

ORCHESTRA

OCloud Item Master Data Practice Lab



Overview

While your Implementation Consultant will make sure to add in all the item and inventory information you sent them, as time goes on, it's going to be necessary to add in new items into the database. Fortunately, it's a simple process.

This lab will walk you through how to add in new grain but adding in any other items works just the same.

In our labs, names of editable fields will be <u>underlined</u> (example: "Click in <u>Item Description</u>"). Clickable items like modules or menus will be **Bolded** (example: "Click on **Modules**"). Key terms for Orchestrated will be *italicized*.

Exercise 1 – Add a New Grain

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Duplicate a Like-Type Item

Because we enter in so much information about each item that remains the same across all items of that type (for example, all grain), the best practice is to duplicate the last item of that type in your inventory. This way all those fields and all that information will copy over, and you won't have to worry about any of it being lost.

1. Open Modules > Inventory > Item Master Data or click it in your Common Functions box if you have already added it.

The *Item Master Data* window opens. Note that all fields are yellow; that means you're in *Find Mode*; those yellow fields are all searchable.

Item Master Data
Item No.
Description
Foreign Name
Item Type
Item Group
UoM Group
Daine List

ltem Master Data							
Item No.	•	RG	Active			Inventory Iter	
Description						Sales Item	
Foreign Name						Purchase Item	
tem Type		Items		Brand			
Item Group	=>	100	-	Pack Type			
UoM Group			• (Bar Code			
Price List		CA-North		Unit Price	Primary Curren	14	



ITEM MASTER DATA

If you haven't added it to your cockpit yet, we recommend you do so now. It'll come in handy often!

2. In the Item Number box, type "RG" and press the <ENTER> key or click Find. This'll bring up a list of all Raw Materials: Grain items.

3. Select the last itme in the list. (In this image, it's RG2014 – Malted Barley) Click Choose or press <ENTER> This will open the item and display all the info that has been entered about it.





ITEM MASTER DATA

As you can see if you click through the tabs, there's a lot of information entered about this item!

Rather than try to painstakingly recreate all this on our new item, we'll duplicate it and bring all that info over automatically.

Right click on any of the gray area and select Duplicate. All the information of the previous item has been pulled to the new one!

tem No. Manual	RG2014	RG2014 Active				V Inv				
Description	Malted Barley	Malted Barley				Sales Item				
Foreign Name						Pu	rchase Item			
tem Type	Items	▼ Brand					•			
tem Group	RM: Grains	*	Pack Type Bar Code		e UoM - Poi		und 🗾			
JoM Group	Manual	• (3)								
Price List	CA-North	•	Unit Pri	ce .	Primary	Curre				
Process Type	None	*								
General Purchasing Dat	a Sales Data Inventory Data	Plannin	g Data	Product	ion Data	Propertie	Attachments	Remarks	Batches	
Do Not Apply Discount	t Groups		C	D	uplicate	te.				
Manufacturer	- No Manufacturer -	-		C	onvert	10				
Additional Identifier				Co	onvert	From				
Shipping Type	Distributor Truck	-		N	ew Acti	vity				
Serial and Batch Numbers				B	icinoce	Partner	Catalog Nur	nhore		
Manage Item by	atches 💌			Bill of Materials						
Management Method	On Every Transaction			DI	II OT IVIA	iterials				
				A	ternativ	/e Items				
				Re	elated A	ctivities				
				In	ventor	Posting	g List			
				In	venton	Audit I	Report			
				Bi	n Locat	ion Con	tent List			
				1+4	in lie					
 Active 	From To		_	176		т				
O Inactive				Ba	at <u>c</u> n ivu	mper Ir	ansactions R	eport		
Advanced			Inventory Status							
				Cr	eate Pu	urchase	Quotation			
TTR Graup Parlay			Purchase Quotation Comparison Report							
The Group Barrey		Cou	ntry	Pu	irchase	Reques	t Report			
		Stan	dard	Δ.	ailable	to Pro	mise			
		Com	mod	A.	anable,		e			

Click in the <u>Item Number</u> box and increase the item number by 1. (In this

tem No.	Manual 🔻	RG2015 Active				✓ Inventory Item			
Description		Smoked Rye				Sales Item			
oreign Name				_			✓ Purchase	Item	
Item Type Item Group 📫		Items	ms 🔻		Brand Pack Type			.	
		RM: Grains		•		UoM - Pound			
loM Group		Manual	•	۲	Bar Code			****	
Price List		CA-North	•	•	Unit Price	Primary Curre			
rocess Type		None	•						
the na	ame of yc	ou new grair	n in th	e	Descripti	<u>on</u> box			

- 7. Make sure <u>Pack Type</u> is set correctly. For grains, UoM Pound is typical.
- 8. Press <ENTER> or click Add
- 9. Press <ESC> or click Cancel to close the Item Master Data window.

Exercise 2: Add a new sugar

Now that you've successfully added a new grain, try it again below with a new sugar. If you need a hint, the steps are listed below. Try it without them first, though.

Exercise steps:

6.

1. Open the Item Master Data function.

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- 2. Find the last entry of a similar item (a sugar in this case)
 - a. Remember, you can quickly find an item type if you remember its item code. What's the item code prefix for 'raw material: sugar'?
- 3. Choose the last sugar in the list
- 4. Right click and choose Duplicate
- 5. Increase the item number by 1.
- 6. Change the name under <u>Description</u> to the new sugar name. Keep the formatting consistent with how your other sugars are names.
- 7. Check that the <u>Pack Type</u> is correct.
- 8. Press <Enter> or click Add
- 9. To exit the window, press <ESC> or click Cancel

How did you do? If you had to check the sheet or look at the diagrams, that's ok, just practice some more until you've got it!