



# Utilities

Budget | GL Determination | Price List | Planning Management  
Item Master | Business Partner

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Presented by:  
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# Agenda:

1. Price List Utility
2. GL Determination Utility
3. Budget Utility
4. Planning Management Utility – NEW!
5. Item Master Utility – NEW!
6. Business Partner Utility – NEW!

# Price List Utility

# Price List Utility:



**SAL**

"The Sales Guy"



- **What is it for?**

Helps manage prices, price lists, and business partner assignments.

- **Scenario & Demo**

# GL Determination Utility

# G/L Determination Utility:

*\*Advanced Utility\**



**PENNY**

"The Accountant"

- **What is it for?**

Helps manage GL determinations (GL mapping) for items at the item, item group, and warehouse levels.

- **Scenario & Demo**



# Planning Management Utility

# Planning Management Utility:



**PETER**

"The Invenr. Mgr."



- **What is it for?**

Helps manage sales goals, forecasts, and items - in relation to goals and MRP

- Sales Goals Items
  - Edit *Brand & Pack Type* for sales items
- MRP Items
  - Lead times, intervals, preferred vendors, quantities, etc.
- Item Properties
  - Associate properties to your items

- **Scenario & Demo**



# Budget Utility

# Budget Utility:



**PENNY**

“The Accountant”



- **What is it for?**

Helps create and maintain budgets within Orchestrated.

- **Setup**

Flag budget relevant GL accounts

- Normally, revenue and expense type accounts
- Done within the *Chart of Accounts* function
  - *Account Details > Relevant to Budget*

- **Financial Reports**

- **Scenario & Demo**

# Item Master Utility

# Item Master Utility:



**PETER**

"The Invenr. Mgr."



- **What is it for?**

Helps manage item settings

- **Scenario & Demo**

# Business Partner Utility

# Business Partner Utility:



**PENNY**  
"The Accountant"

- **What is it for?**  
Helps manage business partner settings.
- **Scenario & Demo**



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**SAL**  
"The Sales Guy"



# Thank You!

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