

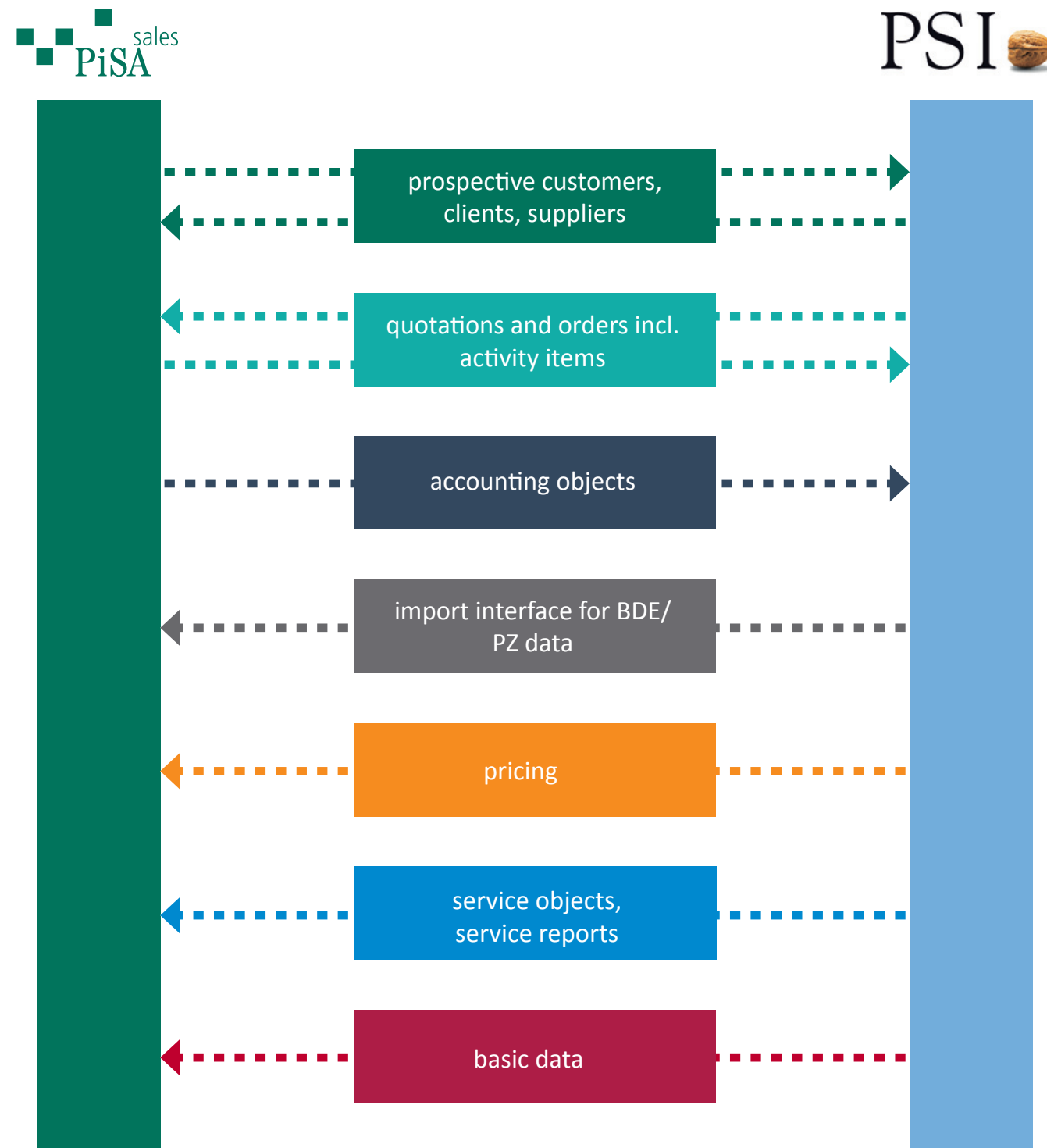
PiSA sales PSIpenta Link

The flexible interface to the PSIpenta ERP

As a strategic product partner to
PSI Automotive & Industry, we offer you a
comprehensive and robust link that supports
flexible extension even at basic level between
the PiSA sales CRM and the PSIpenta ERP.

Scope of synchronisation of the extendable PSIpenta interface

Our PSIpenta interface expertise is based on many years of experience and numerous client projects from the PSIpenta environment, in which our experts have implemented highly differentiated requirements. To support client-specific scenarios, the existing interface can be extended in collaboration with the client with other business objects, fields and functions.



Master data (contacts)

The interface currently comprises three business objects for contact master data, including the associated addresses and financial accounting data.

- ✓ client / prospective customer
- ✓ supplier
- ✓ representative / sales partner

Master data (products)

The interface comprises articles from an article catalogue (e.g. products, services). PSIpenta activity items are mapped in the PiSA sales CRM as activity-specific articles with reference to a catalogue article. It is possible to cyclically update from PSIpenta.

Movement data (activities)

The interface currently comprises activities of the type

- ✓ enquiry
- ✓ quotation
- ✓ order
- ✓ immediate invoice
- ✓ retrieval

and for each of these types of activity the corresponding order types, such as

- ✓ repair order
- ✓ new build order
- ✓ spare parts order
- ✓ maintenance order

It documents activities with the associated client activity items (two levels). Stored addresses on the activity and delivery item can be transferred.

Documents

The interface offers a document exchange table, via which the documents created in PSIpenta can be imported if needed into the PiSA sales CRM.

- ✓ document files such as quotation documents, order confirmations etc.
- ✓ text modules / notes such as descriptive texts for delivery conditions, packaging and shipping conditions

Basic data

Master and movement data is linked with various basic data, which is referenced. To compare this basic data, the interface already supports 15 business objects such as

- ✓ currencies
- ✓ languages
- ✓ payment deadlines
- ✓ delivery conditions, INCOTERMS
- ✓ industries
- ✓ tax types
- ✓ cost types
- ✓ sales territories
- ✓ ...

Pricing

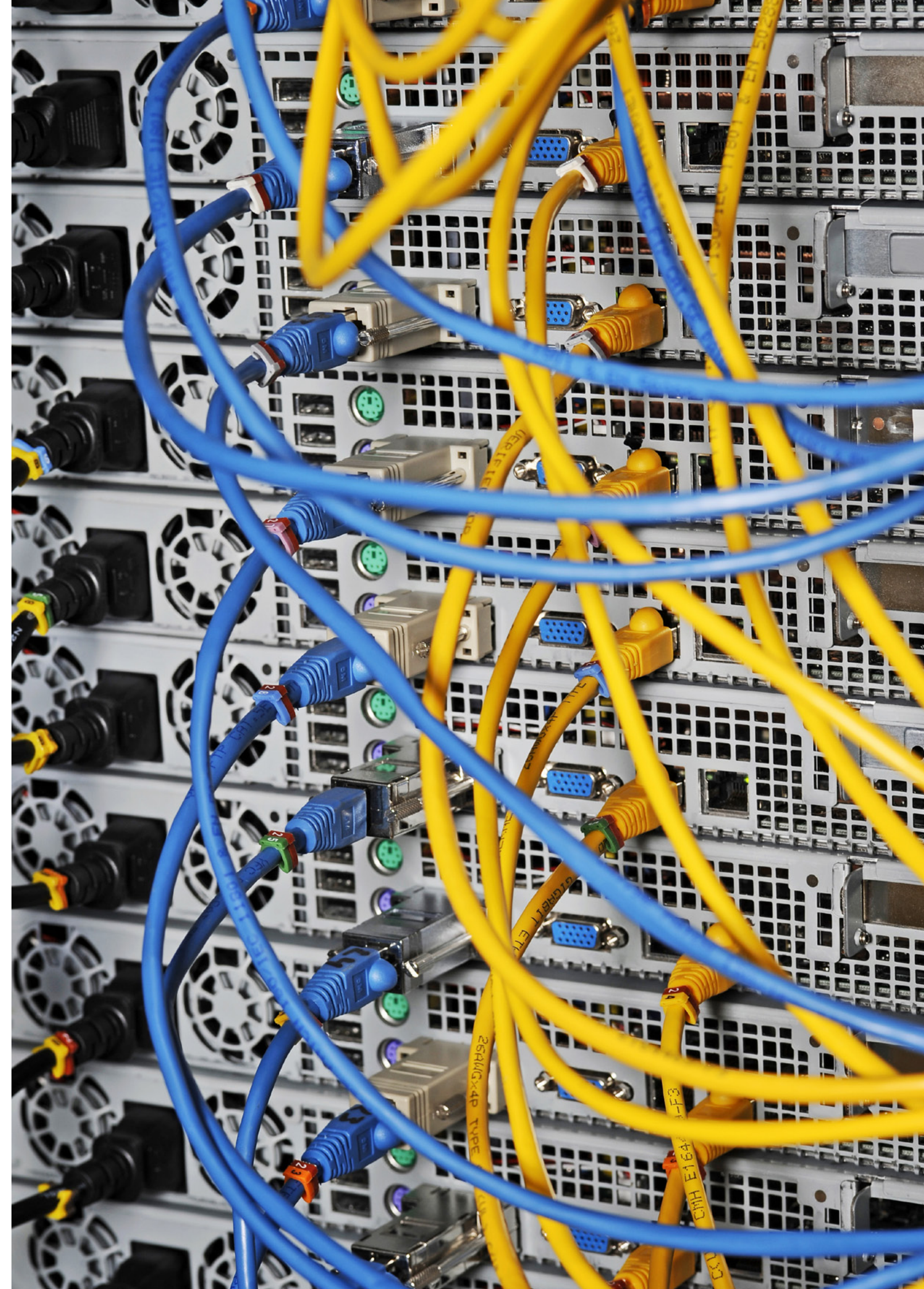
For quotations / orders that are configured and calculated entirely in the PiSA sales CRM, the interface provides a pricing function. It retrieves the price from *PSIpenta* and enters it in the PiSA sales item. The quantity, client and article number are transferred to *PSIpenta*. The price (before the final export of the activity to *PSIpenta*) can also be changed (e.g. discount).

- ✓ retrievable at the activity item
- ✓ determines the price of an item from the *PSIpenta* pricing test (taking account of scale quantities, product groups, client groups, currency, etc.)

Multi-site support

The interface accommodates *PSIpenta* multi-site environments.

- ✓ multi-site connection of more than 10 sites
- ✓ automated mapping of the multi-site configuration from *PSIpenta* in the PiSA sales CRM (via automatic site number allocation or site-specific login in *PSIpenta*)
- ✓ in *PSIpenta* financial accounting data managed on a site-specific basis, such as payment deadlines, can be taken into account
- ✓ relevant for all import and export scenarios



Extensions successfully implemented in client projects

The interface has been custom-extended in various client projects. These developments require a suitable level of PSIpenta expertise on both sides of the contract.

Example: Production orders

Production order heads are generated by the interface on the activity item and populated with articles below the second level.

- ✔ with BOM items, including triggering of the procurement activity in PSIpenta
- ✔ with routing items and allocation to occupancy units
- ✔ Traffic light function to monitor the ordering process, e.g.
 - **red** = at least one article has not yet been ordered / produced
 - **yellow** = all parts have been ordered or are in production, simultaneous generation of the provision deadline for the entire ordering activity
 - **green** = all parts are in stock and have been picked

Example: Accounting

Generation and printing of a billing object in PSIpenta from the PiSA sales CRM, including invoice preview in the PiSA sales CRM.

- ✔ linking of the PSIpenta billing document with the PiSA sales activity
- ✔ display of the invoices managed in Varial for PiSA sales activities and clients as a summary
 - view of reminder levels / payment behaviour

Example: BDE/PZ

Import interface for BDE/PZ data to display holiday and sickness periods in the HR sector.

- ✔ BDE/PZ data is synchronised with the PiSA sales group calendar and/or PiSA sales resources planning board

Example: Client-specific pricing

Implementation of extended pricing based on a third-party system (IOT) and export of the quotation including prices to PSIpenta.

Other

- ✔ product groups
 - for the structuring / classification of products and for the allocation of sales to product groups
- ✔ free cost objects
 - e.g. for the allocation of sales to contracts (KPIs)
- ✔ construction number
 - for the easy mapping of PiSA sales service objects in PSIpenta



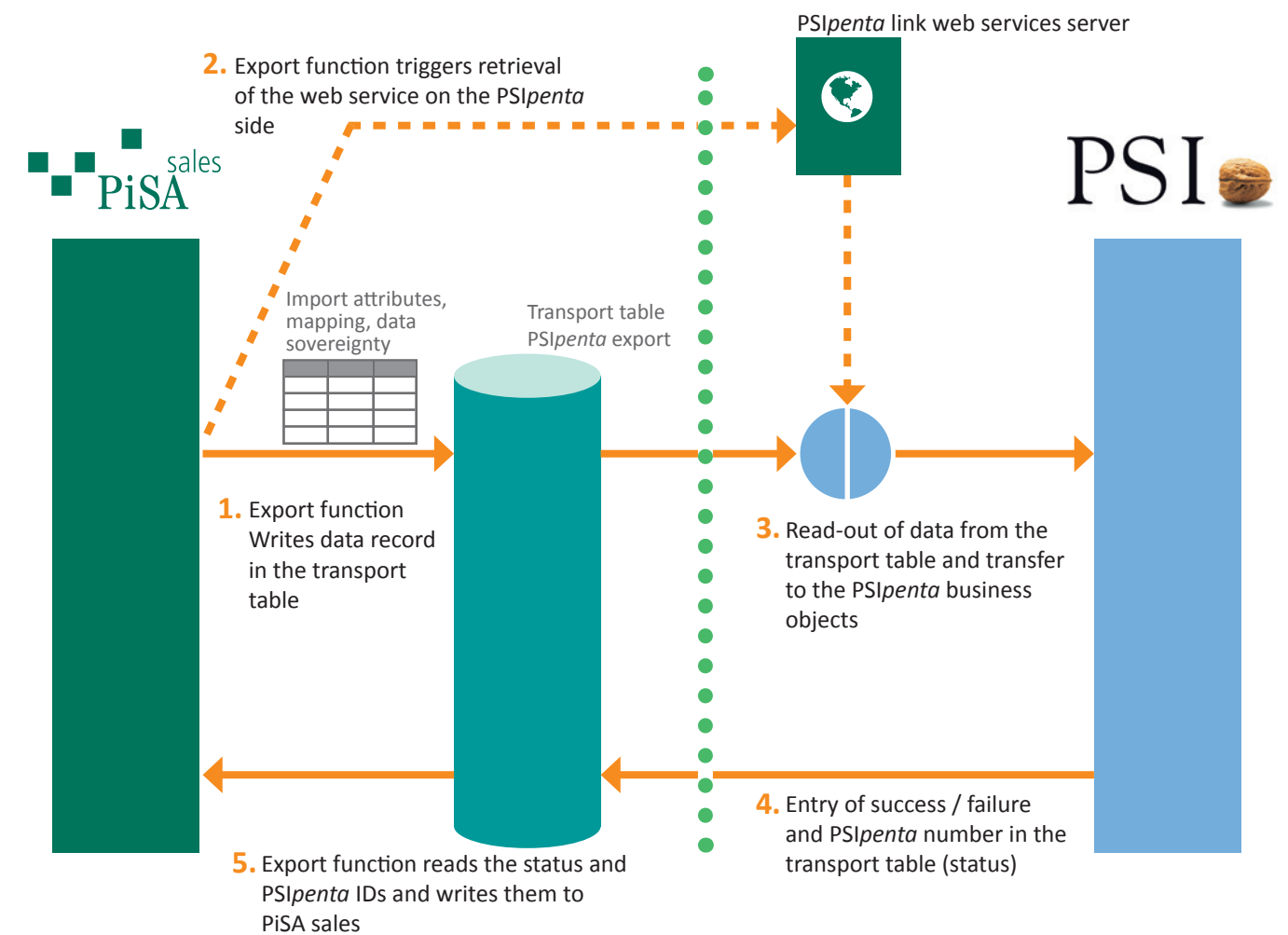
Technology of the PSIpenta interface

For import and export, the interface uses tried-and-tested technologies that are based on modern industry standards.

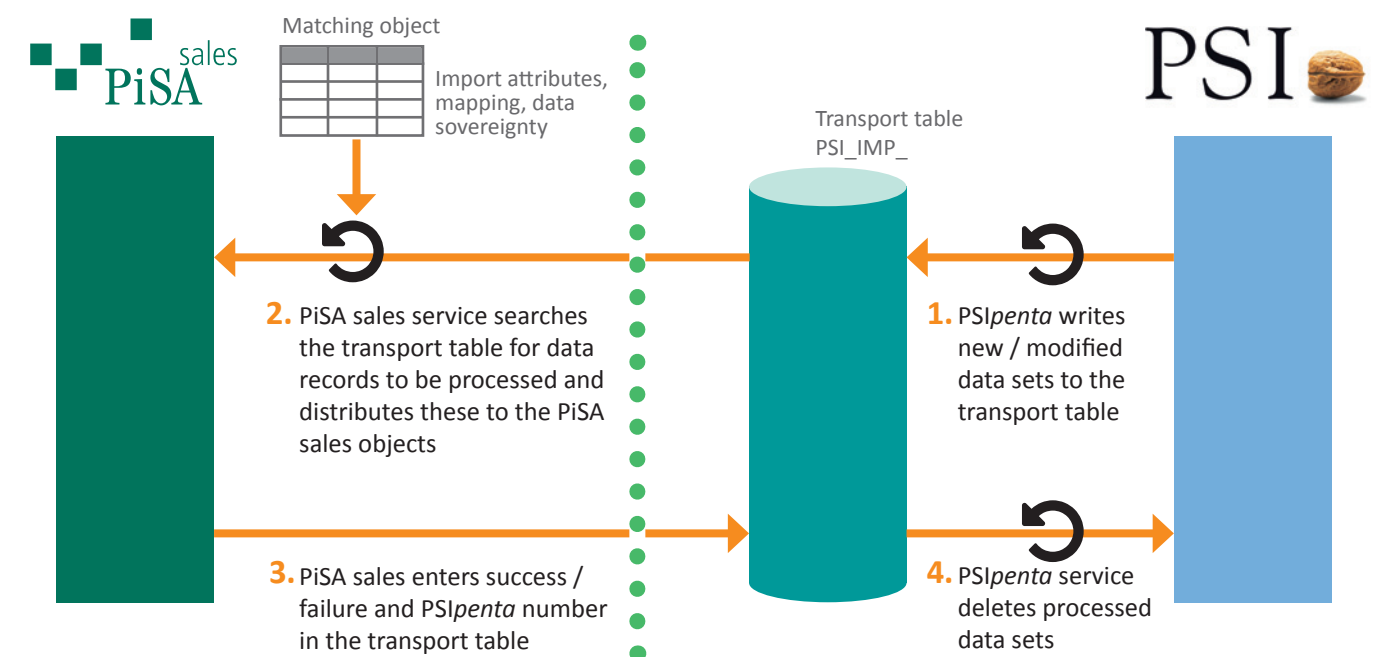
- ✓ use of import and export engines
- ✓ engines can be flexibly configured down to field level
- ✓ the PiSA sales application manages the required jobs
- ✓ service on the PSIpenta side functions as a scheduler
- ✓ provides web services for export
- ✓ exchange takes place via interim tables (transport tables) in PSIpenta's data sovereignty
- ✓ use of filtering rules for dedicated data
- ✓ PiSA sales side reaches these tables via JDBC
- ✓ excellent robustness of the link, e.g. even if there is a temporary unavailability of the PSIpenta database
- ✓ data maintenance via snapshot in the transfer tables
- ✓ platform neutrality for the services used (Windows, Linux, Unix)
- ✓ services for cyclical imports and exports and interactive functions for immediate or prompt import and export
- ✓ intelligent import routines minimise data transfer only to the Delta

MODERN,
COMPREHENSIVE,
FLEXIBLE AND RELIABLE

EXPORT



IMPORT



Interface monitoring

The interface can be conveniently administered with comprehensive interface monitoring in the PiSA sales CRM.

- ✔ monitoring of successful and failed exchange activities
- ✔ comprehensive toolbox offers direct read access to all relevant PSIpenta business objects for visualisation and troubleshooting, without having to open the PSIpenta client
- ✔ toolbox for the convenient definition of various allocations via attributes in mapping tables
- ✔ visualisation of the multi-site configuration via the toolbox
- ✔ extended logging in debug mode in live operation
- ✔ direct visualisation of PSIpenta logs on the PiSA sales side

Features at a glance

The PSIpenta interface offers a wealth of advantages based on innovative technologies and many years of expertise gleaned from a range of client projects.

- ✔ configurable
- ✔ administrable
- ✔ robust and at the same time flexible
- ✔ upgrade security is guaranteed
- ✔ supports the three most commonly-used master data business objects
- ✔ and currently 15 basic data business objects
- ✔ can be extended and adapted to specific client scenarios
- ✔ offers multi-site connectivity

Further developments of the interface

The extendable interface is subject to constant client-specific demands and is therefore being constantly developed.

Feedback to service (still in 2016)

- ✔ feedback from service teams in the PiSA sales CRM via mobile devices and handover to PSIpenta
→ material and services provided, special reserves such as travel costs, expenses, working hours, etc.
- ✔ feedback of hours of service teams to working time accounts in BDE/PZ

Import of service objects and service reports from PSIpenta

- ✔ import of data from customised PSIpenta business objects supported
- ✔ business objects are imported directly from the PSIpenta service module

We have a range of reference objects in the PSIpenta environment. We are delighted to offer you a small selection here:

Hans Lutz Kundendienst GmbH & Co. KG

Complete data sovereignty for companies in the PiSA sales CRM, user-initiated export, updating of changes in PSIpenta.

- ✔ central storage and maintenance of all contact details in the CRM for sales / customer services
- ✔ transfer of tested and qualified data (duplicates, address quality)
- ✔ data is available immediately in the CRM, no waiting for cyclical imports
- ✔ multi-site export with distribution of commercial data to financial accounting client
- ✔ central maintenance of payment / delivery conditions for processes in CRM and ERP
- ✔ complete quotation creation for new-build and modernisation in PiSA sales
- ✔ export of the order with delivery items to PSIpenta, tracking via order status in the PiSA sales CRM
- ✔ same process also for maintenance and repair orders, order processing (deployment dates, feedback) in the PiSA sales CRM; transfer for billing to PSIpenta

The PSIpenta interface has been custom-extended for the client:

- ✔ production order heads on activity items
- ✔ BOM items (procurement activity)
- ✔ routing items
- ✔ traffic light function to monitor the ordering process
- ✔ linking, generation and printing of billing objects on the activity in the CRM
- ✔ visualisation of invoices on activities and clients as a summary in the CRM
- ✔ BDE/PZ import interface for staff with synchronisation of the calendar in the CRM
- ✔ extended pricing



GEMÜ Gebr. Müller Apparatebau GmbH & Co. KG

Multi-site connection of 15 sites with 15 PSIpenta systems.

- ✓ import of companies (prospective customers, clients) from PSIpenta
- ✓ import of quotations / orders from PSIpenta, representation in the PiSA sales CRM
- ✓ cyclical import of basic data and GEMÜ-specific business objects
- ✓ import of activity items, cyclical updates of the article master
- ✓ field sales team sees lead time and delivery status
- ✓ evaluations by product supported

GEMÜ®

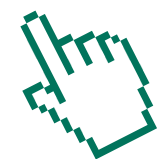
LABOM Mess- und Regeltechnik GmbH

- ✓ import / export of companies (prospective customers, clients) from PSIpenta
- ✓ import of quotations / orders from PSIpenta, representation in the PiSA sales CRM
- ✓ import of quotation documents and storage on quotation
- ✓ dispatch on PiSA sales quotation
- ✓ updating via activities
- ✓ representation of KPIs and analyses generated in PSIpenta in the PiSA sales CRM (e.g. sales, order total, on-time delivery, etc.) as an HTML page to the client



We will be pleased to advise you!

www.pisasales.de/en



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