ORCHESTRA

5.1.0 Release Notes

Contents

Product Enhancements

Usability

- Hide Toolbar: You can hide the SAP Toolbar to increase your working area. (View Menu 'Show/Hide Toolbar')
- Configure License Balloon: A new checkbox Show License Information at Startup is added to the Users – Setup window -> Services tab to set whether the license balloon will be displayed after logging in. The checkbox is reset to default (balloon is displayed): - Every 3 months / 90 days or - When upgrading to a higher patch or release.
- New Alerts Management window: This new window allows users to see a complete Overview of System and User Alerts definitions.
- Attachments on More Document Types: You can now manage attachments on the following transactions:
    - Inventory Counting
    - Production Order
    - Deposit
    - Incoming Payment
    - Outgoing Payment
    - Inventory Posting
    - Inventory Opening Balance
    - Checks for Payment
    - Time Sheet
    - Journal Entry
- Add User Queries to Menu: Queries can now be added to the SAP Business One Menu via the Query Manager, Assign to Menu button option.

Administration

- New Localization: New United Kingdom of Great Britain and Northern Ireland (UK) localization supports new functionality required for Brexit. SAP will stop supporting legal requirements for the UK in the UK International / Republic of Ireland localization beyond 2020.
- Approval Process Setting. You can enable Authorized Users to update a document draft that is in pending status.
- New Authorizations: You can now define General Authorizations for:
    - Item Master Data and Business Partner Master Data windows tabs.
    - The Copy Table menu function: Users with Full Authorization for the Copy Table authorization can use the Copy Table function on all documents, records, and reports in which the Copy Table function is available (right-click a cell in the table and choose Copy Table or, in the menu bar, choose Edit → Copy Table). The default setting for the copy table authorization in new installations and after the

upgrade is Full Authorization; for new users, No Authorization is selected by default.

- Shipping Types can now be activated/deactivated: a new Checkbox to mark a Shipping Type as Active has been added on the Shipping Types – Setup record.
- We have added six new Advanced Authorizations. In the inventory data tab, we have added authorizations for Item Group, GL Determination, Item Valuation, and Manage Inventory by Warehouse. For Business Partners in the Payment Terms tab, we have added authorizations for Payment Terms and Price Lists.
- Warehouses and Sheets configuration menu has been moved to Administration > Setup > Inventory.

Banking

- The Outgoing Payment screen will now display the check number attached to an outgoing payment, without having to drill into the Payment Means screen.

BMC

- The 'Print Tags' button in the Barrel Management Console (BMC) is now working to print barrel tags.

Business Partners

- When the Account Balance window is opened from a customer's master data, a Refresh button has been added so that you can update your view to reflect any documents recently added without having to close out and re-open the window.
- Expanded BP Group Name Field: You can now enter up to 100 characters in the Customer and Vendor Group Name field.
- Hide Empty Address Fields: You can now hide empty address lines while setting up address formats, thus providing a more concise address in documents and printouts.
- Display BP Address UDFs in Marketing Documents: Business Partners – Addresses User Defined Fields (UDF) can be viewed and updated in the following widows:
    - Address Component. Logistics tab in marketing documents
    - Address Component. Business Partner tab of Service Calls
    - Address Formats – Setup window

Financials

- Posting Periods: In the new Posting Periods window, you are now able to:
    - Sort the data in any column.
    - Search for data in the (first) sorted column using the Find field.
    - Automatically set the Due Date To date of the new posting period to the last day of the selected month of the next fiscal year.
- Journal Entry Fields Expanded: The following Journal Entry fields have extended field sizes.

- 254 characters in the Remarks field in the Header
- 100 characters for the Ref3 field in the Header and Rows.

- Updating Reference Field in Journal Entries for JEs in Locked Posting Periods. Starting in FP2011 you can now Update the Remarks, Ref1, Ref2, Ref3, and User-Defined Fields in Journal Entries in a Locked posting period.

Inventory

- Users will now be able to view whether an item is 'Active' or 'Inactive' in the header of Item Master Data.
- On the Batches tab in Item Master Data, the 'Value' column has been changed to 'Unit Cost'.
- When items are marked as 'Inactive', the item will no longer appear in Orchestrated or SAP windows.
- The "Value" of a particular item is now displayed by batch inside the "Batches" tab in Item Master Data (currently it displays Warehouse, Item Code, Batch Number, Quantity, and In Date). This is especially important for those customers who do not have a standard/average cost which could otherwise be easily found on the Inventory Data tab.
- Users can now go into the Item Master Data to directly view and edit the "Status" of a batch to signify if the batch is ready or not ready to be used.
- The Batch Selection screen now shows the Item Description when executing a Retail Transfer.
- Expanded Item Code Description Length: You can now enter up to 200 characters in Item Description.
- Expanded Item Group Name Length: You can now enter up to 100 characters in Item Group Name.
- Item Master Description Update linked to BoMs: When you update the description for an item that is connected to a bill of materials, the Product Description in the Bill of Materials window can be updated as well.
- Update Batch numbers on AR Reserve Invoices and Inventory Transfer Request: You can update serial and batch numbers for A/R Reserve Invoices and Inventory Transfer Requests. You can display the destination warehouse code and name through Form Settings when you update serial numbers or batches for inventory transfers or inventory transfer requests. (PL01)
- New Option ‘Duplicate Bar Codes when Duplicating Items”: A new checkbox Duplicate Bar Codes While Duplicating Items is available under Administration > System Initialization > General Settings > Inventory > Item tab. The default is this option is activated.
- Sales/Purchase Item in Item Master Data can be Deselected: When an item that is a component of another item in a bill of material (BOM) the option Sales Item or Purchase Item can be deselected.

iPad

- iPad Production App users now have the option to add initials on the Issue and Receipt screens.

OSpirits

- When using OSpirits, if a NULL proof is accidentally entered during production, it will pull the default proof for the particular item and/or brand for TTB DRO reporting.
- The Distillation QC window now opens when selecting a PdO within the Fermented Mash tab of the Stillhouse Worksheet.
- When working in OSpirits, Proof Gallons will now show on the Summary Data of a Sales Order

Production

- In the PdO Release Wizard, we have added a column reflecting the "Receive" warehouses. Additionally, a golden arrow has been added that allows you to drill down and view warehouse details.
- You can now review your cost variance and volume variance prior to closing your PdOs in the PdO Close Wizard. The insight into the variances will help to determine if disassembly is necessary before closing the PdO.
- Users are now able to create a Packaging Run directly from the desktop Scheduler. This means there will be three ways to create a Packaging Run in Orchestrated:
    - Right-click > Select Packaging Run in context menu on Packaging PdO that is an output of a Packaging Run
    - Right-click > select Packaging Run in context menu on Filtration PdO that is a source for a Packaging Run
    - Right-click > select Packaging Run in context menu on Filtration PdO that is not a source for a Packaging Run
- On the Packaging Run window, there is now an option to set the PdO status to 'Released'.
- The Packaging Run will now pull the default warehouse from the Bill of Materials (BOM) instead of from Item Master Data.
- When disassembling a PdO, a warning will now pop up if the production order has already been disassembled.
- For operations that utilize an offsite warehouse or separate location within their facility for storage of inventory that is consumed during the production process (packaging materials, etc), an Inventory Transfer Request document can now be generated directly from a Released Production Order. This will help ensure that the right items and exact quantity of items are being picked and transferred to the correct warehouse for each production run.
- Users are now able to configure the system to allow multiple Issue/Receipt of PdOs on the Brewing Worksheet.

- The Packaging Run window will stay open once PdO's are created to allow users to plan multiple runs without having to go back into the Packaging Run screen each time.
- The Inventory UoM field will now populate in the Blending and Additions window so that the production user can confirm the UoM of the items being consumed.
- On the Express Production screen, if the summed 'ActQty' of batches for a particular ingredient is equal to or greater than the 'PlannedQty' for the ingredient, the 'In Stock' fields will no longer be highlighted in red.
- If unique Process Types are created for packaging, you are able to drag and drop the corresponding PdOs on the Scheduler to adjust their dates. The 'Production Date' on the PdO will update to the date where you moved the PdO on the Scheduler, and the 'Due Date' will move ahead by the same number of days.
- If a Posting Period is set to 'Closed,' you are now able to disassemble a PdO that has a posting date within the closed period.
- The TTB BRO has been updated so both Inventory Posting and Repackaging PdO transactions report on line 14, representing losses.
- Can now Edit Closed or Canceled Production document fields: When a Production Order is closed or canceled, the following fields will be editable: (FP2008)
    - Remarks on the form footer
    - Pick and Pack Remarks on the footer
    - Reference Document on the Summary tab
    - Attachments on the Attachments tab
    - User-Defined Fields on Production Order – Title and on Production Order – Rows
- Delete Bill of Materials (BoM) in Mass: Bill of Materials (BOM) can be deleted en masse from the Bill of Materials Management window. (FP2008)

Sales and Purchasing

- The TTB BRO includes A/R Invoice cancellations for business partners flagged as an 'Internal Sales Biz Partner'. This allows the system to properly report A/R Invoices and A/R Invoice Cancellations, which balance accurately on the TTB BRO.
- New Duplicate Document Reference Number Options: Under Administration > System Initialization > Document Settings > Per Document tab. For Sales or Purchasing document types, under 'When Duplicated Customer Reference No. Occurs'. When selecting Warning Only or Block Release/Receipt the following new options are available: (FP2011)
    - Check for Duplicate Under
    - Individual Customer Only
    - All Customers
    - Check for Duplicate in Current Fiscal Year Only
- New Document Settings
    - New Copy Manual Remarks Setting: Under Administration > System Initialization > Document Settings > General tab > Document Remarks Include, a new option

    'Manual Remarks Only' is available. With this option, when using 'Copy To' to copy a base sales, purchasing, or inventory document, the 'Remarks' field in the target document will only include the remarks entered by users in the source document, excluding the 'Base Document Number' or the 'Business Partner Reference Number'. (FP2008)
  - Attachments from Base Document to Target Document: New option Under Administration > System Initialization > Document Settings > General tab to allow the copy of Document Attachments (if any) when using 'Copy To' document functions. (FP2008)
- Edit Due Date on AR or AP Invoice: You can edit the Due Date field in the A/R Invoice and A/P Invoice windows after the invoice is partially reconciled. The new Due Date must be on or after the latest Reconciliation Date.
- Document Add Button Changes: The Add button in Sales and Purchase documents has been enhanced. The new Add options are: (PL01)
  - Add & New: Document is added and a new window opens.
  - Add & View: Document is added and is displayed.
  - Add & Close: Document is added and the window closes.
- New Option for Editing UDFs in Document Rows after Add or Close: A new setting in the Document Settings > 'Allow Update of User-Defined Fields When Document Rows Are Not Editable' gives the possibility to make UDFs editable independently of the document/row status. (PL01)
- Document Reference Enhancements
  - When Duplicating a document, a reference between the original and duplicated document can be created (FP2011).
  - Document Referencing is new to the following documents:
    - Incoming Payments
    - Outgoing Payments
    - Inventory Revaluation
    - Inventory Counting
    - Inventory Posting
- Enhanced Open Items List Report: (PL01)
  - The Open Items List report includes more document information that can be displayed in the results list (Controlled by Form Settings):
  - Owner
    - Sales Employee/Buyer
    - Remarks
    - Approved
    - Created by
    - Contact Person
    - Payment Terms
    - Business Partner
    - Project

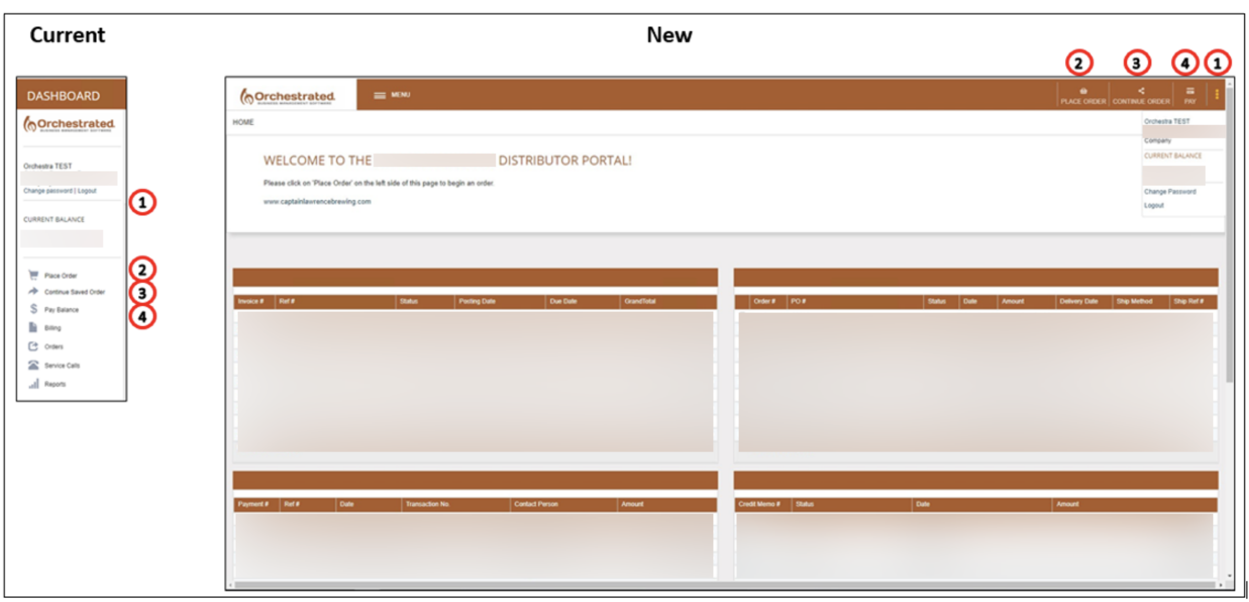
        - UDFs in document headers
- The List offers the possibility to Close and Cancel multiple documents at once. These new Actions are supported for these document types:
    - Sales Quotation
    - Sales Order
    - Purchase Request
    - Purchase Quotation
    - Purchase Order
- New Pricing General Setting: ‘Effective Price Considers All Price Sources’ this new option in Administration > System Initialization > General Settings > Pricing tab. When this checkbox is selected, then both the price before discount groups and the price after discount groups would be considered as the effective price.

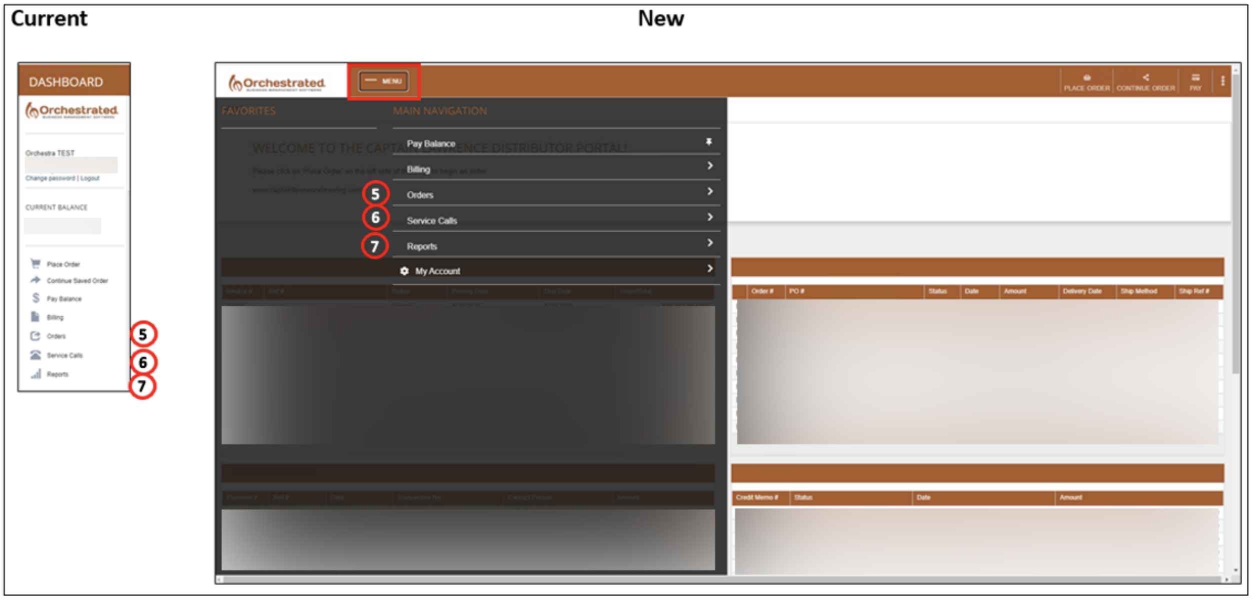
Utilities

- The Planning Management Utility now supports daily, weekly, and monthly forecast time frames.
- When creating a new budget via the Budget Utility, the new year will appear as an option in the budget parameter "Year" drop-down.

Distributor Portal

- The difference in the New Distributor Portal is the Landing Page. The Left menu is gone and the Navigation it once had has been moved to the Menu Bar and the Menu button on the Menu bar.

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