ORCHESTRA

Business Partner Master Data Practice Lab

Contents

Overview

While your Implementation Consultant will make sure to add in all the business partner information you sent them, as you grow your business and build new partnerships, you'll need to add those partners into Orchestrated. It's as easy as adding a new contact to your address book.

This lab will walk you through the process of adding in a new vendor, but you'll follow the same process to add a new customer.

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: Add a new vendor

Unlike adding a new item, with business partners, we don't want to duplicate it. We'll create a new one from scratch.

1. Open **Modules>Business partners>Business partner master data** or click it in your *common functions* box if you have already added it. The business partner master data window opens. Note that all fields are yellow; that means you're in *find mode;* those yellow fields are all searchable.

Business partner

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

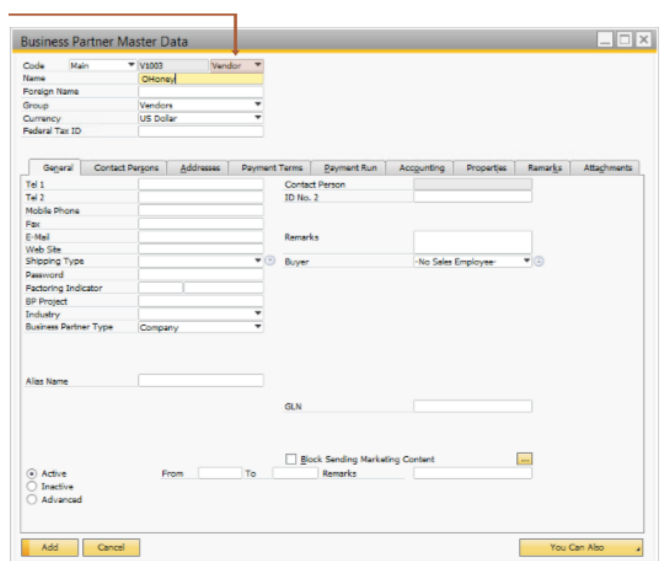
2. Switch to *add mode* by pressing <Ctrl-A> or clicking the **add mode** button. The yellow boxes will turn white, and in some, information will auto populate.

3. We want to add a vendor, so click the dropdown in the top line and select vendor.

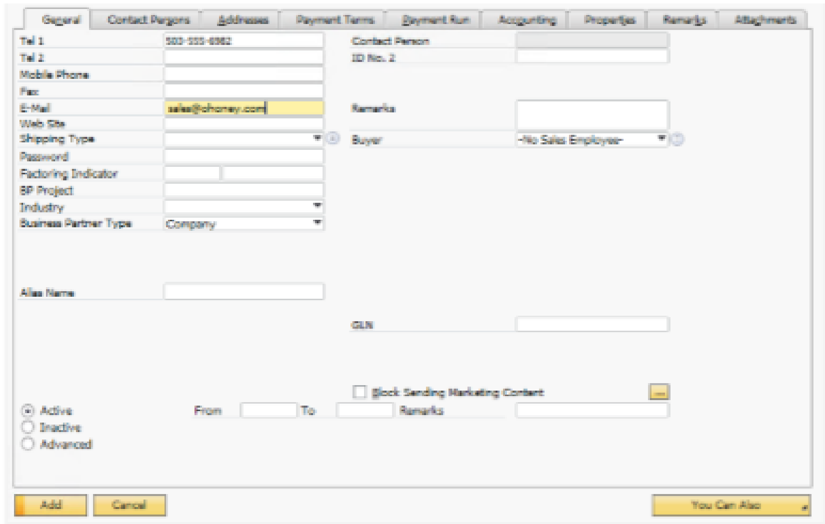
4. Enter the new vendor's name in the <u>name</u> box. We'll call our new vendor OHoney.

We'll handle

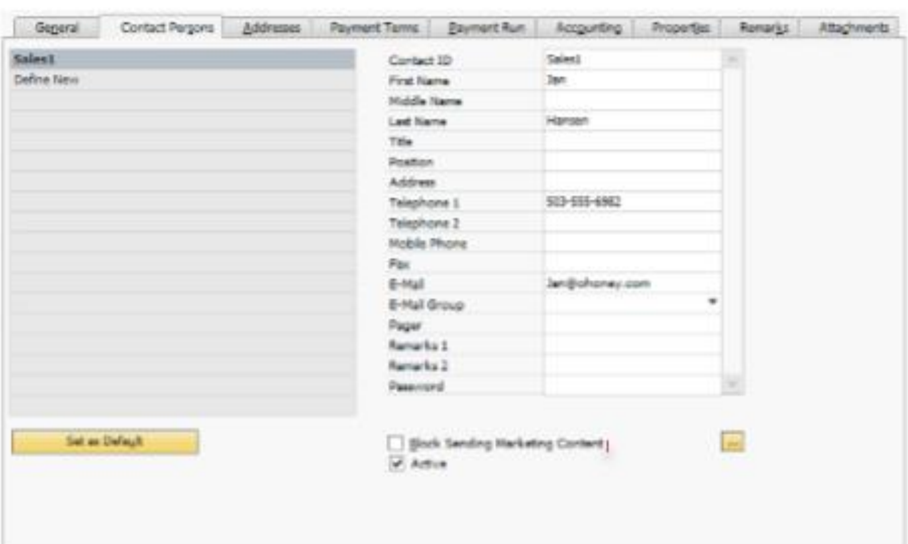
Orchestrated will generate your vendor or customer code for you, increasing the number by one for each new partner of that type.



5. Next we'll put in some contact information for our primary contact.
   a. On the **general** tab, enter:
      Tel 1: **503.555.6982**
      Email: sales@ohoney.com



   b. On the contact persons tab, enter:
      Contact ID: Sales1
      First name: Jan
      Last Name: Hanson
      Tel 1: 503.555.6982
      Email: jan@ohoney.com



   c. Click **<set as default>** to make Jan your primary contact at OHoney.

6. Now we need to enter some financial information so we can pay this vendor.

All that info?

While much of the contact info for business partners is optional, remember that you get out what you put in. Orchestrated shines through integration, so incomplete information means Orchestrated can't do its best work.

If you put in complete information, it's going to give you more complete and better looking reports, invoices, purchasing documents, and sales documents. Plus, having information like emails on file lets you send important documents like purchase orders straight from Orchestrated.

If you're unsure what information you should put in, we recommend that you start with the information you're inputting in the lab here.

a. On the **addresses** tab, look under *pay to*, and select **define new.** Then, in the column to the right, enter:
<u>Address ID:</u> Main Office
<u>Street/PO box:</u> 400 NW Compton Dr
<u>City:</u> Portland
<u>Zip code:</u> 97006
<u>State:</u> Oregon

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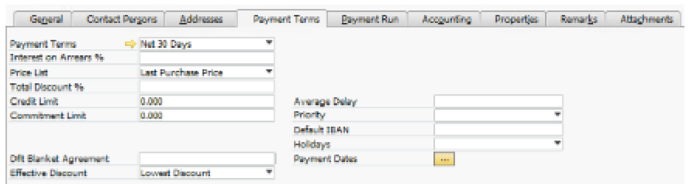
b. Click on the **payment terms** tab, and enter:
<u>Payment terms:</u> Net 30 days
<u>Price list:</u> Last purchase price



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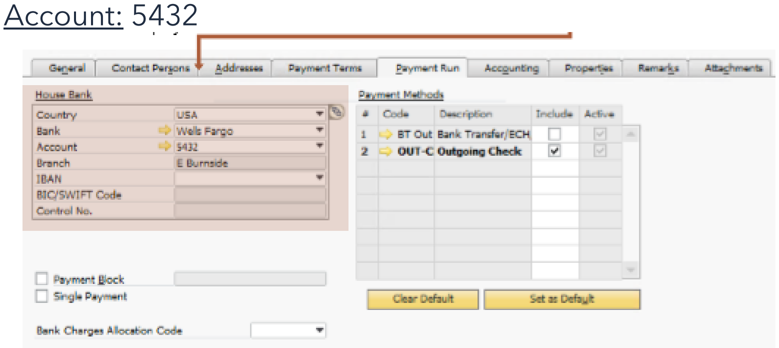
Price list

When you select <u>price list</u> for a vendor, make sure to select 'last purchase price.' This way, Orchestrated will auto-populate pricing info for the items you want to order, based on the moving average it's already tracking for you.

c. Choose the **payment run** tab. Look under *house bank*. Enter:
<u>Bank:</u> Wells Fargo
<u>Account:</u> 5432



Make sure 'outgoing check' is selected and bold so we can pay OHoney with a check when it comes time to pay.

If it isn't, click the row, and then click **<set as default>** to set 'outgoing check' as your default payment method for this vendor.

d. That's all we need in order to create this business partner. Click **<add>** to save what we've entered.

Great. This is all you need to enter in the new vendor. On the next page, try it on your own.

Exercise practice: Add a new vendor

Now that you've added a new vendor with the walkthrough, try it on your own. Add a new vendor: Eternal Hoptimist.

Here's their contact info:

Tel 1: 503-555-9917
Email: sales@eternalhoptimist.com

Contact person

Will Daniels
Tel 1: 503.555.9917
Email: willdaniels@eternalhoptimisit.com

Addresses

Address ID: Main Office
Street/PO Box 400: NW Compton Dr
City: Portland
Zip code: 97006
State: Oregon

Bank: Wells Fargo
Account: 5432

The steps will be available below in case you get stuck.

1. Open **business partner master data**
2. Switch to *add mode*
3. Choose vendor
4. Enter vendor name
5. Enter primary contact information. Remember to add info in:
    a. General
    b. Contact persons
6. Enter payment information. Remember to add info in:
    a. Addresses
    b. Payment terms
    c. Payment run
7. Click **add**