BoSch Data

User Manual
inspectorMAN

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INTRODUCTION

The app was designed for

The inspectorMAN App, based on Microsoft Dynamics™ Business Central® was designed for companies that want to protect themselves and for whom embargos have an impact on their daily business.

Trainings for App Solutions

We know that training is an extremely important prerequisite for you to get the most out of your investment in the BoSch Data - inspectorMAN App application. Our expert-developed training keeps your knowledge of the solution you use up to date, and helps you develop your skills to get the most out of your solution. Whether you choose online training, instructor-led training, or self-paced training, we have the right program for you. Choose the training program that best fits your needs.

With the help of training materials you have the possibility to work through the provided training manuals at your own pace and at any time. Our numerous training materials contain a wealth of tips, tricks and background information that you can refer to again and again.

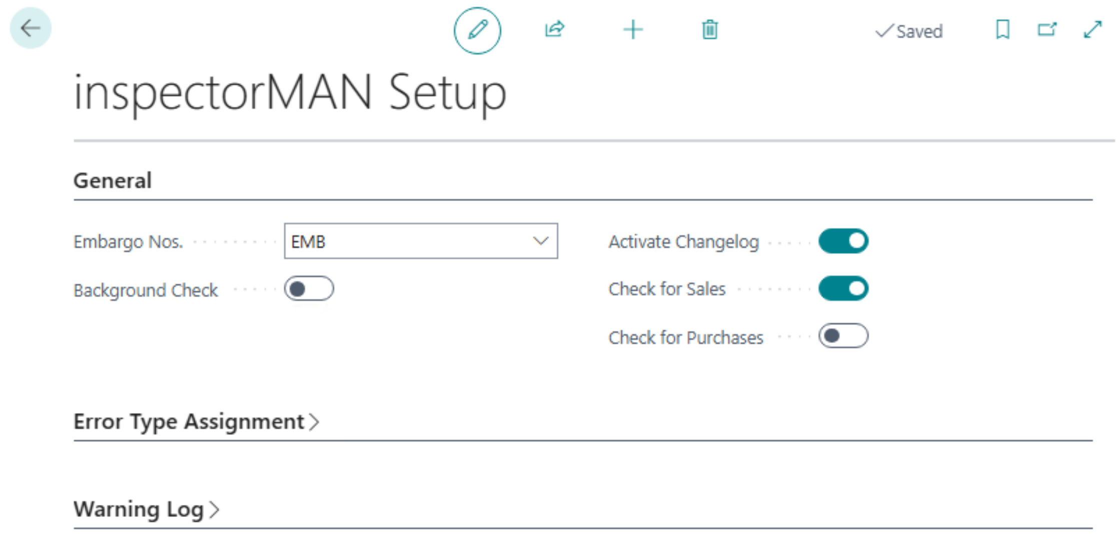
Case Szenarios

In order for an end user to be able for follow the functionalities and its effect in detail, the BoSch Data - inspectorMAN App offers case studies and explanations in the training materials. This allows the end user to reproduce their specific processes and requirements in the standard demo database. They can also test the functions using the examples.

1 Setting up inspectorMAN App

1.1 General

Before you can begin to use your Embargos, you must specifiy how you want to manage company Embargo processes.

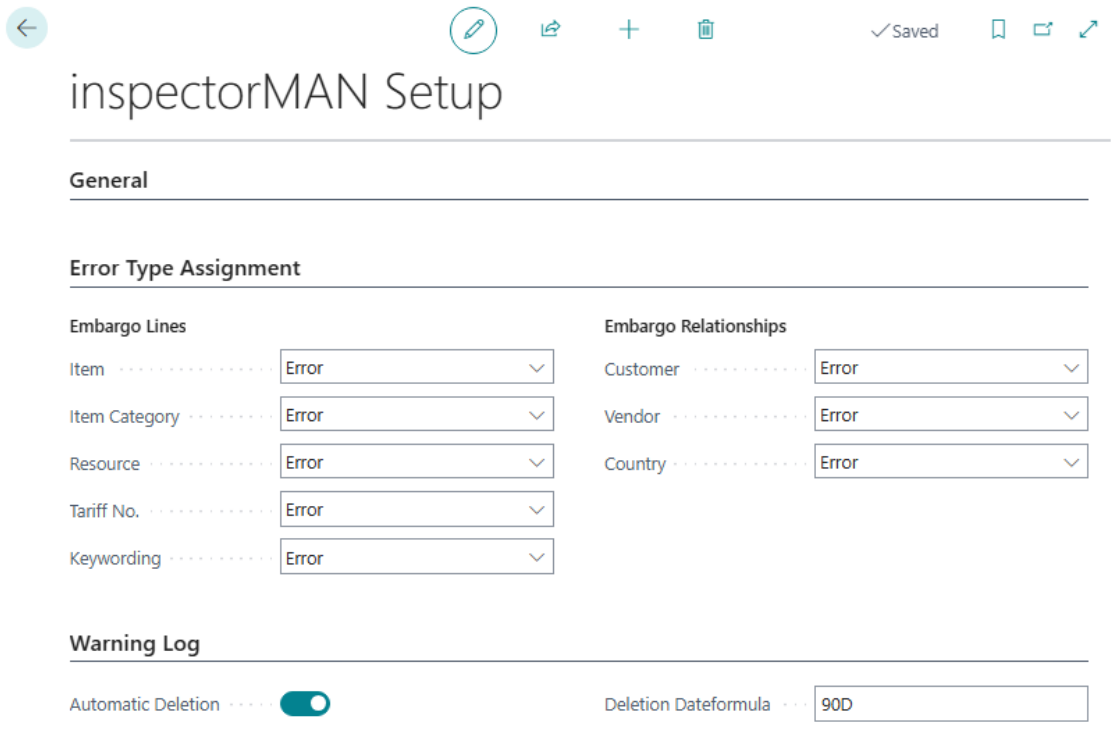


At the setup you can select the settings for the inspectorMAN App.

1. Choose the icon, enter **inspectorMAN Setup**, then choose the related link.
2. At the field Embargo Nos. Series, you can select the number series for embargos.
3. Select **Check for Sales** or/and **Check for Purchase** where you want to use it for.
4. Prevent issue messages active as popup window, enable **Background Check** for silent messaging

1.2 Error Handling

The error message handling for embargos is necessary. For that, inspectorMAN makes error messages by using document check at Business Central. Furthermore, warnings are also necessary so, users can decide if errors stops the process or warnings inform you. For this, you can setup the error message handling template at the settings.



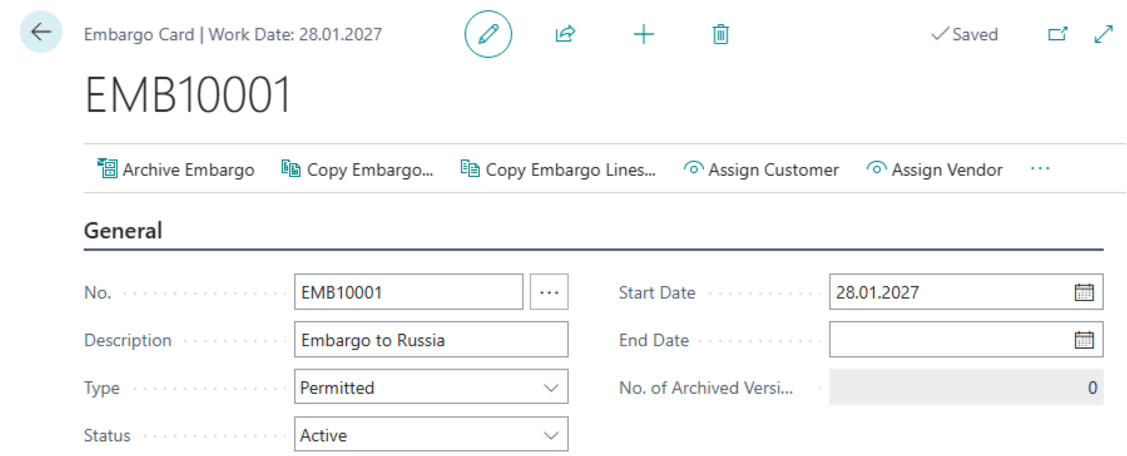
At the setup you can select the settings at the FastTab **Error Type Assignment** and **Warning Log**.

1. Select for **Error** or **Warning** as the general settings for each type of a embargo line.
2. Select also **Error** or **Warning** as the general settings for **customers**, **vendors** or **country**.
3. Enable **Automatic Deletion** when warning messages should be deleted automatically after the deletion period.
4. Setup the **Deletion Dataformula** for the deletion period.

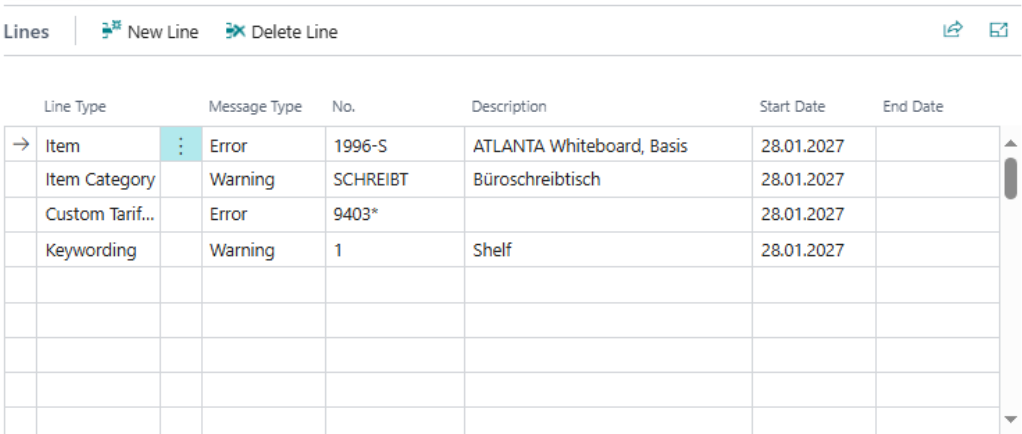
2 Setting up an Embargo

You create an embargo to secure your shipments and receipts.

2.1 To create an embargo



1. Choose the icon, enter Embargos, then choose the related link.
2. Select **New** to create a new entry.
3. In the **Embargo Desc.** field, enter the name of the embargo.
4. Fill in the remaining fields on the Embargo page as necessary. Hover over a field to read a short description.



5. On the **Lines** FastTab, in the Line Type field, select the type of item, resource, item category, tariff number or keywording. Select another **message type** which is necessary.

> ⓘ **Note**
>
> *For using keywording, you can configure a separate keywording list where the inspectorMAN App is searching for. Regarding the description of items or item categories, keywording can be used like legacy search parameters. Adress for this your keywords at the field **KEYWORDING** on the item card.*

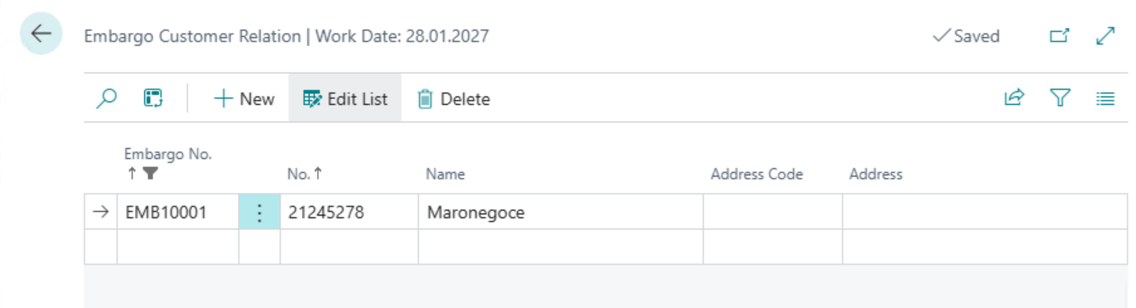
6. In the **No.** field, select a record associated with the line type.
7. Repeat steps 5 through 6 for every type entry you want to set on the embargo.

2.2 Adding Customers, Vendors and Countries to Embargos

After you have created an embargo and entered basic information about it, you may want to assign customers, vendors or countries to the embargo.

2.2.1 To assign customers to an embargo

1. Choose the **Assign Customer** action, and then choose the customer you want to add.

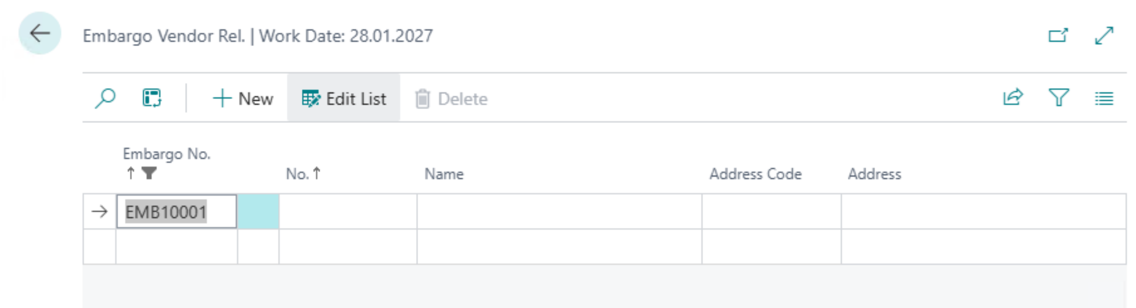


2. Add a **Ship-to Code**, if the embargo is valid only for a special ship-to address.

> **Tipp**
>
> *If you need the embargo for all customers, leave the assign to customer blank.*

2.2.2 To assign vendors to an embargo

1. Choose the **Assign Vendors** action, and then choose the customer you want to add.

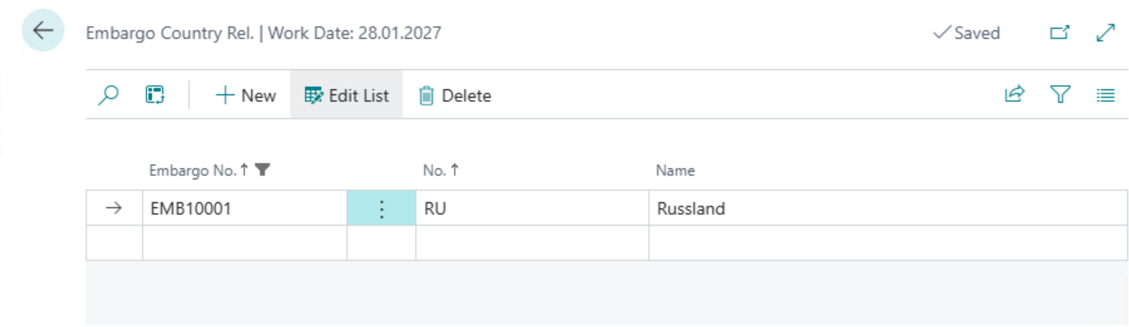


2. Add a **Remit-to Code**, if the embargo is valid only for a special remit-to address.

> **Tipp**
>
> *If you need the embargo for all vendors, leave the assign to vendor blank.*

2.2.3 To assign countries to an embargo

1. Choose the **Assign Country** action, and then choose the country you want to add.



> **Tipp**
>
> *If you need the embargo for all countries, leave the assign to country blank.*

2.2.4 Status, Archive and Copy Embargos

On Embargos, you can specify if an embargo is ready, valid or not valid. You have finished the preparation on your embargo, so **Embargo Status** can change from **Draft** to **Active**. Now, you can use it for purchase and sales.

If you decide that an embargo is not valid, change the **Embargo Status** back to **Draft**. If you set up a new embargo and will safe time, **Copy Embargo** or **Copy Embargo Lines** from active or archived embargos accelerates the process.

3 Work with Embargos

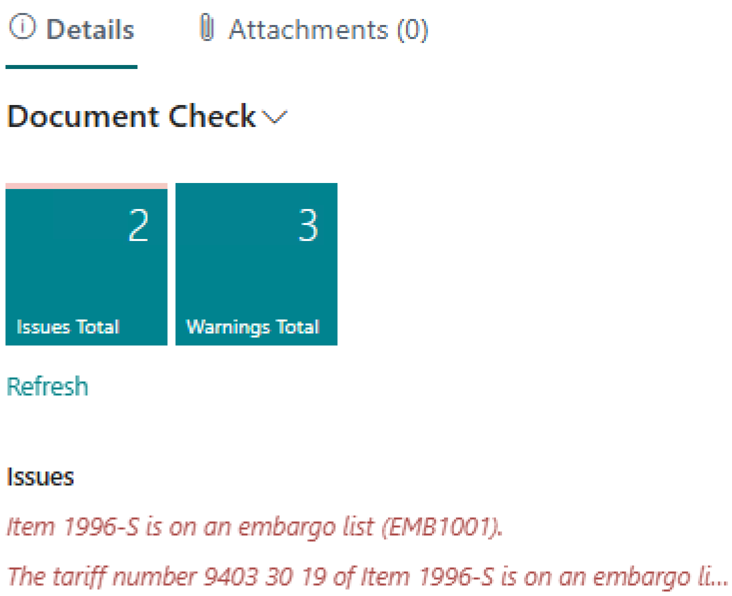
You set up an embargo to secure your sales and purchase processes. You will now be informed about certain circumstances, if your sales or purchase document is not valid for an active embargo.

3.1 Use Embargos at Sales

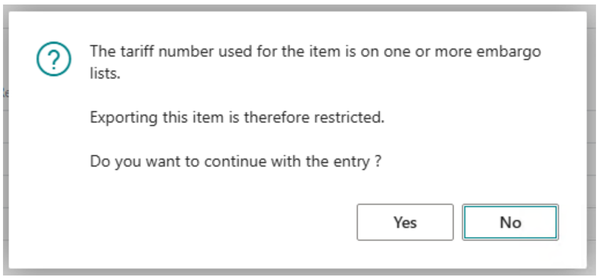
1. Choose the icon, enter Sales Orders, and then choose the related link.
2. In the **Customer Name** field, enter the name of an existing customer.

> **Note**
>
> *If you have assigned the customers or his country code to an embargo, you get an issue message at the document check.*

3. Fill in the remaining fields on the Sales Order page as necessary. Hover over a field to read a short description.



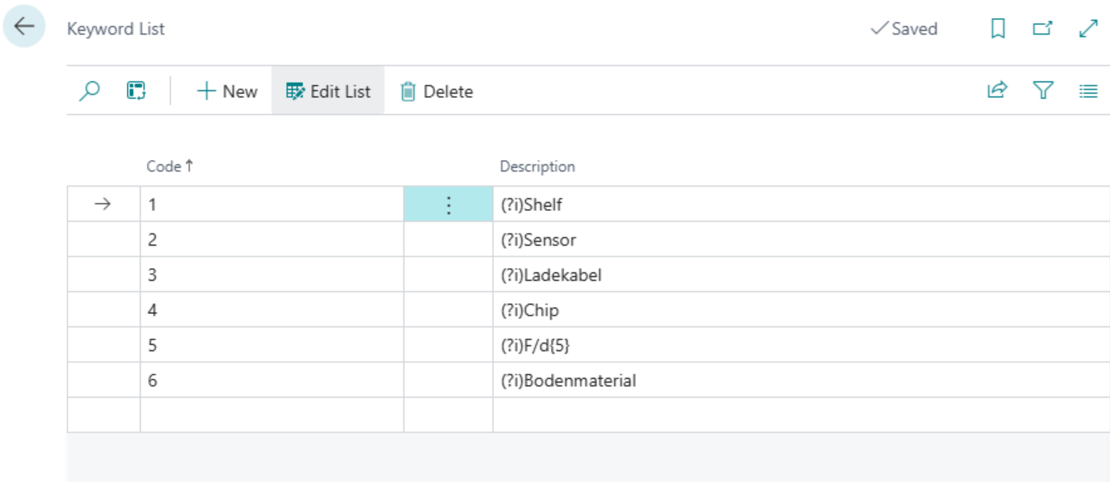
4. On the **Lines** FastTab, in the **Type** field, select the type of product you post for the customer on the sales line.
   You're now ready to fill in the **Lines** FastTab with products you're selling to the customer.
5. Depending on your embargo you have already configured, you get some more information per sales line. For example, if you have set the tariff no. on the embargo, the message displays the issue.



3.2 Use Keyword List

You can setup your embargo with many textual parameters. Item description and item categories descriptions have multiple text elements, where you also want to check them before sales and purchases documents are leaving your company.

1. Choose the icon, enter **Keyword List**, and then choose the related link.



2. Create keywords line by line, you want to use at embargos.

> **Tipp**
>
> *To optimize the search it is handled like a regular expression. For reference of available expressions see: https://learn.microsoft.com/en-us/dotnet/standard/base-types/regular-expression-language-quick-reference.*
> *This example searches the parameter within a text and ignore case sensitive.*