



ORCHESTRA

Overview | Spirits

This guide will introduce you to the software roadmap, navigation and core functionality within Orchestrated!



Contents

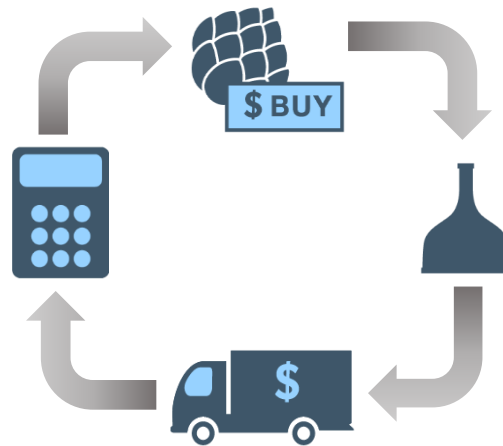
Software navigation	5
Logging-in.....	5
Navigation basics	6
Main Menu Bar & Tool Bar	7
Main menu	7
Tool bar	7
Search Bar	7
Yellow Arrow.....	8
How to Exit	8
Interface	9
Cockpit	9
Modules & Functions	10
Core functionality.....	11
Core master data.....	11
Business Partner Master Data	11
How to find/search Business Partner Master Data (Ctrl F).....	12
How to add Business Partner Master Data (Ctrl A).....	14
Item Master Data	16
How to find/search Item Master Data (Ctrl F).....	17
How to add Item Master Data (Ctrl A).....	22



Software Roadmap

The Orchestrated Continuous Cycle

What are the components/departments required to make one orchestrated system? We have broken them out into 4 functions: Purchasing | Production | Sales | Financials. Each department is dependent on one another:



1. Purchasing = A/P (accounts payable)

Order materials | Receive orders | Verify incoming billing

2. Production

Each stage of production consumes the last:



3. Sales = A/R (accounts receivable)

Intake orders | Verify outgoing delivery | Bill customers

4. Financials

Real time accounting throughout daily operations

If one of the components is removed, the cycle is broken and cannot be completed, e.g. if money is not received through Financials, more ingredients cannot be purchased. If finished goods are not sold, no money will be received. If production shuts down for a week, the sales department has no end-product to sell.



Software Roadmap

The Orchestrated Continuous Cycle continued

Purchasing



What will be created:

Purchase Order (PO) - list of items to buy

Goods Receipt PO - list of items brought into stock

A/P Invoice - representation of what is owed to vendor/supplier

What will be received:

Inventory into stock (Raw Materials, Packaging, Merchandise, Office Supplies)



Production



What will be created:

Production Order (PdO)

Plan of what to make & the inventory/ingredients required

Worksheet (Cooking/ Stillhouse/ Cellar/ Packaging)

What will be received:

New liquid/finished goods into stock

What will be removed:

Raw Material and/or liquid from stock

Final liquid & packaging items from stock



Sales



What will be created:

Sales Order - What the customer wants to order

Delivery Note - What is actually delivered to the customer

A/R Invoice - What is being charged to the customer

What will be removed

Finished goods from stock (Kegs, Cases, Bottles etc.)

Financials



What will be created:

Outgoing payments (A/P) - out to vendors

Incoming payments (A/R) - in from customers

What will be received/ removed:

Money \$ \$ \$

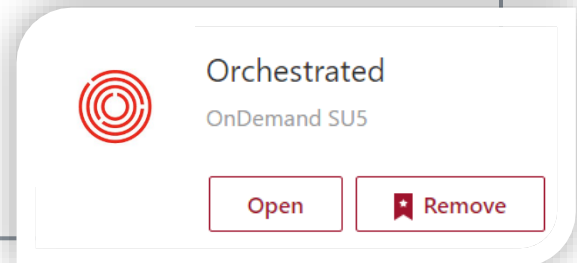




Software navigation

Logging-in

1. Open **any** web browser
2. Go to Citrix.com/downloads and download latest version of "Workspace app"
3. Enter URL: login.orchestrated.com
4. Input your login information (Username & Password - provided by your consultant)
5. Click on the Apps Tab
6. Double-Click the Orchestrated icon to launch your Database
7. CONGRATULATIONS! You're in!



Databases

- Training Database - mock data to practice and train with
- Testing Database - your data (not live)
- Productive Database - your LIVE data

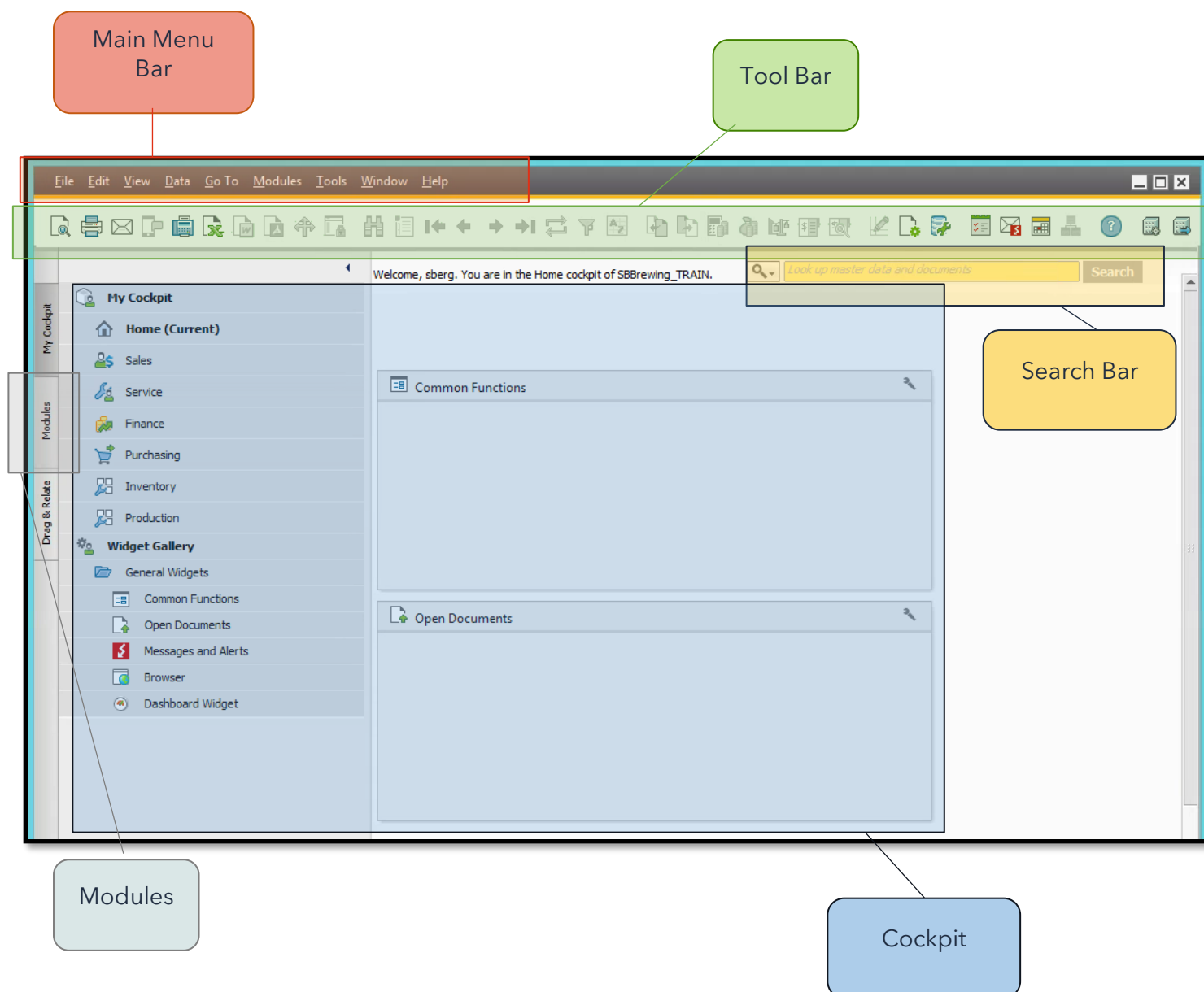
*Troubleshooting:

- If you get Citrix pop-ups, click Allow and check the box so you don't see that reminder again
- If it appears your mouse is not working in the system, make sure the Display settings on your desktop are set to 100% for each monitor
- If you continue experiencing difficulties, helpful information can be found at our support site: <http://support.orchestratedbeer.com/hc/en-us/articles/208981858-Log-in-to-Orchestrated-OnDemand>.



Navigation basics

Orchestrated is built on top of SAP Business One. SAP Business One is an ERP (Enterprise Resource Planning) solution and is the backbone to our product, allowing us to automate key business functions. The software organizes functions into Modules, and Orchestra Software has expanded upon these modules to assist Breweries with handling all aspects of the ORCHESTRATED Continuous Cycle ([Purchasing](#) | [Production](#) | [Sales](#) | [Financials](#)) on one, tailored platform. Let's look at the basics of navigating the system and see what the interface offers:





Main Menu Bar & Tool Bar

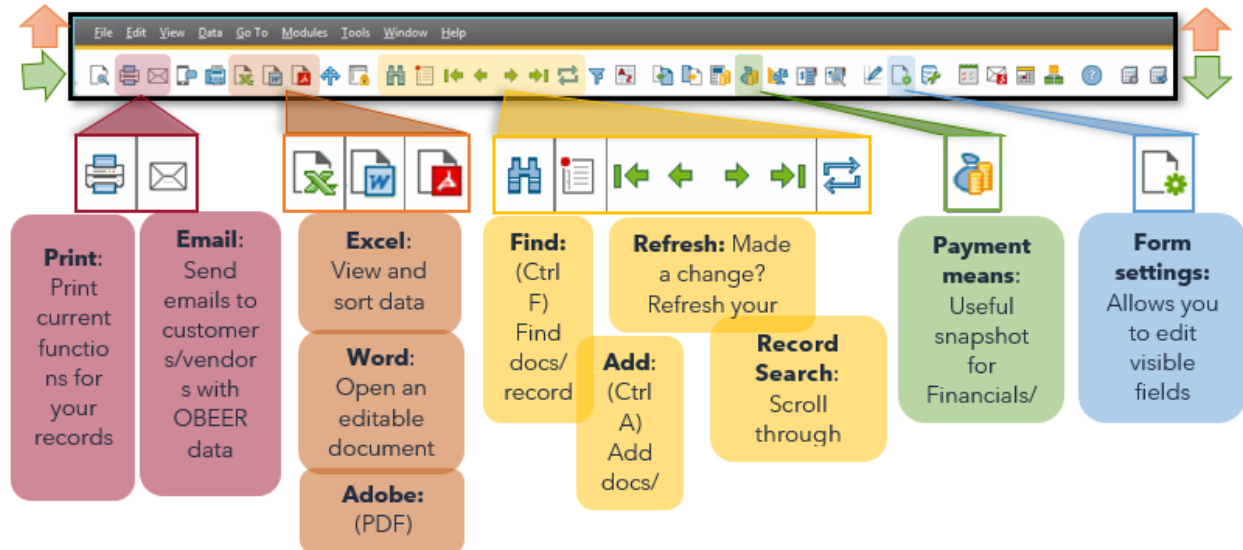
Main menu

File | Edit | View | Data | Go To | Modules | Tools | Window | Help

Can be accessed by right-clicking anywhere as well

Help Menu: Useful for assistance with SAP

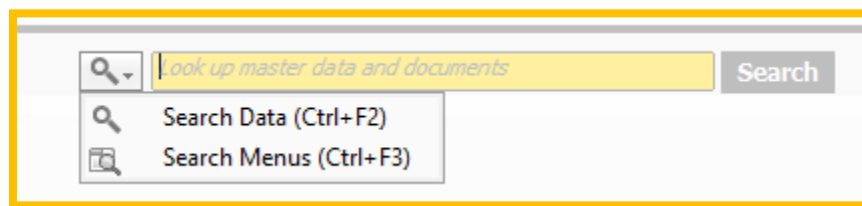
Tool bar



Search Bar

Search Data - look for master data (items/business partners)

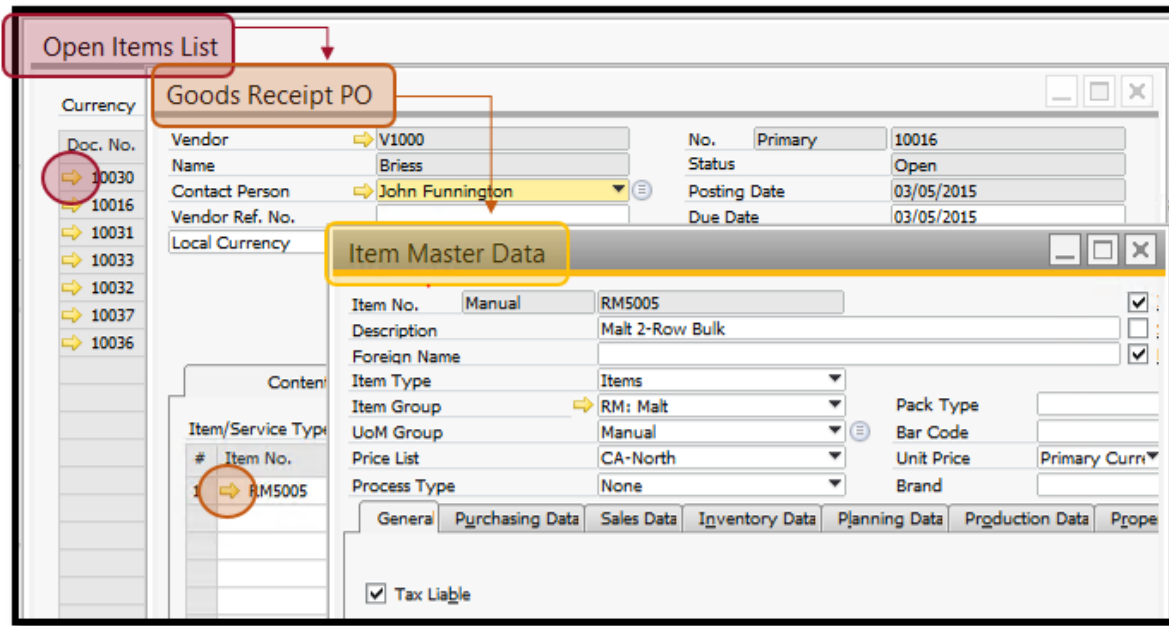
Search Menus - look for





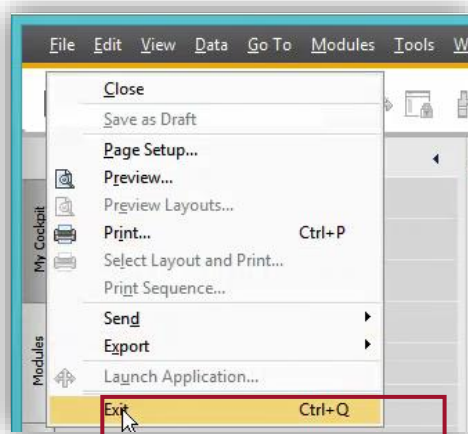
Yellow Arrow

This tool is used to “drill down” within functions and get to a deeper level of data (opens up a new function!)



How to Exit

When customizing your view, such as utilizing your cockpits and changing form settings, it is important to note that clicking X in the top right corner will NOT save those changes you diligently made. Therefore, it is best practice to always use **File > Exit** to leave the software.





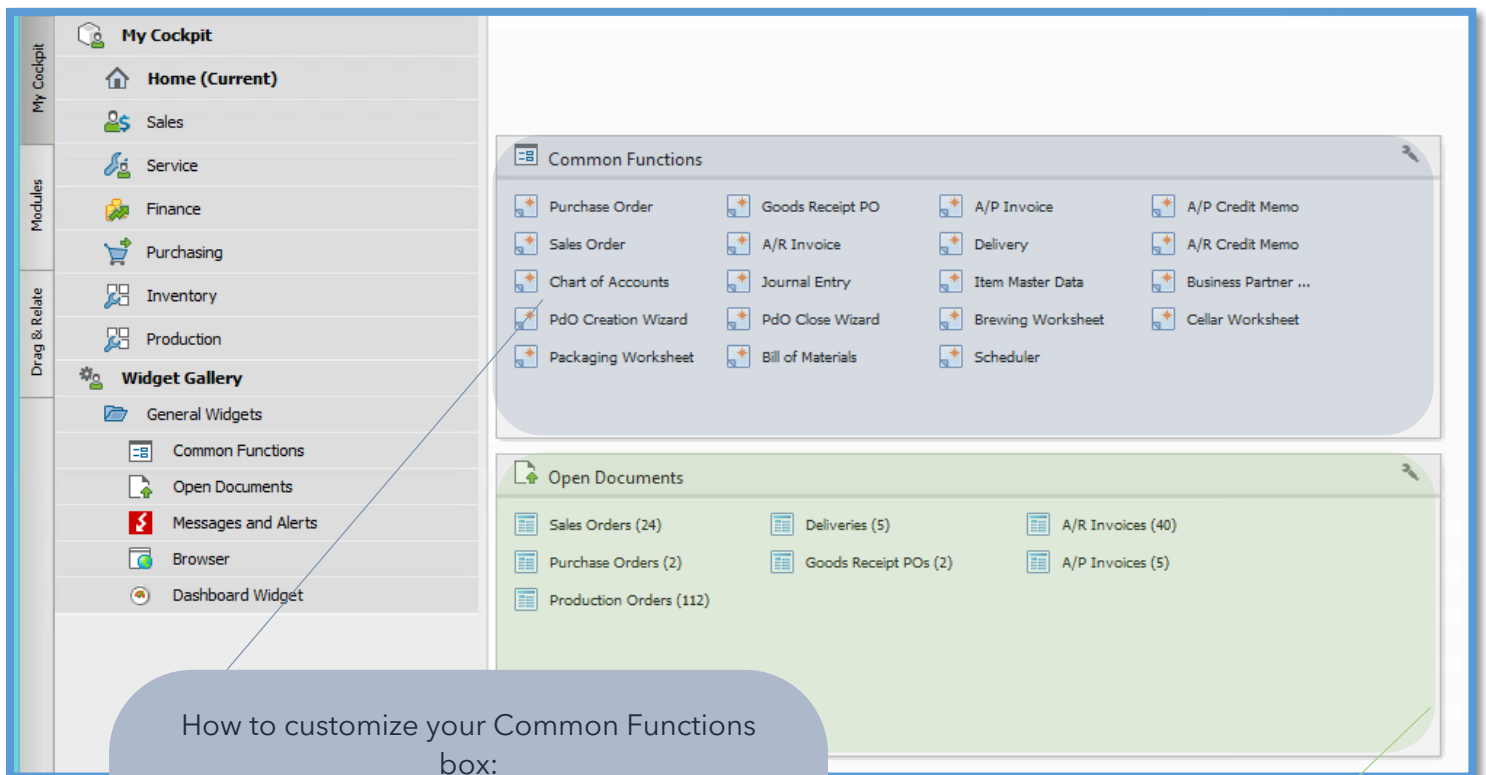
Interface

Cockpit

The cockpit is the interface control room, where a user can view, search, organize, and perform their regular work functions. It can be customized and edited at any time and will be each user's personalized work center.

Common Functions contains **shortcuts** to the function you'd like to Find or Add

Open Documents contains documents that are currently **open**.



How to customize your Common Functions box:

1. Click to expand the Modules tab
2. Select the specific function you'd like to move
3. **Drag and drop functions to personalize your 'Common Functions' box**
4. To remove a function, just pull it out of the box and release

How to customize your Open Documents box:

1. Click on the wrench in the upper right hand corner of box
2. Checkmark which functions you'd like to view within the open documents box
3. Click update
4. To remove an open document function, un-check from the settings wrench



Modules & Functions

Modules: Groups of ORCHESTRATED documents & functions. Organized by persona's role

Interface Tip!

Within an open function, you can customize your view! This is done with the form settings tool!

The screenshot shows the ORCHESTRATED software interface. On the left, the 'My Cockpit' sidebar lists various modules: Administration, Financials, Opportunities, Sales - A/R, Purchasing - A/P, Business Partners, Banking, Inventory, Resources, Production, MRP, Service, Human Resources, Reports, Integrations, Interfaces, and Utilities. The 'Purchasing - A/P' module is highlighted. In the center, the 'Purchasing - A/P' sub-menu is open, showing a list of functions: Purchase Blanket Agreement, Purchase Request, Purchase Quotation, Purchase Order, Goods Receipt PO, Goods Return, A/P Down Payment Invoice, A/P Invoice, A/P Credit Memo, A/P Reserve Invoice, Recurring Transactions, Recurring Transaction Templates, Landed Costs, Procurement Confirmation Wizard, Purchase Quotation Generation Wizard, Document Printing, and Purchasing Reports. The 'A/P Invoice' function is selected. On the right, the 'A/P Invoice' form is displayed, showing fields for Vendor, Name, Contact Person, Vendor Ref. No., Local Currency, No., Primary, Status, Posting Date, Due Date, and Document Date. Below these fields is a table with columns for Item/Service Type, Item, Quantity, Unit Price, Summary Type, Disc..., Tax C..., and Total (LC). The table has one row with item number 1. At the bottom of the form, there are fields for Buyer, Owner, Total Before Discount, Discount, Total Down Payment, Freight, Rounding, Total Payment Due, Applied Amount, and Balance Due. There are also buttons for Add, Cancel, Copy From, and Copy To.

Functions:

Documents/records within each Module

ALL data is stored via functions



Real Life: When Dan the Distiller logs in to Orchestrated, he'll *probably* just be interested in functions located within the **Production** Module. Penny in accounting will be working primarily in the **Financials** module.



Core functionality

Core master data

To better manage the daily business, your business partners and inventoried items will be set up as master data records. This information becomes the default data for purchasing, production and sales & inventory transactions. A master data record is created for each product and identified with a unique code. Each master for an item/business partner will store essential information such as business partner contact information, payment terms, if an item is purchased or sold, the price of the item and the inventory level. This data is used automatically by the system for all phases of our cycle: [Purchasing](#) | [Production](#) | [Sales](#) | [Financials](#).

Business Partner Master Data

This is your master data stored for all [vendors](#) and [customers](#)

Modules > Business Partners > Business Partner Master Data

Welcome, sberg. You are in the Home cockpit of SBBrewing_TRAIN.

Common Functions

Business Partner Master Data

Code BP Currency

Name

Foreign Name

Group

Currency

Federal Tax ID

Orders 0.00

Opportunities

General	Payment Terms	Payment Run	Accounting	Remarks
Tel 1 <input type="text"/>		Contact Person <input type="text"/>		
Tel 2 <input type="text"/>		ID No. 2 <input type="text"/>		
Mobile Phone <input type="text"/>				
Fax <input type="text"/>				
E-Mail <input type="text"/>		Remarks <input type="text"/>		
Web Site <input type="text"/>				
Shipping Type <input type="text"/>				
Password <input type="text"/>				
Factoring Indicator <input type="text"/>				
BP Project <input type="text"/>		BP Channel Code <input type="text"/>		
Industry <input type="text"/>				
Business Partner Type <input type="text"/> Company		Territory <input type="text"/>		

Alias Name

GLN

☐ Active
☐ Inactive
☐ Advanced

☐ Block Sending Marketing Content

Find Cancel You Can Also

Business Partner Master Data is a very common function, if you haven't already, go ahead and add it to your common functions box in the cockpit!



How to find/search Business Partner Master Data (Ctrl F)

To find a particular business partner

Record Search Arrows
Scroll through existing business partners

Business Partner Code (e.g. C1100 or V1073)

C = Customer | V = Vendor

Name (e.g. Columbia)

Wildcard/Asterisk (e.g. *Dist)

Searches all business partners with 'dist' in their name

Fun Fact!

Any field in yellow means you can search by it!

Navigation Tip!

After entering your search criteria, press **ENTER** to open up your business partner list

The screenshot shows the 'Business Partner Master Data' form. At the top, there's a toolbar with navigation arrows (left, right, double left, double right) highlighted in green. Below the toolbar, the form is divided into several sections. The top section contains fields for 'Code', 'Name', 'Foreign Name', 'Group', 'Currency', and 'Federal Tax ID'. To the right of these are 'Orders' (set to 0.00) and 'Opportunities'. Below this is a tabbed interface with tabs for 'General', 'Payment Terms', 'Payment Run', 'Accounting', and 'Remarks'. The 'General' tab is active, showing fields for 'Tel 1', 'Tel 2', 'Mobile Phone', 'Fax', 'E-Mail', 'Web Site', 'Shipping Type', 'Password', 'Factoring Indicator', 'BP Project', 'Industry', and 'Business Partner Type' (set to 'Company'). The 'Payment Run' tab shows 'Contact Person', 'ID No. 2', 'Remarks', 'BP Channel Code', and 'Territory'. At the bottom, there's a 'GLN' field and a checkbox for 'Block Sending Marketing Content'. A legend at the bottom left indicates 'Active' (yellow circle), 'Inactive' (light green circle), and 'Advanced' (light blue circle). At the bottom right, there's a 'You Can Also' dropdown. The 'Find' and 'Cancel' buttons are at the bottom left.



Real Life: Peter needs to search for his distributors. He decides to search using the WILDCARD!



Partner Master Data

Code

Name

Foreign Name

Group

Currency

Federal Tax ID

Orders

General

Tel 1

Tel 2

Mobile Phone

Fax

E-Mail

Web Site

Shipping Type

Password

Factoring Indicator

BP Project

Industry

Business Partner Type

List of Business Partners

Find

☐ Keep Visible

#	BP Name	BP Code	BP Balance	Territory
1	Bay Area Distributing	C1115	0.00	
2	Beer House Distributors	C1060	0.00	
3	Carolinas Dist Co.	C1145	0.00	
4	Columbia Distributing - Port	C1125	0.00	
5	Coors Distributing Company	C1020	0.00	
6	Eastern Star Distributing	C1025	14,038.00	
7	Fox Distributing Co.	C1080	2,958.00	
8	Guintini & Son Beverage Dis	C1095	0.00	
9	Henry J. Smith Distributing	C1135	11,049.90	
10	Pacific Distributing Inc.	C1005	10,535.70	

Choose Cancel

Navigation Tip!

If you're searching through a list within Orchestrated, you can double click the heading to sort from top to bottom, or bottom



How to add Business Partner Master Data (Ctrl A)

1. Open a Business Partner Master Data function

Fun Fact!

The next Business Partner Code in sequence is automatically populated once Add mode is activated

2. Switch to **ADD** mode (click icon or Ctrl A)

3. Select either Customer or Vendor

4. Enter name of new Business Partner

Business Partner Master Data

Code: Main, C1001, Customer

Name: Rock Bottom Distribution

Foreign Name:

Group: Account, US Dollar

Payment Terms: Net 30 Days

Price List: OR

Total Discount %:

Credit Limit: 0.00

Commitment Limit: 0.00

Dunning Term:

Dfif Blanket Agreement:

Effective Discount: Lowest Discount

Business Partner Bank:

Bank Country:

Bank Name:

Bank Code:

Account:

BIC/SWIFT Code:

Bank Account Name:

Branch:

Ctrl Int. ID:

IBAN:

Mandate ID:

Date of Signature:

Credit Card Type:

Credit Card No.:

Expiration Date:

ID Number:

Add, Cancel, You Can Also

Continued on Next Page!



5. Ensure the following fields are filled out in order to successfully complete BP addition:

If adding a new Customer:

Ship to Address
Payment Terms

Business Partner Master Data

Code: Main | C1002 | Customer

Name: Rock Bottom Distribution

Foreign Name:

Group: Account

Currency: US Dollar

Federal Tax ID:

Addresses

Bill to

Define New

Ship to

Define New

Address ID: Define New

Street / PO Box:

Block:

City:

Zip Code:

County:

State:

Country: USA

Payment Terms

Payment Terms: Net 30 Days

Interest on Arrears %:

Price List: OR

Total Discount %:

Credit Limit: 0.00

Commitment Limit: 0.00

Dunning Term:

Dft Blanket Agreement:

Credit Card Type:

Credit Card No.:

Expiration Date:

ID Number:

Average Delay:

Priority:

Default IBAN:

Holidays:

Payment Dates: ...

If adding a new Vendor:

Payment Terms

Business Partner Master Data

Code: V1003 | Vendor

Name: Merry Malt

Foreign Name:

Group: Raw Materials

Currency: US Dollar

Federal Tax ID:

Payment Terms

Payment Terms: Net 30 Days

Interest on Arrears %:

Price List: OR

Total Discount %:

Credit Limit: 0.00

Commitment Limit: 0.00

Average Delay:

Priority:

Default IBAN:

6. Click Add!

Add



Item Master Data

Master Data stored for all your inventoried items that you track (anything you want to buy, produce or sell)

Modules > Inventory > Item Master Data

The screenshot shows the SBBrewing TRAINING software interface. On the left is a 'My Cockpit' sidebar with a 'Modules' section containing 'Inventory' and 'Item Master Data'. The 'Item Master Data' module is highlighted. The main window displays the 'Item Master Data' form with various fields for item information, including Item No., Description, Foreign Name, Item Type, Item Group, UoM Group, Price List, Process Type, Pack Type, Bar Code, Unit Price, and Brand. The 'General' tab is selected, showing options for 'Tax Liabilities', 'Do Not Apply Discount Groups', 'Manufacturer', 'Additional Identifier', 'Shipping Type', 'Serial and Batch Numbers', and 'Manage Item by'. The 'Find' and 'Cancel' buttons are at the bottom.

You might notice:

The Item Master Data defaults to open in Find mode. To add a new Item, you can toggle using the Add button or (Ctrl A)

Item Master Data is a very common function, if you haven't already, go ahead and add it to your common functions box in the cockpit!



How to find/search Item Master Data (Ctrl F)

To find a particular item, there are 4 main search

Record Search Arrows

Scroll through existing items

Item Code (e.g. RH | RM | BB)

RH = Raw Hops | RM = Raw Malts | BB = Bright

Name (e.g. malt)

Wildcard/Asterisk (e.g. *keg)

Searches for everything on the character string after

Fun Fact!

Any field in yellow means you can search by it!

Navigation Tip!

After entering your search criteria, press **ENTER** to open up your item list

The screenshot shows the 'Item Master Data' form with various fields. Yellow highlights indicate searchable fields: Item No., Description, Foreign Name, Item Type, Item Group, UoM Group, Price List, Process Type, Manufacturer, Additional Identifier, Shipping Type, Serial and Batch Numbers, Manage Item by, TTB Group, and the Find button. Annotations include: 'Record Search Arrows' pointing to navigation arrows; 'Item Code' pointing to the Item No. field with a legend; 'Name' pointing to the Description field; 'Wildcard/Asterisk' pointing to the Description field; and 'Navigation Tip' pointing to the Find button.

Field	Value
Item No.	[Yellow]
Description	[Yellow]
Foreign Name	[Yellow]
Item Type	[Yellow]
Item Group	[Yellow]
UoM Group	[Yellow]
Price List	CA-North
Process Type	[Yellow]
Brand	[Yellow]
Pack Type	[Yellow]
Bar Code	[Yellow]
Unit Price	[Yellow]
Manufacturer	[Yellow]
Additional Identifier	[Yellow]
Shipping Type	[Yellow]
Serial and Batch Numbers	[Yellow]
Manage Item by	None
TTB Group	[Yellow]



Real Life: Peter now needs to check on details and the inventory level of his bagged 2-row malt. Let's see how he goes about finding it!



1. Open an Item Master Data function

2. Enter 'RM' to expand list of all "Raw Material - Malts"

3. Highlight the type of malt in question (Malt 2-Row bag)

4. Choose or double click on the item

#	Item No.	Item Description	Item Gr...	Process ...	In Stock	Pack...
2	RM5006	Malt 2-Row bag	RM: Malt	None	100,370.00	UoM-LB
1	RM5005	Malt 2-Row Bulk	RM: Malt	None	67,746.00	
3	RM5007	Malt Amber	RM: Malt	None	50,000.00	UoM-LB
4	RM5008	Malt Best Chit	RM: Malt	None	1,501.00	UoM-LB
5	RM5009	Malt Best Heidelberg	RM: Malt	None	3,900.00	UoM-LB
6	RM5010	Malt Best Kara Pils	RM: Malt	None	1,500.00	UoM-LB
7	RM5011	Malt Best Spelt	RM: Malt	None	5,700.00	UoM-LB
8	RM5012	Malt Biscuit	RM: Malt	None	1,301.00	UoM-LB
9	RM5013	Malt Black	RM: Malt	None	1,300.00	UoM-LB
10	RM5014	Malt C-120	RM: Malt	None	585.00	UoM-LB
11	RM5015	Malt C-135	RM: Malt	None	1,500.00	UoM-LB
20	RM5024	Malt C-45	RM: Malt	None	8,295.00	
21	RM5025	Malt C-50-60	RM: Malt	None	9,999.00	UoM-LB
22	RM5026	Malt C-70-80	RM: Malt	None	1,100.00	UoM-LB
12	RM5016	Malt Carafa 2 Dehusk	RM: Malt	None	5,700.00	UoM-LB
13	RM5017	Malt Carafoam	RM: Malt	None	1,500.00	UoM-LB
14	RM5018	Malt CaraHell	RM: Malt	None	1,500.00	UoM-LB
15	RM5019	Malt Caramunich	RM: Malt	None	7,790.31	
16	RM5020	Malt CaraRed	RM: Malt	None	1,500.00	UoM-LB
17	RM5021	Malt Carastan	RM: Malt	None	7,964.00	UoM-LB
18	RM5022	Malt Caravienne	RM: Malt	None	22,344.99	
19	RM5023	Malt Chocolate	RM: Malt	None	8,492.00	
30	RM5034	Malt Durst Pilsener bag	RM: Malt	None	1,500.00	UoM-LB

Continued on Next Page!



5. Review specifics on the item by looking through the tabs:

General Tab

Item Group the 'mother' group of like-type items

Inventory | Sales | Purchase Denotes if item is part of inventory, can be sold, is purchased

Price List lists based on territory/how item is priced

Pack Type Describes how the item is measured and stored

Manage Item by identifies if item is managed/differentiated via batch

Did you know?
Any **consumable** item/material within your inventory will be managed via batch # to ensure traceability.

The screenshot shows the 'Item Master Data' form with the following fields and values:

- Item No.: Manual, RM5006
- Description: Malt 2-Row bag
- Foreign Name:
- Item Type: Items
- Item Group: RM: Malt
- UoM Group: Manual
- Price List: CA-North
- Process Type: None
- Pack Type: UoM - Pound
- Bar Code:
- Unit Price: Primary Curr
- Brand:
- Inventory Item: ☒
- Sales Item: ☐
- Purchase Item: ☒
- Do Not Apply Discount Groups: ☐
- Manufacturer: - No Manufacturer -
- Additional Identifier:
- Shipping Type: Distributor Truck
- Serial and Batch Numbers: Manage Item by Batches, Management Method On Every Transaction
- Active: ☒ Inactive: ☐ Advanced: ☐
- TTB Group: Pt 3 Column 5 (Brew Grain)



Purchasing Data Tab

Purchasing UoM Name & Items per Purchase Unit

- reflects if item is purchased in different quantity than how it is packed (i.e. you purchase bags of malt at 200 lbs. each)

The screenshot shows the 'Purchasing Data' tab with the following fields:

- Preferred Vendor: V1000
- Mfr Catalog No.: (empty)
- Purchasing UoM Name: (empty)
- Items per Purchase Unit: 200
- Packaging UoM Name: (empty)
- Quantity per Package: 200
- Length: (empty)
- Width: (empty)
- Height: (empty)
- Volume: (empty)
- Weight: (empty)
- Factor 1: 1
- Factor 2: 1
- Factor 3: 1
- Factor 4: 1
- Customs Group: Customs Exempt
- Tax Type: Regular Tax

Inventory Data Tab

UoM Name - How item is measured within your recipes (ounces, lbs., grams, liters etc.)

Whse - shows where item is allowed to be located (warehouses)

Reflects item amounts **In Stock**, **Committed**, **Ordered** and how much is **Available** for production.

The screenshot shows the 'Inventory Data' tab with the following fields and table:

- Set G/L Accounts By: Item Group
- UoM Name: lb
- Weight: (empty)
- Valuation Method: Moving Average
- Manage Inventory by Warehouse: ☒
- Inventory Level: (empty)
- Required (Purchasing UoM): (empty)
- Minimum: (empty)
- Maximum: (empty)

#	Whse ...	Whse Na...	Locked	In Stock	Committed	Ordered	Available	Min. Inve...	Max. Inv...	Re...
1	A1	Main Ware	<input type="checkbox"/>	100,370			100,370			
2			<input type="checkbox"/>							
				100,370			100,370			

Set Default Whse



Planning Data Tab

Shows built in lead times for making beer and/or purchasing material

Gen...	Purchasing D...	Sales D...	Inventory D...	Planning Data	Production Data	Properties	Remarks	Attachments	Batches
Planning Method		MRP							
Procurement Method		Buy							
Order Interval									
Order Multiple		200							
Minimum Order Qty		0.00							
Lead Time		<div><div></div>Days</div> <div><div>0</div>Hours</div> <div><div>0</div>Minutes</div> <div><div></div>Days</div>							
Tolerance Days									

Batches Tab

Gen...	Purchasing D...	Sales D...	Inventory D...	Planning D...	Production Data	Properties	Remarks	Attachments	Batches
Warehouse	ItemCode	BatchNumber	Quantity	InDate					
A1	RM5006	LOT303	400.00	01/01/2015					
A1	RM5006	456456	99,970.00	12/31/2013					

Reflects ANY batches of this item which are currently in inventory. Captures where the inventory is, the batch number, quantity and when it was received.



That's pretty cool! Makes my life a lot easier knowing I can track my inventory down to this detail!



How to add Item Master Data (Ctrl A)

1. Open an Item Master Data function

2. Stay in **FIND** mode

3. Search for a 'like-type' item (i.e. if you need to add a new hop, search for 'rh')

4. Find the last Item that was added (*this will also be the largest Item No. i.e. RH5031*)

Item Master Data

Item No. [] Description [] Foreign Name [] Item Type [Items] Item Group [Items] UoM Group [] Price List [CA-North] Process Type [] Pack Type [] Bar Code [] Unit Price [Primary Curren] Brand []

General Purchasing Data Sales Data Inventory Data Planning Data Production Data Prope

☒ Tax Liab
☐ Do Not Apply Discount Groups
Manufacturer [- No Manufacturer -]
Additional Identifier []
Shipping Type []
Serial and Batch Numbers
Manage Item by [Batches]
Management Method [On Every Transaction]

☐ Active
☐ Inactive
☐ Advanced
TTB Group []

Find Cancel

Navigation Tip!

Remember, you can double click the heading row to sort your items!

Continued on Next Page!



5. Double click item to populate (i.e. 'RM2031 - Malted Rye #2')

Item Master Data

Item No. Manual RM2031

Description Malted Rye #2

Foreign Name

Item Type Items

Item Group RM: Grains

UoM Group Manual

Price List Connecticut

Process Type None

Brand

Pack Type UoM - Pound

Bar Code

Unit Price Primary Curr

Inventory Item ☒

Sales Item ☐

Purchase Item ☒

General Purchasing Data Sales Data Inventory Data Planning Data Production Data Properties Remarks Attachments

☐ Tax Liab

☐ Do Not Apply Discount Groups

Manufacturer - No Manufacturer -

Additional Identifier

Shipping Type

Serial and Batch Numbers

Manage Item by Batches

Management Method On Every Transaction

6. Right click anywhere in the function and select 'Duplicate'

Remove

Duplicate

Convert To...

Convert From...

New Activity

Business Partner Catalog Numbers

Bill of Materials

Alternative Items

Related Activities

Inventory Posting List

Inventory Audit Report

Bin Location Content List

7. A duplicate Item Master is created, with editable fields (in yellow)

Item Master Data

Item No. Manual RM2031

Description Malted Rye #2

Foreign Name

Item Type Items

Item Group RM: Grains

UoM Group Manual

Price List Connecticut

Process Type None

Brand

Pack Type UoM - Pound

Bar Code

Unit Price Primary Curr

Inventory Item ☒

Sales Item ☐

Purchase Item ☒

General Purchasing Data Sales Data Inventory Data Planning Data Production Data Properties Remarks Attachments Batches

☐ Tax Liab

Continued on Next Page!



8. Change the Item No. to the next in sequence ('RM2032') & add the new, correct description

Item Master Data

Item No. Manual RM2032

Description Buckwheat

Foreign Name

Item Type Items

Item Group RM: Grains

UoM Group Manual

Price List Connecticut

Process Type None

Brand

Pack Type UoM - Pound

Bar Code

Unit Price Primary Curr

☒ Inventory Item

☐ Sales Item

☒ Purchase Item

General Purchasing Data Sales Data Inventory Data Planning Data Production Data Properties Remarks Attachments Batches

☐ Tax Liab

☐ Do Not Apply Discount Groups

Manufacturer - No Manufacturer -

Additional Identifier

Shipping Type

Serial and Batch Numbers

9. Click Add!

Add

- Item Master Data is **deduplicated** to ensure item settings are kept consistent, such as Unit of Measure and Warehouses.
- To double check the item was successfully added, go back into find mode to verify the new Item is available 😊



CONGRATULATIONS! You are now armed with the knowledge of how to navigate through Orchestrated and find or add important core functionality! These are the building blocks for the rest of the Software!!!