

ORCHESTRA OCloud Business Partner Master Data Practice Lab

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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.



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.

 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 partne

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

- 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.
- 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.

Code M	ain 🔻	V1000	Vendor							
Name		OHoney	4							
Foreign Name										
Group		Vendors		-						
Currency		US Dolla	r.	*						
Federal Tax II	>									
General	Contact Per	rsons	Payment Terms	Addre	sses Payment Run	Accounting	Properties	Attachments	Remarks	eDogs
Tel 1					Contact Person					
Tel 2					ID No. 2					
Mobile Phone	2									
Fax										
E-Mail					Remarks					
Web Site							_			
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Password										
Factoring Inc	licator									
BP Project		<u> </u>								
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Business Part	ner Type	Compan	Y	•	Territory					
Alias Name					GLN					
Active Inactive		Fre	m	То	Block Sending M Remarks	arketing Conter	t	in.		



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>
	Email: sales@ohoney.com

Tel 2	303.333.0302	Contact Perso	on		
Malatia Diana		ID No. 2			
Fax					
E-Mail	sales@ohoney.com	Remarks	Ĩ.		
Web Site					
Shipping Type		Buyer	-1	o Sales Employee-	•(=)
Factoring Indicator					
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Business Partner Type	Company	Territory			
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O Advanced					
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- 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:

Address ID: Main Office <u>Street/PO box:</u> 400 NW Compton Dr <u>City:</u> Portland <u>Zip code:</u> 97006 <u>State:</u> Oregon

Ge <u>n</u> eral	Contact Persons	Payment Terms	Addresses	Payment Run	Accounting	Properties	Attachments	Remarks	eDog
Pay to			Pay	To		Show Locat	ion in Web Brow	/ser	
Main Office			Ad	dress ID		Main Office			
Define Ne	ew		Ad	dress Name 2				11	
Ship To			Ad	dress Name 3					
Define Ne	ew		Str	eet / PO Box		1750 NW Naito	Pkwy		
			Blo	ck					
			Cit	/		Portland			
			Zip	Code		97209			
			Co	unty					
			Sta	te		Oregon			
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<u>b.</u> Click on the Payment Terms tab, and enter: <u>Payment terms:</u> Net 30 days Price list: Last purchase price

General Contact Perg	ons Payment Terms	Addresses	Payment Run	Accounting	Properties	Attachments	Remarks	eDocs
Payment Terms	Net 30 Days	*						
Interest on Arrears %								
Price List	Price List 01	•						
Total Discount %		Ave	erage Delay					
Credit Limit	0.00	Pric	ority			*		
Commitment Limit	0.00	Def	ault IBAN					
		Hol	lidays			*		
		Pay	ment Dates					

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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.

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.

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: The Grain Reaper.

Here's their contact info:

<u>Tel 1:</u> 503-555-9917 <u>Email: sales@grainreaper.com</u>

Contact person

Will Daniels <u>Tel 1:</u> 503.555.9917 <u>Email: willdaniels@grainreaper.com</u>

Addresses

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

<u>Bank</u>: Wells Fargo <u>Account</u>: 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 <u>Name</u>
- 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