Event Order Management-Vendor (EOM-V)

Visual Training Aid (VTA)

Last edited: January 2025

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ABOUT EVENT ORDER MANAGEMENT (EOM)

WHAT IS EOM?

EVENT ORDER MANAGEMENT (EOM) ALLOWS USERS TO MANAGE EVENTS, PROMOTIONS, AND SURVEYS TO COLLABORATE BETWEEN PROCUREMENT, SUPPLY CHAIN, STORE MANAGEMENT, AND REGIONAL LEADERSHIP.

EOM ALLOWS USERS TO:

1) Create and submit offers for items carried by H-E-B, including half pallets, mixed ready pallets (MRTs), displays with multiple components, and cost links.

    a. Offers should not include any open stock codes. If the component is an open stock item, it must be in a unique configuration.
    b. After entering an existing universal product code (UPC) or item code (IC) into the application, it will prepopulate with all H-E-B system information.
    c. Users must work with their business development manager (BDM) to ensure all information entered in the system is correct before submitting.

2) Create and submit new offers for BDM consideration, prior to setting up the item in Product Attribute Management (PAM).
    a. All new items must be set up using the **New Item Set Up** process within PAM.
    b. For existing items, users will need to go through the same process if any attributes have changed, such as pack size, component UPCs/ICs, etc.

3) Other features include the ability to copy an existing offer, make changes prior to submitting, export the offer list to Excel, and export offer details to PDF.

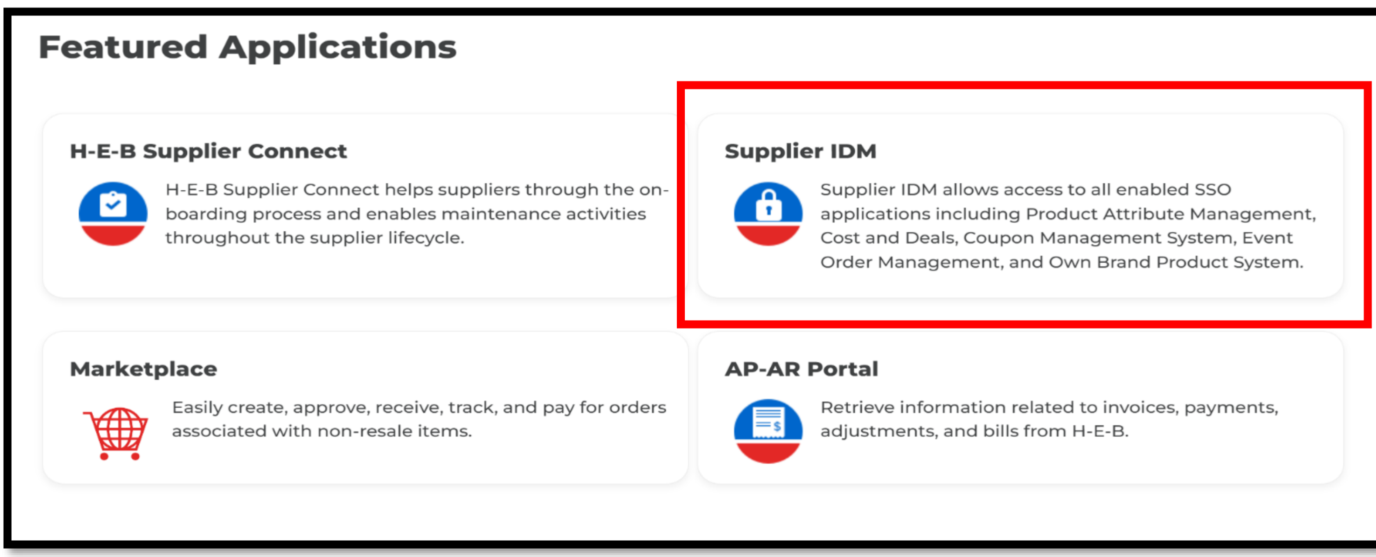
4) Receive email notifications when the offer has been accepted or rejected by the BDM or when the BDM requires users to take further action on the submitted offer.

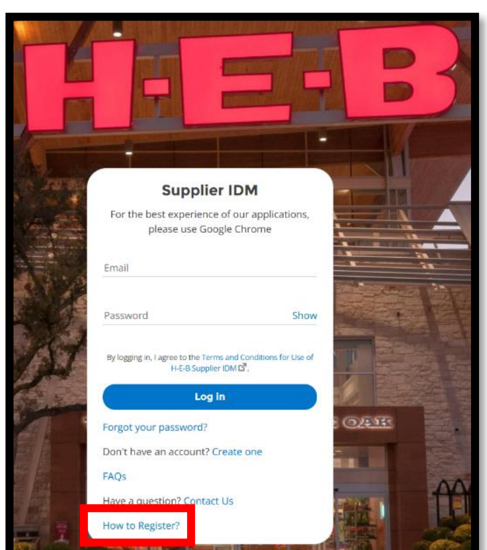
How to access EOM:

Navigating to the Supplier IDM - Quick Set-Up Guide

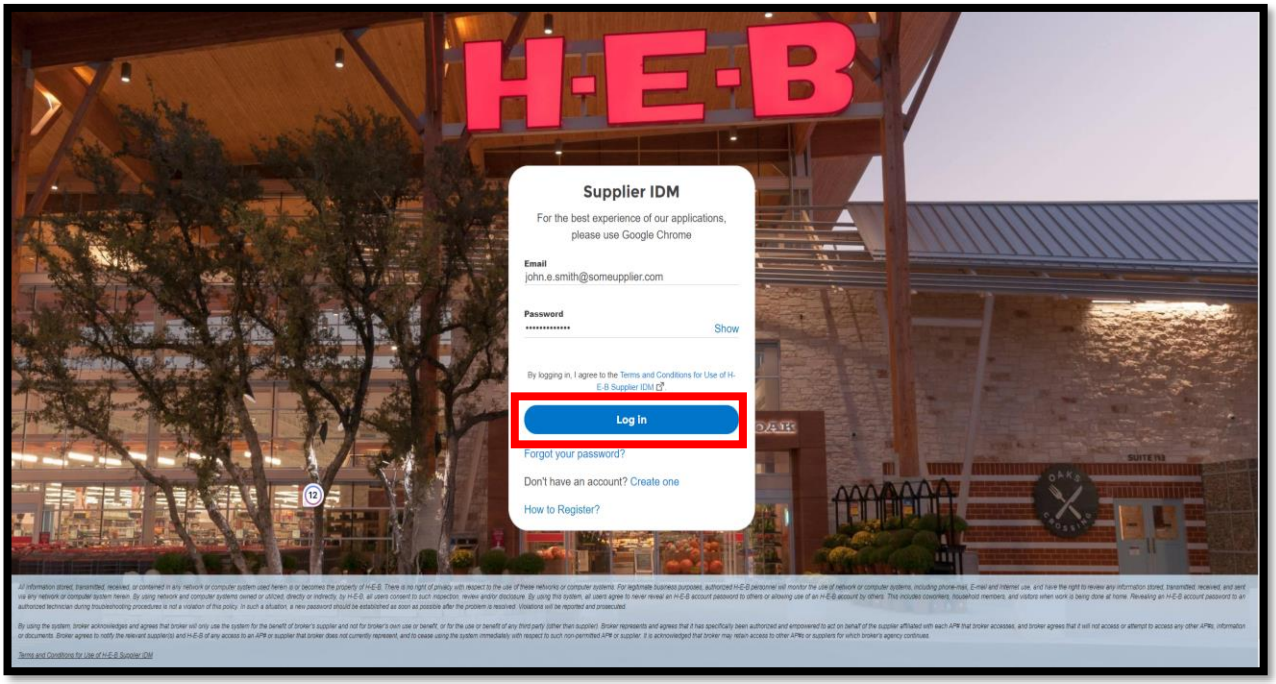
Using a **Google Chrome** browser: Navigate to the H-E-B Supplier Site (https://supplier.heb.com/home)

Select **Systems** > select **Supplier IDM** > select **How to Register?** > follow **Supplier IDM - Quick Set-Up Guide** steps.

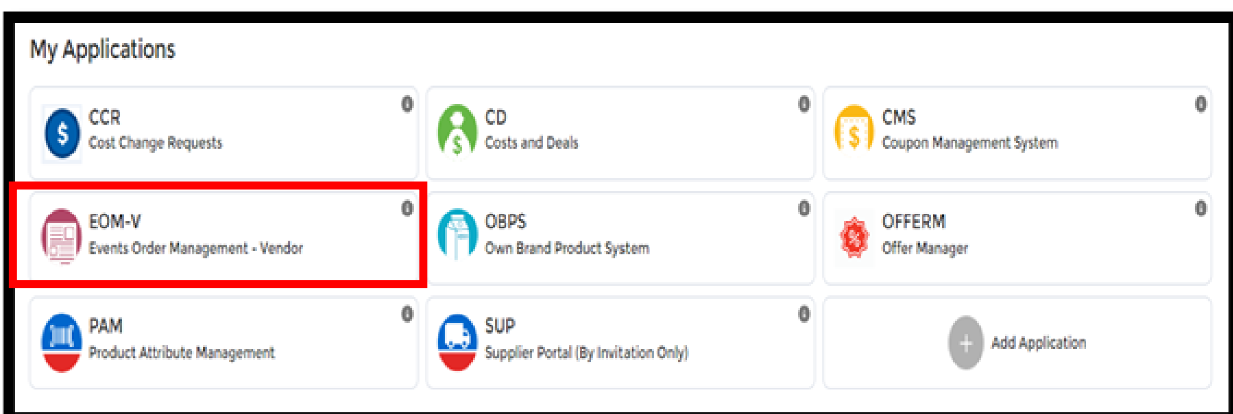




Enter the registered email address and password into the respective fields.



Select the icon of the desired application in the **My Applications** to be directed to that application.



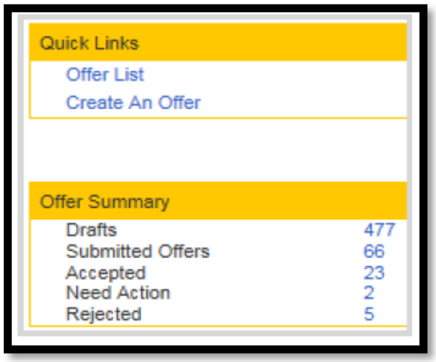
ADDITIONAL ASSISTANCE:

For assistance with Supplier IDM, please reach out to the H-E-B Supplier Engagement team at supplier@supplier.heb.com.

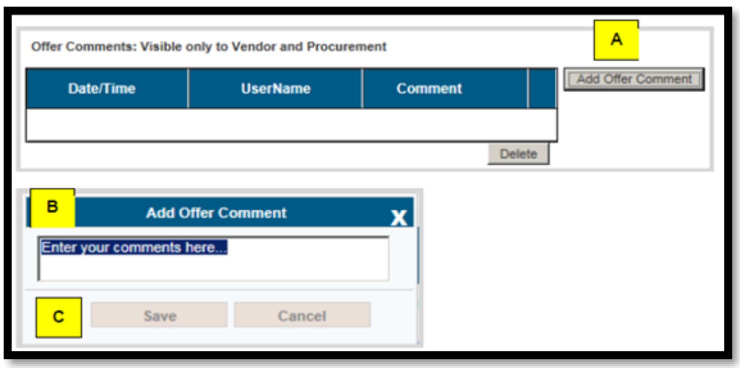
EOM OFFER CREATION AND SUBMISSION

HOW TO CREATE THE OFFER:

Step 1: Navigate to the **Main Menu** > **Quick Links** > select **Create an Offer.**

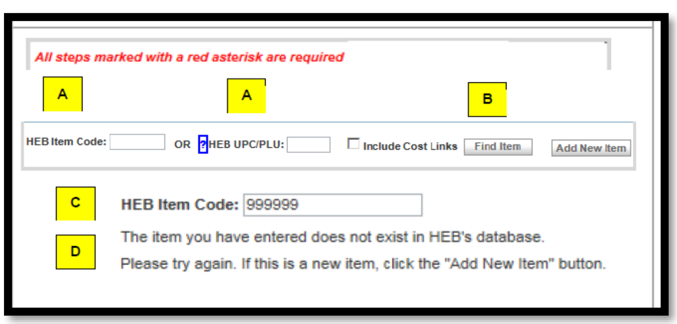


Step 2: Navigate to the **Creation Screen** > select **Add Offer Comment** > enter comments > select **Save.**

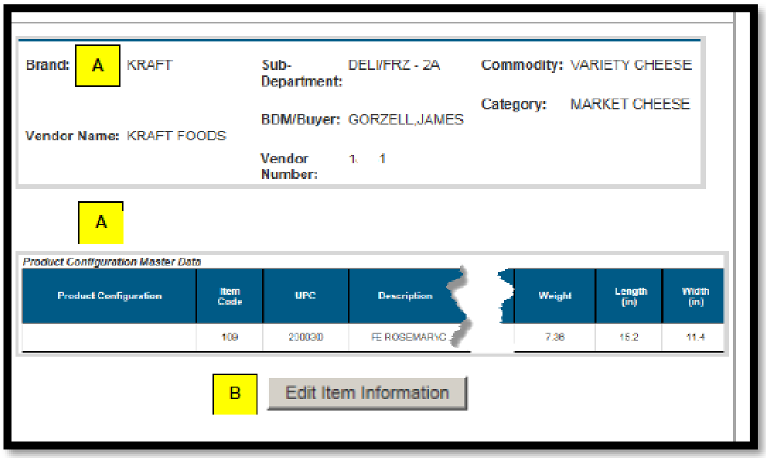


Step 3: Enter the H-E-B Item Code or UPC/PLU > select **Find Item.**

Note: If the item is found, proceed to **Step 4A**, but if the item is not found, read the error message, skip **Step 4A,** and proceed to **Step 4B**.

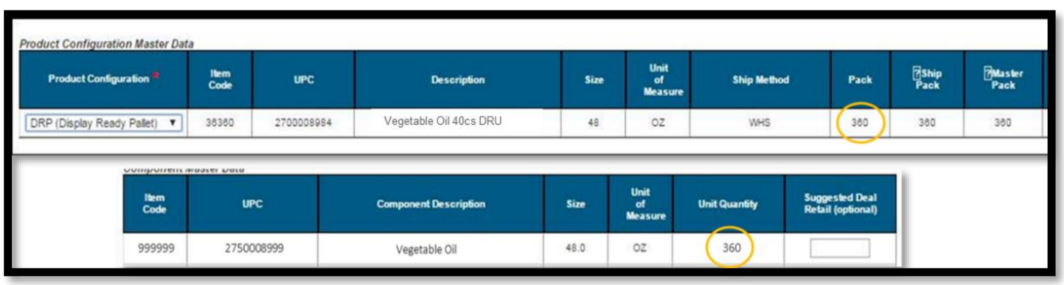


Step 4A: If the item exists, please validate the item information. EOM only allows items mapped to the user's Supplier ID to be added to the offer. Proceed to the next step to add a new item. Select **Edit Item Information** if the information is incorrect.

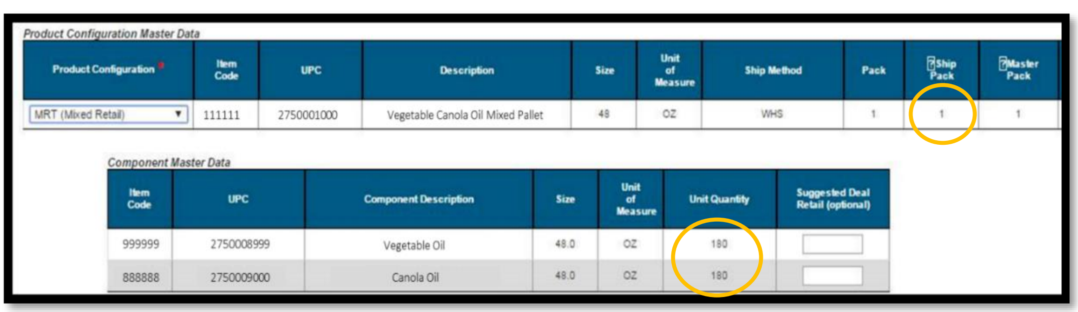


If the offer contains multiple components, the pack may return as a count of "1" based upon how the display was originally setup in PAM instead of the total count of sellable units in the display. If the offer has a single component, the pack will match the Unit Quantity of that component.

Scenario 1: Single Component, display ready pack (DRP) with one SKU the DRP pack size matches the component's "Unit Quantity".

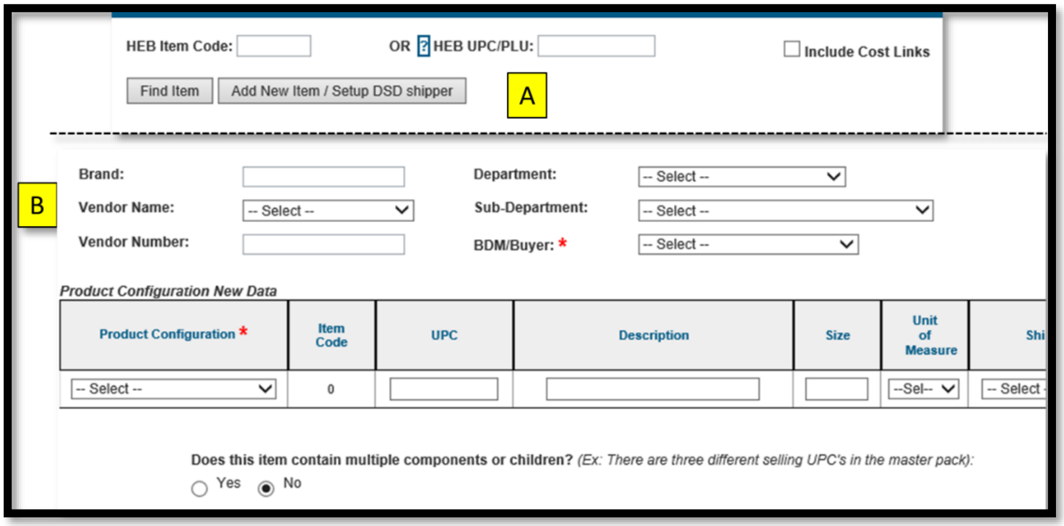


Scenario 2: Multi-Component, mixed pallet with two SKUs the mixed pallet's pack size equals (1) and is independent of the true total quantity of the sellable component units. **DO NOT EDIT THE ITEM INFORMATION-** This set up display should not be changed unless the user submits the revisions through PAM.

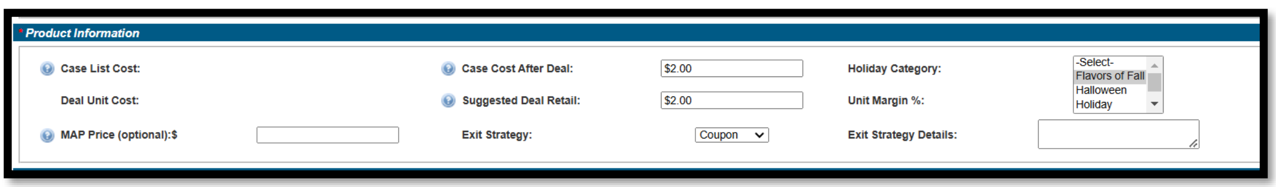


Step 4B: If the item doesn't exist or the user received the Error Message in Step 3:

Select **Add New Item/Setup DSD Shipper** > enter **New Item** fields.

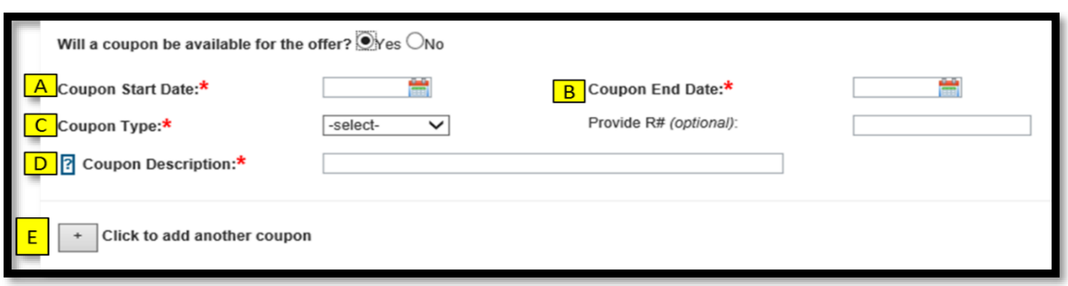


Step 5: Product Information



Step 6: Mark **Yes** or **No** if a coupon will be available for the offer. If selecting **Yes:**

Enter the **Coupon Start Date** > enter the **Coupon End Date** > select the **Coupon Type** from the drop-down options > enter the **Coupon Description** > select **Submit.**

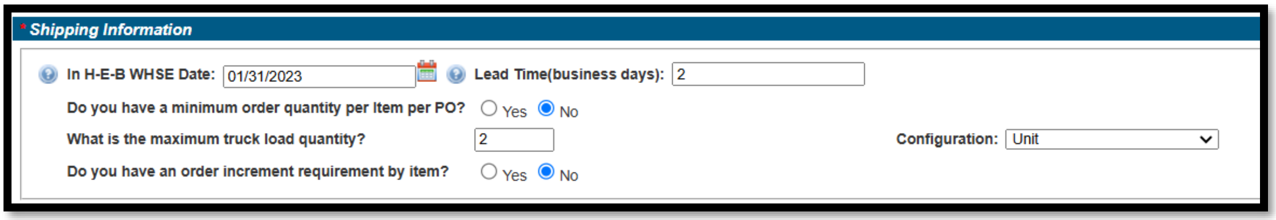


Note: Users can submit multiple coupons as a part of the offer.

After adding the first coupon, select the **+** button to add another coupon. Select the **Delete Coupon** button to delete a coupon. The coupon must be set up in Offer Manager (OM) if the offer is accepted by the BDM.

Step 7: Enter Shipping Information

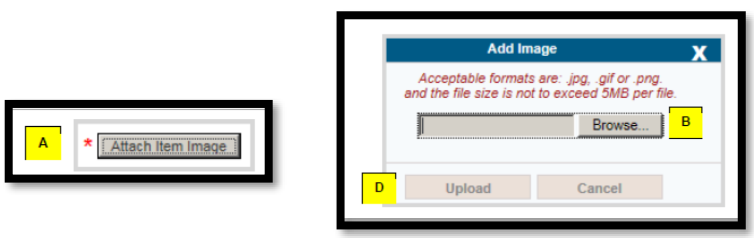
Enter the first available date > enter the **Lead Time** (business days) > enter the **Maximum Truck Load Quantity** > select **Configuration** (Case, MRT or Full Pallet)



Note: Minimum Order Quantities (MOQs): Please provide minimum truck load quantities and order increments (if applicable). Failure to provide this information will result in delayed or cancelled orders.

Step 8: Attach an Item Image

Select **Attach Item Image** > select **Browse >** select the file > select **Upload**

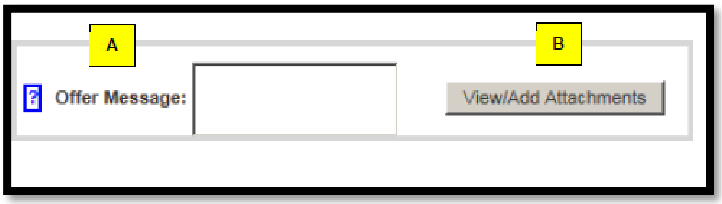


NOTE: Acceptable formats are .jpg, .gif, .png and the file size is not to exceed 5MB per file.

Step 9: (Optional) Add messages and other attachments

The **Offer Message** can be viewed by store department managers. The message describes the offer and explains why the item is great for the holidays.

Users can attach other documents for the store department managers to review when placing the orders. To add other attachments, select the **View/Add Attachments** button.



Note: If the offer is accepted, the user is required to create the new item in PAM and attach a spec sheet to the offer using the **Add Attachment** button. Users can avoid double entry if the Item is entered into PAM first.

Note: If changes are made to a key attribute on an offer, the user is required to update the change in PAM and attach a spec sheet using the **Add Attachment** button.

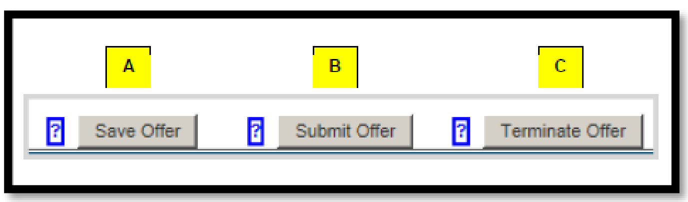
Step 10: Action Button to Save, Submit, or Terminate an Offer

To **save** and **NOT** submit, select **Save Offer**

> **Note:** If users are waiting for information, users may save the offer and come back later to finish populating the offer and then submit.

To **submit** the offer to the BDM/Buyer, select **Submit Offer** and enter all required information fields.

To **cancel** the offer, select **Terminate Offer**.



WHAT HAPPENS AFTER THE OFFER HAS BEEN SUBMITTED?

Step 1: The BDM will review the offer and either accept, reject, or request revisions.

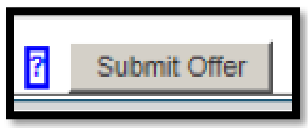
Step 2: An email will be sent to the email address associated with the user's Supplier IDM account to notify the user of the offer status.

Step 3: The Regional Merchant and Director will provide the final approval or rejection of the offer. (A BDM's accepted offer can be rejected at this stage.)

Step 4: If the offer does not receive Regional Merchant and Director approval, the user will receive an email notification regarding the new offer status.

WHY CAN'T THE BUYER SEE MY OFFER?

- Verify the offer has been submitted properly and is no longer listed in the "saved" offers.
- Verify the correct BDM was selected.



Note: The BDM cannot accept an offer for a new or changed item until the item has been set up in PAM.

HOW TO UPDATE THE OFFER AFTER A NEW ITEM IS SET UP?

Step 1: The offer status must be **Vendor Action Required.**

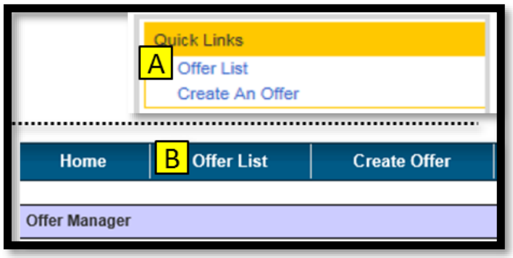
Step 2: Users may key the new IC or UPC and it will replace the previously keyed item information.

Step 3: Re-submit the offer.

NOTE: If a BDM makes updates to the offer, they will be notated in the **Offer Comments** section at the top of the offer detail page.

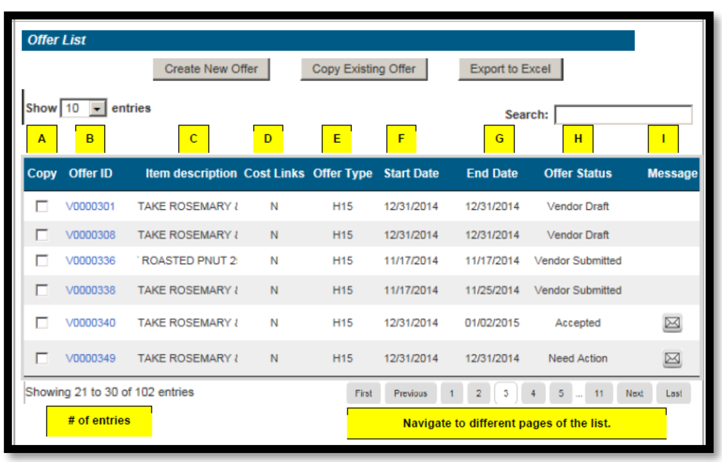
EOM OFFER STATUS

Step 1: Navigate to the **Home Page** > navigate to **Quick Links** > select **Offer List**



Step 3: View the Offer List

A. Copy: check to duplicate offer
B. Offer ID: double click the link to view the offer
C. Item Description
D. Cost Link: Y, if included in the offer
E. Offer Type
F. Start Date
G. End Date
H. Offer Status
I. Message: select **Message**, if applicable



Note: Offers with **Need Action** status always display first and are highlighted in yellow. All other offers are listed in descending order by Offer ID unless a filter was used.

OFFER STATUS DEFINITIONS:

1) **BDM Accepted:** The BDM has reviewed the offer and accepted it.

2) **Cancelled:** The supplier has terminated the offer and it is no longer valid.

3) **Need Action:** The BDM has reviewed the offer and action must be taken to revise part of the offer prior to accepting. Look for the mail icon to view messages from the BDM. Once the user has made the changes, the offer must be re-submitted to the BDM. The BDM cannot accept the offer until the item has been set up in PAM and the IC or UPC has been added to the offer.

4) **Rejected:** The BDM has rejected the offer.

5) **Vendor Draft:** The offer has been saved and can be revised or updated before submitting. The BDM cannot see offers that are in **Vendor Draft** status.

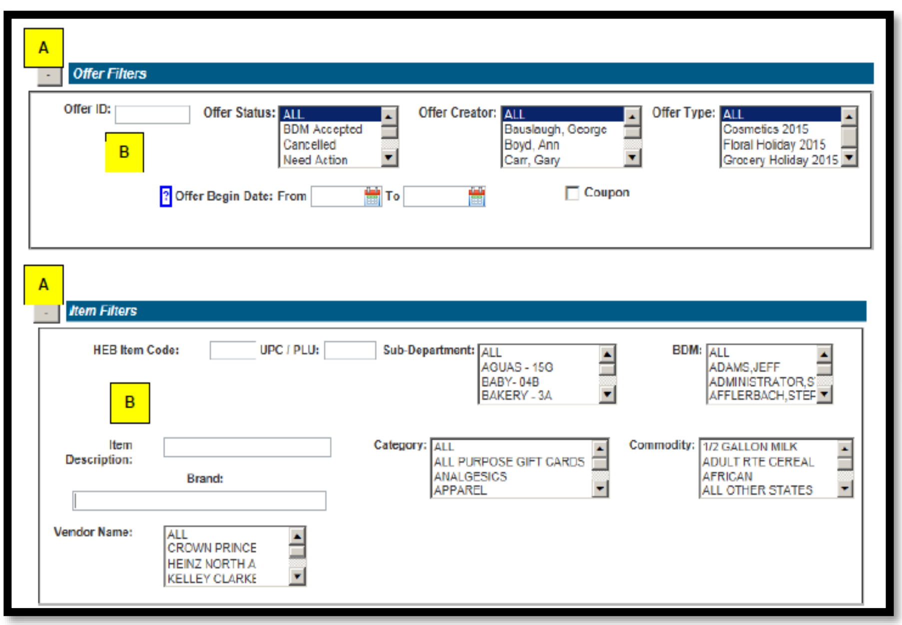
6) **Vendor Submitted:** The offer has been submitted and the BDM is now able to review the offer. The BDM can accept, reject, or request revisions.

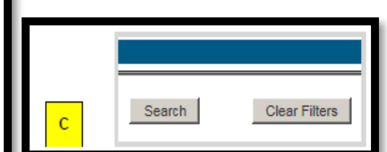
EOM NAVIGATION

HOW TO USE FILTERS:

Step 1: Access **Offer Filters** section and/or the **Item Filters** section.

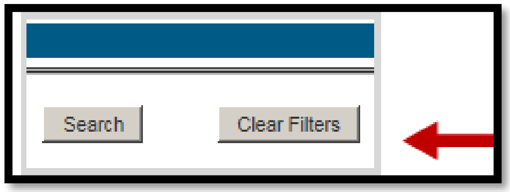
Expand **Offer Filters** by selecting the **+** icon > select **Search**





Note: To make multiple selections from a drop-down list, hold the **Control** key on your keyboard, while clicking on the selections.

Step 2: Select **Clear Filters** if the intended results are not received.

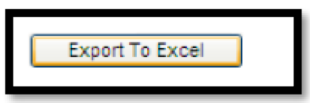


Note: Users can filter either or both sections at the same time.

EXPORTING & PRINTING EOM OFFER SUBMISSIONS

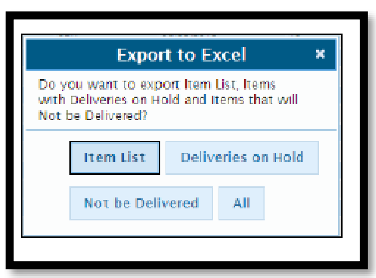
HOW TO EXPORT OFFER DATA TO EXCEL:

Step 1: Select **Export to Excel**

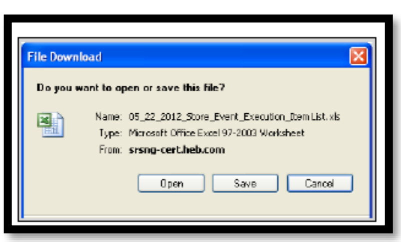


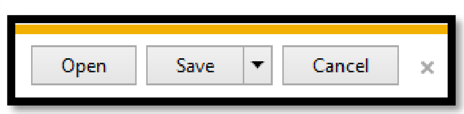
Step 2: Users will need to choose which list must be exported.

- Item List
- Deliveries on Hold
- Not be Delivered
- All: Select to export all of the above reports



Step 3: Select **Open.**





Results: Excel opens and the data is populated. Use Excel functions as needed to view, sort, rearrange, or save data.

	A	B	C	D	E
1	Event ID	Event Name	Promo Type	Start Date	End Date
2	10000	Halloween Promo (Test Event)	HOL, B, P,	11/8/2011	11/13/2011
3	10002	Test Event 1	NONE, P, CBO, B, CPN, HOL,	12/2/2011	12/27/2012
4	10005	Test Ely Event	CPN,	11/9/2011	11/24/2011
5	11272	Test Event 2	ROP, MDL, NIB, PDP, PLT, RFS,	11/1/2011	3/26/2013
6	13864	Beta Jayjay Event 0.1	P, CBO, PLT, HOL, MDL, CSB,	12/1/2011	12/12/2011
7	13866	Beta Jayjay Event 2.0.0	DMO, WOW,	12/14/2011	12/30/2011
8	25373	Valentine 2012	CPN,	2/12/2012	1/15/2012
9	31777	JackMapaTest	CBO,	2/16/2012	2/23/2012
10	32159	klhviu	CBO,	2/1/2012	2/29/2012
11	36061	Darren February 9-3	HOL,	2/26/2012	2/29/2012

HOW TO PRINT THE OFFER:

Select **Export to PDF >** Users can utilize the print feature in the PDF viewer software