



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.

In our labs, names of editable fields will be underlined (example: "click in item description"). Clickable items like modules or menus will be **bolded** (example: "click on **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.
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.
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 Name box. We'll call our new vendor OHoney.

Business partner

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

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.



5. Next we'll put in some contact information for our primary contact.

a. On the general tab, enter:

Tel 1: 503.555.6982

Email: sales@ohoney.com

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

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.

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 here.



- 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
Street/PO box: 400 NW
Compton Dr
City: Portland
Zip code: 97006
State: Oregon

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

Price list

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.

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:

Tel 1: 503-555-9917

Email: sales@grainreaper.com

Contact person

Will Daniels

Tel 1: 503.555.9917

Email: willdaniels@grainreaper.com

Addresses

Address ID: Main Office

Street/PO Box 400: NW Compton Dr

City: Portland

Zip code: 97006

State: 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