

Chapter 2 – Shopping

Creating and Adding to *Purchase Orders*

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

Shopping > Creating and Adding to POs

- 3 different Options to add to or create new POs
 - ▶ From Product Search
 - ▶ From Shopping Cart
 - ▶ From Order Guide



Shopping > Creating and Adding to POs > From Product Search

From your search results under the Catalog Tab you can add products directly to a PO (new or existing).

Suppose you want to buy two types of Floor Lamps. Select the models by checking the boxes at the line item level.

Type the order quantities here.

The UOM is the base UOM. The item may be priced in multiple UOMs. You can change the UOM in Cart or Order Guide.

Search All Catalogs: Products | lamp GO | In Box: New23 Total29

Buttons: Add to Cart, Add to Order Guide, Create PO, Add to PO, Create REQ, Add to REQ

Item	Product Name	Mfr	Pack/Size	UOM	Min Qty	Ord Qty	Price	Select
SKU130016 More Product Info	Floor Lamp 1003PW 36" Polished Brass McBride's Hotel Furniture Suppliers	McBride's Hotel Furniture	1 (17" H X 24" D X 12" L)	EA	1	2	23.15	<input checked="" type="checkbox"/>
SKU130017 More Product Info	Floor Lamp 3003H 59" Polished Brass McBride's Hotel Furniture Suppliers	McBride's Hotel Furniture	-/-	EA	1	4	23.99	<input checked="" type="checkbox"/>
SKU130018 More Product Info	Floor Lamp 2003EM 56" Polished Brass McBride's Hotel Furniture Suppliers	McBride's Hotel Furniture	-/-	EA	1		24.0	<input type="checkbox"/>
SKU130019 More Product Info	Floor Lamp 5003EM 58" Polished Brass McBride's Hotel Furniture Suppliers	McBride's Hotel Furniture	-/-	EA	1		25.99	<input type="checkbox"/>
SKU130020 More Product Info	Floor Lamp 4003EM 53" Polished Brass McBride's Hotel Furniture Suppliers	McBride's Hotel Furniture	-/-	EA	1		26.0	<input type="checkbox"/>
SKU130021 More Product Info	Floor Lamp Willow HF24-6011-12 McBride's Hotel Furniture Suppliers	McBride's Hotel Furniture	-/-	EA	1		27.99	<input type="checkbox"/>
SKU130022 More Product Info	Floor Lamp Leaves HF24-6701-20 McBride's Hotel Furniture Suppliers	McBride's Hotel Furniture	-/-	EA	1		30.1	<input type="checkbox"/>



Shopping > Creating and Adding to POs > From Product Search

Click the 'Create PO' button.

Important!

If you have selected items from multiple suppliers, a separate PO for every supplier will be generated

The screenshot shows the Hilton Supply Management web application interface. At the top, there is a search bar with the text "Search All Catalogs" and a "GO" button. Below the search bar, there are navigation tabs: "Catalogs", "Order Guide", "Cart", "InBox", "PO", "REQ", "Approval", and "Suppliers PO". The "PO" tab is currently selected. Below the tabs, there is a row of buttons: "Add to Cart", "Add to Supplier Cart", "Create PO", "Add to PO", "Create REQ", and "Add to REQ". The "Create PO" button is highlighted with a red box. A red arrow points from the callout box to this button. Below the buttons, there is a table of product search results. The table has columns: "Item", "Product Name", "Mfr", "Pack/Size", "UOM", "Min Qty", "Ord Qty", "Price", and "Select". The table contains seven rows of product information, all from "McBride's Hotel Furniture Suppliers".

Item	Product Name	Mfr	Pack/Size	UOM	Min Qty	Ord Qty	Price	Select
SKU130016	Floor Lamp 8003PW 36" Polished Brass	McBride's Hotel Furniture	- / 17" H X 24" D X 17" L	EA	1	2	23.15	<input checked="" type="checkbox"/>
SKU130017	Floor Lamp 3003EM 59" Polished Brass	McBride's Hotel Furniture	- / -	EA	1	4	23.99	<input checked="" type="checkbox"/>
SKU130018	Floor Lamp 2003EM 56" Polished Brass	McBride's Hotel Furniture	- / -	EA	1		24.0	<input type="checkbox"/>
SKU130019	Floor Lamp 5003EM 58" Polished Brass	McBride's Hotel Furniture	- / -	EA	1		25.99	<input type="checkbox"/>
SKU130020	Floor Lamp 4003EM 53" Polished Brass	McBride's Hotel Furniture	- / -	EA	1		26.0	<input type="checkbox"/>
SKU130021	Floor Lamp Willow HF24 4511-12	McBride's Hotel Furniture	- / -	EA	1		27.99	<input type="checkbox"/>
SKU130022	Floor Lamp Leaves HF24 6701-20	McBride's Hotel Furniture	- / -	EA	1		30.1	<input type="checkbox"/>

Shopping > Creating and Adding to POs > From Product Search

Create Document Window

After Clicking on 'Create PO', this window will open up. It represents the first step of the Purchase Order creation process.

Subject

Type the subject or name of the Purchase Order.

Need by Date

Type in the date you need the order to be delivered by. Or click the calendar icon to launch a calendar window and choose a date from there. The field also supports the special date entry formats described in Chapter 1 – v7 Overview

Approver

Select the name of the person approving this PO from the drop down list

Notes

Type any applicable notes here.

Confirm

Click OK to proceed or Cancel to revert back to your previous screen

Item#	Product
SKU130016	Floor L. McBride's
SKU130017	Floor L. McBride's
SKU130018	Floor L. McBride's
SKU130019	Floor L. McBride's
SKU130020	Floor Lamp 4003EM 53" Polished Brass McBride's Hotel Furniture Suppliers
SKU130021	Floor L. McBride's
SKU130022	Floor L. McBride's

Shopping > Creating and Adding to POs > From Product Search

You will get a message that the PO was created successfully and if you click 'Ok' you will see this message stating the number for the newly generated PO. Click OK to proceed

The screenshot shows the Hilton Supply Management web application interface. At the top, there is a search bar with 'Products' selected and 'lamp' entered. Below the search bar, there are navigation tabs: 'Catalogs', 'Order Guide', 'Cart', 'InBox', 'PO', 'REQ', 'Approval', and 'Suppliers PO'. The 'PO' tab is currently selected. A table of products is displayed, with columns for 'Item', 'Product Name', 'UOM', 'Min Qty', 'Ord Qty', and 'Price'. A red box highlights the 'Add to PO' button in the table's header. A red arrow points from this button to a small dialog box that has appeared, which contains a warning icon and the text 'Generated PO Number: 00000000000129'. The dialog box has an 'OK' button.

Item	Product Name	UOM	Min Qty	Ord Qty	Price	Select
SKU130016	Floor Lamp 1003PW McBride's Hotel Furniture Suppliers	EA	1	2	23.15	<input checked="" type="checkbox"/>
SKU130017	Floor Lamp 3003EM 59" Polished Brass McBride's Hotel Furniture Suppliers	EA	1	1	23.99	<input checked="" type="checkbox"/>
SKU130018	Floor Lamp 2003EM 56" Polished Brass McBride's Hotel Furniture Suppliers	EA	1		24.0	<input type="checkbox"/>
SKU130019	Floor Lamp 5003EM 58" Polished Brass McBride's Hotel Furniture Suppliers	EA	1		25.99	<input type="checkbox"/>
SKU130020	Floor Lamp 4003EM 53" Polished Brass McBride's Hotel Furniture Suppliers	EA	1		26.0	<input type="checkbox"/>
SKU130021	Floor Lamp Willow HF24 4511-12 McBride's Hotel Furniture Suppliers	EA	1		27.99	<input type="checkbox"/>
SKU130022	Floor Lamp Leaves HF24 6701-20 McBride's Hotel Furniture Suppliers	EA	1		30.1	<input type="checkbox"/>

Shopping > Creating and Adding to POs > From Product Search

You will be taken to the PO tab for further processing of the newly generated PO

For quick access, the system will automatically display only the PO you just have created.

All system functionality concerning Purchase Orders will be explained within the Purchase Order tutorial.

The screenshot shows the Hilton Supply Management web application interface. The browser title is "Sagece Systems - J1 Menu - Microsoft Internet Explorer". The page header includes the Hilton logo and navigation links like "Welcome Ann MThajyan", "Home", "Use Terms", "My Mailbox", "My Settings", "Help", "Tutorial", and "Logout". A search bar is visible with "Products" selected and "lamp" entered. The "PO" tab is highlighted in the navigation menu. Below the navigation, there are buttons for "Submit", "Print PO", "Receive", "Buyer Contact", and "Supp Contact". A search section shows "Search Columns: All" and "Search Text: 00000000000129". A table displays one purchase order:

PO number	PO Status	Subject	Inv code	PO date	Req delivery	PO Total
00000000000129	New	Subject: Floor Lamp Test PO Supplier: Hilton Supply Management	No Inv Code	11/18/2002	12/18/2002	142.26

Shopping > Creating and Adding to POs > From Product Search

Go back to the search result page by clicking the Catalogs Tab.

Suppose you want to add another Floor Lamp to the PO you have just created. Select the model by checking the boxes at the line item level.

Type the order quantity here.

Click the 'Add to PO' button.

The screenshot shows the Hilton Supply Management web application interface. The browser window title is "Sagece Systems - J1 Menu - Microsoft Internet Explorer". The page header includes the Hilton logo and a navigation bar with tabs: "Catalogs", "Order Guide", "Cart", "InBox", "PO", "REQ", "Approval", and "Suppliers PO". The "Catalogs" tab is selected and circled in red. Below the navigation bar, there are buttons for "Add to Cart", "Add to Order Guide", "Create PO", "Add to PO", "Create REQ", and "Add to REQ". The "Add to PO" button is highlighted with a red box. Below these buttons, there is a section for "Products: 8" and "Pages: 1". A table displays the search results for floor lamps. The table has columns: "Item#", "Product Name", "Mfr", "Pack/Size", "UOM", "Min Qty", "Ord Qty", "Price", and "Select". The third row, for SKU130018, is highlighted. The "Ord Qty" field for this row contains the number "5" and is circled in red. The "Select" checkbox for this row is also circled in red. Red arrows point from the "Add to PO" button to the "Select" checkbox and the "Ord Qty" field. The table data is as follows:

Item#	Product Name	Mfr	Pack/Size	UOM	Min Qty	Ord Qty	Price	Select
SKU130016	Floor Lamp 8003PW 36" Polished Brass McBride's Hotel Furniture Suppliers	McBride's Hotel Furniture	- (17" H X 24" D X 17" L	EA	1		23.15	<input type="checkbox"/>
SKU130017	Floor Lamp 3003EM 59" Polished Brass McBride's Hotel Furniture Suppliers	McBride's Hotel Furniture	- (-	EA	1		23.99	<input type="checkbox"/>
SKU130018	Floor Lamp 2003PW 56" Polished Brass McBride's Hotel Furniture Suppliers	McBride's Hotel Furniture	- (-	EA	1	5	24.5	<input checked="" type="checkbox"/>
SKU130019	Floor Lamp 5003EM 58" Polished Brass McBride's Hotel Furniture Suppliers	McBride's Hotel Furniture	- (-	EA	1		25.99	<input type="checkbox"/>
SKU130020	Floor Lamp 4003EM 53" Polished Brass McBride's Hotel Furniture Suppliers	McBride's Hotel Furniture	- (-	EA	1		26.0	<input type="checkbox"/>
SKU130021	Floor Lamp Willow HF24 4511-12 McBride's Hotel Furniture Suppliers	McBride's Hotel Furniture	- (-	EA	1		27.99	<input type="checkbox"/>
SKU130022	Floor Lamp Leaves HF24 6701-20 McBride's Hotel Furniture Suppliers	McBride's Hotel Furniture	- (-	EA	1		30.7	<input type="checkbox"/>

Shopping > Creating and Adding to POs > From Product Search

A purchase order lookup window will appear.

Locate and click on the PO number you have just created to add the selected item to the existing order.

You will receive a confirmation message, that the item has been added.

The screenshot shows the Hilton Supply Management interface. The main window displays a search for 'Floor Lamp' with several results. A 'Purchase Order Number Lookup' window is open, showing a table of PO numbers and revision numbers. A red arrow points from the 'Purchase Order Number Lookup' window to the 'SKU130016' product in the main window. Another red arrow points from the 'Purchase Order Number Lookup' window to the 'Purchase Order Number Lookup' window.

PO number	Revision num	Subject
000000000000000000000000	0	Subject from User
0000000000000000000000041	0	Subject from User
0000000000000000000000042	0	Subject from User
0000000000000000000000043	0	Subject from User
0000000000000000000000044	0	Filem
0000000000000000000000046	0	Subject from User
0000000000000000000000047	0	Subject from User
0000000000000000000000048	0	REQ Co Sub
0000000000000000000000050	0	Subject from User
0000000000000000000000056	0	Subject from User
0000000000000000000000058	0	Subject from User
0000000000000000000000061	0	Subject from User
0000000000000000000000070	0	PO Co Sub
0000000000000000000000071	0	PO Co Sub

Shopping > Creating and Adding to POs > From Shopping Cart

From your Shopping Cart Tab you can add products previously moved to the cart directly to a PO.

Suppose you want to buy the two Floor Lamp models you previously moved to the cart. Select the models by checking the boxes at the line item level.

Edit order quantity and UOM if desired.

Important Note:
If you change anything here you have to click **UPDATE** for the changes to take effect.

The screenshot shows the Hilton Supply Management web application interface. The 'Cart' tab is selected and highlighted with a red circle. Below the navigation tabs, there are buttons for 'Create REQ', 'Create PO', 'Add to Favorite', 'Add to PO', 'Add to REQ', 'Update', and 'Delete Item'. The 'Update' button is highlighted with a red box. Below these buttons is a search area with 'Advanced Search' and 'Search Columns: Catalog Item'. The main content area displays a table with the following data:

Item #	Product Name	Req UOM	Min order qty	Quantity	Price	Extension
SKU130016	Wm Floor Lamp 1003PV 36" Polished Brass Supplier:McBride's Hotel Furniture Suppliers	EA	1	2	23.15	46.3
SKU130017	Wm Floor Lamp 3003DH 50" Polished Brass Supplier:McBride's Hotel Furniture Suppliers	EA	1	4	23.99	95.96

Shopping > Creating and Adding to POs > From Shopping Cart

Click the 'Create PO' button.

The steps that follow are identical to the procedure under 'Creating and Adding from Product Search'

Important!

If you have selected items from multiple suppliers, a separate PO for every supplier will be generated

The screenshot shows the Hilton Supply Management interface in a Microsoft Internet Explorer browser. The page title is 'Sagece Systems - J1 Menu - Microsoft Internet Explorer'. The browser address bar shows 'Local intranet'. The page header includes the Hilton logo and navigation links: 'Welcome Ann M'Hajayen', 'Hilton Garden Inn Anaheim/Garden Grove', 'Hide Menu', 'Home', 'Use Terms', 'My Mailbox', 'My Settings', 'Help', 'Tutorial', and 'Logout'. Below the header is a search bar with 'Search All Catalogs' and 'Products' dropdown, a 'GO' button, and 'InBox: New:23 Total:29'. A navigation bar contains tabs: 'Catalogs', 'Order Guide', 'Cart', 'InBox', 'PO', 'REQ', 'Approval', and 'Suppliers PO'. The 'Cart' tab is active, showing a table of items. A red box highlights the 'Create PO' button in the top right of the cart area. A red arrow points from the 'Create PO' button in the top right to the 'Create PO' button in the top left of the cart area. Below the table is a search bar with 'Advanced Search', 'First Previous Next Last Refresh', 'Search Column: Catalog Item', and 'Search Text:'. The table has columns: 'All', 'Item #', 'Product Name', 'Req UOM', 'Min order qty', 'Quantity', 'Price', and 'Extension'. The table contains two rows of items.

All	Item #	Product Name	Req UOM	Min order qty	Quantity	Price	Extension
<input type="checkbox"/>	SNP130016	Wmefloor Lamp 1003PV 36" Polished Brass Supplier:McBride's Hotel Furniture Suppliers	EA		2	23.15	46.3
<input type="checkbox"/>	SNP130017	Wmefloor Lamp 3003DH 50" Polished Brass Supplier:McBride's Hotel Furniture Suppliers	EA		4	23.99	95.96

Shopping > Creating and Adding to POs > From Order Guide

From your Order Guide you can create Purchase Orders or add to existing ones. Click the Order Guide Tab.

Select the Order Guide you want to use from the pull down list. In our example the Lighting Replacement list.

Select the products by checking the corresponding boxes. (Check the 'All' box to select the entire Order Guide)

Edit order quantity and UOM if desired.

Important Note:
If you change anything here you have to click **UPDATE** for the changes to take effect.

ALL	Item #	Product Name	Row UOM	Min order qty	Quantity	Price	Extension
<input checked="" type="checkbox"/>	800130017	Floor Lamp 3003EM 59" Polished Brass McEwain's Hotel Furniture Suppliers	EA		1	\$25.99	\$25.99
<input checked="" type="checkbox"/>	800130016	Menu Stand, 2" diameter tube, 1 1/4" x 1 1/4" angle frame, 12" diameter base, 14 1/2" H x 18" 1/2" W, display area, foil insert, McEwain's Hotel Furniture Suppliers	EA		1	\$23.15	\$23.15

Shopping > Creating and Adding to POs > From Order Guide

Click here to add to an existing PO

Click here to create a new PO

The steps that follow are identical to the procedure under 'Creating and Adding from Product Search'

The screenshot shows the Hilton ISM Online interface. At the top, there is a search bar with 'Products: Lamp' and a 'GO' button. To the right, it shows 'In Box New: 0 Total: 0' and 'Shopping Cart Lines: 2 Total: \$ 142.26'. Below the search bar is a navigation menu with 'Order Guide' selected. A table of actions is visible, with 'Create PO' and 'Add to PO' buttons highlighted in red. Below this is a table of products:

Item #	Product Name	Req UOM	Mlt order qty	Quantity	Price	Extension
SK0130017	Floor Lamp 3002EM 59" Polished Brass McEwain's Hotel Furniture Suppliers	EA	1	4	\$23.99	\$95.96
SK0130016	Menu Stand, 2" diameter tube, 1 1/4" x 1 1/4" angle frame, 12" diameter base, 14 1/2" H x 18" 1/2" W, display area, full insert, McEwain's Hotel Furniture Suppliers	EA	1	2	\$23.15	\$46.30

