

ORCHESTRA OCloud Business Partner Master Data Practice Lab

Contents

Overview 3

Exercise: Add a new vendor



Exercise practice: Add a new vendor



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</u> <u>description</u>"). Clickable items like modules or menus will be bolded (example: "click or modules"). Key terms for Orchestrated will be *italicized*.

Exercise: Add a new vendor

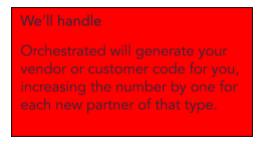
Unlike adding a new item, with business partners, we don't want to duplicate it. We'll create a new one from scratch.

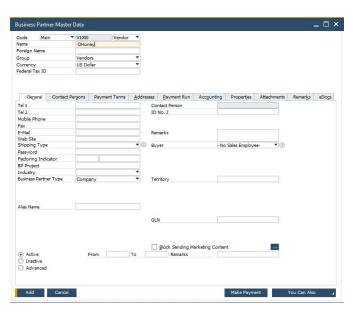
1. Navigate to Modules>Business partners>Business Partner Master Data or click it in your *Common Functions* if you have already added it. The Business Partner Master Data window opens. Note that all fields are yellow; that means you're in *find mode;* those yellow fields are all searchable.

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 icon in the tool bar. The yellow boxes will turn white, and in some, information will auto populate.
- 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.

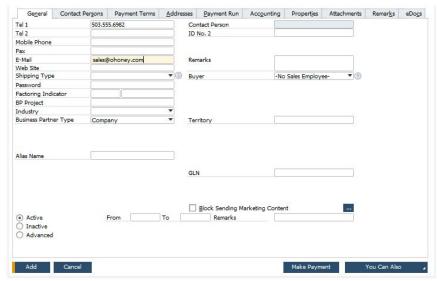






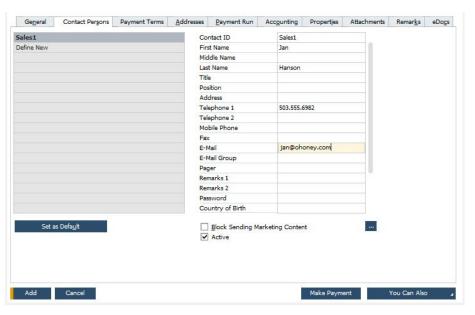
- 5. Next we'll put in some contact information for our primary contact.
 - a. On the general tab, enter:

<u>Tel 1: 503.555.6982</u> <u>Email: sales@ohoney.com</u>



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



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 hore.

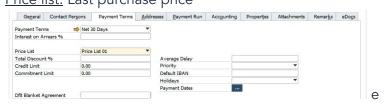
- c. Click <Set as Default> to make Jan your primary contact at OHoney.
- 6. Now we need to enter some financial information so we can pay this vendor.



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



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.

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

When you select
Price List 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.

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

<u>City:</u> Portland <u>Zip code:</u> 97006 <u>State:</u> 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 from the dropdown next to Code
- 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. Price List
- 7. Click Add