MARRIOTT US PROCUREMENT ONLINE GUIDE

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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 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 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 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)

➢ Chef Works ➢ Cintas ➢ Wasserstrom ➢ Courtesy Products	➢ Grainger – Coming Soon ➢ Corporate Express – Coming Soon ➢ American Hotel Register (no additional log in required, if you are asked for one please call BirchStreet support) ➢ USFoods *you will not 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.

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.

➢ Caldwell Foods ➢ Keaney Produce ➢ Coastal Produce ➢ Acme Paper	➢ ProFish ➢ Metropolitan ➢ Maryland Quality Meats ➢ Progressive Gourmet

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

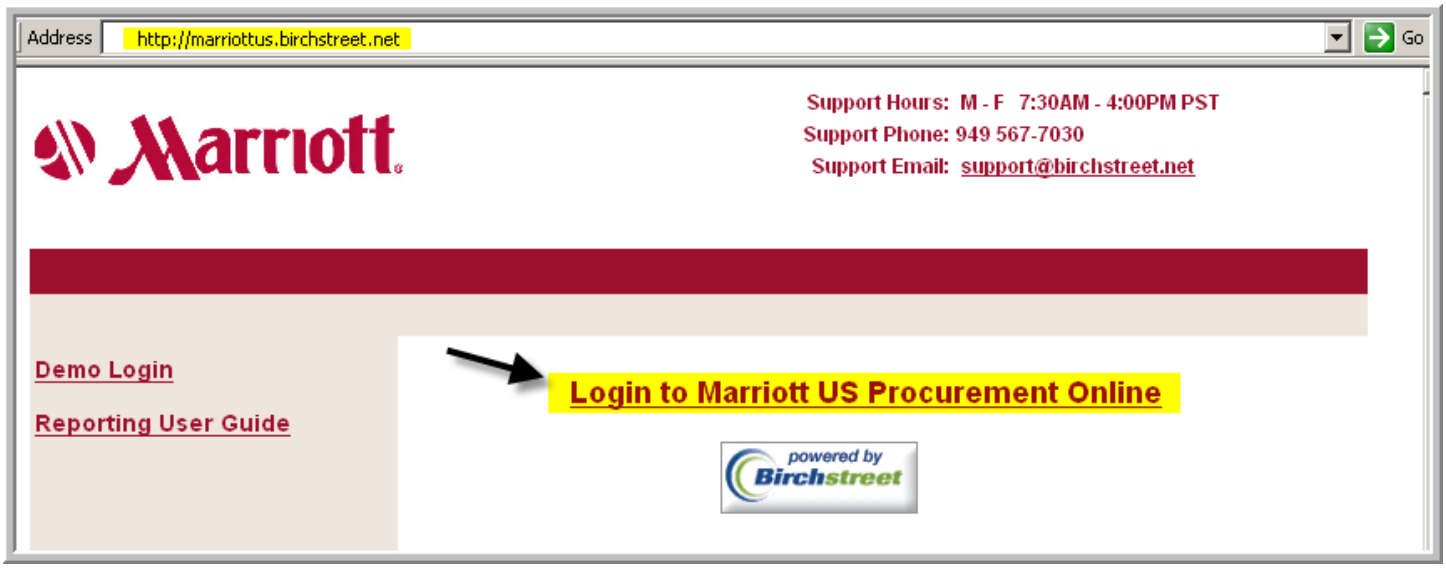
4.) Supplier On The Fly (SOTF) - i.e., Adams Burch

- 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.

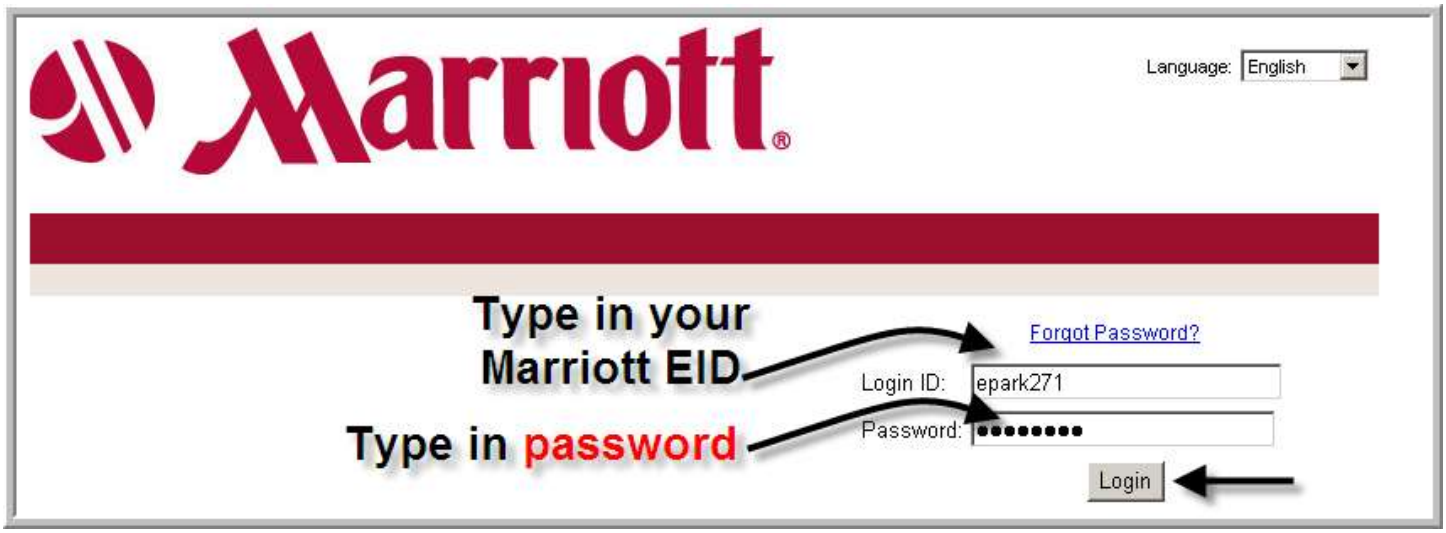
LOGIN SCREEN

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

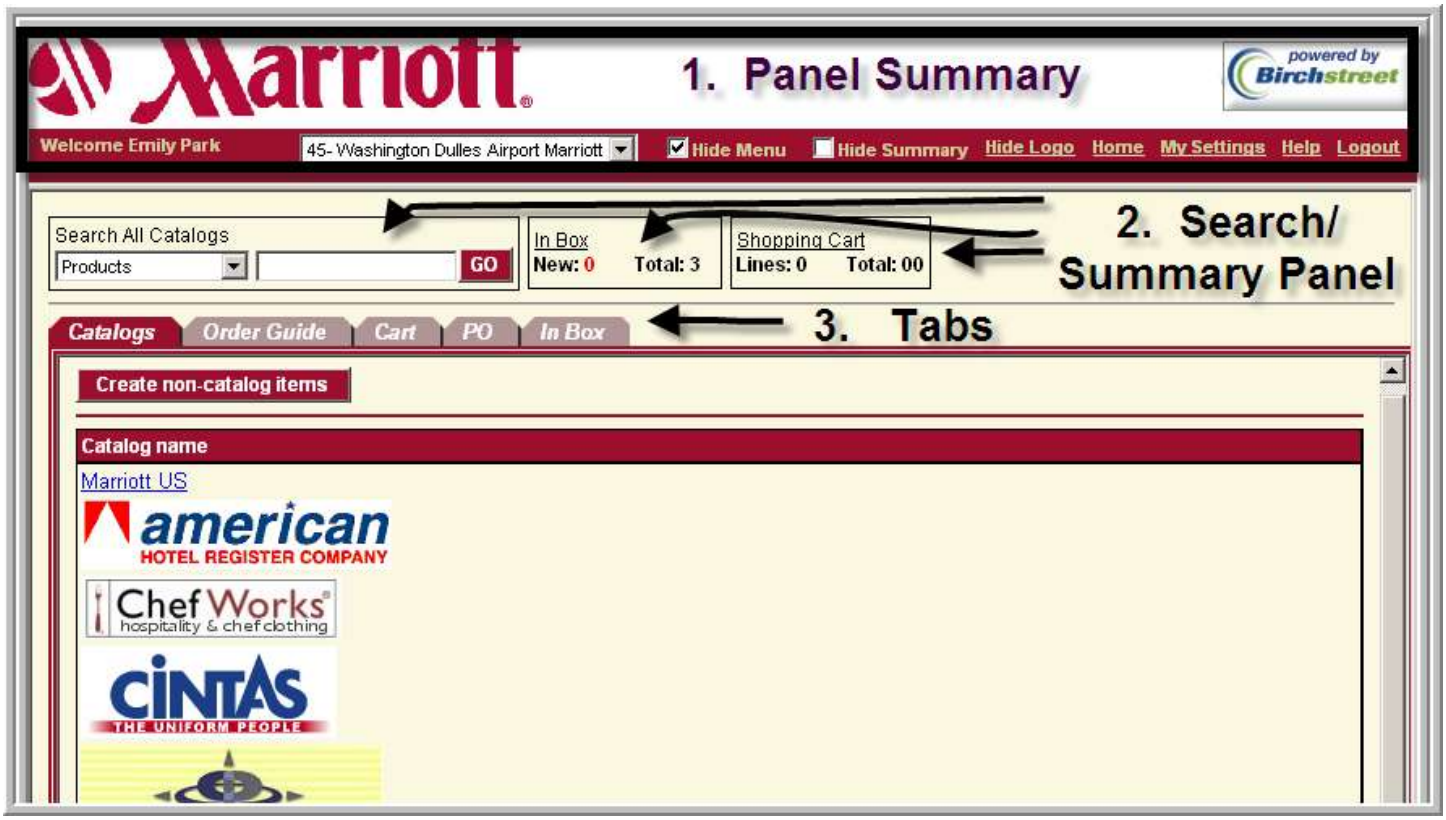
Click the link 'Login to Marriott US Procurement Online'



- 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



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**

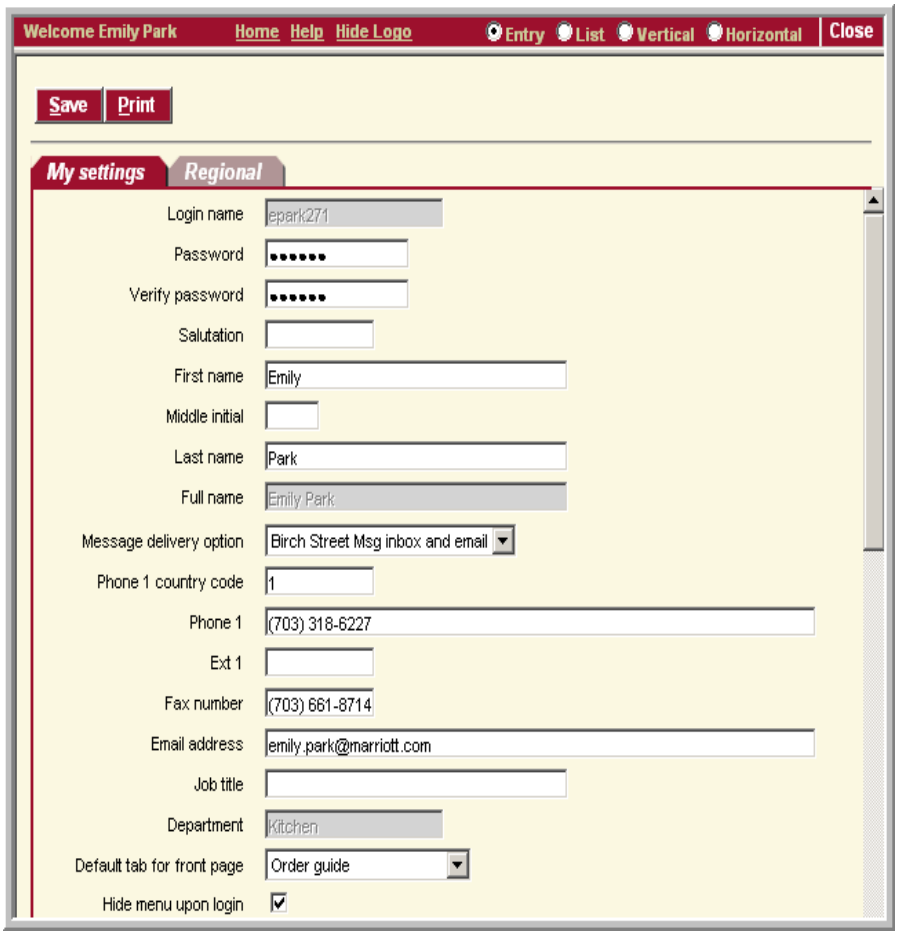
d. **My Settings -** opens up a new window (important-please open this for your initial login-see next page)

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.



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

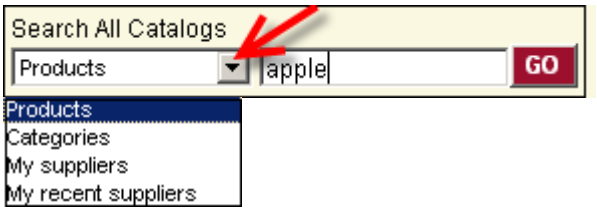
Default Tab for Front Page: use the dropdown to select which Tab should be opened upon each log in. For example, if you are a Purchasing Agent that uses primarily Order Guides to place orders then Order Guides will be the default tab for front page.

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

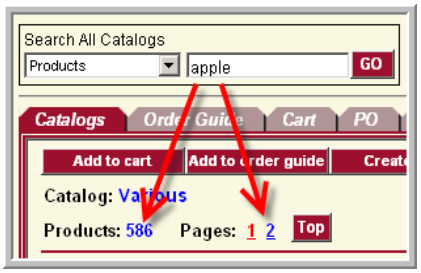
No. 2 - The **Search/Summary Panel** contains the Search window, used to search the Catalog. It also displays information on the contents of the Inbox and the Shopping Cart.

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.

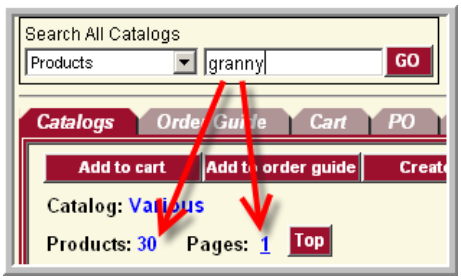


Example:
Use the dropdown to change the search by Products and type 'apple'. Click 'Go'
The system returns all items with the key word apple anywhere in the data.

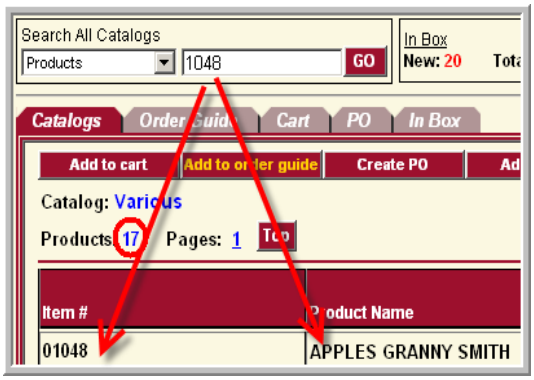


There are 586 products, 2 pages of data with the key word apple.

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 and 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 exceptation, 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.

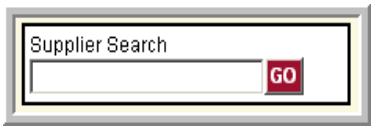
You can view and access products in the catalogs either directly by drilling down into the categories and browse or by using Search All Catalogs.

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.

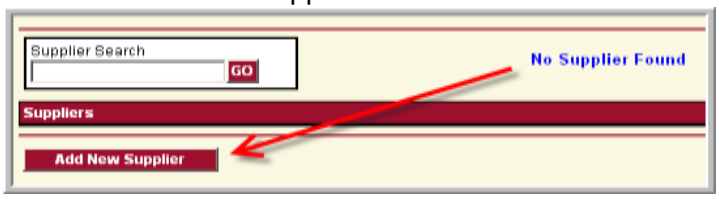
You must first identify what supplier these items will be purchased from so click ‘select supplier’. This opens the Supplier Search box.



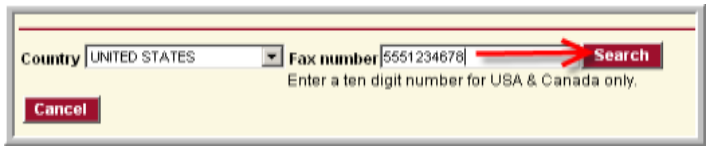
Type in a key word within the supplier’s name i.e. Produce and click Go. Try to pick a broad key word like produce, just in case you spelled the descriptive name incorrectly.

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

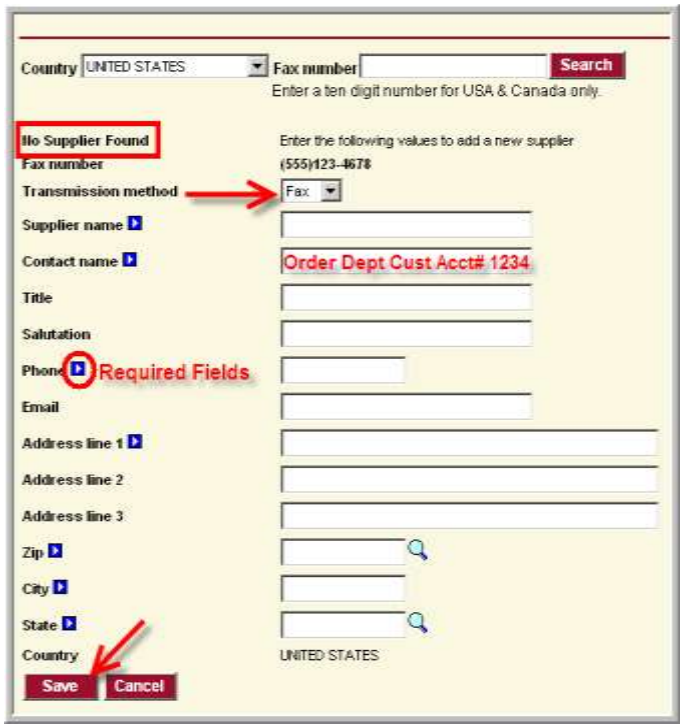
If your supplier is not found it is a SOTF click ‘Add Supplier’.



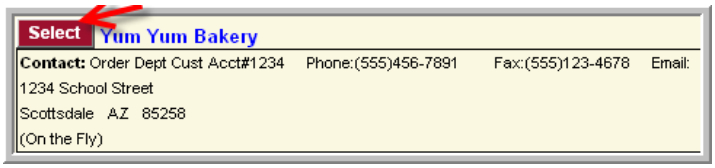
Next, type in the SOTF’s fax number with no dashes or parenthesis. In case you spelled the name wrong the system will try to find the supplier by the fax number. The fax number acts as a thumb print or account number for each supplier. Click on ‘Search’.



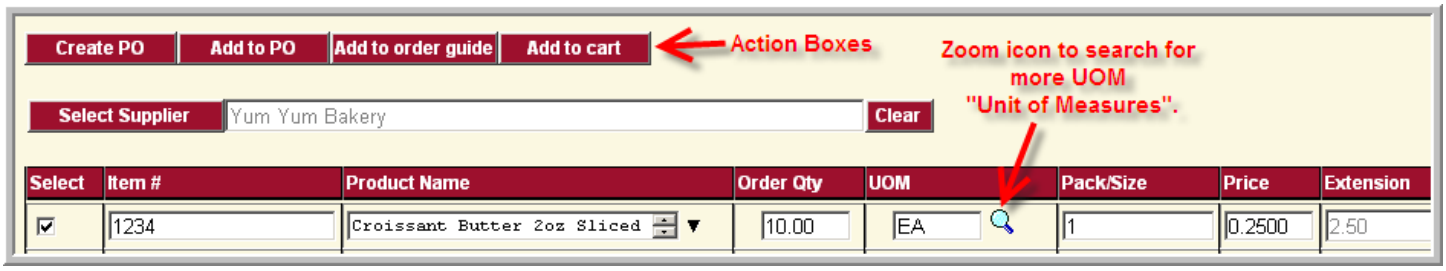
The search will come back ‘No Supplier Found”.
SOTF can choose transition method either fax or email you need to ask the supplier which is best.
Contact Name: Most likely the order will go to an order department, add your account number here.
Fill in all the required fields as indicated by the blue box with white arrow.
Click on Save.



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



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

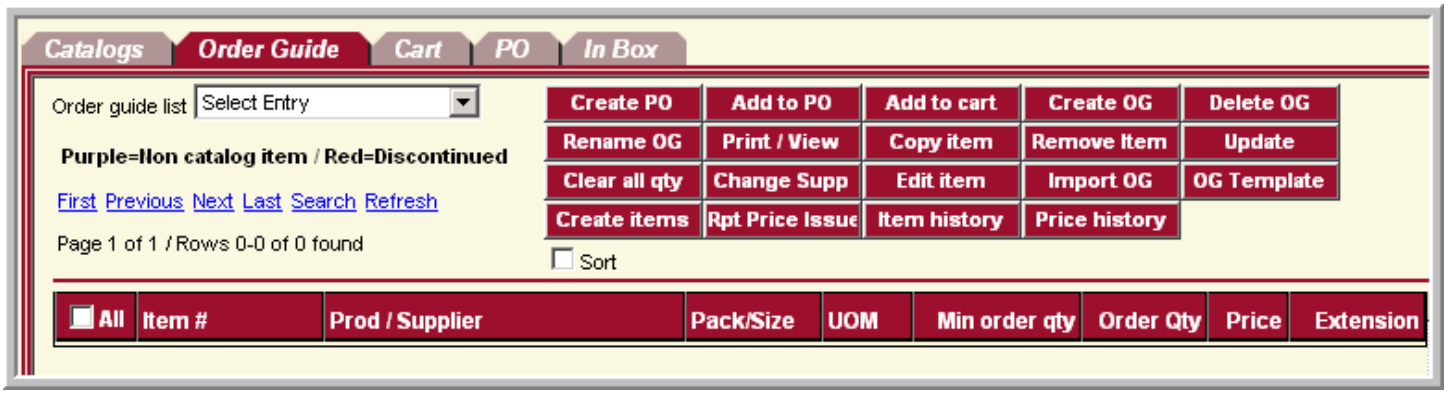


The system automatically selects the checkbox when you enter data. You do not need to enter quantity when simply setting up an order guide. When you do enter a quantity the system also calculates the total price at the far right. Category" on the far right is not a required field however you can use 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.



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:

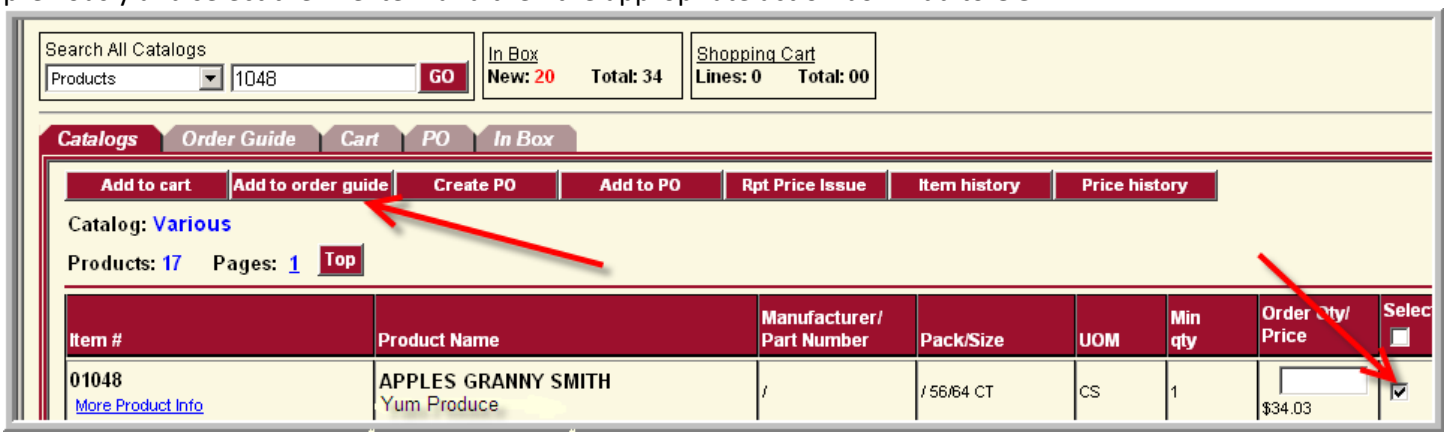
You can enter any name you want, up to 50 characters. NOTE: use your 2-3 letter of your departments abbreviation ie. HSKP for Housekeeping, ENG for Engineering, F&B for Food and Beverage, Purch for Purchasing. This will help when located your order guides. You can call your order guide by the supplier 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'.

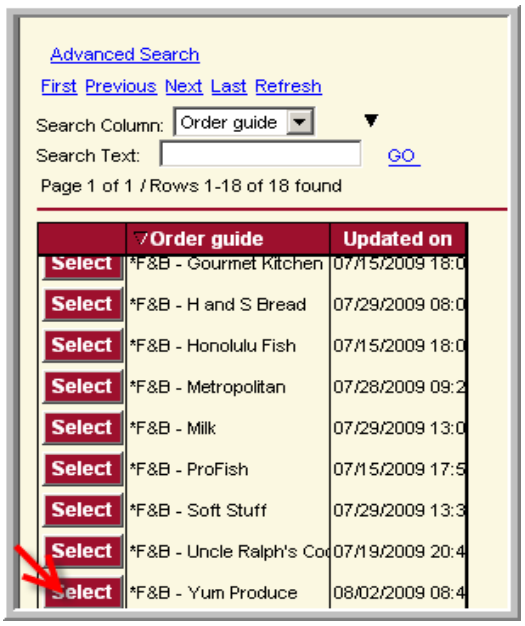
Name the OG and click OK. This brings you back to the previous screen, now showing the empty, new OG.

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'.



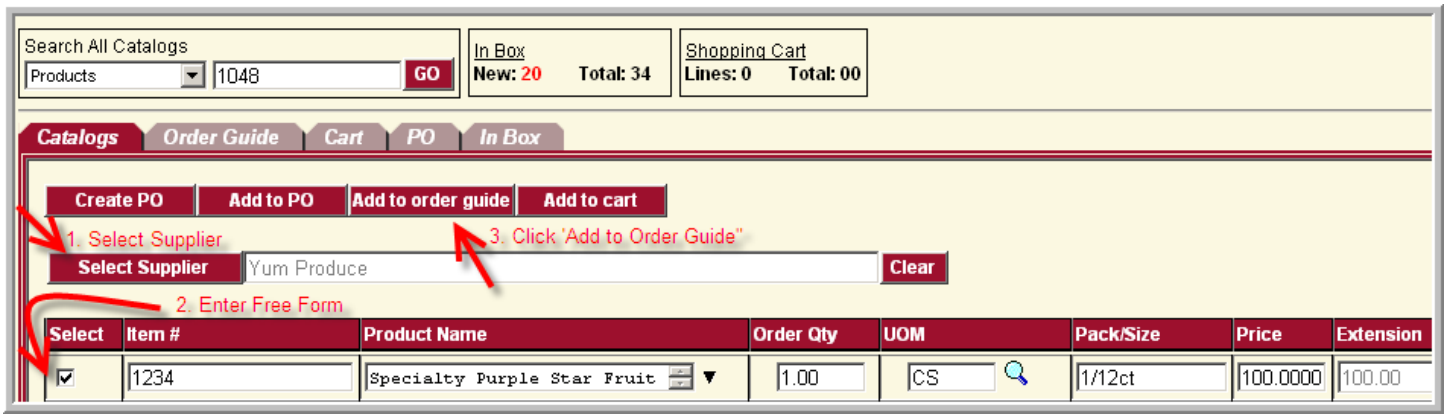
This loads the following window:



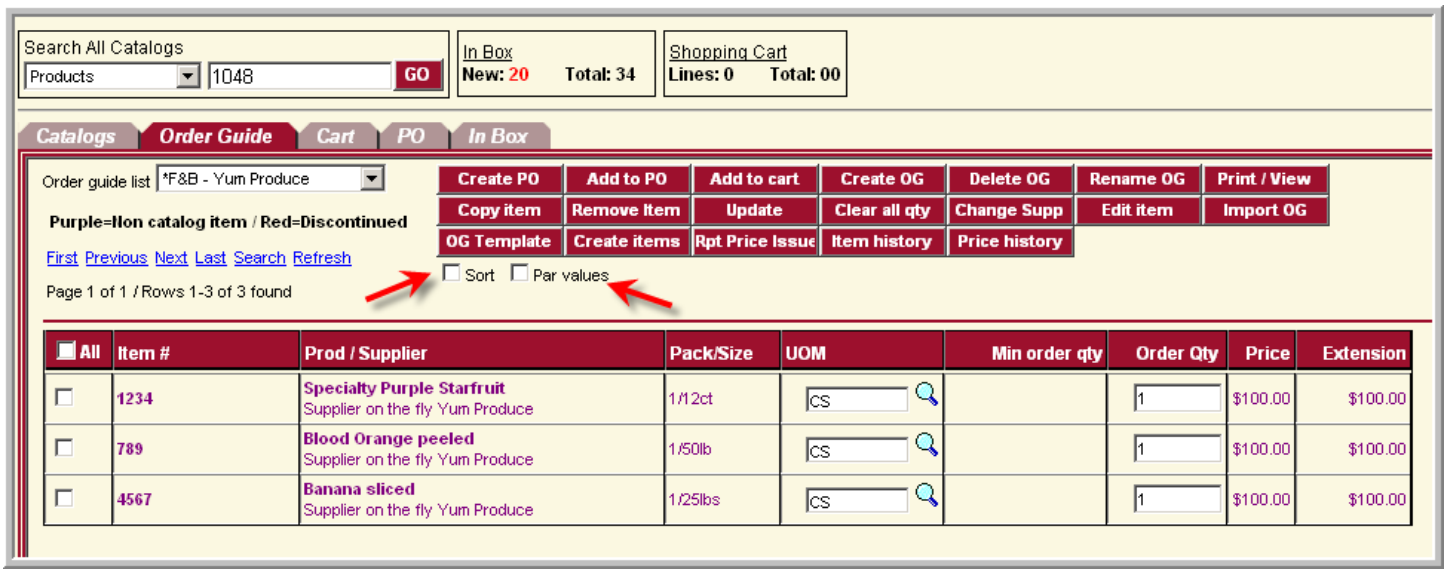
Click the 'Select' box next to the OG you want to add the items to.
Now, click on the OG tab. It will show the selected OG with the items you just added. NOTE: If you click back on the Catalog tab it still shows your selected items. This is done on purpose, to allow you to move back and forth within 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.



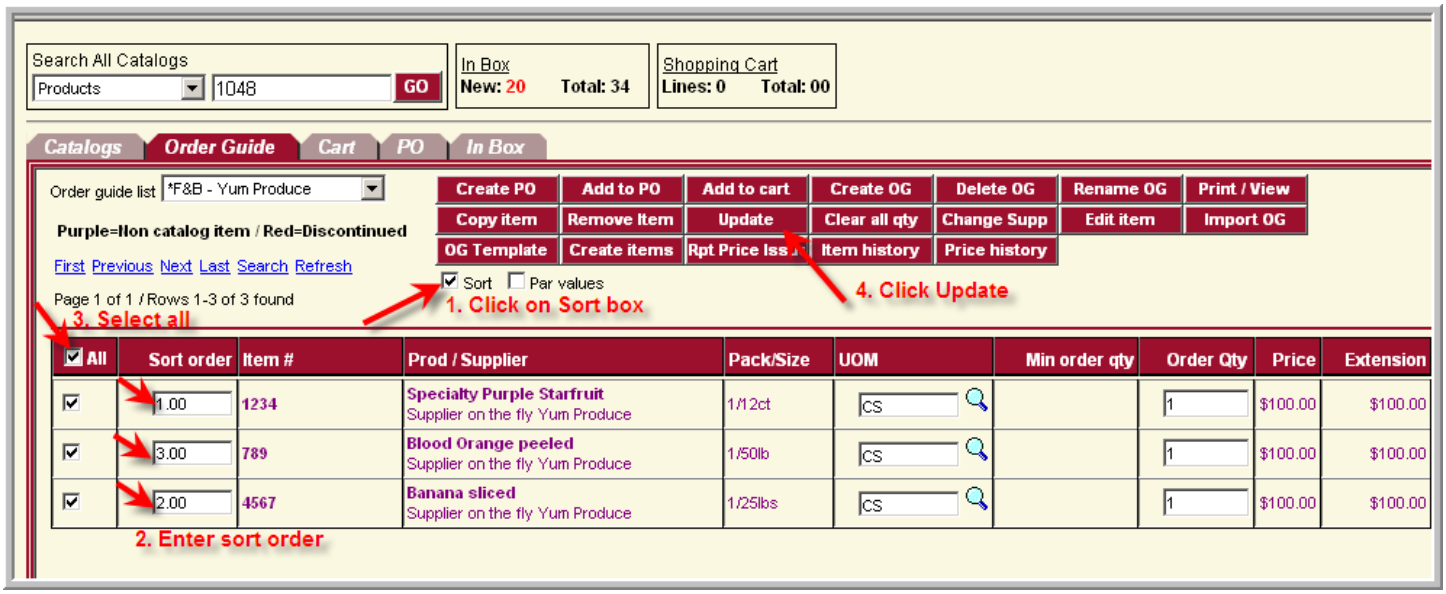
Sort Order and Par Values:



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

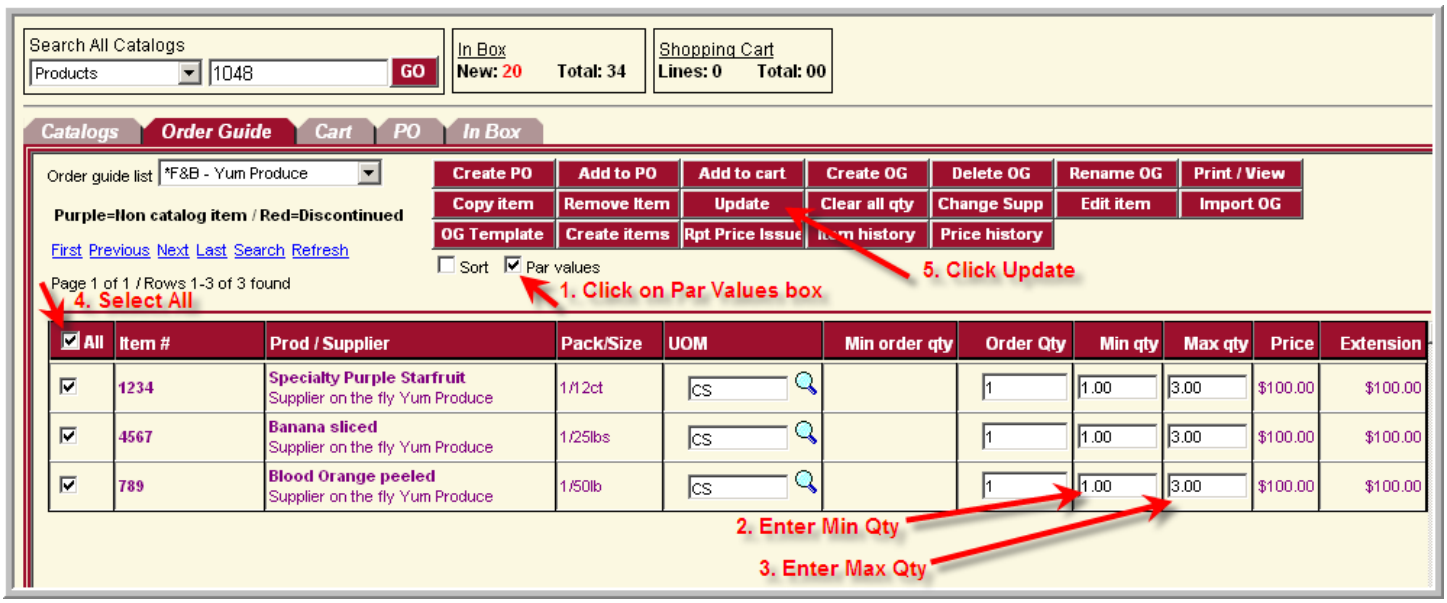
Click on the Sort Check Box, a new column appears 'Sort Order'. Enter sort numbers, Select line items, Click "Update" now your order guide will match the orders of your shelves.



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.

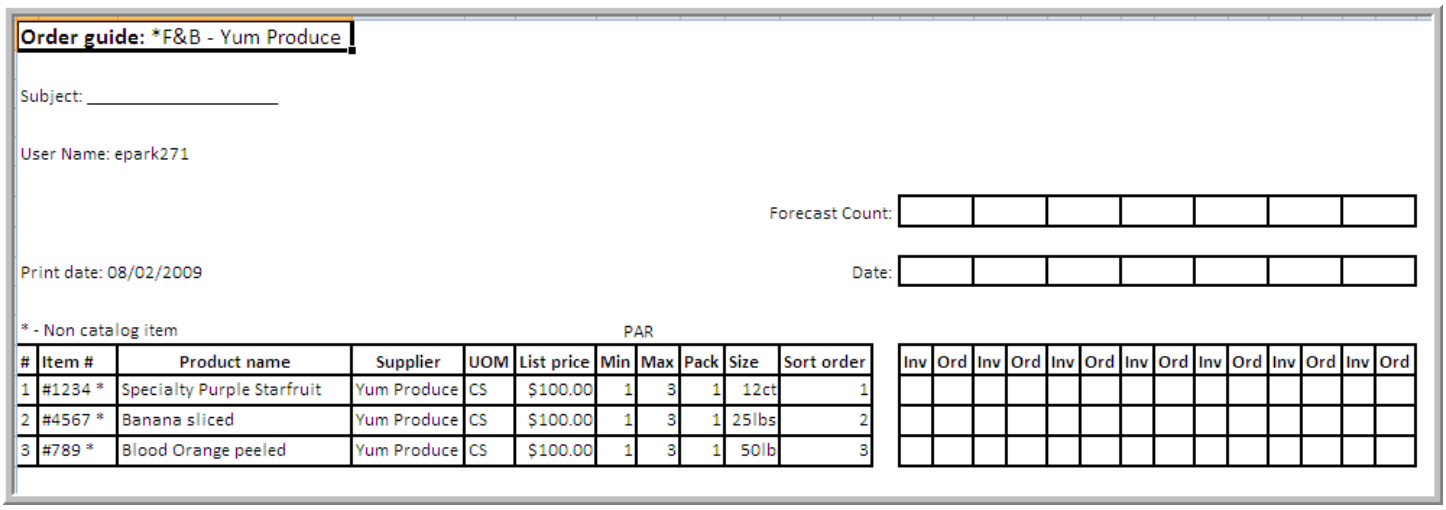
Par Value:

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.



Here is an example of how you might use the Sort and Par Values:

Click on 'Print/View, if you get a prompt to open or save the file, click open. You will now see your order guide in an Excel Spreadsheet, this is an example:



Order guide: *F&B - Yum Produce

Subject: _____

User Name: epark271

Forecast Count:

Print date: 08/02/2009

Date:

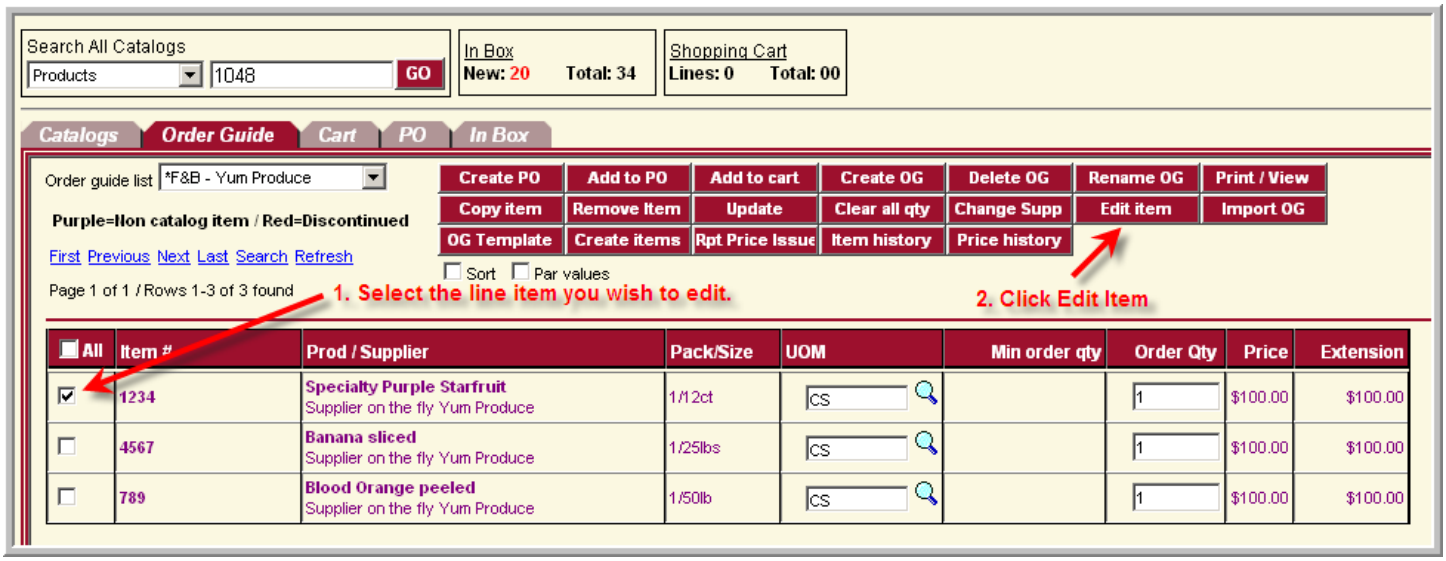
* - Non catalog item

PAR

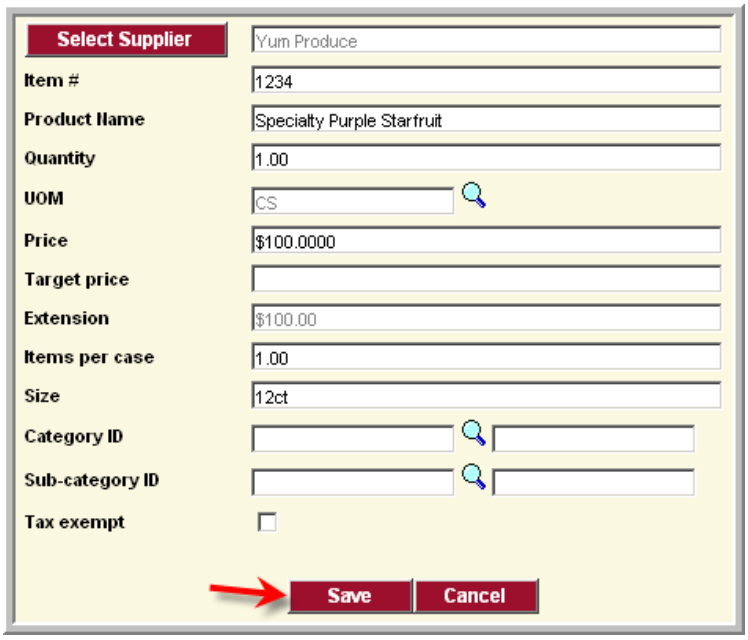
#	Item #	Product name	Supplier	UOM	List price	Min	Max	Pack	Size	Sort order	Inv	Ord	Inv	Ord	Inv	Ord	Inv	Ord	Inv	Ord	Inv	Ord	Inv	Ord
1	#1234 *	Specialty Purple Starfruit	Yum Produce	CS	$100.00	1	3	1	12ct	1														
2	#4567 *	Banana sliced	Yum Produce	CS	$100.00	1	3	1	25lbs	2														
3	#789 *	Blood Orange peeled	Yum Produce	CS	$100.00	1	3	1	50lb	3														

This spreadsheet can be printed out and put on a clipboard, to make the tracking of the inventory in your stock room a lot easier. Now close this window and go back to the Order Guide.

Editing Non-Catalog Items in the Order Guide:



Select the non-catalog item in purple you wish to edit and click Edit. This brings up a separate window: Make appropriate changes and click on 'Save'.



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:

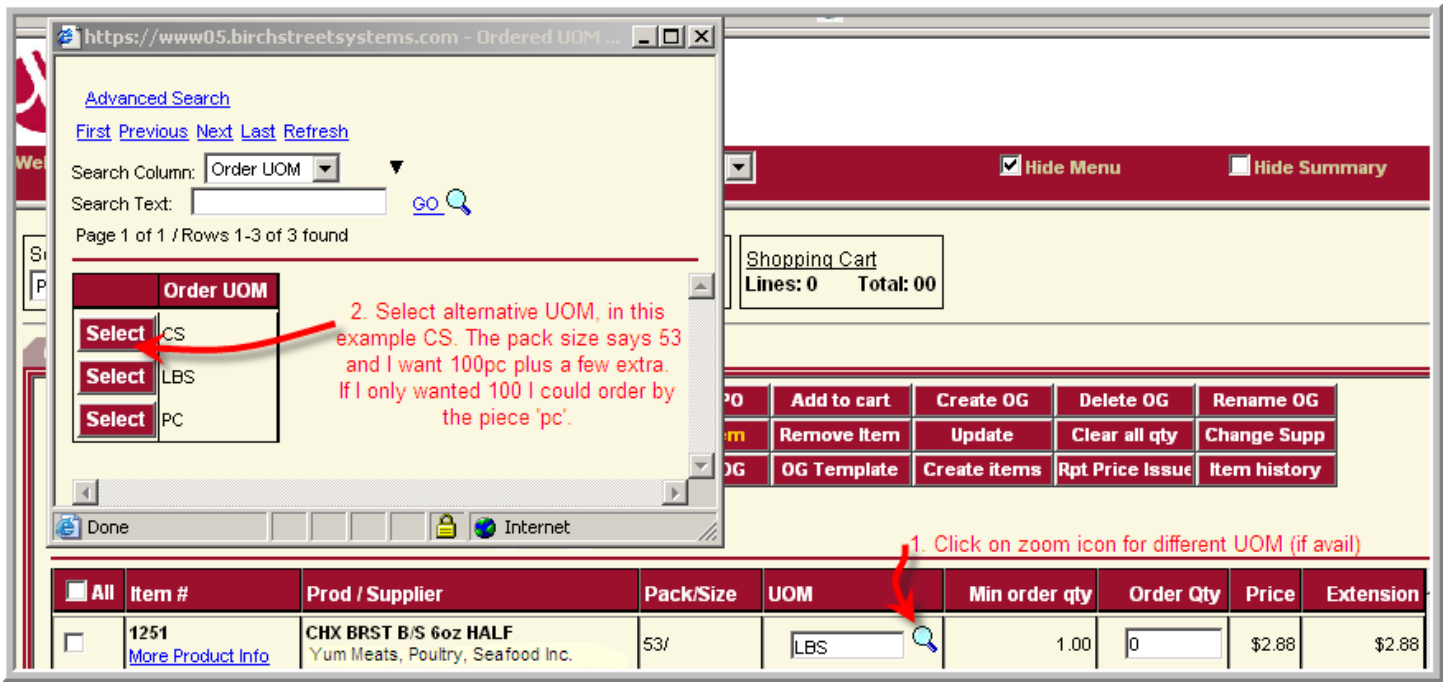
Adopted Suppliers with catalog can provide more information that described in a line item as well as provide pictures when available.

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:

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:

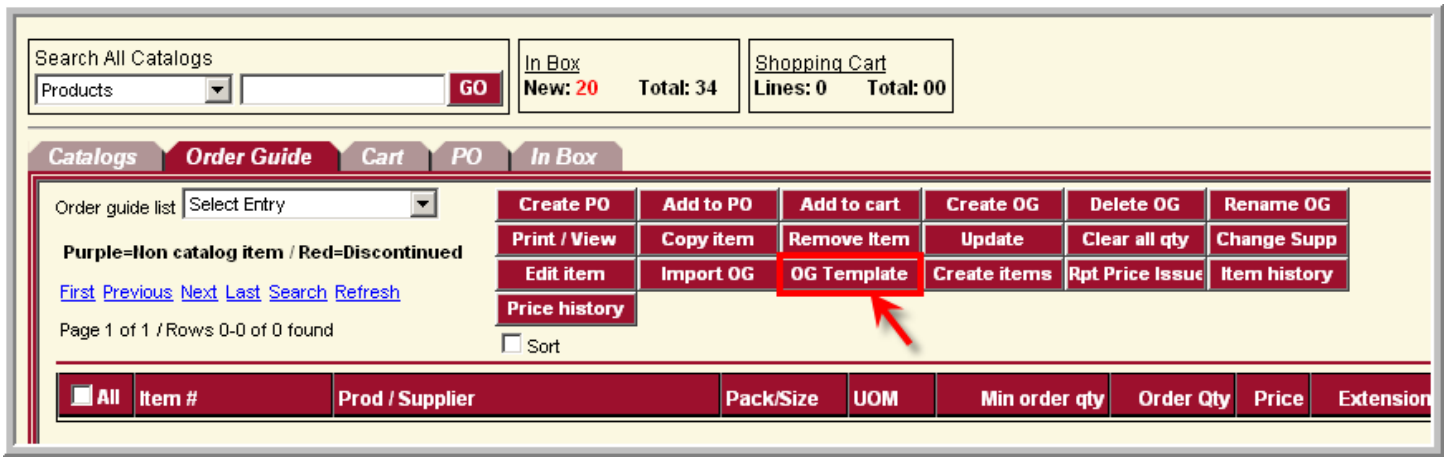
Click the checkbox next to an item and click on 'Delete Item'.

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 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.

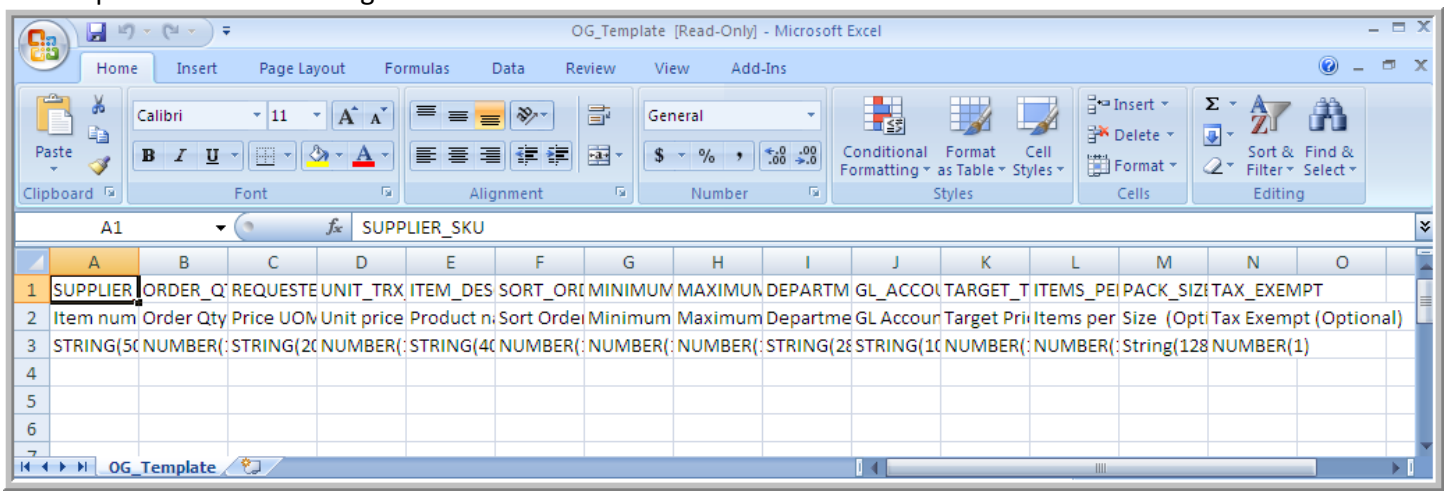
Import OG/OG Template:

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'.



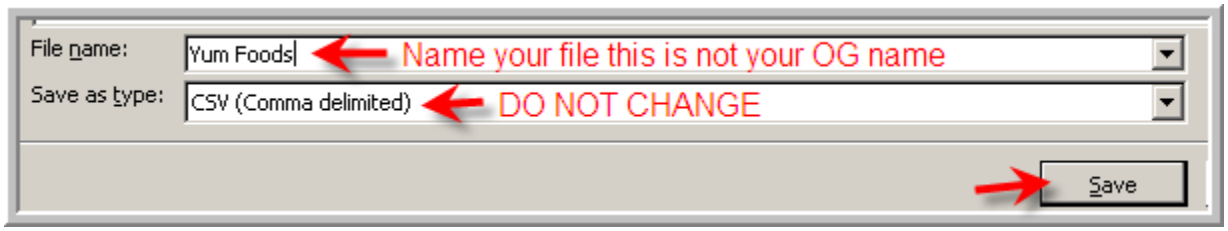
You will see the following message:

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



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.

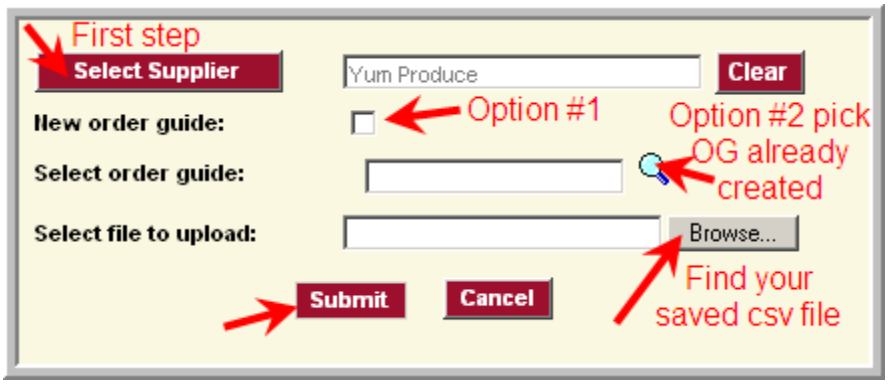
Once you have entered the information, save the file on your PC in a place where you can easily retrieve it. DO NOT change the type of file or format from CSV to anything else.



Now, click on 'Import OG'

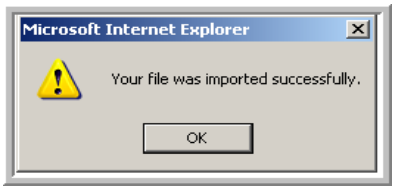
(next to OG Template). The following pop-up window appears:
Click on New Order Guide box or if you wish to import using an existing Order Guide name, select the supplier and click the zoom next to the field 'Select Order Guide"

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. It 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:



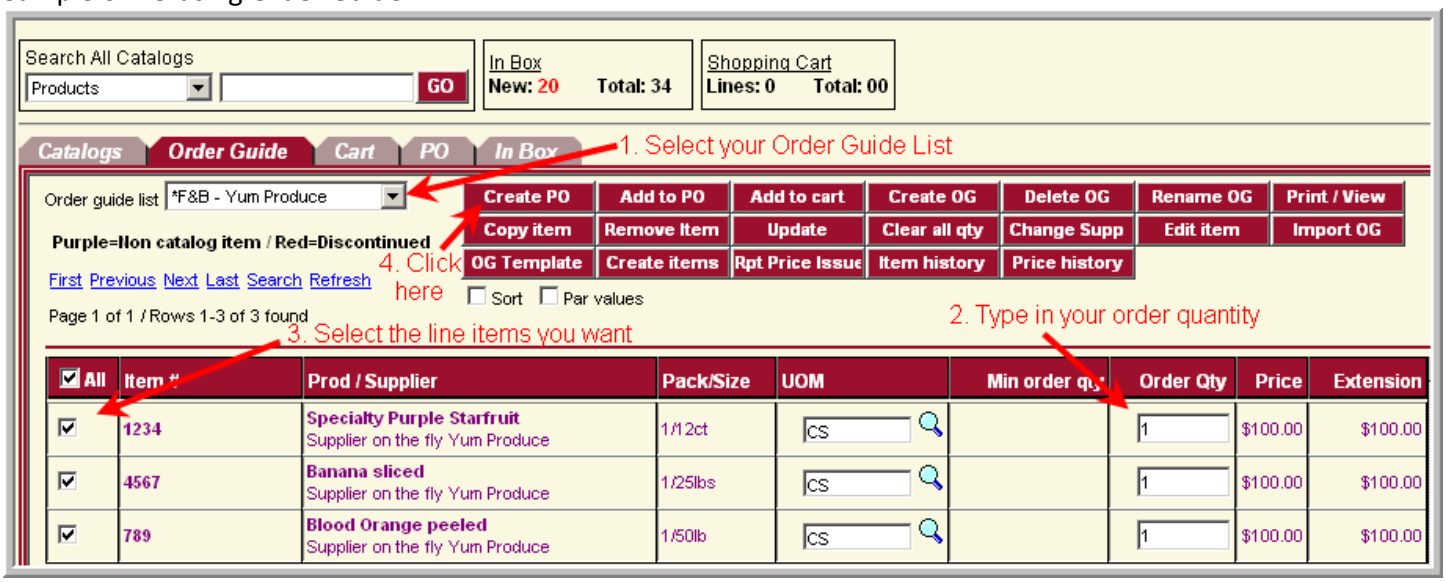
Your changes will be available tomorrow. This is an overnight process.

Creating a PO (Purchase Order)

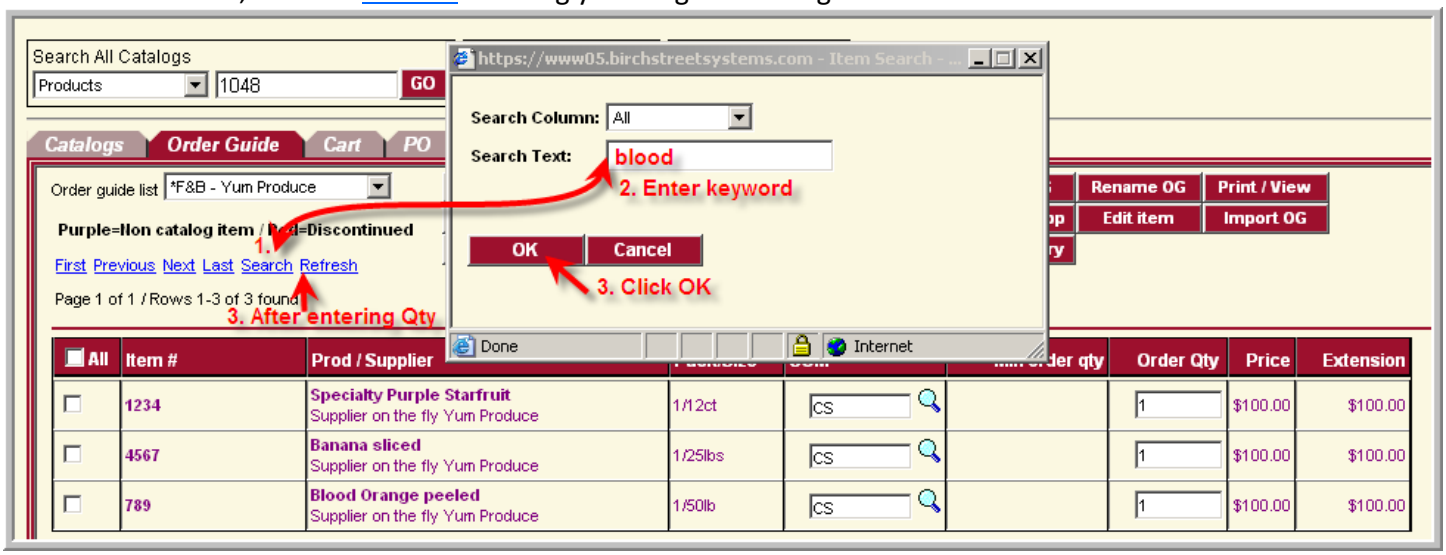
There are several methods for creating PO's.

- 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:



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.



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.

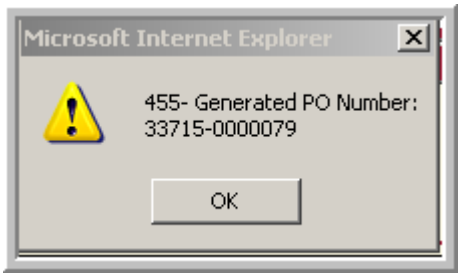
Required Delivery Date: This is the date by which you want to receive the items.. This is a required filed. You can enter the date in multiple ways; type the date manually 7/1/09, click the calendar Icon and select a day and click OK, or you can use a shortcut, by typing something like +1 for tomorrow.

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

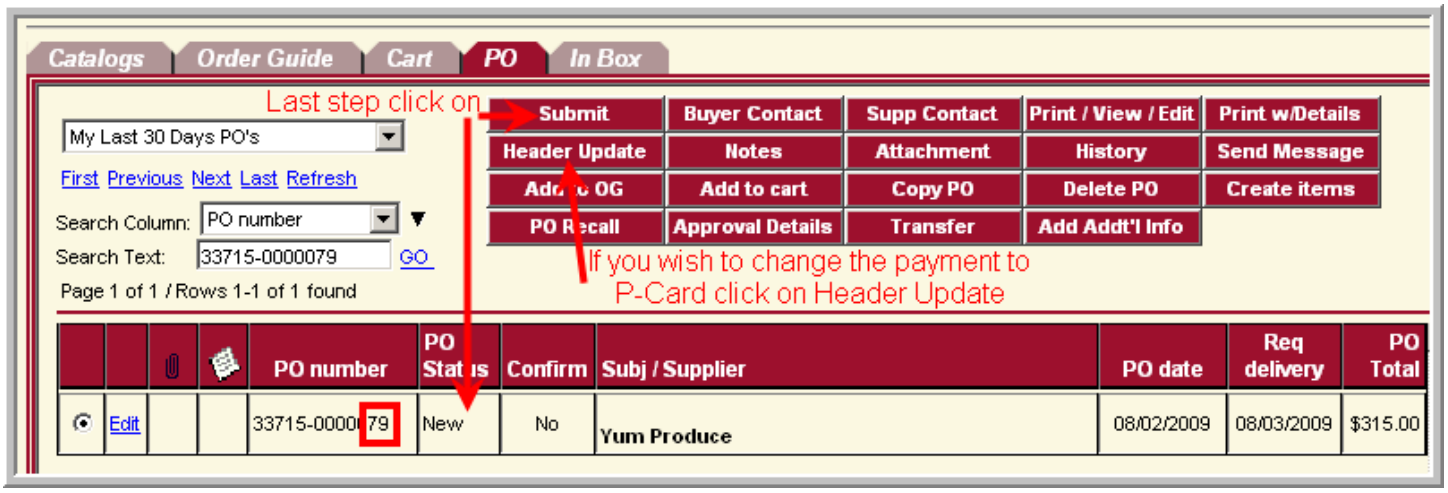
Allow Partial Ship: When this box is checked, the supplier has the option to ship part of your order.

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

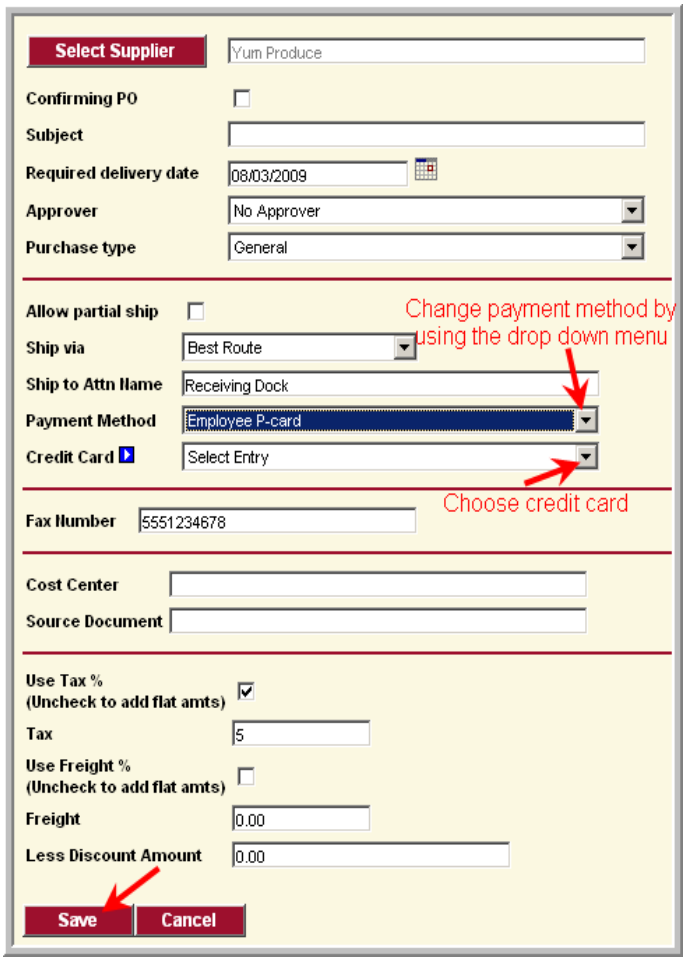
Tax/Freight: Enter numeric values on the right. If the box on the left is checked, the value is a percentage. If the box is unchecked, the value is a flat amount.
Less Discount Amount: Value entered is flat dollar amount, to be take off the total PO value, after Tax and Freight were added. Click 'OK'



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.

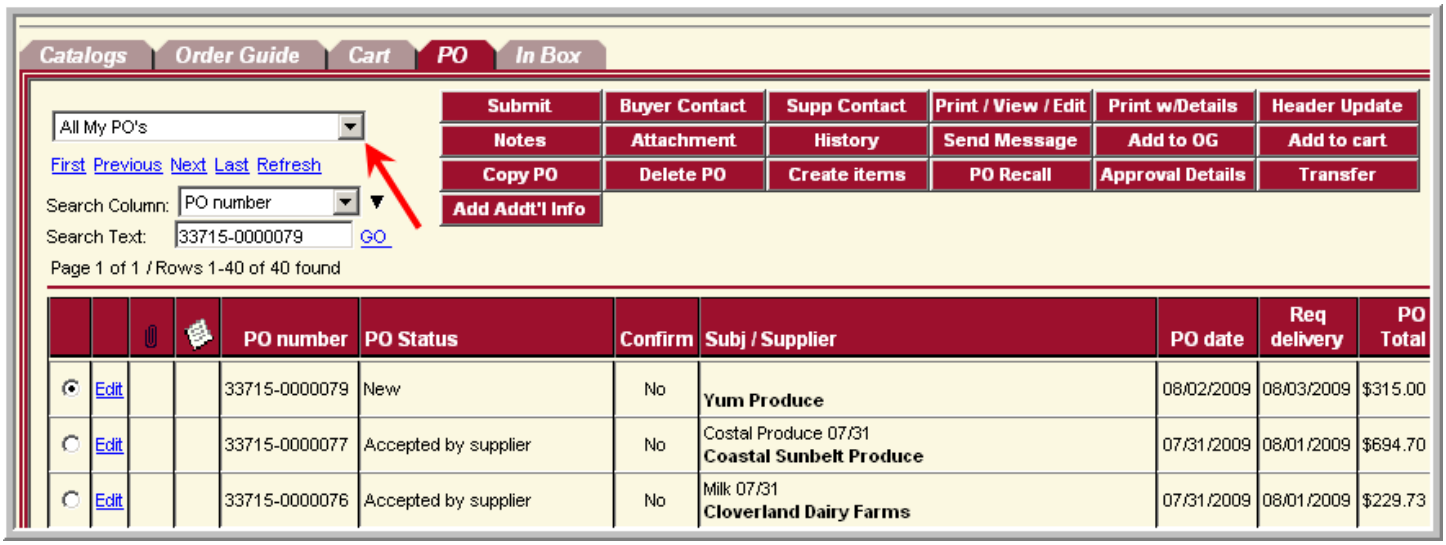


The default method of payment is Purchase Order or billable net terms with the contract or you can choose P-Card. Birch Street does not charge the P-Card it simply notifies the supplier to use the P-card on file. **BEFORE** clicking on 'Sumbit' click on the action box '**Header Update**'. Here you can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



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

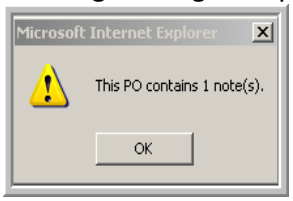
Attachment and Notes Columns:

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.

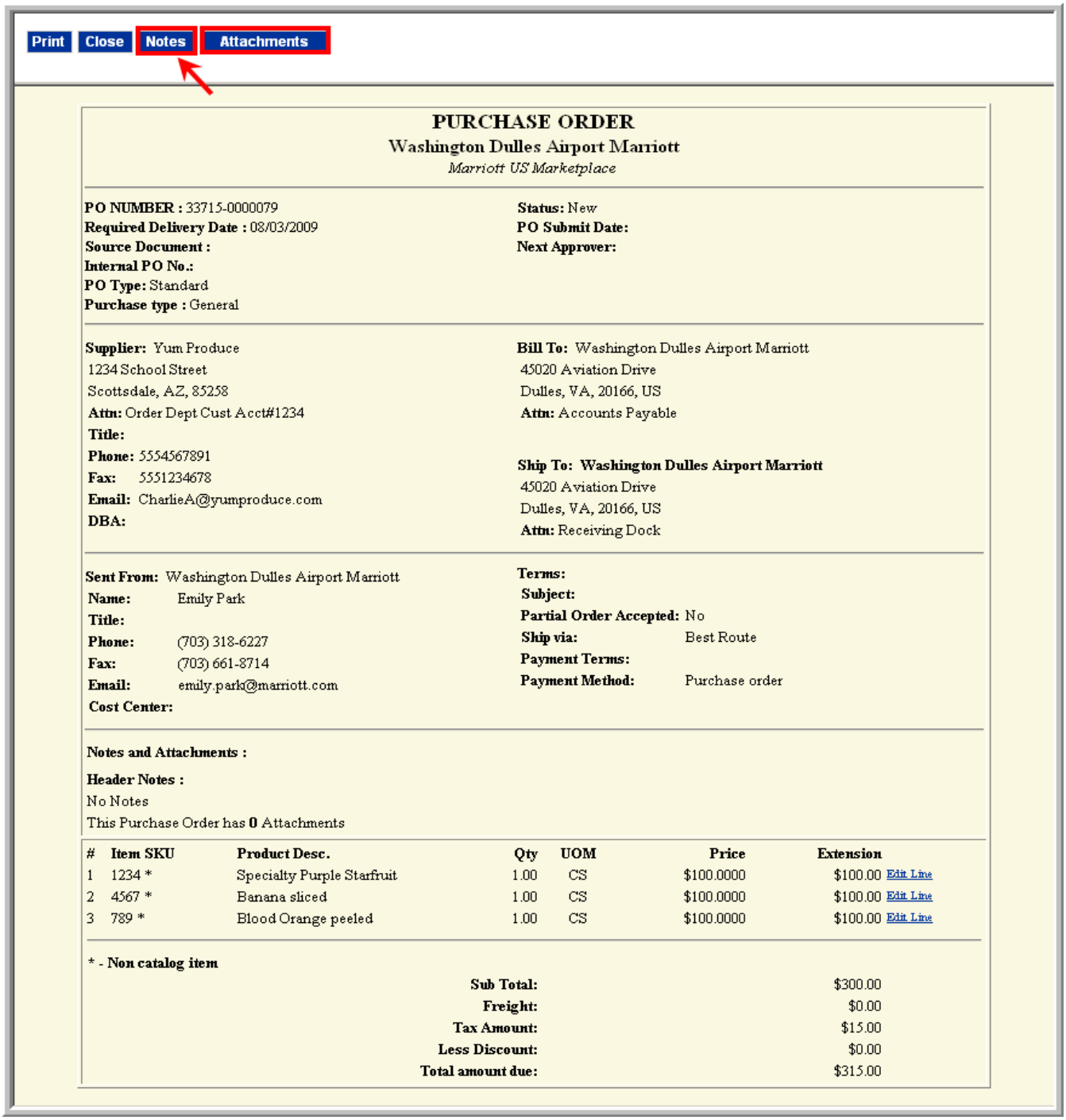
Print/View/Edit a PO:

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.



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

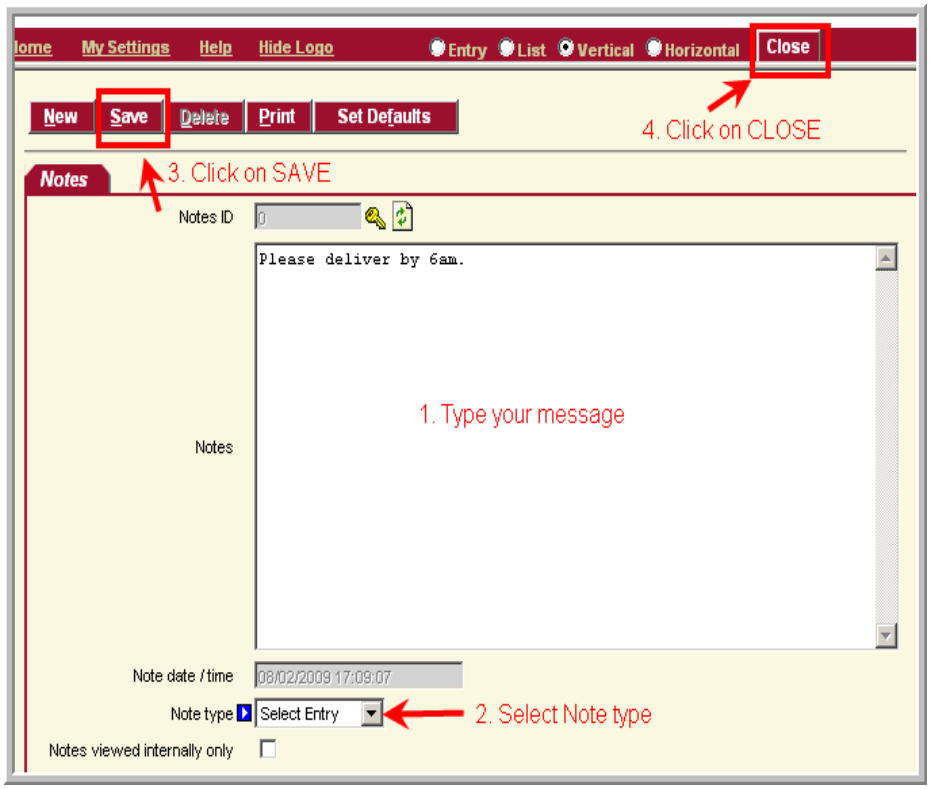
Notes and Attachments :

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	Edit Line
2	4567 *	Banana sliced	1.00	CS	$100.0000	$100.00	Edit Line
3	789 *	Blood Orange peeled	1.00	CS	$100.0000	$100.00	Edit Line

* - **Non catalog item**

Sub Total:	$300.00
Freight:	$0.00
Tax Amount:	$15.00
Less Discount:	$0.00
Total amount due:	$315.00

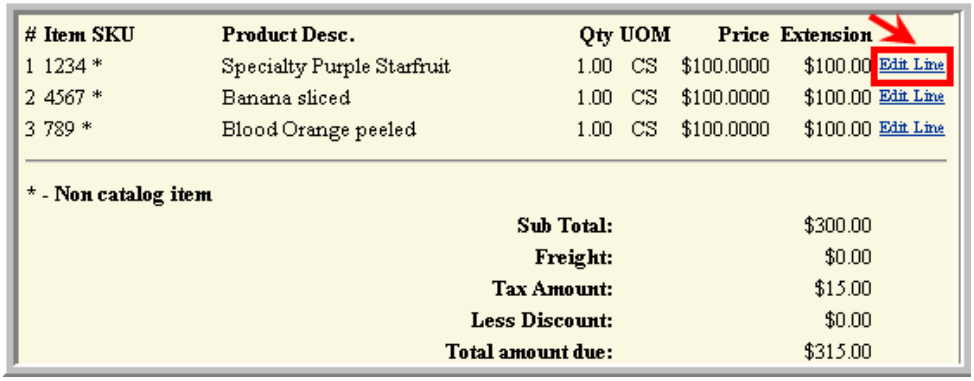


You can enter free form text in the main field. The date of the note is pre-populated, but can be changed. The Note type drop down field is a required field. The Note type should indicate who is writing the note, not whom the note is intended. The check box 'Notes viewed internally only' ensure that 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:

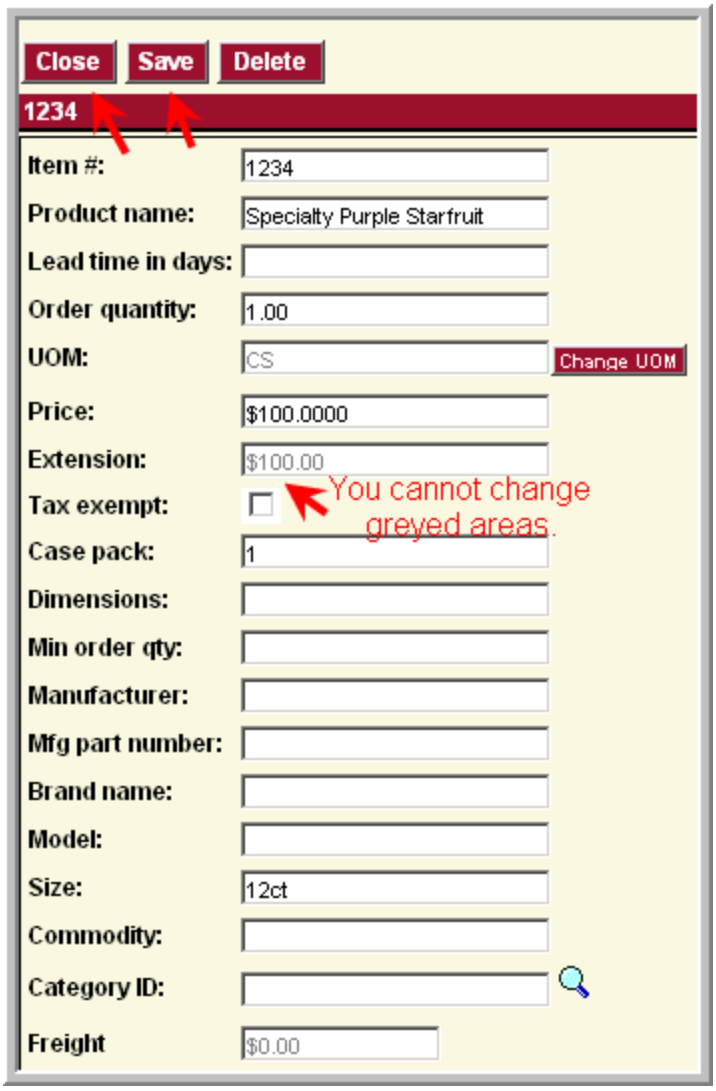


#	Item SKU	Product Desc.	Qty	UOM	Price	Extension	
1	1234 *	Specialty Purple Starfruit	1.00	CS	$100.0000	$100.00	Edit Line
2	4567 *	Banana sliced	1.00	CS	$100.0000	$100.00	Edit Line
3	789 *	Blood Orange peeled	1.00	CS	$100.0000	$100.00	Edit Line

* - Non catalog item

Sub Total:	$300.00
Freight:	$0.00
Tax Amount:	$15.00
Less Discount:	$0.00
Total amount due:	$315.00

Click on 'Edit Line'. This will bring up a separate window:

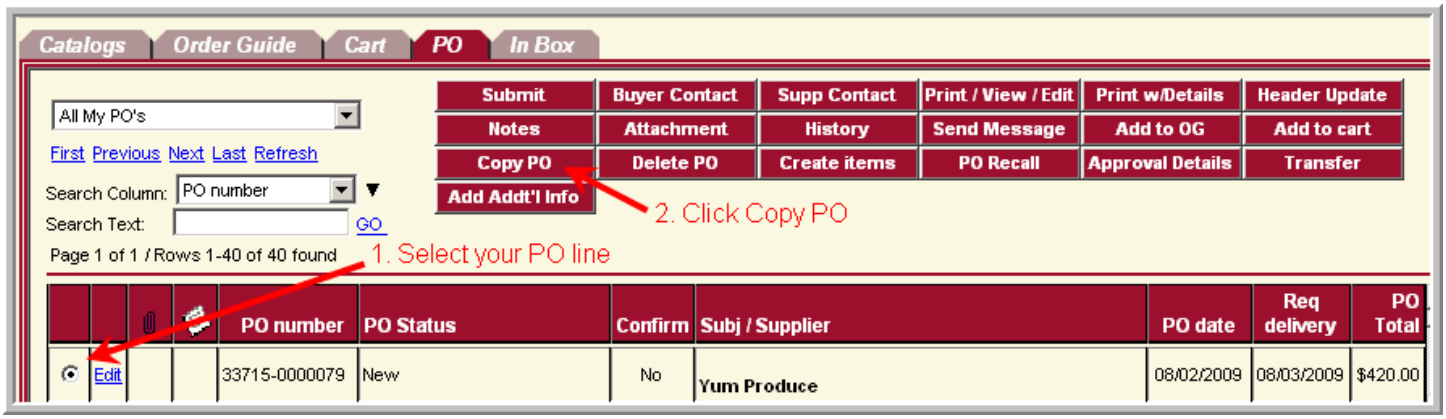


The only fields that are editable are:
Non-catalog items – all areas but extension price which is calculated based on quantity
Catalog items – quantity only

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'.

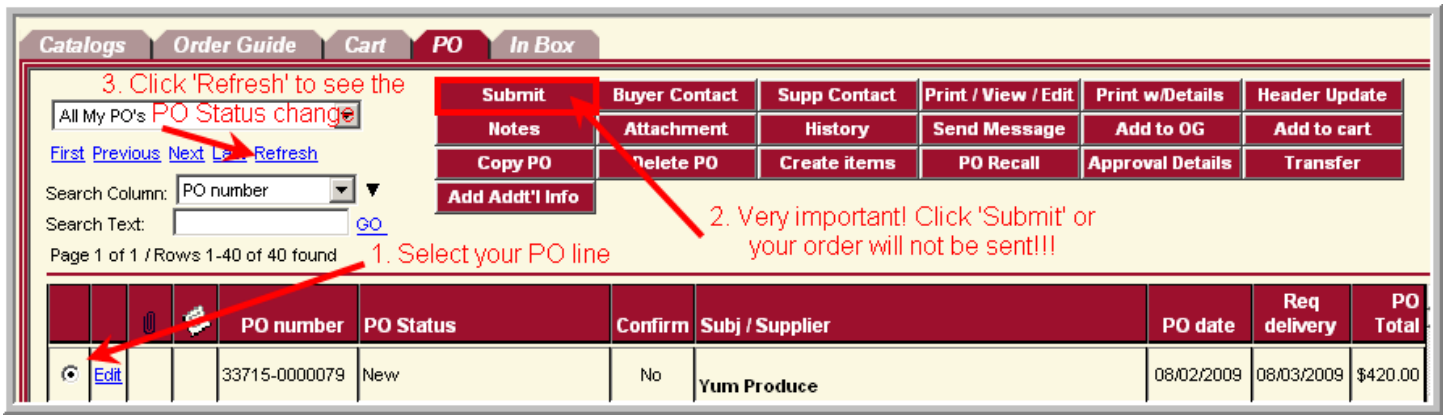


Submit PO

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:

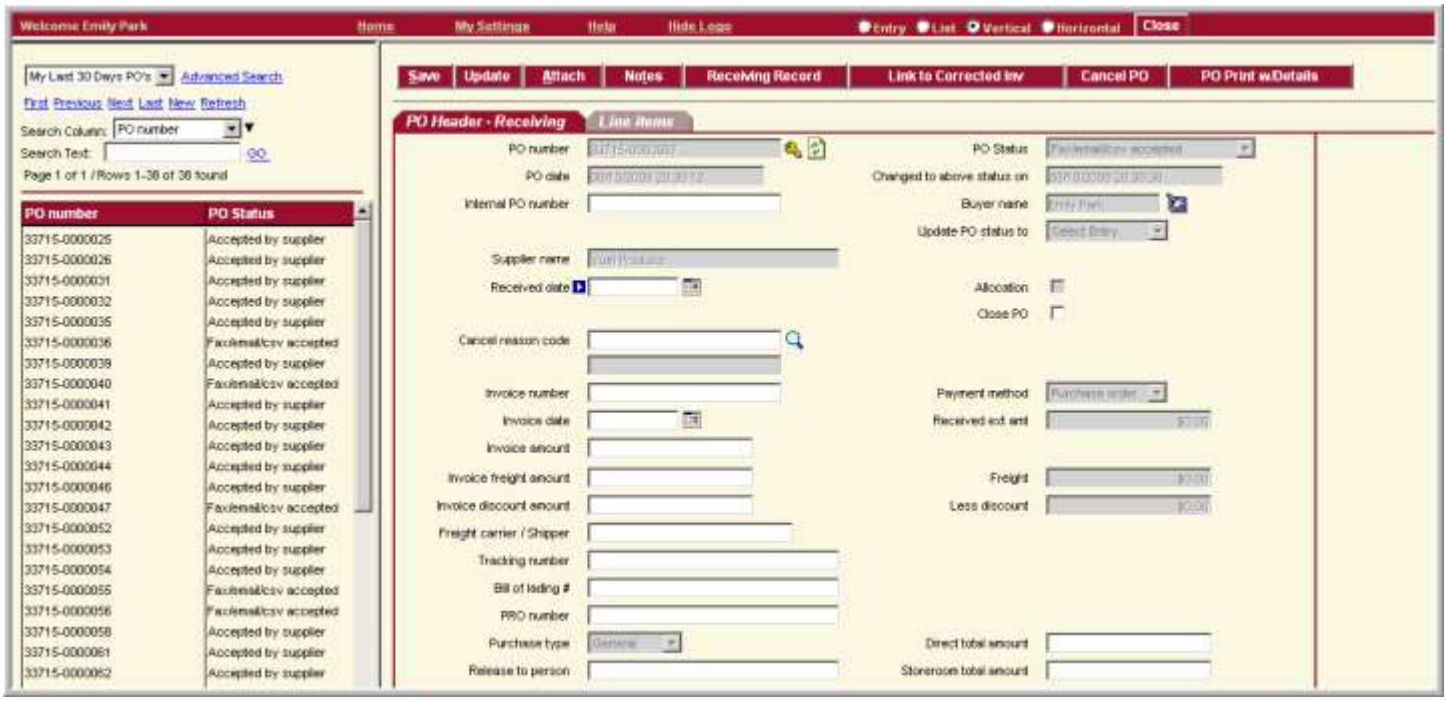
- Approval Pending, if you sent the PO for approval
- Accepted by Supplier
- Fax/email/csv accepted
- Viewed by supplier (if this status does not change to Accepted by supplier you must call the supplier and ask them to log into your account and accept the order)
- Fax failed connection not made (you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



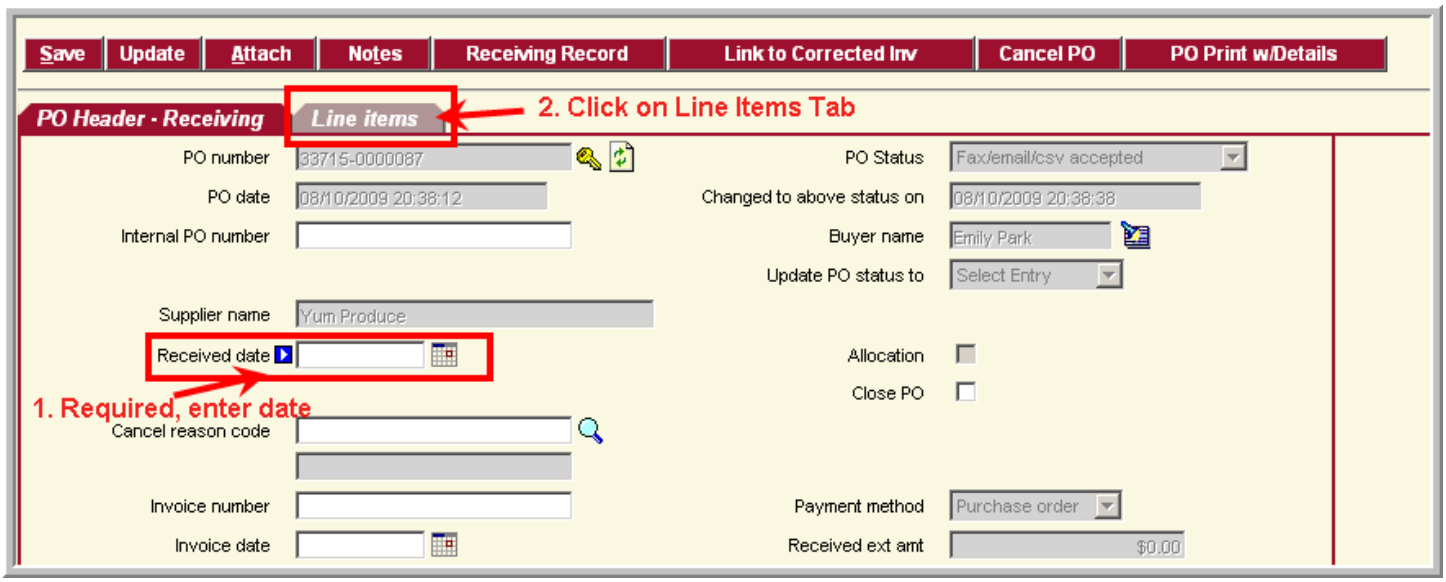
Receiving from a PO:

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".**

This will load the Receiving screen in a separate window.

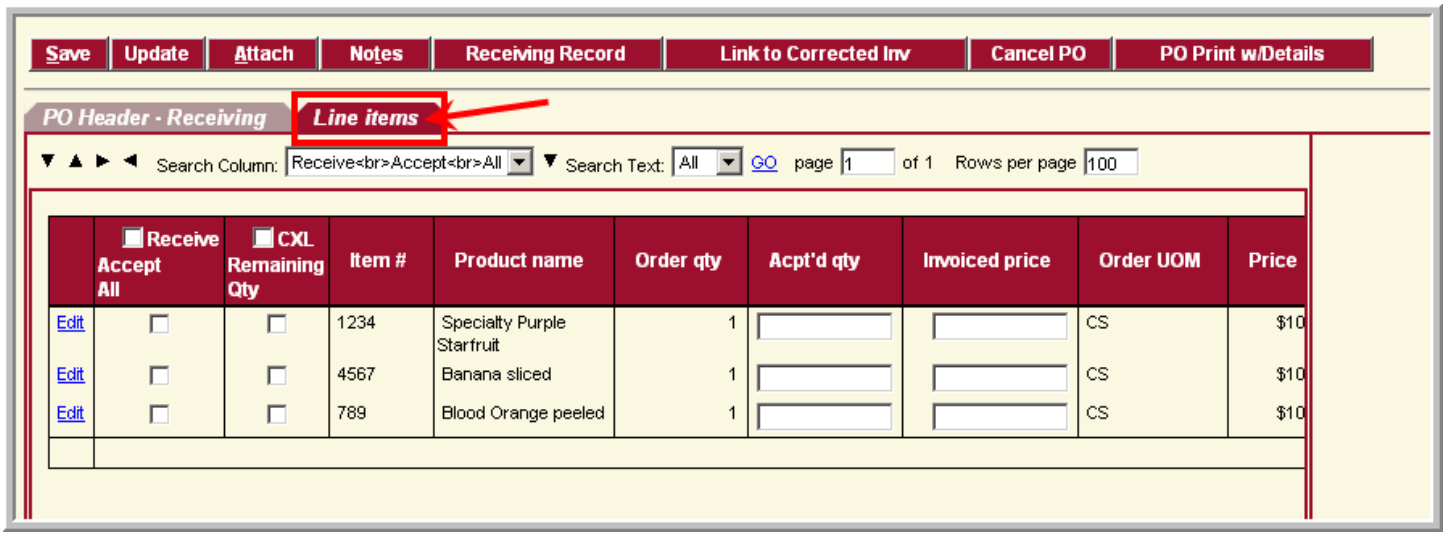


The only required field on this screen is the Received Date, type in the date



Receiving Individual Line Items

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



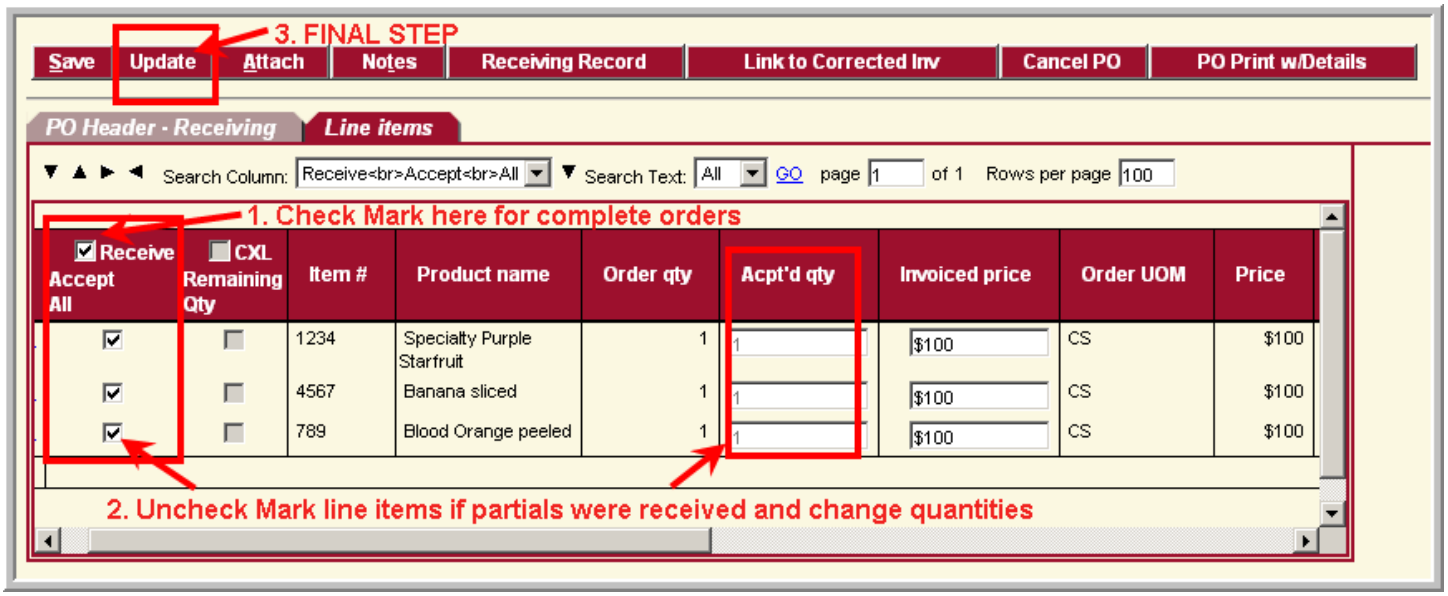
When receiving partial deliveries, check the boxes next to the items you are accepting and enter the quantity received. If there is a large order with multiple lines and only one line item requires editing. When going back into the receive function for the remaining partial, Check the Accept box for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

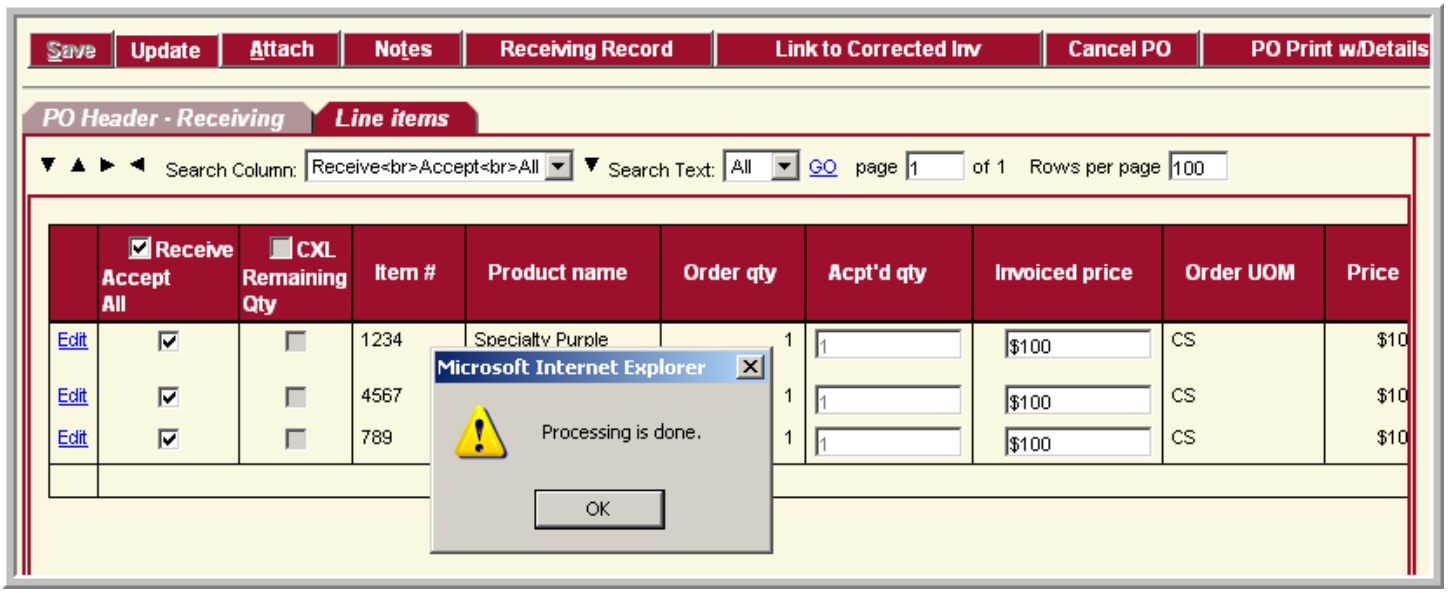
When you are done, click **Update.**

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.

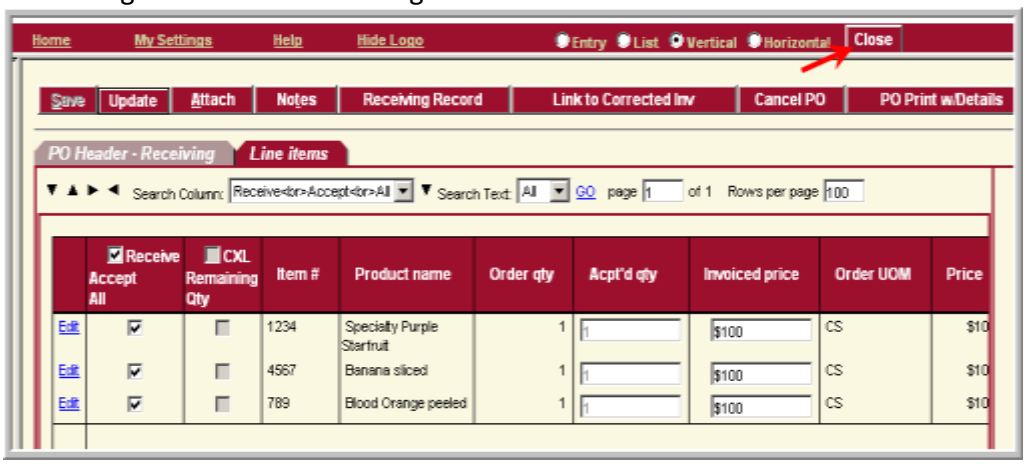
If you merely want to save a record and come back to it later, click SAVE (next to Update).



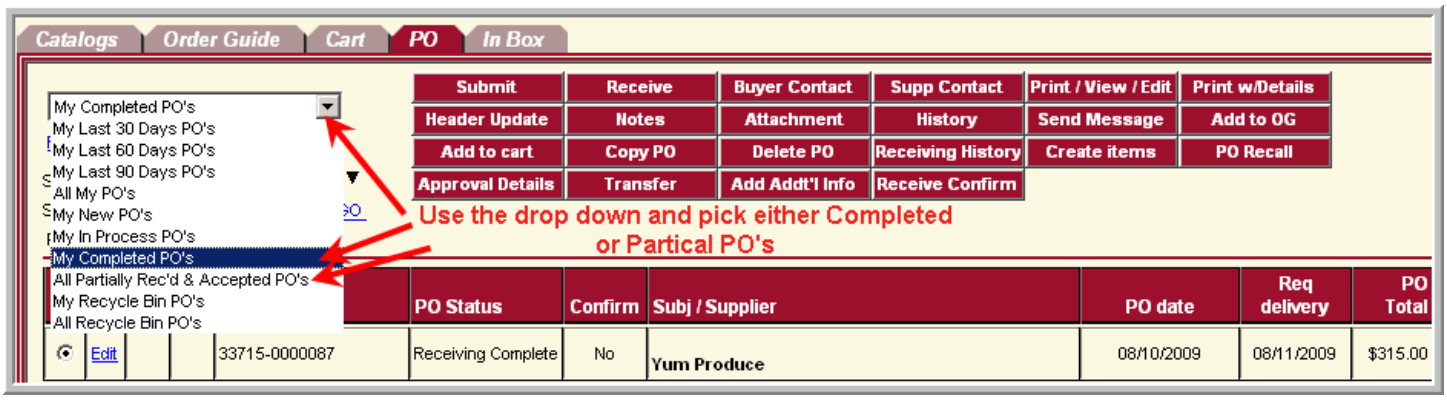
When going back into the receive function for the remaining partial, Check the Accept box for the particular line item and click Update. After Clicking on Update click on OK:



Click the ‘Close’ button to go back to the Front Page.

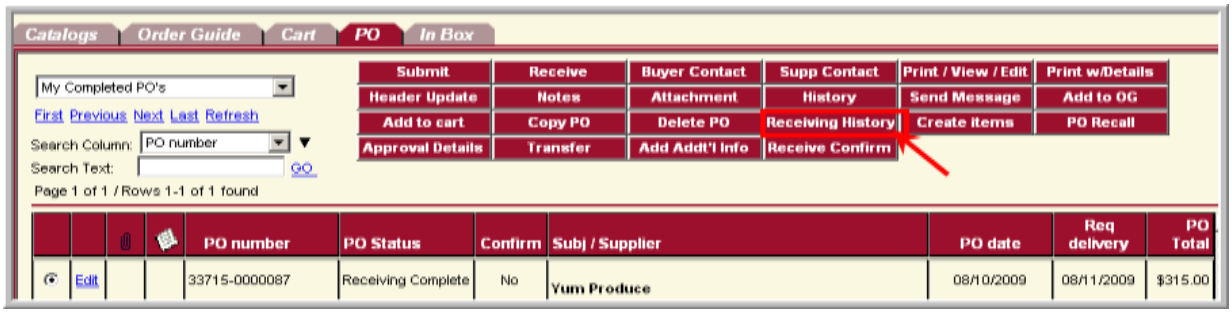


Under the PO tab, you can view the completely received PO’s under “My Completed PO’s” or partially received PO’s under “All Partially Rec’d & Accepted PO’s”. The PO Status now indicates the change; in the example below it is “Receiving Complete”.



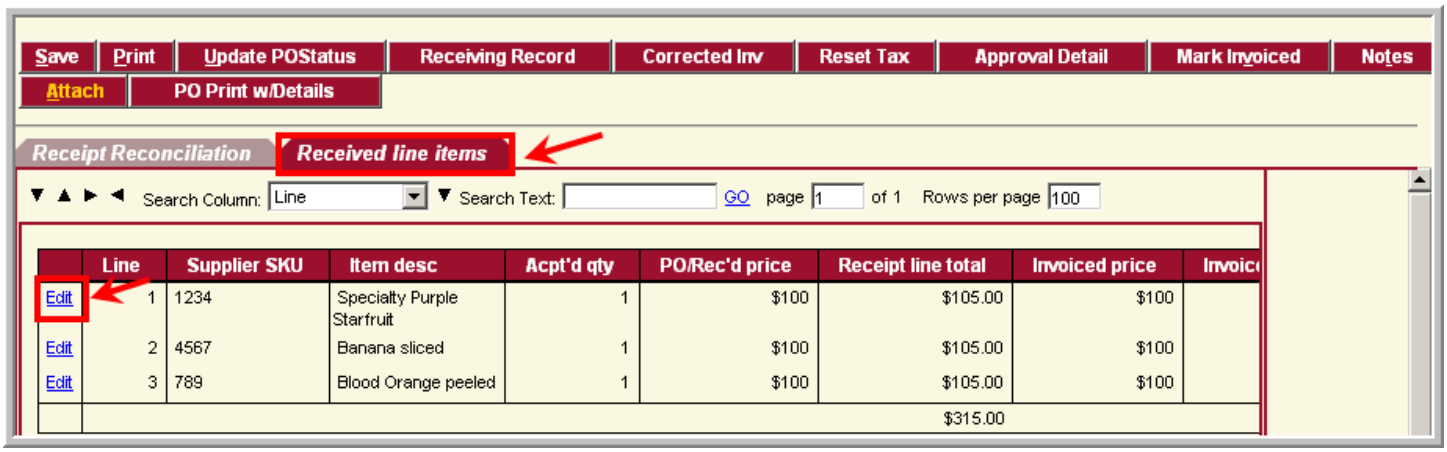
Receiving History

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.

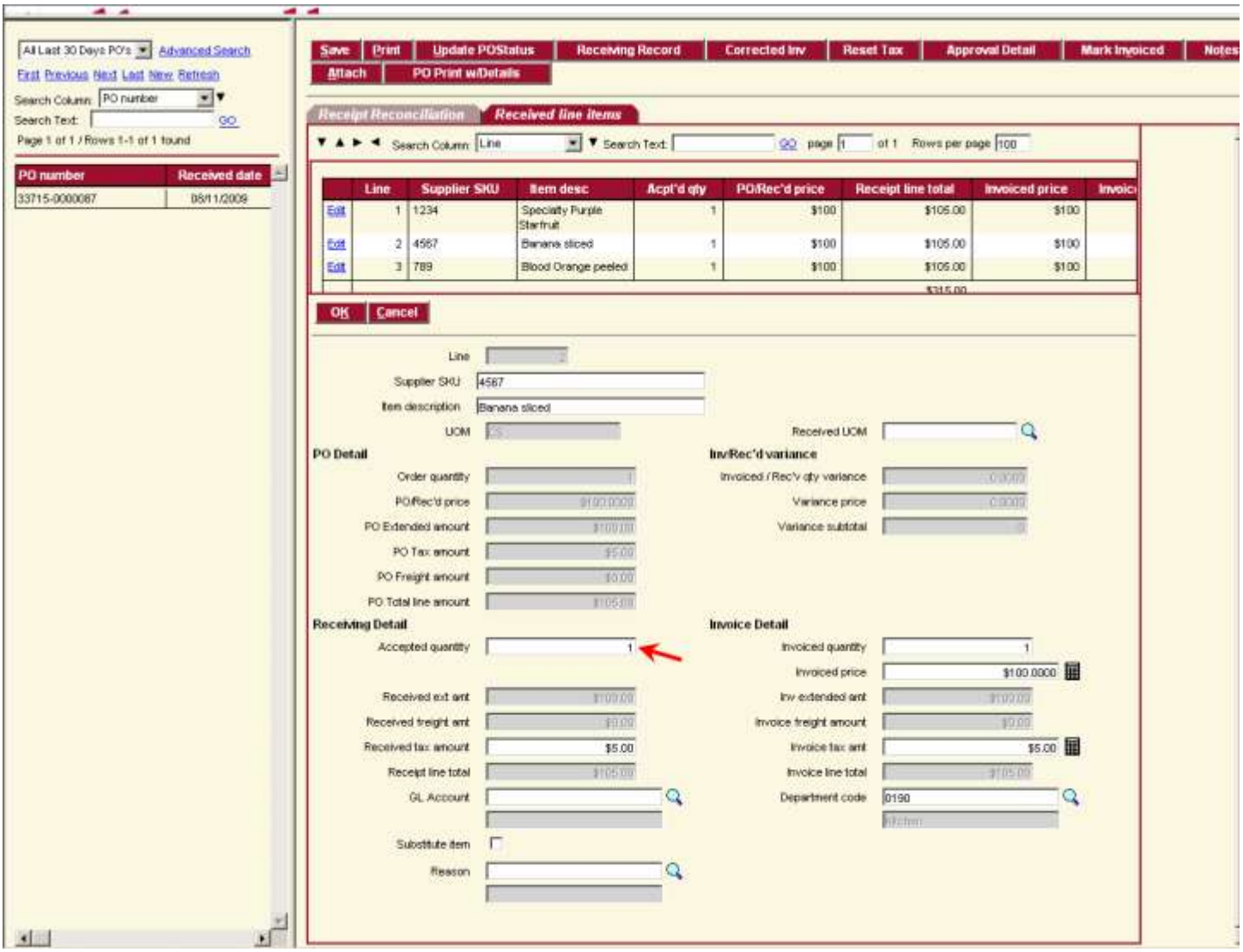


Select a Receiving Event on the left and the information will load on the right. The Receipt Reconciliation tab will show information such as Date Received, Receiving Status, etc:

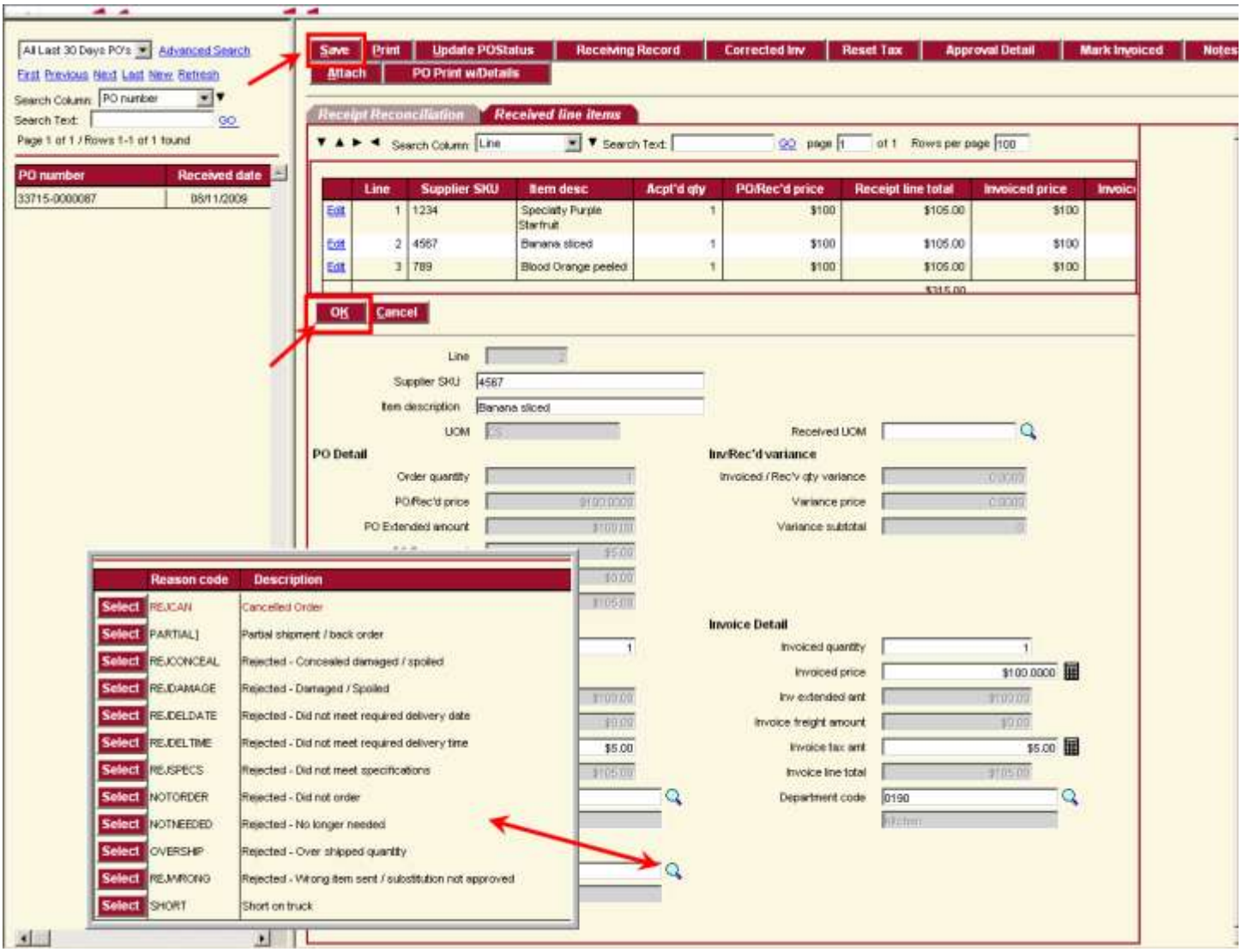
The Received Line Items tab will list all the items included in this Receiving Event:



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.



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.



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