

**Birchstreet Support:**

**Q. Who should I contact with Birchstreet questions or support issues?**

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

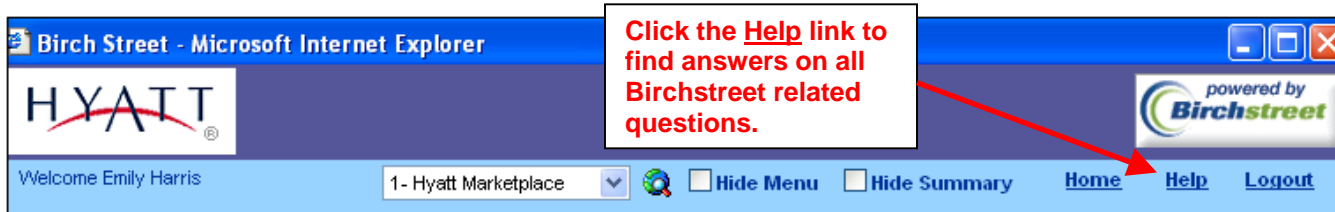
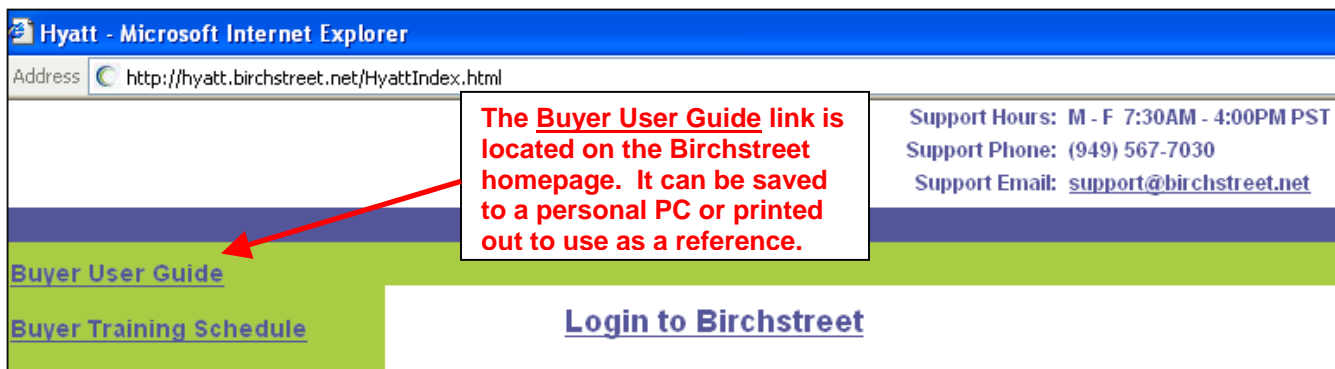
Kathy Amaya	(504) 887-0966	<a href="mailto:kathy.amaya@hyatt.com">kathy.amaya@hyatt.com</a>
Emily Harris	(312) 780-6127	<a href="mailto:emily.harris@hyatt.com">emily.harris@hyatt.com</a>
Charlotte Wheeler	(407) 396-8633	<a href="mailto:charlotte.wheeler@hyatt.com">charlotte.wheeler@hyatt.com</a>

**Q. What are the Birchstreet support hours currently?**

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

**Q. Are there any Birchstreet handbooks or training materials available on-line?**

**A.** Yes. There is a link to the *Buyer User Guide* and other Birchstreet *Job Aids* on the Birchstreet homepage <http://hyatt.birchstreet.net>. Also, within the Birchstreet 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 Birchstreet application.



**System Requirements:**

**Q. How many times will Birchstreet 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 Birchstreet 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](mailto: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.** Birchstreet 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](mailto: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 Birchstreet 'adopted' suppliers?**

**A.** Any interested supplier should contact Phillip Kasbaum from Birchstreet 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.

**Q. How do I request a new supplier to be added to Birchstreet?**

**A.** New suppliers can be requested through Formscape using the Supplier Setup Form. All Birchstreet champions have Formscape access and are able to request new suppliers for the hotel. Each new supplier request is routed to the hotel controller for approval and then set up in Oracle for the hotel. The new supplier becomes visible in Birchstreet the following day. Once the supplier is in Birchstreet, you will have to validate the PO transmission for the supplier. Refer to the *Hotel Vendor Job Aid* on the BSS homepage for validation instructions. Questions regarding new suppliers should be sent to Emily Harris at [emily.harris@hyatt.com](mailto:emily.harris@hyatt.com).

**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. How is the GL coding handled for a prepaid expense?**

**A.** Prepaid expenses are coded at the line level of the PO. The 'Edit Line' feature on the PO should be used to add prepaid information.

**Click the 'Prepay' checkbox. Additional fields will appear below.**

**Enter all prepaid information in these fields.**

Department: 00000 NONE  
 GL account: 11911001 UTILITY DEPOSITS  
 Tax group code: 216 Utilities and Heating Oil  
**Prepay:**   
 Expense department: 07400 UTILITIES  
 Expense account: 64604001 STEAM  
 Prepay start date: 10/31/2008  
 Prepay duration months: 12.00  
 Prepay monthly amt: \$6,000.00

**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.

**Use the 'Add to PO' button to add items to an existing PO**

Buttons: Create PO, Add to PO, Add to order guide, Add to cart

Select	Item #	Product Name Supplier Name	UOM	Pack/Size	Price
<input checked="" type="checkbox"/>	859623	FUJI APPLE	1.00	CS	8.0000

**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.

**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 checkbook? 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. What steps should a PO approver follow when on vacation?**

**A.** When out of the office, approvers should use the My Settings screen to designate an alternate approver.

**Q. What happens to POs that are not approved for an extended amount of time?**

**A.** POs that are not approved for an extended amount of time remain in their approver's approval queue.

**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 most punch-out PO cannot be changed, and the approver would have to disapprove the entire PO. Five punch-out suppliers allow edits to POs. They are Chef Works, Grainger, Cintas, Testa Produce, and HomeDepot Supply.

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

	Status	Type	Doc number	Confirm	Doc Date	Req deliv date	Submitter	Subj / Supplier	Total amount
<a href="#">Edit</a>	Awaiting approval	PO	97760000001941	No	07/21/2008 16:34:26	07/21/2008	Isabel Barabicho	F&B Office Supplies IMPACT PAPER & INK	\$535.29
<a href="#">Edit</a>	Awaiting approval	PO	97760000001940	No	07/21/2008 16:34:09	07/28/2008	Isabel Barabicho	Sales/ Catering Office Supplie IMPACT PAPER & INK	\$535.29
<a href="#">Edit</a>	Awaiting approval	PO	97760000001858	No	03/28/2008 10:53:54	04/07/2008	Isabel Barabicho		\$5,750.00

Approvals header Line items

Search Column: Line # Search Text: GO page 1 of 1 Rows per page 50

Line #	Item #	Product name	Qty req	Qty apprvd	Order UOM	Unit price	Extension
<a href="#">Edit</a>	1	13-305 1ply bond paper	5	5	CS	\$23	\$115.00
<a href="#">Edit</a>	2	18-235 2ply carbonless bond	5	5	CS	\$36	\$180.00
<a href="#">Edit</a>	3	40175 epson ink cartridge	12	12	CS	\$17.4	\$208.80
							\$503.80

OK Cancel Change Product

Use this screen to change PO quantities

Approvals header Line items

Search Column: Line # Search Text: GO page 1 of 1 Rows per page 50

Line #	Item #	Product name	Qty req	Qty apprvd	Order UOM	Unit price	Extension
<a href="#">Edit</a>	1	13-305 1ply bond paper	5	5	CS	\$23	\$115.00
<a href="#">Edit</a>	2	18-235 2ply carbonless bond	5	3	CS	\$36.0000	\$108.00
<a href="#">Edit</a>	3	40175 epson ink cartridge	12	12	CS	\$17.4	\$208.80
							\$431.80

**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 feature in the Order Guide screen. This feature stores the Department code along with the GL account in the Order Guide, and when the user creates a PO, the Department and GL account combination will be put into 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	Department	GL account	Dept
729130	DESSERT TRIPLE MOUSSE 24 CT MARTIN PREFERRED	/				
710434					5.16	
730017					7.02	52110001 02110
					7.40	52110001 02010

**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 Birchstreet?**

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

**Q. Can POs be over-received?**

**A.** Non-catalog POs do not allow over-receiving. Only catalog POs that have catch weight items can be over-received. These catalog suppliers are set up specifically to allow for the over-receiving of goods. For example, catch weight items such as beef can be ordered by the case and received by the pound. For non-catalog POs, an additional confirming PO must be created in order to account for additional quantities that have been delivered.

**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.

•Click the Edit link to return received goods

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

Additional Receiving Fields Appear

OK Cancel

Item

Line: 1  
Line status: Receiving Complete  
Item #: 123  
Product name: Bagels

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