Hilton Supply Management®

Chapter 2 – Shopping

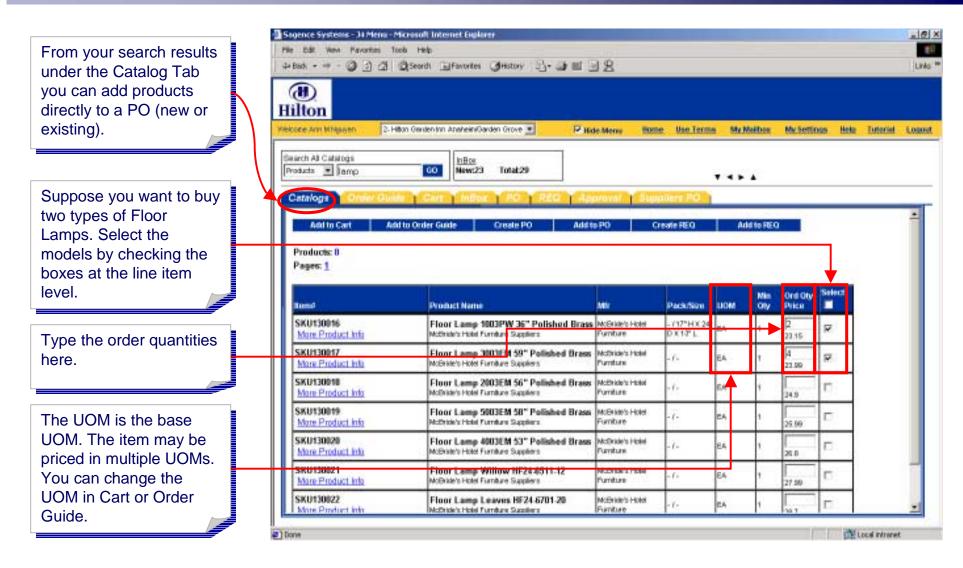## Creating and Adding to *Purchase Orders*

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

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

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.
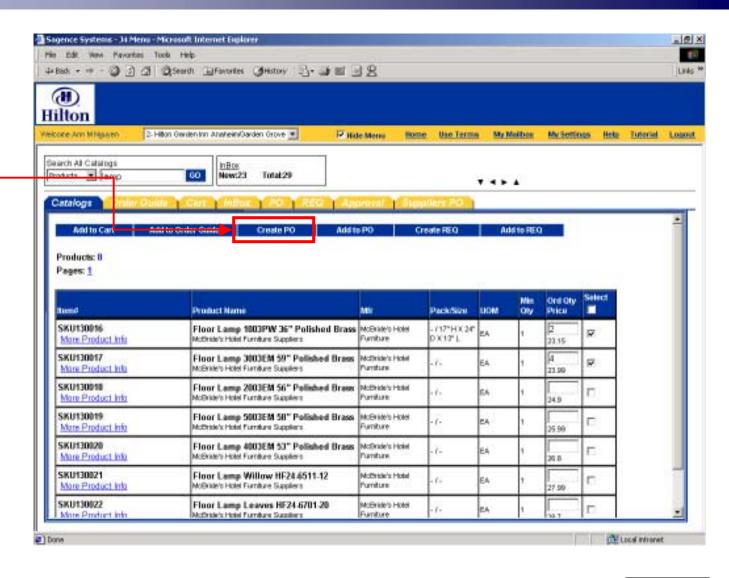
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Click the '**Create PO**' button.

Important!

If you have selected items from multiple suppliers, a separate PO for every supplier will be generated
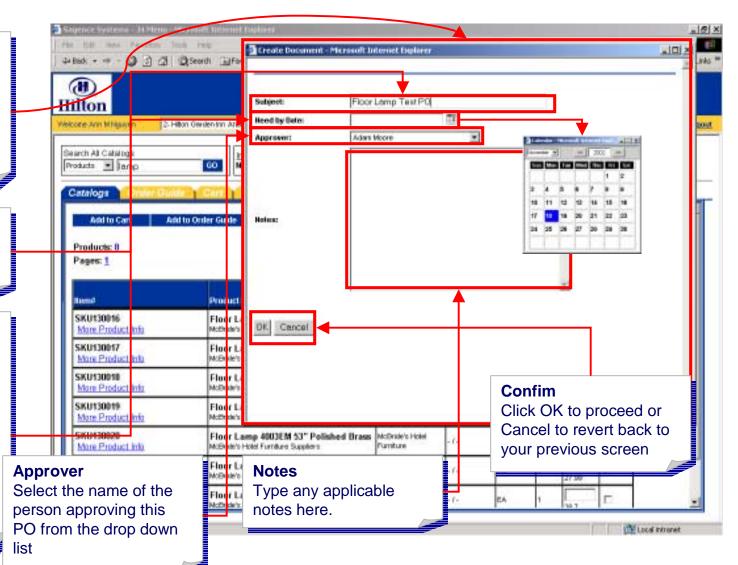
Create Document Window
After Clicking on 'Create PO', this window will open up. It represents the first step of the Purchase Order creation process.

Subject
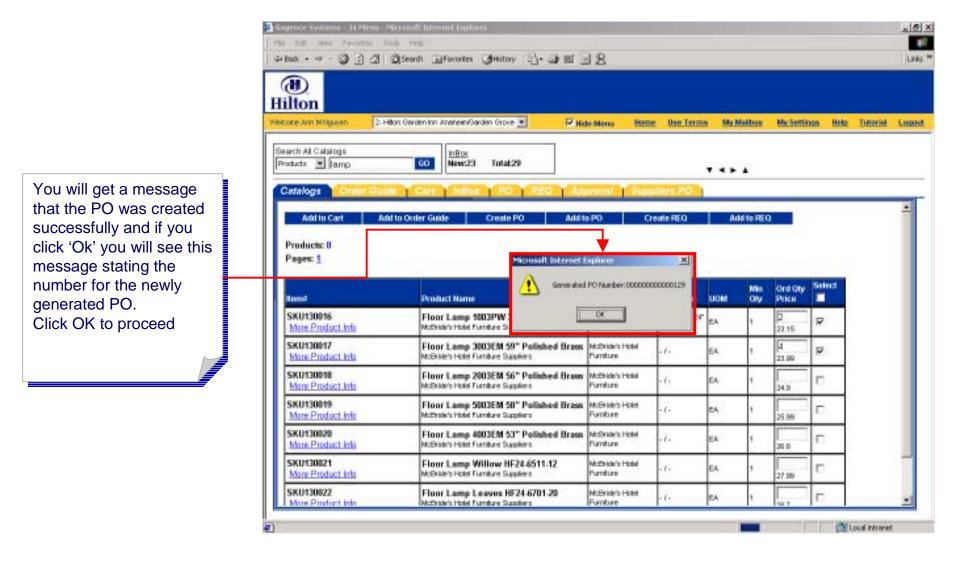Type the subject or name of the Purchase Order.

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.

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

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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
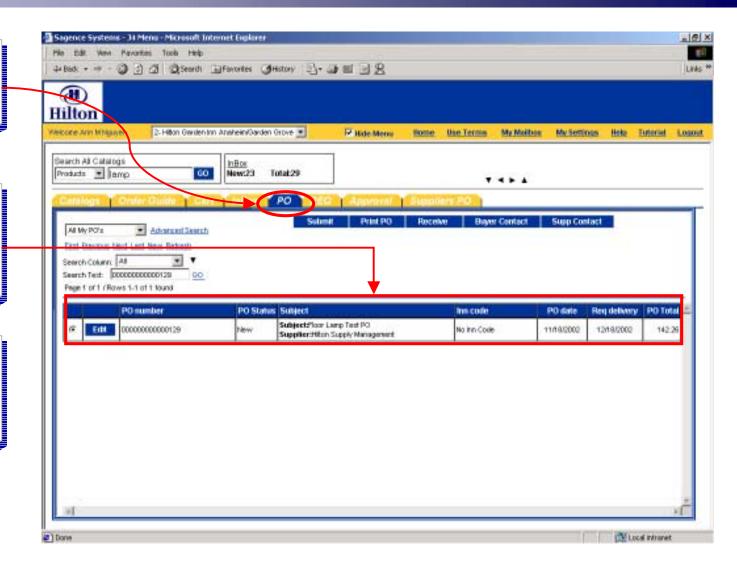
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You will be taken to the PO tab for further processing of the newly generated PO
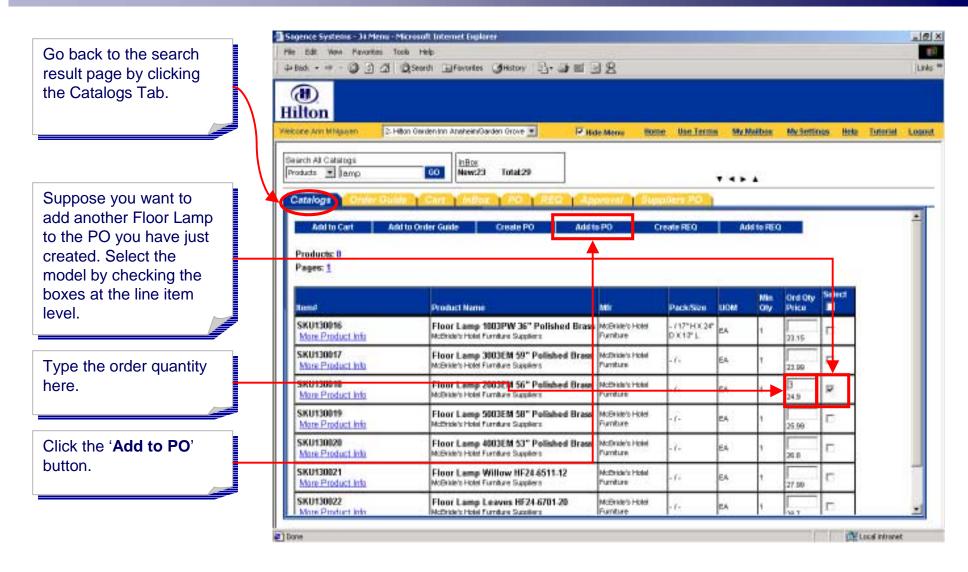
For quick access, the system will automatically display only the PO you just have created.

All system functionality concerning Purchase Orders will be explained within the Purchase Order tutorial.
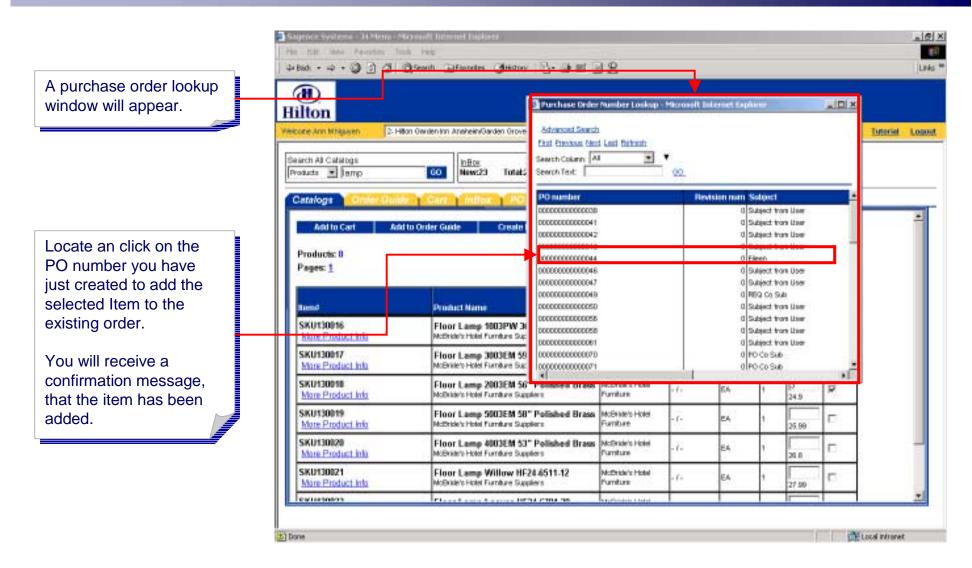
Go back to the search result page by clicking the Catalogs Tab.

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.

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A purchase order lookup window will appear.

Locate an 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.

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.
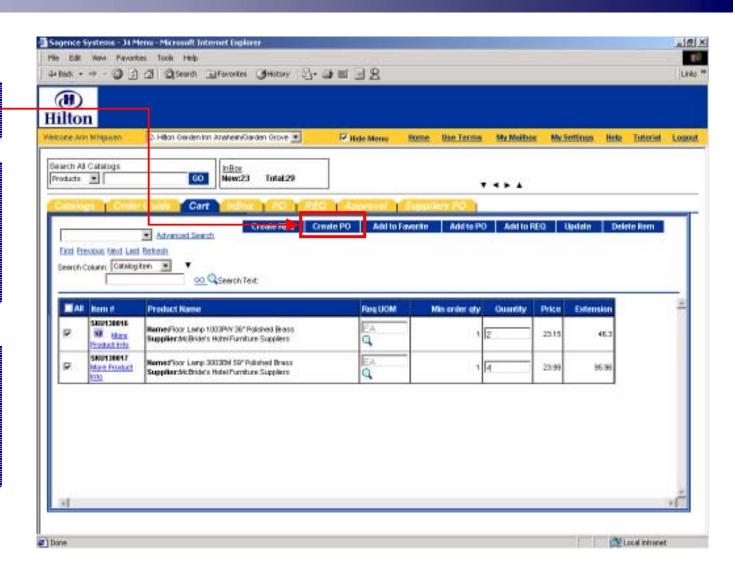
Edit order quantity and UOM if desired.

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

Click the '**Create PO**' button.

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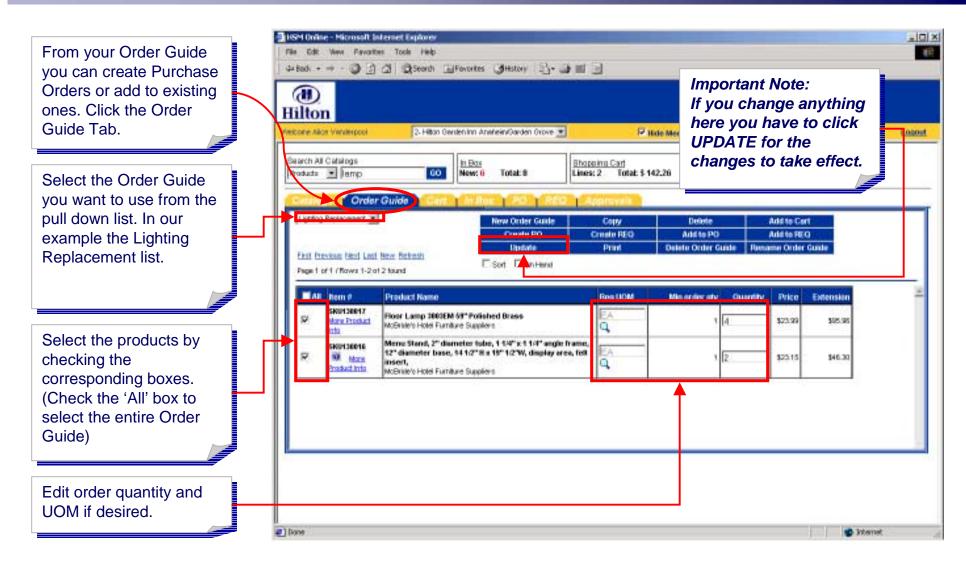
Important!

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

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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.

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'

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