

Birch Street Support:

Q. Who should I contact with Birch Street questions or support issues?

A. Birch Street Customer Support can be contacted at (949) 567-7030 or support@birchstreetsystems.com for application specific questions. Hyatt-specific questions should be directed to:

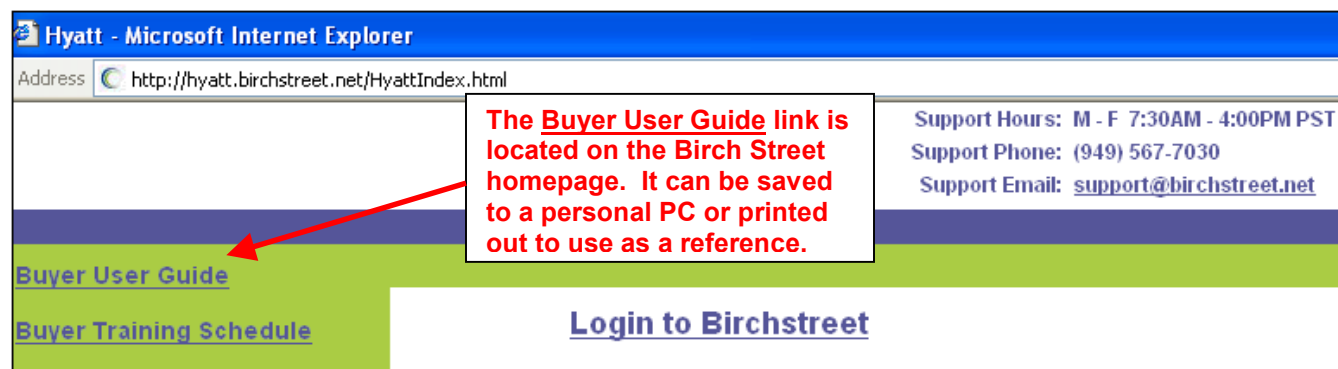
Kathy Amaya	(504) 887-0966	kathy.amaya@hyatt.com
Emily Harris	(312) 780-6127	emily.harris@hyatt.com
Charlotte Wheeler	(407) 396-8633	charlotte.wheeler@hyatt.com

Q. What are the Birch Street support hours currently?

A. The support team at Birch Street Systems is available from 7:30AM to 4:30PM Pacific Standard Time (PST).

Q. Are there any Birch Street handbooks or training materials available on-line?

A. Yes. There is a link to the *Buyer User Guide* and other Birch Street *Job Aids* on the Birch Street homepage <http://hyatt.birchstreet.net>. Also, within the Birch Street website, you can access the *Help* link on the main screen. Both the *Buyer User Guide* and *Help* link have comprehensive directions for using the Birch Street application.



System Requirements:

Q. How many times will Birch Street allow me to attempt to log on before I am locked out of the system?

A. You can attempt and fail to login five times. After that, the hotel level administrator or BSS support team will need to re-set your password.

Q. How often must I change my BSS password?

A. All passwords expire at 45 days and must be changed at that time.

Q. Is it okay to have “generic” users (for rotational positions) set up in the system?

A. Each and every user will be assigned a unique login ID and password. Both SOx requirements and Hyatt guidelines require all transactions are linked to one specific user. Logins and passwords must be held secure and not shared.

Q. How are new user requests and password resets handled?

A. The Birch Street implementation team will set up all new users. A New User spreadsheet must be filled out with all required information and emailed to kathy.amaya@hyatt.com in order to request the creation of a new BSS user. Hotel level administrators as well as the BSS support team can complete password resets.

Q. Are punch-out catalogs password protected? How do I gain access to a punch-out catalog?

A. Yes, punch-out catalogs are password protected but BSS provides user access to the punch-outs prior to your hotel's implementation. You may be prompted to enter a password or username when you attempt to use the punch-out for the first time. In order to fix this, you must adjust the internet privacy settings on your computer. The *Punch-out Guidelines* document provides step-by-step directions for adjusting internet privacy settings.

Q. How long does the system have before it times out? How can a PO be saved when the system times out?

A. Birch Street will time out after 120 minutes. While creating a PO, any items that are added to the shopping cart will be saved even if the session times out.

Suppliers:

Q. In the case of a "One Man Farm" where there the supplier does not have a fax machine or computer, orders need to be called in. Would these kinds of suppliers be set up in BSS? How is it going to be handled?

A. This type of supplier will be set up as a non-catalog supplier and setup with an email address of test@birchstreet.net. There will be no catalog in BSS, but the buyers can create non-catalog items and store them on an order guide. Pricing will be managed by hotel users and updated as product is received in the application. Users will have to call the suppliers directly to place this type of order.

Q. If a supplier does not provide an item number for a product, what is the general rule for designating an item number on a PO?

A. As a general rule, the items on a PO should be numbered sequentially if the supplier does not provide item numbers.

Q. How do suppliers to become Birch Street 'adopted' suppliers?

A. Any interested supplier should contact Phillip Kasbaum from Birch Street Systems at 949-567-7038. He will walk them through a series of questions and then through the appropriate catalog process. BSS provides training and support for all suppliers on the Hyatt Supplier portal. These services are included in the monthly subscription fee that the hotels pay, at no cost to the suppliers.

PO Creation:

Q. Can PO numbers be duplicated?

A. No, a PO number will never be duplicated in the system.

Q. How are required delivery dates determined by the buyer?

A. When creating a PO, the buyer should determine the required delivery date based on when the goods must arrive at the receiving dock. The buyer should also consider the budget when choosing a delivery date since required delivery date governs when the declining checkbook is impacted.

Q. Can items be added to a PO once it has been created?

A. Items can be added to an existing PO if it is still in the 'New' status. The Add to PO button can be accessed from the Catalogs, Order Guide, and Cart tabs.

Q. Can items be ordered by the ½ case?

A. Yes, the following unit of measures (UOM) can be ordered in fractions: case, dozen, pounds, and hours if the supplier will accept it that way.

Q. Is the category listing necessary or relevant in the PO creation process?

A. The category listing is not a required field for PO creation at this time, and it will not become relevant until Phase two enhancements are complete.

Q. What is the purpose of the 'PO Recall' button?

A. The 'PO Recall' feature on the PO tab allows a buyer to recall an order that is no longer needed. A PO that is in 'Approval pending' status may be recalled from approval. A PO that has been accepted by an *adopted* supplier may also be recalled, but the supplier must accept the PO recall. PO recall cannot be used with offline or punch-out suppliers.

Q. How is the freight handled on a PO?

A. Freight can be added as a dollar amount or as a percentage. There may be a default freight estimate on the POs at some hotels. This default amount can be changed or overridden on the PO header screen.

Q. Once a PO is submitted to the supplier, it cannot be withdrawn or deleted; what is the process for deleting the PO?

A. Users can use the 'Delete PO' button on the PO tab to delete a PO when it is still in a *New* status. Once it is submitted to the supplier, a PO cannot be deleted, but it can be canceled before it is received. In the Receiving screen, there is a 'Cancel PO' button. A reason must be provided when canceling a PO.

The screenshot shows the 'PO Header - Receiving' screen. At the top, there is a navigation bar with buttons: Save, Update, Attach, Notes, Receiving Record, Link to Corrected Inv, and Cancel PO. Below this, the screen is divided into two tabs: 'PO Header - Receiving' (selected) and 'Line items'. The 'PO Header - Receiving' tab contains the following fields:

- PO number: 99190000004955
- PO date: 07/09/2008
- Internal PO number: (empty)
- Supplier: CINTAS CORP.
- Received date: 07/09/2008
- PO Status: Accepted by supplier
- Changed to above status on: 07/09/2008 14:38:42
- Buyer name: Jacob Volker
- Update PO status to: Select Entry
- Allocation: ☐
- Close PO: ☐

At the bottom of the screen, there is a 'Cancel reason code' field with a dropdown menu. The dropdown is open, showing 'NOTNEEDED' and 'Rejected - No longer needed'. A red box highlights this area. A red arrow points from the 'Cancel PO' button in the top navigation bar to the 'Cancel reason code' field. Another red arrow points from the 'Cancel reason code' field to a text box that says 'Enter Cancel reason code'. A third red arrow points from the 'Cancel PO' button to a text box that says 'Use this button to cancel a PO'.

Q. When a buyer cancels a PO, is the supplier notified?

A. No, the supplier is not notified of any cancellations made on a PO. The buyer must contact the supplier directly if they decide to cancel goods.

Q. When is the amount of a PO subtracted from the declining checkbox? Is the budget impacted as soon as a PO is created?

A. The budget is impacted once a PO has been submitted. The budget impact will be adjusted by receiving. For example, a PO that is partially cancelled at the time of receiving will only impact the budget by the partial amount.

PO Approval:

Q. Can an approver change the quantity on a PO line item rather than disapproving an entire PO?

A. The approver can change the quantities on any catalog or non-catalog POs. The quantities on a punch-out PO cannot be changed, and the approver would have to disapprove the entire PO.

Click the **Edit** link to change the quantity of a PO during the approval process

		Doc number	Doc Date	Req deliv date	Submitter	Subj / Supplier
Edit	Awaiting approval	977600000004329	07/27/2009	08/06/2009	Oriana Carotenuto	CHEF WORKS PUNCHOUT
Edit	Awaiting approval	977600000004297	07/21/2009	12/31/2009	Surasuk Yaisawarng	TY.ROBES

Approvals header **Line items**

Line #	Item #	Product name	Qty req	Qty apprvd	UOM	Unit price	Extension
Edit	1	3812HSV 12 oz Shawl Collar Velour Bathrobe	5	5	PC	\$23.75	\$118.75
Edit	2	3812KVXL 12 oz Kimono Velour XL Bathrobe	5	5	EA	\$24.5	\$122.50

OK **Cancel** **Change Product**

Item: _____ Line type: Catalog item

Document number: 977600000004297

Item #: 3812HSV

Quantity requested: 5

Quantity approved: 5

Order UOM: PC

Approvals header **Line items**

Line #	Item #	Product name	Qty req	Qty apprvd	UOM	Unit price	Extension
Edit	1	3812HSV 12 oz Shawl Collar Velour Bathrobe	5	2	PC	\$23.75	\$47.50
Edit	2	3812KVXL 12 oz Kimono Velour XL Bathrobe	5	5	EA	\$24.5	\$122.50

\$170.00

Use this screen to change PO quantities

Q. Once a PO has been approved, do the request for approval remain in the approver's inbox? Does it have to be removed manually?

A. Yes, the notification to approve the PO will remain in the approver's inbox. All inbox messages have to be removed manually. A user can manage their message inbox from the My Settings screen.

Save **Print**

My settings **Regional**

Login name: eharris

Full name: Emily Harris

Message delivery option: Email only

Phone 1 country code: Select Entry

Phone 1: Birch Street Message inbox only

Ext 1: Email only

Email address: Emily.Harris@corphq.hyatt.com

Birch Street Msg inbox and email

Approvers can manage email notifications in the My Settings screen.

Order Guide(s):

Q. Prices on order guides are to be maintained by the hotels. How are hotels notified of prices changes? When the supplier accepts the PO, does he or she accept the prices?

A. Prices only need to be maintained for non-catalog items. Prices can be updated for order guides through the receiving process. Suppliers maintain catalogs through the Supplier Portal, and they also maintain their prices.

The buyer will have to make sure they are verifying the price for a non-catalog item that has not been purchased within an appropriate time frame, i.e. one month for food, one year for office supplies, etc. When a supplier accepts a PO, they are accepting the prices on the PO.

Q. How are order guides shared among users?

A. In order to share an order guide among users, the order guide name must be prefixed with an asterisk (*). For example, an order guide with the name “*Banquet Candles” will be a public order guide. If the order guide needs to be made private, the user can simply rename the order guide without the asterisk, and it will no longer be shared.

Q. Can order guides be deleted?

A. Only the user that creates the order guide is able to delete it. Any copies that have been made of the deleted order guide will remain intact.

Q. Can Department and GL information be added to items on an order guide?

A. Yes, Departments and GL accounts can be added to an order guide by using the ‘Add GL Account’ button in the Order Guide screen. This feature stores the Department code, GL account and tax group code (if activated) in the Order Guide. When the user creates a PO, the Department and GL account combination will be added to the PO line item. This functionality is useful for people who have multi-department access.

Click the ‘Add GL Acct’ button to code order guide items with Department and GL information.

In order to store Department and GL codes for an entire order guide, select the ‘All’ checkbox.

Item #	Prod / Supplier	Pack/Size	UO
<input checked="" type="checkbox"/> 729130	DESSERT TRIPLE MOUSSE 24 CT	/	
<input type="checkbox"/> 710454	MARTIN PREFERRED		
<input type="checkbox"/> 730017			

Q. Why do certain Order Guide items show up in red?

A. Items that have been discontinued by a supplier will show up in red in your order guide. These items cannot be added to Purchase Orders. It is recommended that you contact the supplier to see if the discontinuation is temporary or permanent and/or if the supplier has a replacement item. If the *non-catalog* order guide items turn red, it means that the supplier attached to the order guide has been changed or inactivated. Use the ‘Change Supplier’ button on the Order Guide screen to reattach the updated or correct supplier to the order guide. Refer to the *Change Supplier Feature Job Aid* on the BSS homepage for instructions on using that feature.

PO Receiving:

Q. When should the Purchasing Director (or other receivers) receive goods in Birch Street?

A. POs must be received on the same day that the goods are delivered.

Q. Can POs be over-received?

A. Yes, all POs can be over-received in Birch Street. If the amount of good delivered to the hotel exceeds the amount of goods ordered on the PO, the receiving department will make this change when the.

Q. Once a PO is fully received, can the receiving be cancelled?

A. Yes, receiving can be reversed by entering the received quantity as a negative number. This will reverse the receiving error.

Save Update Attach Notes Receiving Record Link to Corrected Inv Cancel PO

PO Header - Receiving Line items

Search Column: Receive
Accept
All Search Text: All GO page 1 of 1 Rows per page 50

Receive	CXL	Item #	Product name	Order qty	Acpt'd qty	Invoiced price	Order UOM
Accept	Remaining Qty	123	Bagels	2	0	\$10	DZ

•Click the Edit link to return received goods

Additional Receiving Fields Appear

OK Cancel

Item

Line 1

Line status Receiving Complete

Item # 123 Product name Bagels

Substitute item ☐

Order Unit of Measure

Order quantity 2

Order UOM DZ

Accepted quantity -2.0000

Remaining open quantity 2.0000

Price \$20.0000

Extension -\$40.00

Receiving Unit of Measure

Receive by Order UOM

Received UOM DZ

Accepted quantity -2

Variance 2.000

•Enter the Accepted quantity as a negative number

•Click OK

•Click Update to complete the return