BoSch
Data

User Manual
sisMAN

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INTRODUCTION

The app was designed for

The sisMAN App, based on Microsoft Dynamics™ Business Central® was designed for trading, construction and building companies they plan and calculate the different types workload along an object. At the daily business for planning, communication with stakeholder and management dates for constructions and buildings, sisMAN (sales information system system management) gives you a prefect overview about costs, status and tasks for each object. Also, calculation opportunities for special references is possible as well, managing tasks and interactions. An important clarification need to be mentioned: what is an object in sisMAN? An object can be a project, a construction site, an order with a long lifecycle, an opportunity with complex presales or offering structures or anything else with different participants (contacts, multiplicators, vendors or customers).

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 - sisMAN 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.

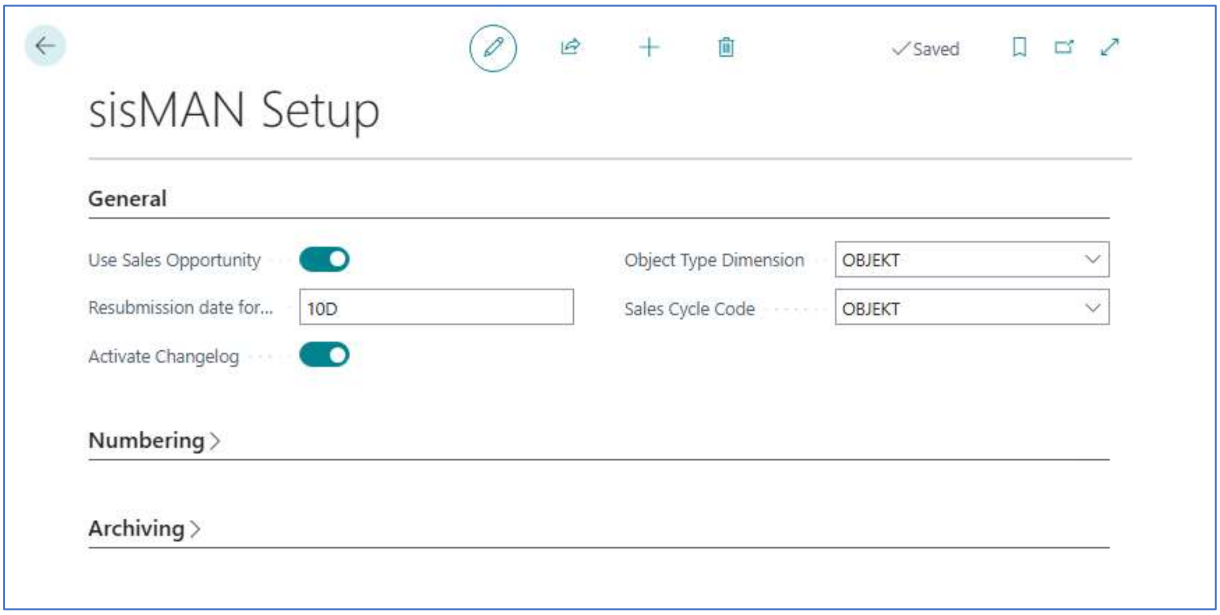
Case szenarios

In order for an end user to be able to follow the functionalities and its effects in detail, the BoSch Data - sisMAN 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 Setup sisMAN App

1.1 General

Before you can begin using your objects, you must setup sisMAN.



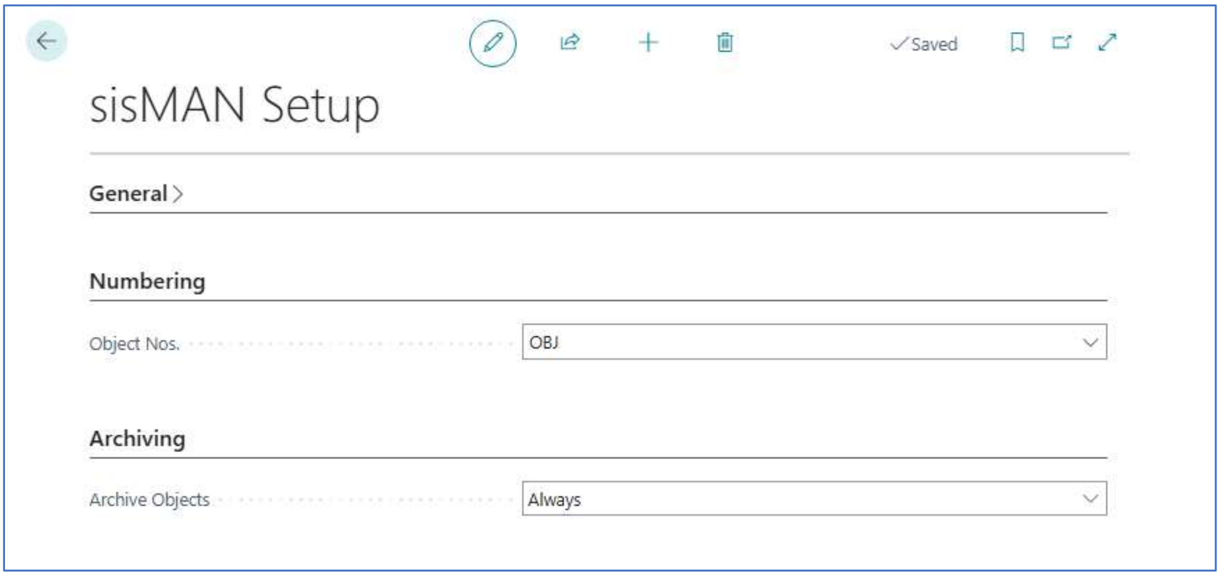
At the setup you can select the settings for the sisMAN app.

1. Choose the icon, enter **sisMAN Setup**, then choose the related link.
2. Enable **Use Sales Opportunity**, if you manage opportunities at objects or their responsibility references.
3. Setup the **Resubmission date formular** for automatic calculation the end of the resubmission date at the object, starting from the submission date.
4. **Enable Change Log** for tracking changes at the object.
5. **Object Type Dimension** is enabled after installation sisMAN. It is for using default dimension for each object.

1.2 Numbering and archiving

At the **sisMAN** setup you can select your numbering for objects.

1. Open the register **Numbering.**
2. Check the installed number series at **Object Nos.**
3. Open the register **Archiving**.
4. Set the **Archive Objects** on **Always, Never or Question.**


Saved
sisMAN Setup
General
Numbering
Object Nos.
OBJ
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Archive Objects
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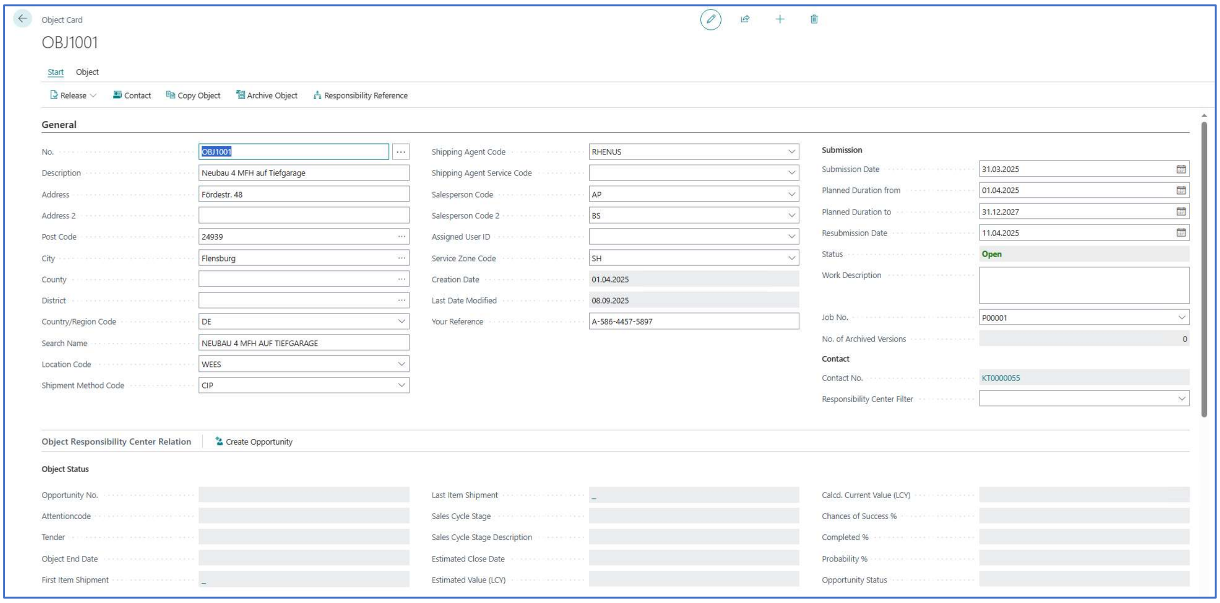
2 Working with objects

You can create objects for your construction / building job or offering/proposals and order. Manage everything around the specified object and tracking each type of communication with your stakeholders.

2.1 To create an object



Note

Before you can create contacts from objects, you must specify a business relation code on the Marketing Setup page on the Interactions FastTab.

Also, you must also have at least one template set up for each of them. For example, to create a contact from an object, you must have an object template.

1. Choose the icon, enter **Object**, then choose the related link.
2. Select **New** to create a new entry.
3. In the **Description** field, enter the name of the object.
4. Fill in the remaining fields on the object page as necessary. Hover over a field to read a short description.
5. Type in the **Submission** Date. The **Resubmission Date** will be calculated automatically with the parameter you entered at the sisMAN setup.
6. Fill in the **Planned Duration from** and **Planned Duration to** date.
7. Enter the **Job. No.** if necessary, even when you use job module at Microsoft Dynamics 365 Business Central for construction sections.

On the **Object Status** FastTab, all relevant calculated parameters show the status of the current opportunity, if you enable **Use Sales Opportunities** at the sisMAN setup.

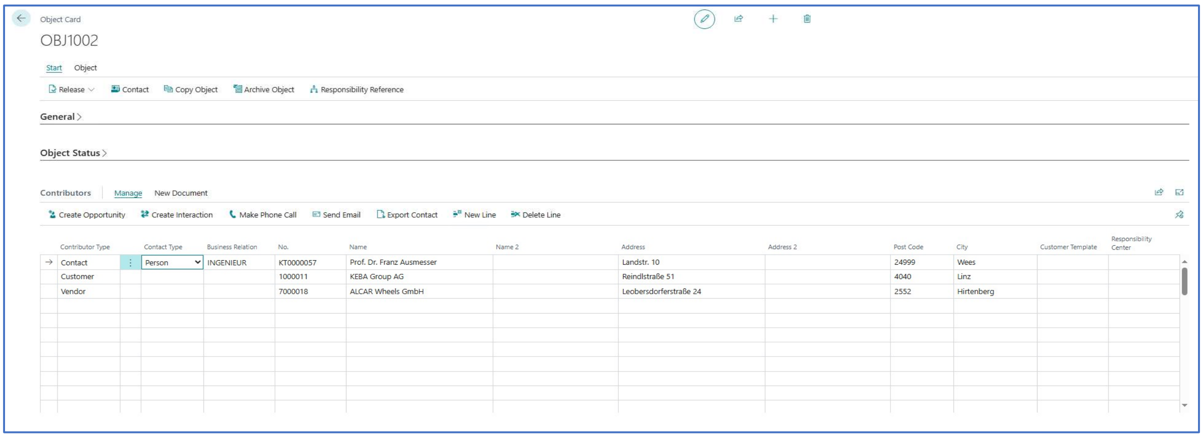
> **Note**
>
> *For using Object Status, you must configure Customer Relationship at the Microsoft Dynamics 365 Business Central. With* ***Opportunities*** *you can planned calculated costs and plans the step at the sales circle stage.*

8. Click at **Create Opportunity** to create a new sales opportunity for this object.

> **Tipp**
>
> *If you are working with various construction areas (civil engineering or others), create responsibility references. For each reference you can setup an own opportunity for evaluate each potential.*

2.2 Adding Contributors

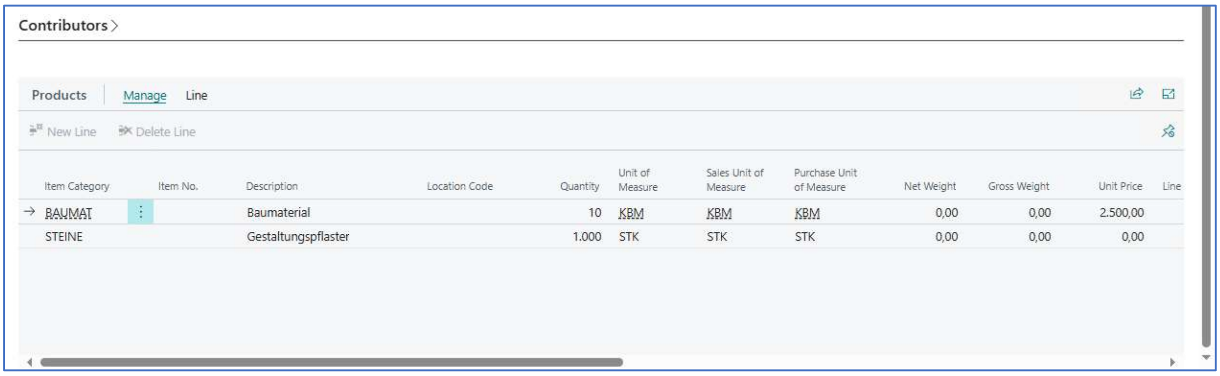
Working with an object needs to manage your contributors. So, fill in your contributors for this object and take options to send mail, make a phone call or create other interactions. Also, create new documents like purchase quote or sales orders.



1. Specify the **contact, customer** or **vendor** that you want to list as a contributor.
    - If the contact is not a vendor or customer, then specify the **customer / vendor template** field.
2. To create a sales order or purchase order with a contributor, choose the **New Document** action.

2.3 Adding Products

Using items for calculations or planning the construction of objects that need to be specified in the beginning of the process. For that, you can select special items or use the type of item category for a first overview.



You're now ready to fill in the product lines with inventory items or services you want the object to purchase or to sell.

1. On the **Products** FastTab, in the **No.** field, enter the number of an inventory item or service.

Leave the **No.** field empty if the line is for a:

- Item Category. Choose the **Item Category**, which kind of items from the category you want to choose later.

2. In the **Quantity** field, enter the number of items for the object.

> **Note**
>
> *For items of Service or No Inventory type, the quantity could be a time unit, such as hours, as indicated in the **Unit of Measure Code** field on the line. To learn more, go to **Set Up Item Units of Measure**.*

The **Line Amount** field is updated to show the value in the **Unit Price** field multiplied by the number in the **Quantity** field. The price and line amounts are shown without tax.

3. In the **Line Discount %** field, enter a percentage if you want to grant a discount on the product. The value in the **Line Amount** field is updated accordingly.

If you set up special object prices on the **Object Prices**, the price and amount values on the lines update automatically if the criteria are met. To learn more about prices and discounts, go to Record Sales Price, Discount, and Payment Agreements.

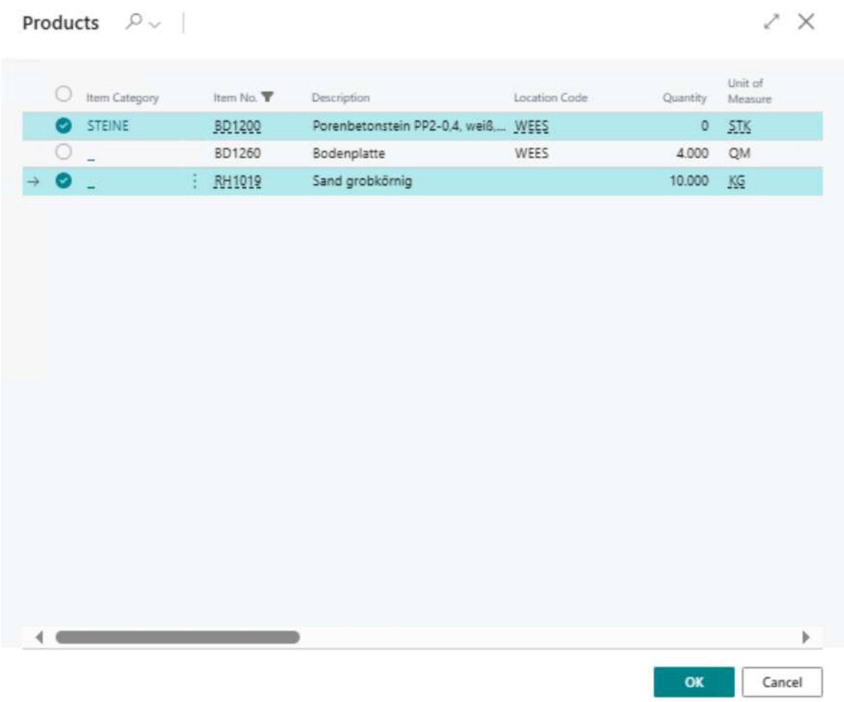
4. Repeat steps 1 through 3 for every item you want the object to purchase or to sell.
5. Optionally, in the **Job No.** and **Job Task No.** fields, enter the No. and the Task of your construction project to see, for what part you have planned.

> ⓘ Important
>
> Using the object no. in documents related the contributor or items to this object and paste them. All related postings with this object show you the shipped quantities at the object card.

6. Additional, in the **Responsibility Center** field you can enter items for selected responsibility centers.
7. When the Product Lines are completed, choose the **Release** action.

2.4 Create documents with items

Working with items at sales or purchase documents, create a document and select the relevant items.



1. Click on the **customer** or **vendor** that you create a sales or purchase document for.
    - If the contact is not a vendor or customer, then specify the **customer / vendor template** field.
2. To create a sales order or purchase order with a contributor, choose the **New Document** action.

3. **Select** the relevant **items**, you want to address into a new document and click **OK**
4. A new sales or purchase document will open with your selected items.

2.5 Set up object prices

Price lists are flexible and let you specify the business partner or activity that they apply to. For example, you can set up one price list that applies to an object. Special prices or discounts are often based on a minimum quantity on purchase or sales orders, periods of time, or a certain combination of item, minimum quantity, and unit of measure. The prices and discounts you define automatically apply to your object as well to purchase and sales documents.

1. At action bar, choose **Prices** and **Create Price List**.
2. Enter a **Description** for the price list.
3. On the **General** and **Tax** FastTabs, fill in the fields as necessary. Hover over a field to read a short description.
4. Add items to the list in one of the following ways:
   - To add many items, choose **Suggest Lines**, and then enter filter criteria to specify the types of items to add. Optionally, you can enter settings for the items that are specific to the price list. You can change the settings later, if needed.
   - To copy items from another price list, choose **Copy Lines**, and then choose the price list to copy.
   - To add items manually, in the **Product Type** field, choose the type of product that the price list is for. Depending on your selection, fill in the remaining fields as necessary. Hover over a field to read a short description.
5. To start using the price list, in the **Status** field, choose **Active**.

3 Usage of Responsibility Centers and Opportunities

Some construction companies have different areas in which they carry out their construction projects — in building construction, civil engineering, or landscaping – also in case of trading procedures. For that and why objects can have some of those areas, responsibility centers are the right way to specifiy those areas for objects.

3.1 To set up a responsibility center

1. Select **Search** (Alt+Q) in the upper-right corner, enter **Responsibility Centers**, and then choose the related link.
2. Choose the **New** action.
3. Fill in the fields as necessary – your special areas. Hover over a field to read a short description.

If you're using responsibility centers to administer your company, it can be useful to have a default responsibility center.

4. Select **Search** (Alt+Q) in the upper-right corner, enter **Company Information**, and then choose the related link.
5. On the **Shipping** FastTab, in the **Responsibility Center** field, enter a responsibility center code.

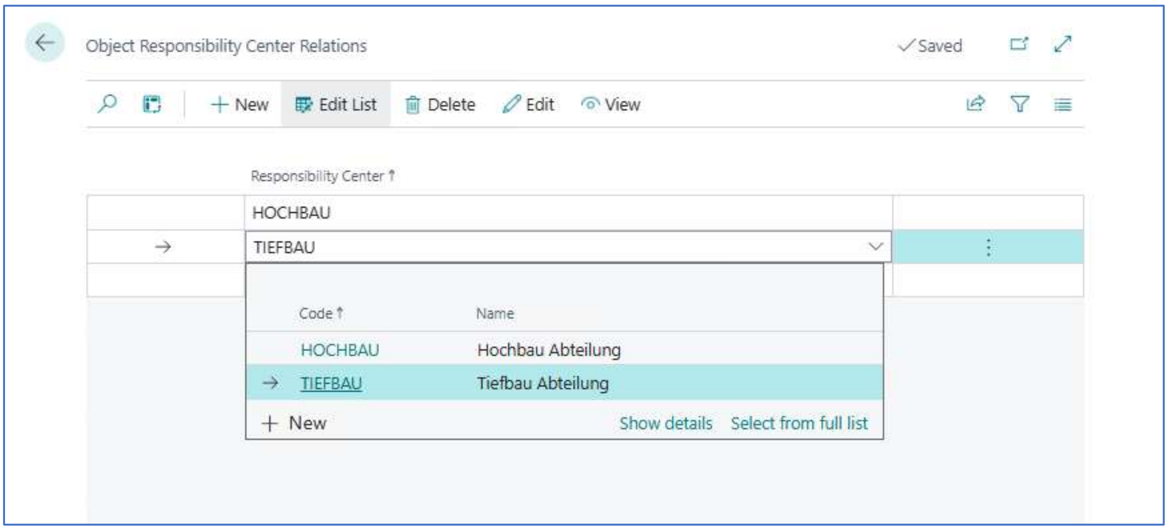
This code will automatically inserted at the object, if the user or customer has no default responsibility center.

Note

When you enter a responsibility center code on a document, it affects the address, dimensions, and prices on the document.

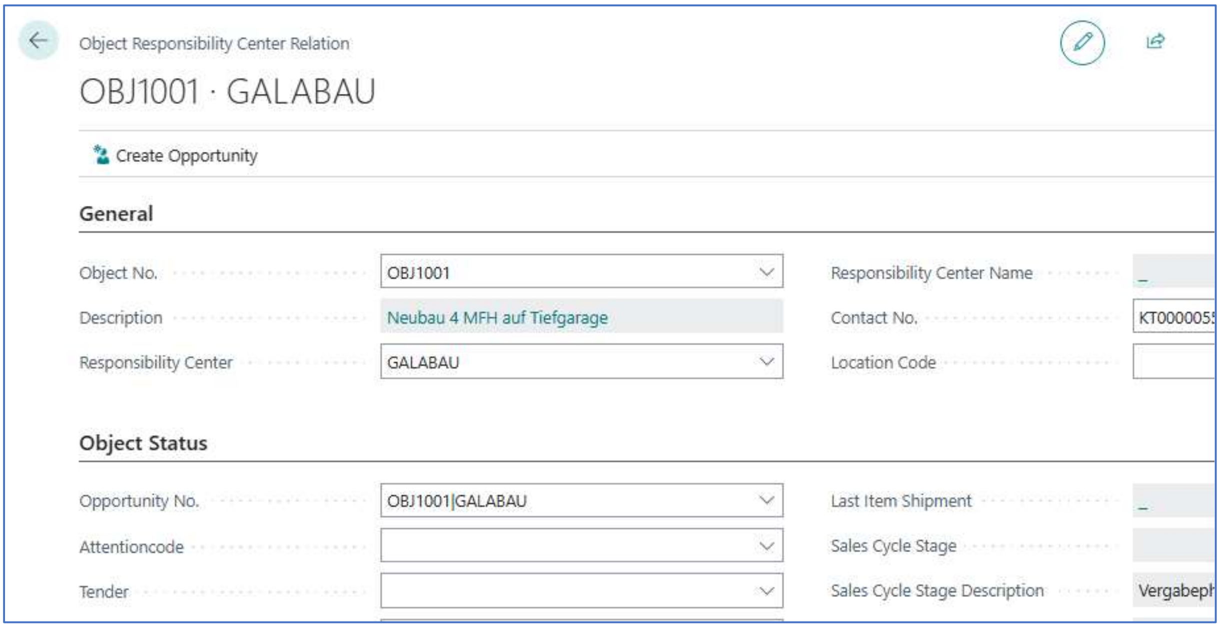
3.2 Assign responsibility center on an object

1. Select **Search** (Alt+Q) in the upper-right corner, enter **Objects**, and then choose the related link.
2. Open the **Object** card.
3. Click on **Responsibility Reference** action.
4. In the **Responsibility Center** field, select the responsibility center code for your constructions which is related to your object.



3.3 Assign opportunities on several construction areas

1. Open the **Responsibility Reference** action on the object.
2. Choose the **Edit List** action.
3. Choose the **create opportunity** action, then fill in the fields as necessary. Flyover a field with the cursor to get and read a short description.



4. Select the **Attentioncode**. You can create an attentioncode to specify that opportunity in detail.
5. Choose the **Tender** type and fill in on the opportunity.
6. Specify the **Object End Date** to control your opportunity for this responsibility code.

💡 Tipp

The sales cycle stages of an opportunity are pre-defined. You can enhance them individually. Using the sales cycle stages and proceed with the realization of an opportunity, go to Process sales opportunities.