



Business Partner Utility

Summary

A simple, yet powerful, Excel utility to make mass updates to common Business Partner Master Data fields for existing BPs.

Description

Business Partner Master Data keeps track of many important pieces of information for all of your vendors and customers, but maintaining or reviewing that data for accuracy can be tiresome. To help ease this problem we created an Excel utility, titled the Business Partner Utility (found in the *Utilities* menu for all Orchestrated platforms.)





****Once the Excel tool has launched, the first thing to do every time is click Get Existing Data at the Top – either This Worksheet or Entire Workbook. This ensures your data is accurate and up-to-date with your real-time database before making adjustments.**

Note the separate Excel tabs at the Bottom for Customers and Vendors, and across the Top are columns with Filters so you can make adjustments to only view the subsection of items that you're looking to update. Many cells have dropdown menus in them, as the information for the cell is restricted to one of a few options only – cells that allow free-form text (the Phone and Email cells are examples) can be typed into directly. Business Partner Codes cannot be changed from the Utility nor the database – you will need to create a new BP and Inactivate the old one.

As you make adjustments the *Action Required* column on the Far Left automatically changes to a 'U' indicating the row is ready to be updated.

When you have one or more updates to send back into Orchestrated, click Process Changes to Worksheet at the Top. Once complete, your view automatically shows the status of each row on the Far Right, under *Processing Results*. If any errors occurred, those rows will appear at the Top with an error to help resolve the cell causing the error. If you can't resolve an error send in a Support Ticket (or contact your Implementation Consultant if still implementing) and we'll be able to help.



The changes are immediate and can be viewed from the database right after to confirm successful completion.

Note:

- All users, regardless of license, will have access to the utility but changes can only be performed by users with the ability to add/edit Item Master Data fields. And keep in mind you cannot add new items within the Utility.
- Currently Contact Persons and Bill To/Ship To Addresses cannot be updated from within the Utility, but those are additions will be available in a future update of the Utility.

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