Size:</b>	12ct
<b>Commodity:</b>	
<b>Category ID:</b>	<input type="text"/> 
<b>Freight</b>	\$0.00

The only fields that are editable are:

Non-catalog items – all areas but extension price which is calculated based on quantity

Catalog items – quantity only

Click on 'Save' and click on 'Close' this brings you back to the PO Print/View/Edit screen.

## Copy PO

The Copy PO action is used to create an exact copy of the PO selected. The newly created PO will appear at the top of the PO list and you will be prompted to change the Header, using 'Header Update'. Here you can give the new PO a new subject, delivery date, and you can make additions/subtractions before clicking on 'Submit'.

1. Select your PO line

2. Click Copy PO

PO number	PO Status	Confirm	Subj / Supplier	PO date	Req delivery	PO Total
33715-0000079	New	No	Yum Produce	08/02/2009	08/03/2009	\$420.00

## Submit PO



For New PO's in the 'PO Status' column must be submitting by clicking on

The status of the selected PO will change from 'New' to 'Submitting'. Click on [Refresh](#) after 30 seconds or so, and the status will change to:

- [Approval Pending](#), if you sent the PO for approval
- [Accepted by Supplier](#)
- [Fax/email/csv accepted](#)
- [Viewed by supplier](#) (if this status does not change to Accepted by supplier you must call the supplier and ask them to log into your account and accept the order)
- [Fax failed connection not made](#) (you may have an incorrect fax number, supplier may have fax machine turned off or out of paper)

1. Select your PO line

2. Very important! Click 'Submit' or your order will not be sent!!!

3. Click 'Refresh' to see the PO Status change

PO number	PO Status	Confirm	Subj / Supplier	PO date	Req delivery	PO Total
33715-0000079	New	No	Yum Produce	08/02/2009	08/03/2009	\$420.00

## Receiving from a PO:

From the PO tab, select your PO on the far left and click the 'Receive' button. **NOTE: You may only receive against a PO that has a status of "Accepted by Supplier" or "Partially Received".**

The screenshot shows the PO management interface with the following elements:

- Navigation tabs: Catalogs, Order Guide, Cart, **PO**, In Box
- Search area: My Last 30 Days PO's, Search Column: PO number, Search Text: [ ] GO
- Buttons: Submit, **Receive**, Buyer Contact, Supp Contact, Print / View / Edit, Print w/Details, Header Update, Notes, Attachment, History, Send Message, Add to OG, Add to cart, Copy PO, Delete PO, Receiving History, Create items, PO Recall, Approval Details, Transfer, Add Add'l info, Receive Confirm
- Text: Page 1 of 1 / Rows 1-41 of 41 found
- Table with columns: PO number, PO Status, Confirm, Subj / Supplier, PO date, Req delivery, PO Total
- Table row: PO number: 33715-0000087, PO Status: Fax/email/csv accepted, Confirm: No, Subj / Supplier: Yum Produce, PO date: 08/10/2009, Req delivery: 08/11/2009, PO Total: \$315.00
- Annotations: Red arrow pointing to the PO line with text "1. Select your po line", red box around the 'Receive' button with text "2. Click on Receive".

This will load the Receiving screen in a separate window.

The screenshot shows the 'PO Header - Receiving' screen with the following elements:

- Navigation: Save, Update, Attach, Notes, Receiving Record, Link to Corrected Inv, Cancel PO, PO Print w/Details
- PO Header - Receiving: PO number: 33715000087, PO date: 08/10/2009 12:00:00, PO Status: Fax/email/csv accepted, Internal PO number: [ ], Buyer name: Emily Park, Update PO status to: Good Entry, Allocation: [ ], Close PO: [ ]
- Supplier name: Yum Produce, Received date: [ ], Payment method: Purchase order, Received ext amt: \$315.00
- Cancel reason code: [ ], Invoice number: [ ], Invoice date: [ ], Invoice amount: [ ], Invoice freight amount: [ ], Invoice discount amount: [ ], Freight: \$0.00, Less discount: \$0.00
- Freight carrier / Shipper: [ ], Tracking number: [ ], Bill of lading #: [ ], PPO number: [ ], Purchase type: Online, Direct total amount: [ ], Release to person: [ ], Storeroom total amount: [ ]
- Table on the left: PO number, PO Status
- Table rows: 33715-0000025 Accepted by supplier, 33715-0000026 Accepted by supplier, 33715-0000031 Accepted by supplier, 33715-0000032 Accepted by supplier, 33715-0000035 Accepted by supplier, 33715-0000036 Fax/email/csv accepted, 33715-0000038 Accepted by supplier, 33715-0000040 Fax/email/csv accepted, 33715-0000041 Accepted by supplier, 33715-0000042 Accepted by supplier, 33715-0000043 Accepted by supplier, 33715-0000044 Accepted by supplier, 33715-0000046 Accepted by supplier, 33715-0000047 Fax/email/csv accepted, 33715-0000052 Accepted by supplier, 33715-0000053 Accepted by supplier, 33715-0000054 Accepted by supplier, 33715-0000055 Fax/email/csv accepted, 33715-0000056 Fax/email/csv accepted, 33715-0000058 Accepted by supplier, 33715-0000061 Accepted by supplier, 33715-0000062 Accepted by supplier

The only required field on this screen is the Received Date, type in the date

## Receiving Individual Line Items

Click the 'Line Items' tab which will load the following screen:

	<input type="checkbox"/> Receive Accept All	<input type="checkbox"/> CXL Remaining Qty	Item #	Product name	Order qty	Acpt'd qty	Invoiced price	Order UOM	Price
<a href="#">Edit</a>	<input type="checkbox"/>	<input type="checkbox"/>	1234	Specialty Purple Starfruit	1	<input type="text"/>	<input type="text"/>	CS	\$10
<a href="#">Edit</a>	<input type="checkbox"/>	<input type="checkbox"/>	4567	Banana sliced	1	<input type="text"/>	<input type="text"/>	CS	\$10
<a href="#">Edit</a>	<input type="checkbox"/>	<input type="checkbox"/>	789	Blood Orange peeled	1	<input type="text"/>	<input type="text"/>	CS	\$10

When receiving partial deliveries, check the boxes next to the items you are accepting and enter the quantity received. If there is a large order with multiple lines and only one line item requires editing. When going back into the receive function for the remaining partial, Check the Accept box for the particular line item and click Update.

When receiving complete orders, check **Receive/Accept All**, all of the quantity received will populate automatically according to your original quantity ordered, showing you received the entire order.

When you are done, click **Update**.

**NOTE:** Clicking Update is FINAL. If you reload the record (by clicking on it in the left column), the items you have Updated are now grayed out.

If you merely want to save a record and come back to it later, click SAVE (next to Update).

**3. FINAL STEP**

Save **Update** Attach Notes Receiving Record Link to Corrected Inv Cancel PO PO Print w/Details

PO Header - Receiving **Line items**

Search Column: Receive<br>Accept<br>All Search Text: All GO page 1 of 1 Rows per page 100

**1. Check Mark here for complete orders**

<input checked="" type="checkbox"/> Receive Accept All	<input type="checkbox"/> CXL Remaining Qty	Item #	Product name	Order qty	Acpt'd qty	Invoiced price	Order UOM	Price
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1234	Specialty Purple Starfruit	1	1	\$100	CS	\$100
<input checked="" type="checkbox"/>	<input type="checkbox"/>	4567	Banana sliced	1	1	\$100	CS	\$100
<input checked="" type="checkbox"/>	<input type="checkbox"/>	789	Blood Orange peeled	1	1	\$100	CS	\$100

**2. Uncheck Mark line items if partials were received and change quantities**

When going back into the receive function for the remaining partial, Check the Accept box for the particular line item and click Update. After Clicking on Update click on OK:

Save Update Attach Notes Receiving Record Link to Corrected Inv Cancel PO PO Print w/Details

PO Header - Receiving **Line items**

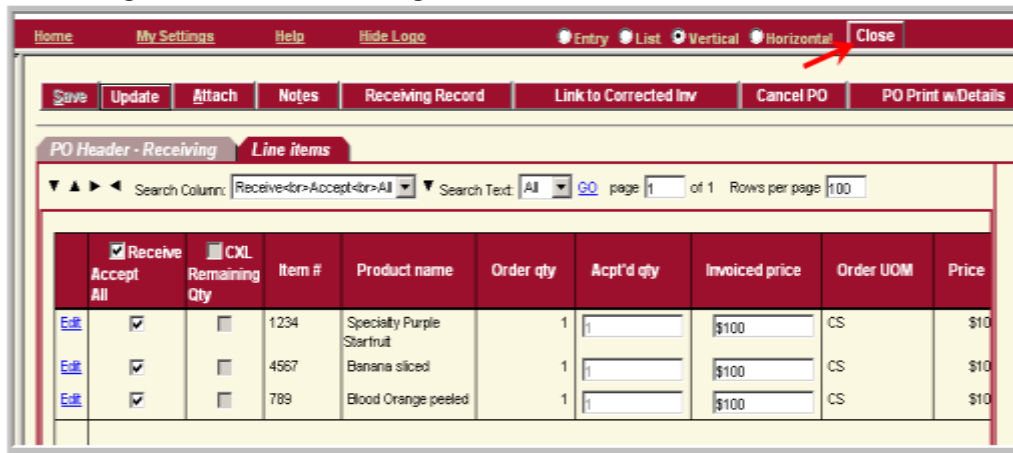
Search Column: Receive<br>Accept<br>All Search Text: All GO page 1 of 1 Rows per page 100

<input checked="" type="checkbox"/> Receive Accept All	<input type="checkbox"/> CXL Remaining Qty	Item #	Product name	Order qty	Acpt'd qty	Invoiced price	Order UOM	Price
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1234	Specialty Purple	1	1	\$100	CS	\$10
<input checked="" type="checkbox"/>	<input type="checkbox"/>	4567		1	1	\$100	CS	\$10
<input checked="" type="checkbox"/>	<input type="checkbox"/>	789		1	1	\$100	CS	\$10

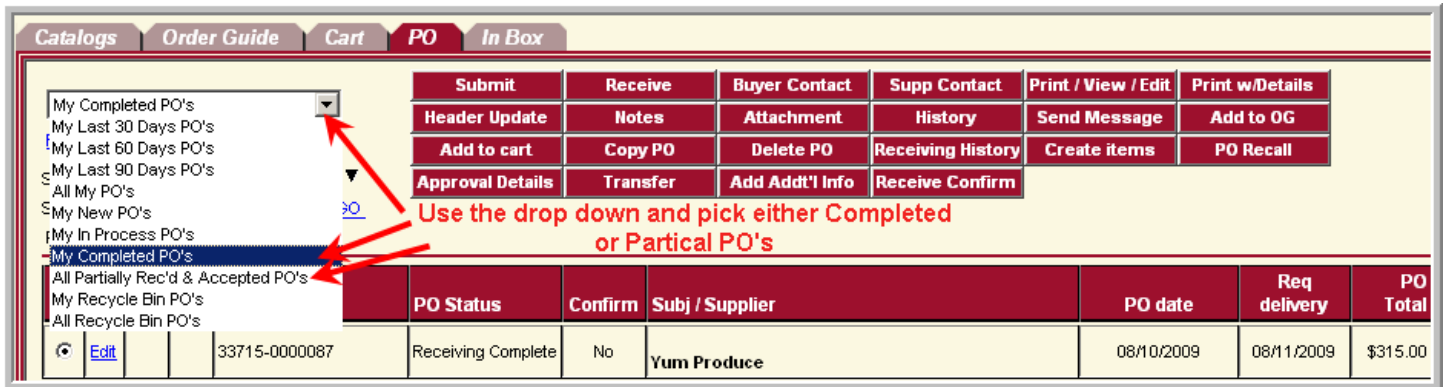
Microsoft Internet Explorer  
Processing is done.  
OK



Click the 'Close' button to go back to the Front Page.



Under the PO tab, you can view the completely received PO's under "My Completed PO's" or partially received PO's under "All Partially Rec'd & Accepted PO's". The PO Status now indicates the change; in the example below it is "Receiving Complete".



## Receiving History

The 'Receiving History' action button within the PO Tab loads a new window, which will list all PO's which are partially or fully received.



Select a Receiving Event on the left and the information will load on the right. The Receipt Reconciliation tab will show information such as Date Received, Receiving Status, etc:

The screenshot shows a software interface for Receipt Reconciliation. On the left, there is a search area with a dropdown menu set to 'All Last 30 Days PO's' and a search column set to 'PO number'. Below this is a table with two columns: 'PO number' and 'Received date'. The first row contains the values '3715-000007' and '08/11/2009'. A red box highlights this row, and a red arrow points to it with the text 'Click here to load the record'. On the right, the 'Receipt Reconciliation' tab is active, displaying a form with various fields: Receiving number (00000000000000000000), Received date (08/11/2009), Purchase order number (3715-000007), Internal PO number, Supplier name (Jen Produce), Invoice number, Receiving status (Receiving Complete), Changed to above status on (08/11/2009 16:22:35), Buyer name (J22), Subject (ENV Park), Cancel reason code, PO Status (Receiving Complete), and Update PO status to (Select Entry). At the top of the interface, there are several buttons: Save, Print, Update POStatus, Receiving Record, Corrected Inv, Reset Tax, Approval Detail, Mark Invoiced, Notes, Attach, and PO Print w/Details.

The Received Line Items tab will list all the items included in this Receiving Event:

The screenshot shows the 'Received line items' tab of the Receipt Reconciliation interface. At the top, there are buttons: Save, Print, Update POStatus, Receiving Record, Corrected Inv, Reset Tax, Approval Detail, Mark Invoiced, Notes, Attach, and PO Print w/Details. Below these is a navigation bar with 'Receipt Reconciliation' and 'Received line items' tabs. A red arrow points to the 'Received line items' tab. Below the tabs is a search area with 'Search Column: Line', 'Search Text: [ ]', and 'GO' button. Below the search area is a table with the following columns: Line, Supplier SKU, Item desc, Acpt'd qty, PO/Rec'd price, Receipt line total, Invoiced price, and Invoiced. The table contains three rows of data:
 

Line	Supplier SKU	Item desc	Acpt'd qty	PO/Rec'd price	Receipt line total	Invoiced price	Invoiced
<a href="#">Edit</a>	1234	Specialty Purple Starfruit	1	\$100	\$105.00	\$100	
<a href="#">Edit</a>	4567	Banana sliced	1	\$100	\$105.00	\$100	
<a href="#">Edit</a>	789	Blood Orange peeled	1	\$100	\$105.00	\$100	
					\$315.00		

 A red arrow points to the 'Edit' link in the first row. At the bottom right of the table, the total receipt line total is \$315.00.

If you click [Edit](#) next to one of the line items, you will see a new screen, where you can alter the quantity received, etc.

The screenshot displays a 'Receipt Reconciliation' window with the following components:

- Search Panel:** Includes filters for 'All Last 30 Days PO's', 'Advanced Search', and search criteria for 'PO number'.
- Table:** A table titled 'Received line items' with the following data:
 

Line	Supplier SKU	Item desc	Acpt'd qty	PO/Rec'd price	Receipt line total	Invoiced price	Invoice
1	1234	Specialty Purple Starfruit	1	\$100	\$105.00	\$100	
2	4567	Banana sliced	1	\$100	\$105.00	\$100	
3	789	Blood Orange peeled	1	\$100	\$105.00	\$100	
					\$315.00		
- Form Fields:**
  - PO Detail:** Order quantity, PO/Rec'd price (\$100.00), PO Extended amount (\$100.00), PO Tax amount (\$5.00), PO Freight amount (\$0.00), PO Total line amount (\$105.00).
  - Receiving Detail:** Accepted quantity (1), Received ext. amt (\$100.00), Received freight amt (\$0.00), Received tax amount (\$5.00), Receipt line total (\$105.00), GL Account, Substitute item, Reason.
  - Invoice Detail:** Invoiced quantity (1), Invoiced price (\$100.0000), Inv. extended amt (\$100.00), Invoice freight amount (\$0.00), Invoice tax amt (\$5.00), Invoice line total (\$105.00), Department code (0190).
  - Inv/Rec'd variance:** Invoiced / Rec'd qty variance (0.0000), Variance price (0.0000), Variance subtotal.

Click on the zoom icon next to Reason. Select any of the above. These screens allow you to manipulate the received items in every conceivable way. You can reject wrong items, reopen closed PO's, etc., as you see fit.

The screenshot displays a software interface for managing Purchase Orders (POs). At the top, there is a navigation bar with buttons: Save, Print, Update POStatus, Receiving Record, Corrected Inv, Reset Tax, Approval Detail, Mark Invoiced, and Notes. Below this is a search section with a dropdown for 'All Last 30 Days PO's', an 'Advanced Search' link, and search filters for 'PO number' and 'Received date'. A table lists PO numbers and their received dates.

The main area is titled 'Receipt Reconciliation' and 'Received line items'. It contains a table with the following data:

Line	Supplier SKU	Item desc	Acpt'd qty	PO/Rec'd price	Receipt line total	Invoiced price	Invoice
1	1234	Specialty Purple Starfruit	1	\$100	\$105.00	\$100	
2	4567	Banana sliced	1	\$100	\$105.00	\$100	
3	789	Blood Orange peeled	1	\$100	\$105.00	\$100	
					\$315.00		

Below the table is a form for 'PO Detail' and 'Invoice Detail'. The 'PO Detail' section includes fields for Line, Supplier SKU (4567), Item description (Banana sliced), UCM, Order quantity, PO/Rec'd price (\$100.0000), and PO Extended amount (\$100.00). The 'Invoice Detail' section includes fields for Invoiced quantity (1), Invoiced price (\$100.0000), Inv extended amt (\$100.00), Invoice freight amount (\$0.00), Invoice tax amt (\$5.00), and Invoice line total (\$105.00). A 'Department code' field is set to 0190.

A modal window is open in the foreground, showing a list of 'Reason code' and 'Description' options. The list includes:

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

Red arrows in the image point to the 'Save' button, the 'Reason' field, and the 'Reason code' list.

Revised Aug 12, 2009 7pm - Please continue to check back for the most revised edition found at the log in screen.