BoSch Data

Smarte Software für Ihre Branche.

Microsoft Dynamics 365 Business Central

sisMAN

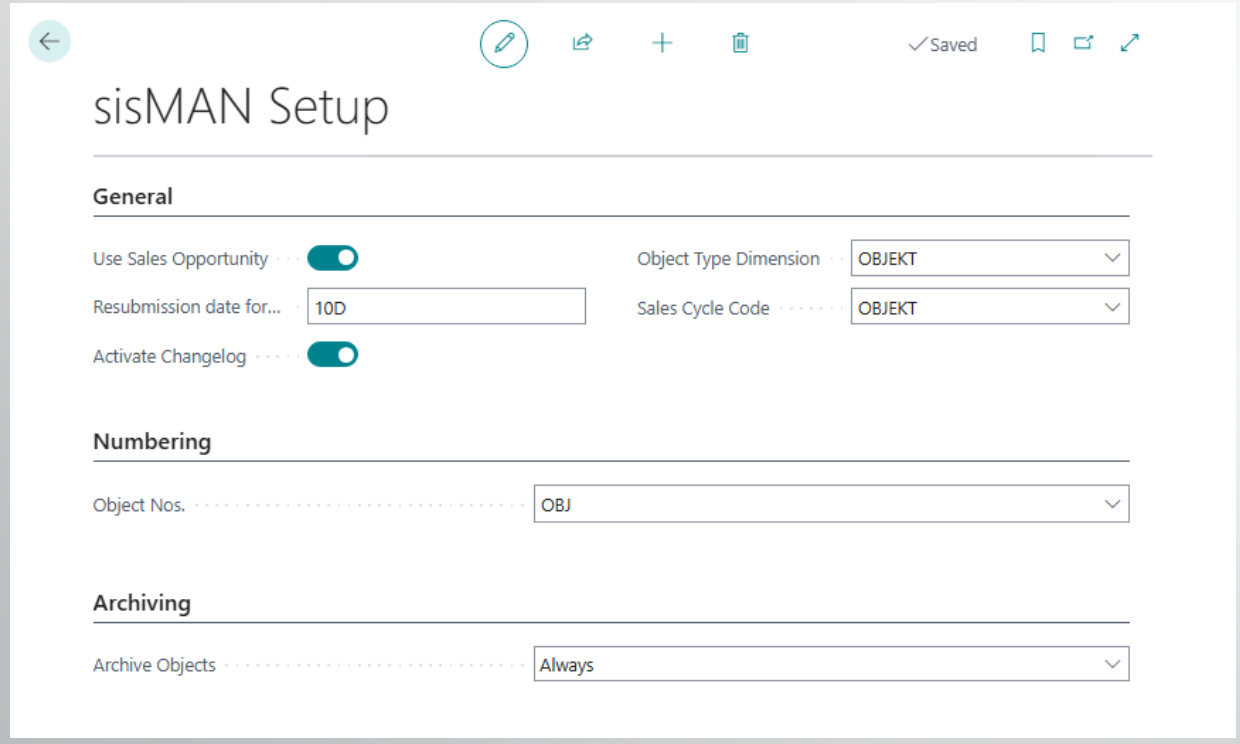
www.bosch-data.de

Agenda

- Setup sisMAN
- Setting-up objects responsibility reference
- Working with objects
- Set up object prices

setup sisMAN

setup sisMAN

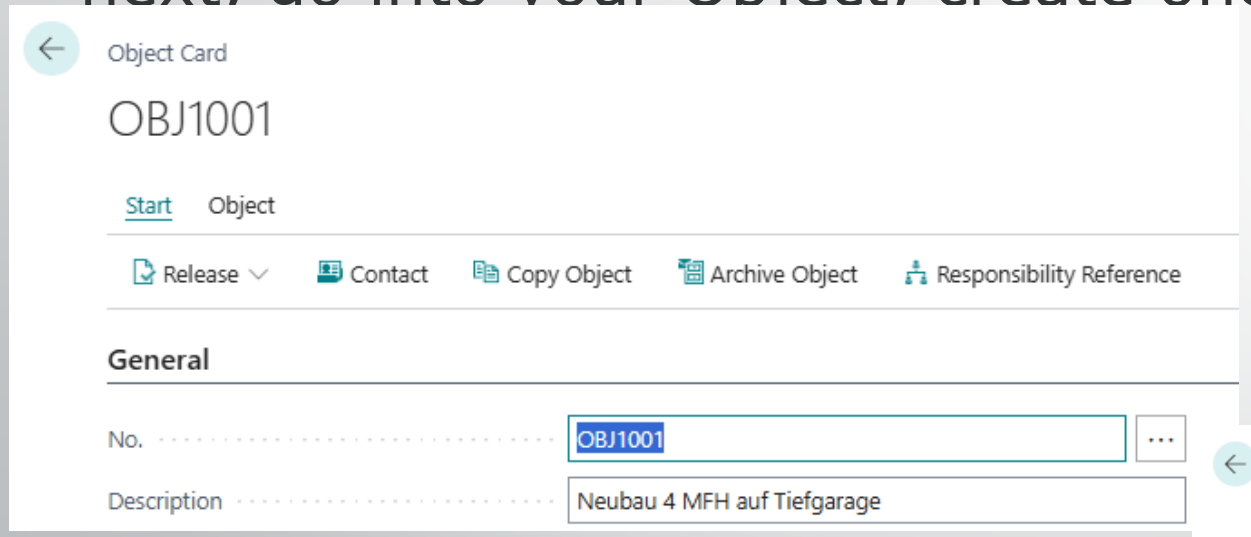


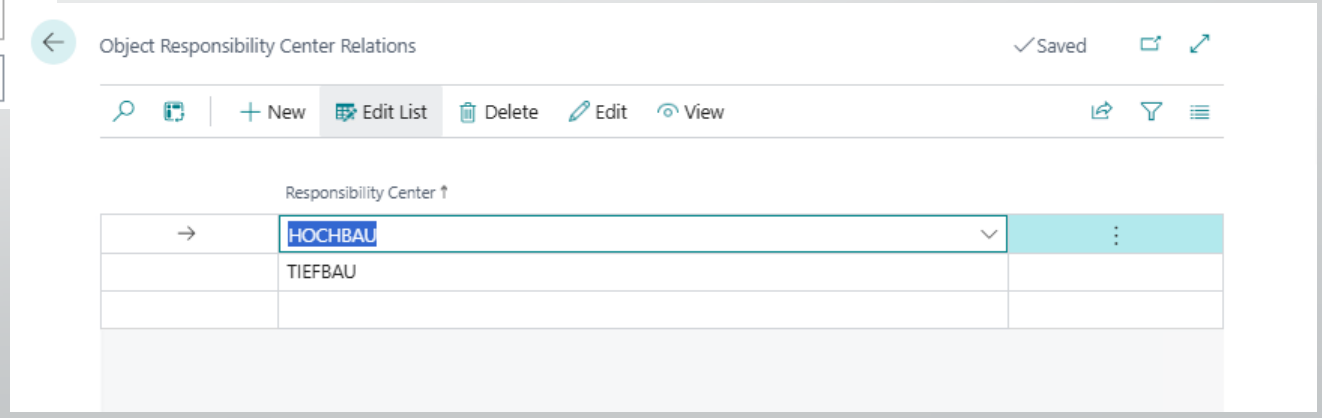
- Setup the sisMAN
  - enable sales opportunities
  - enter the resubmission date formular
  - enable change log
  - change/set the object type dimension
  - setup the sales cycle code for objects opportunities
  - setup the number series
  - enable the archive objects function

setting-up objects responsibility references

setting-up objects responsibility references

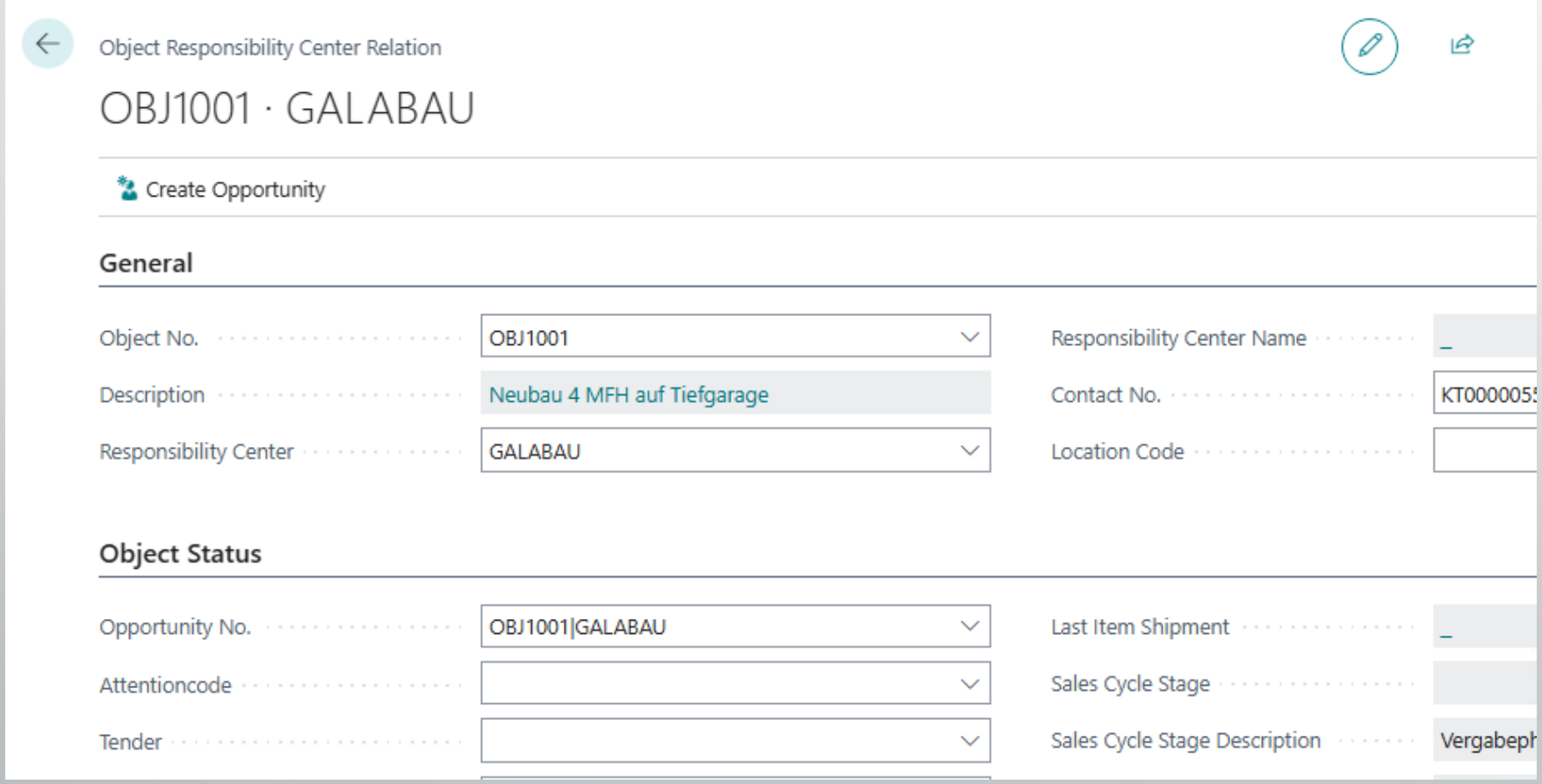
- first, setup responsibility centers at Microsoft Dynamics 365 Business Central
- next, go into your Object, create one and assign responsibility references





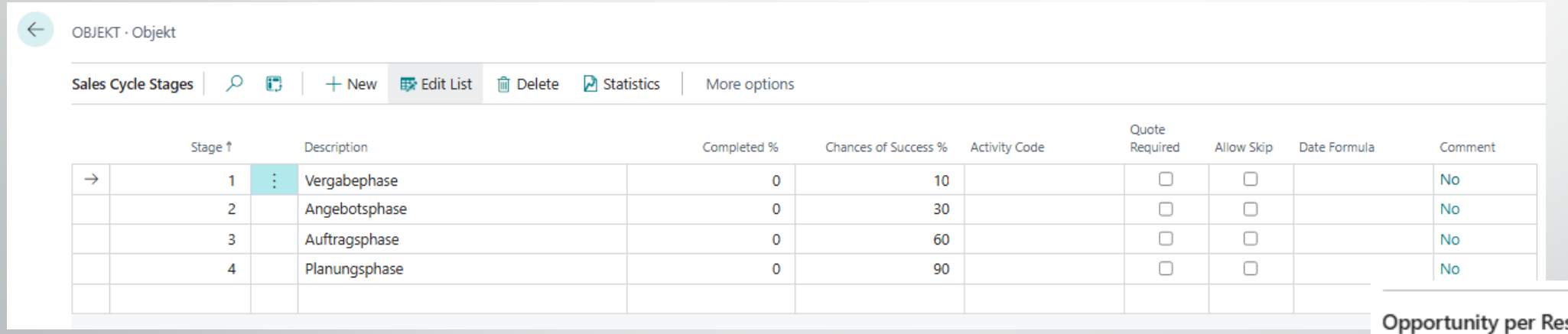
assign opportunities an each construction areas

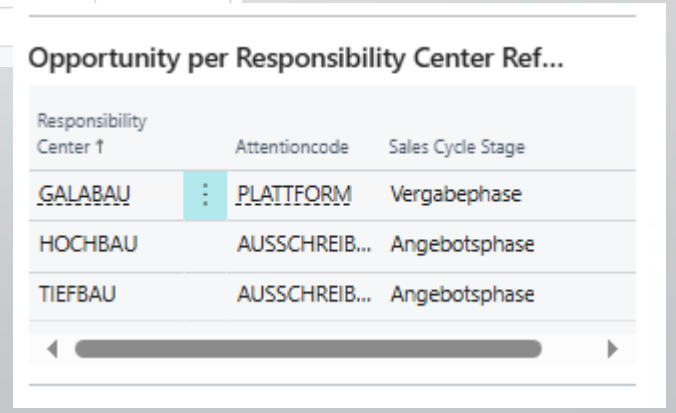
- edit the responsibility center and click **Create Opportunity** at action
- An **Object Reference** shows the changing of an opportunity



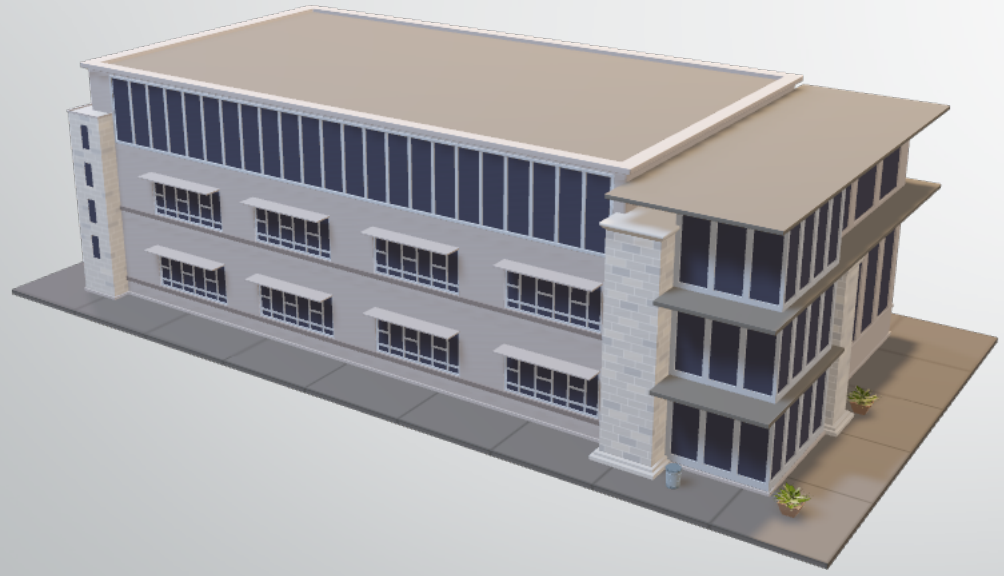
assign opportunities an each construction areas

- sales cycles are pre-defined but you can change/edit them indivudal
- also, the % of success
- You can see them for each responsibility center at the info pane





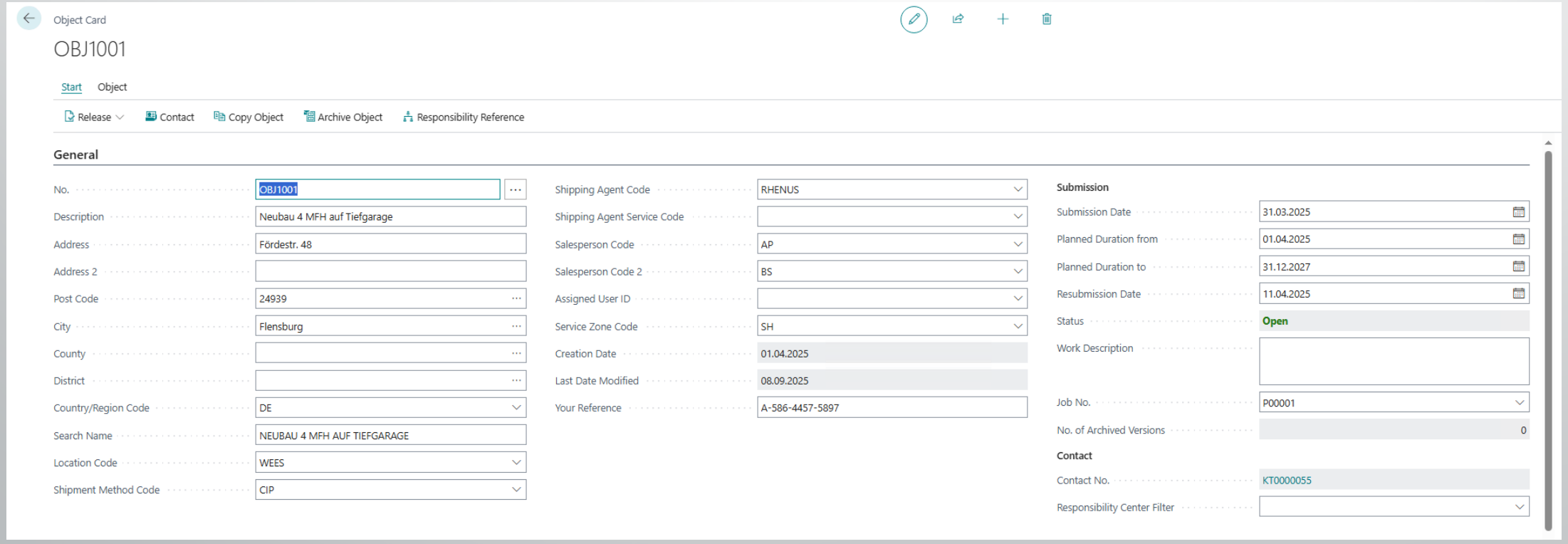
working with objects



create an object

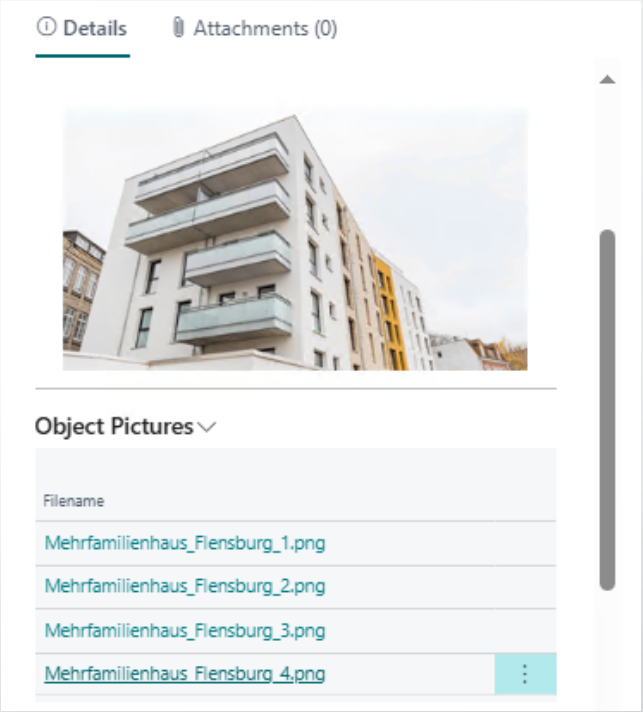
create an object

- create an object with its invidual parameters
- you can also use projects and you can connect object phases



create an object

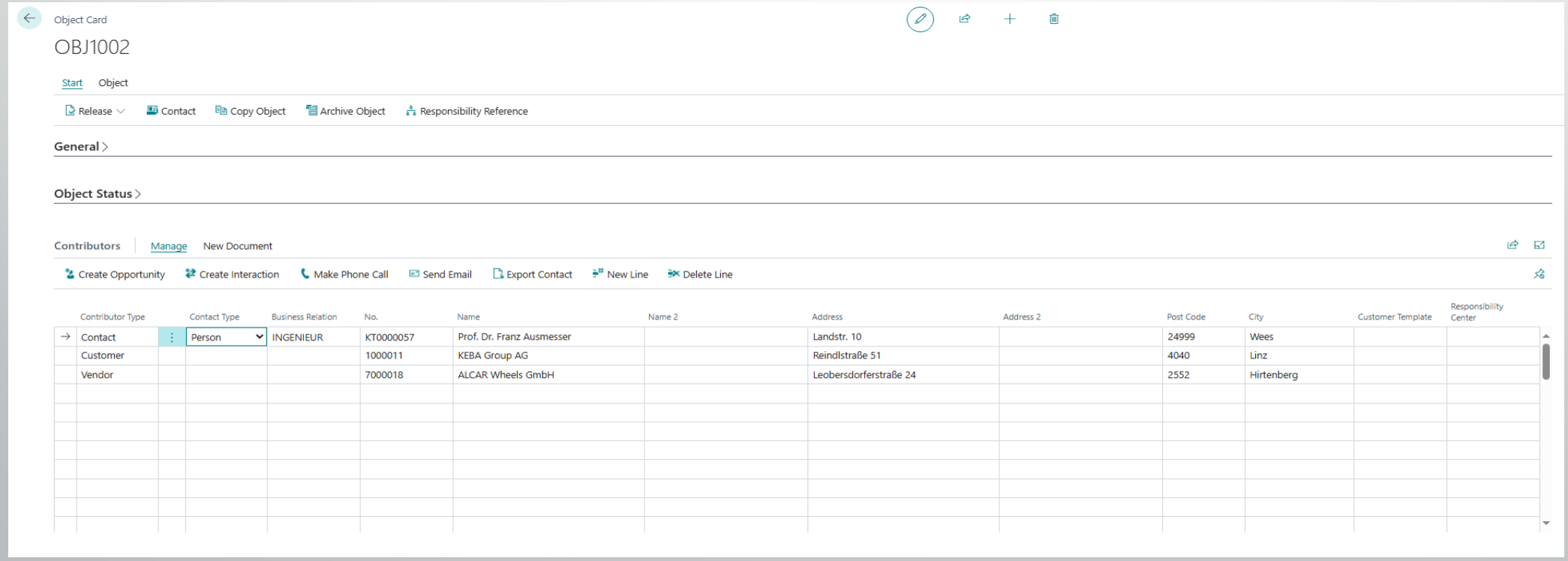
- add pictures direct to the object
- use on mobile your camera directly



- use archive or copy object details

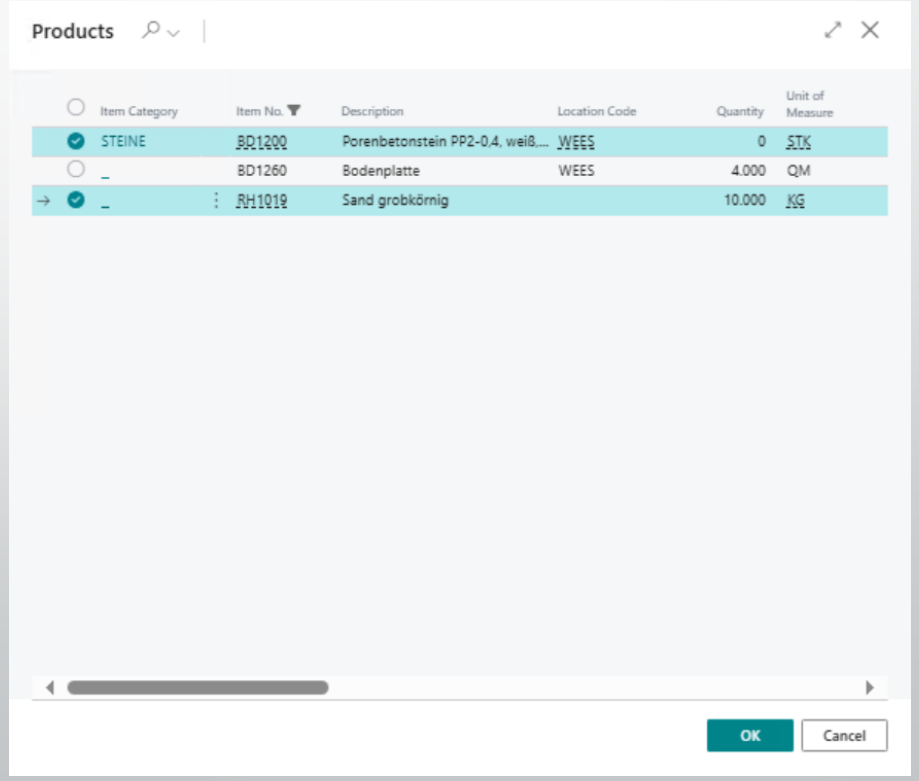
create an object

- add contributors you act with in an object
- use the communications and note functionalities for documentations
- send E-Mail direct out of the object



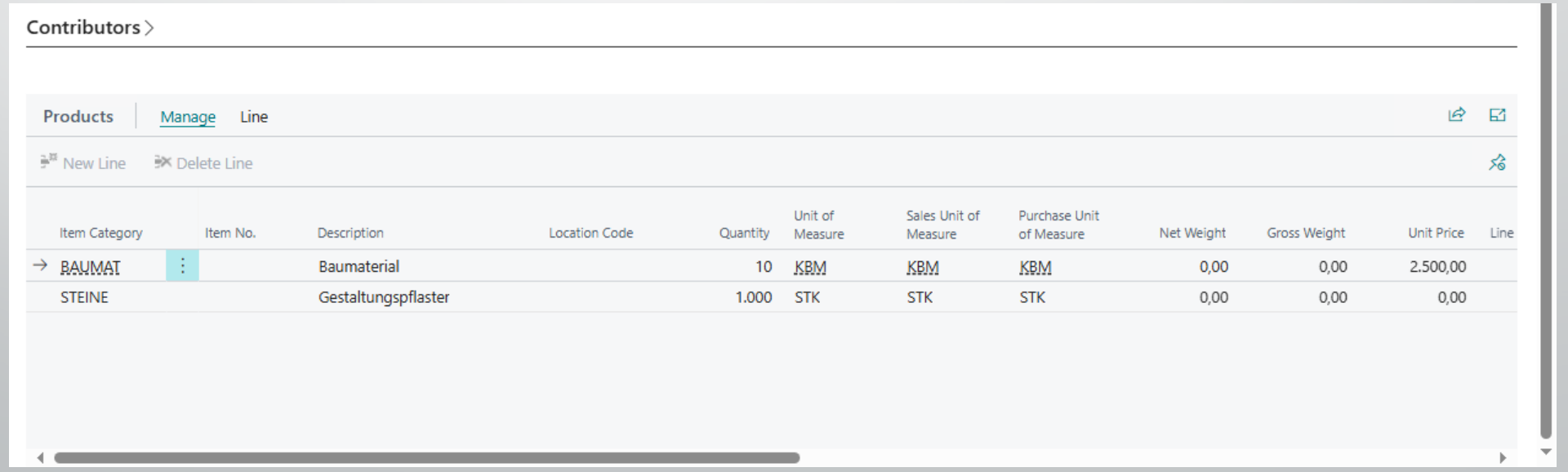
create an object

- create customers, if you use contact and customer templates
- create documents for vendors and customers
- select favorite items you get into a working document



create an object

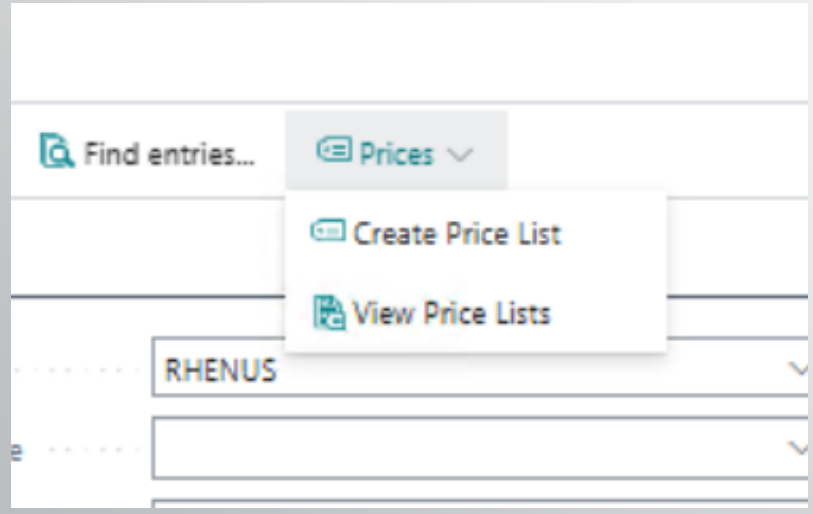
- assign products for your object, you are planning with
- use pre-definied filters like item category as preview
- specified later the item of an item category you manage at the object
- see, how many quantities are already delivered/received
- documents with the object ID will add items, you have not listed

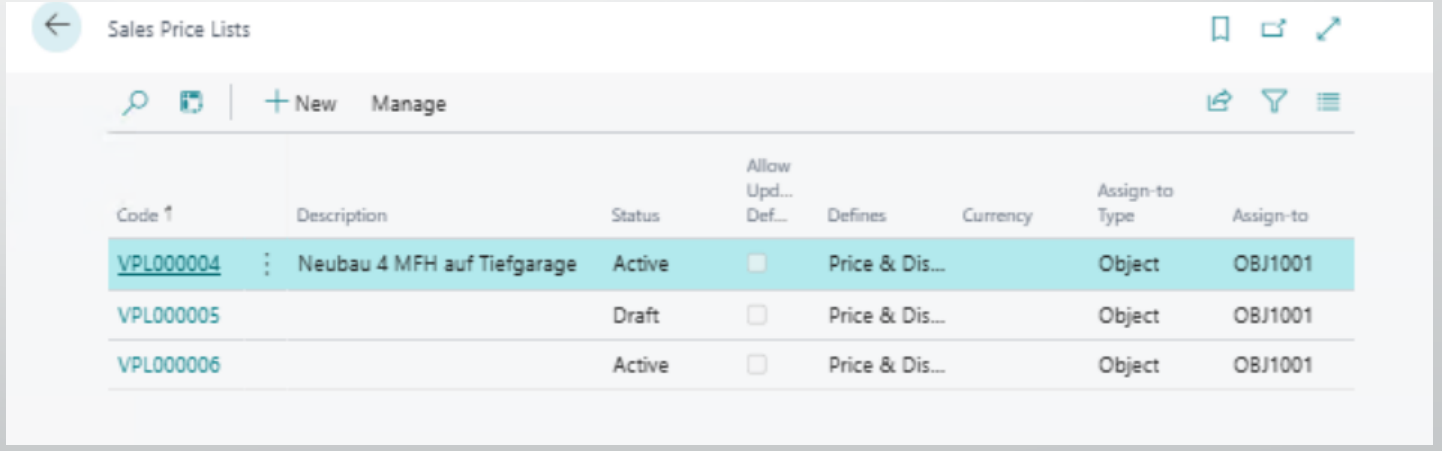


set up object prices

set up object prices

- set up individual price lists for your object
- add new entries in active prices lists or create new separate price lists for your object





Thank you very much!