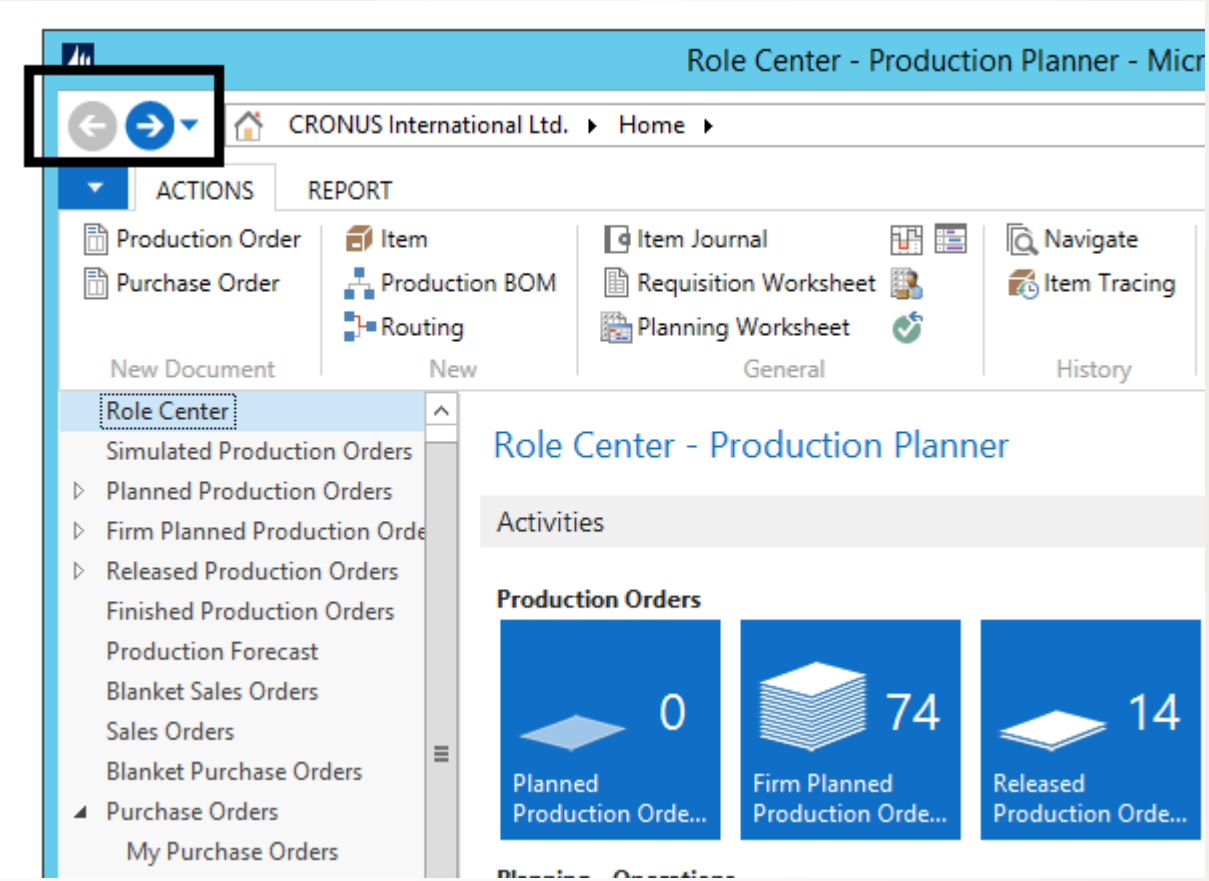
Chosen set of Add-Ons basics II.

J.Skorkovský
19.8.2014 Brno

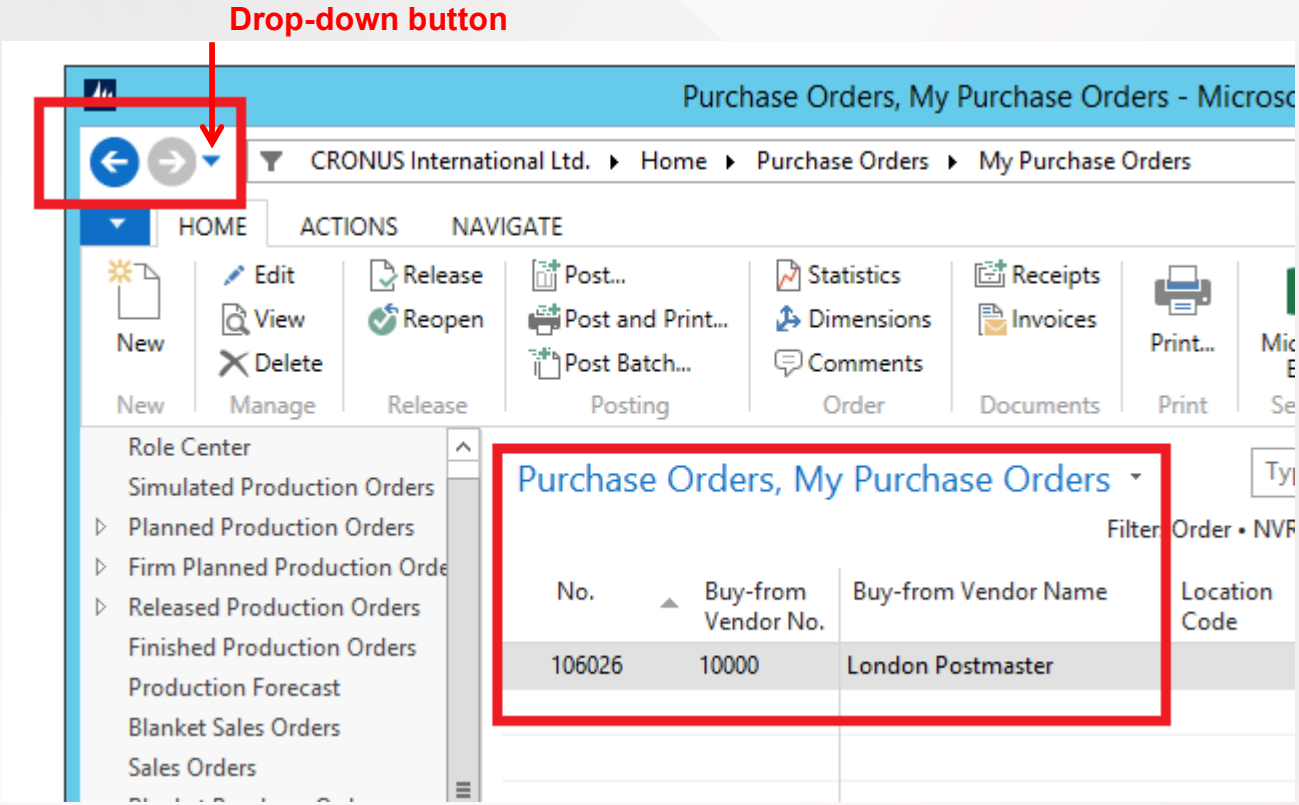
NAV **Operation areas**

- Backward and forward button
- Address bar
- Searching window
- Ribbon
- Application menu
- Navigation pane
- Main „task“ window page (list, card,…)
- Faxbox pane

Backward and forward button I



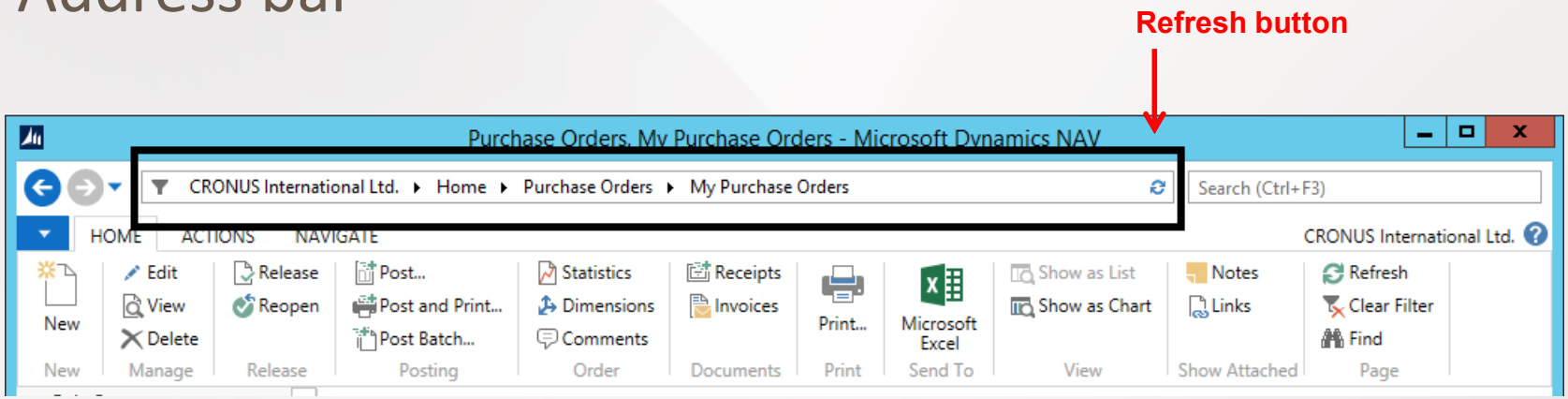
Backward and forward button I



Back and forward buttons on the controls of Microsoft Dynamics NAV to the left of the address bar enable you to move through pages that you have previously visited.

When you use these buttons, you can see the path in the address bar changing. If you click the drop-down button, at the right side of the **Forward** button, you see the travel history. It shows you a list of previously visited pages, and it makes it easy to return to a specific one.

Address bar



The address bar shows the path of your present page. You can also move within Microsoft Dynamics NAV 2015 by clicking the name or arrow buttons and making your selection.

At the right side of the address bar, you can find the refresh button.

Searching window : text only

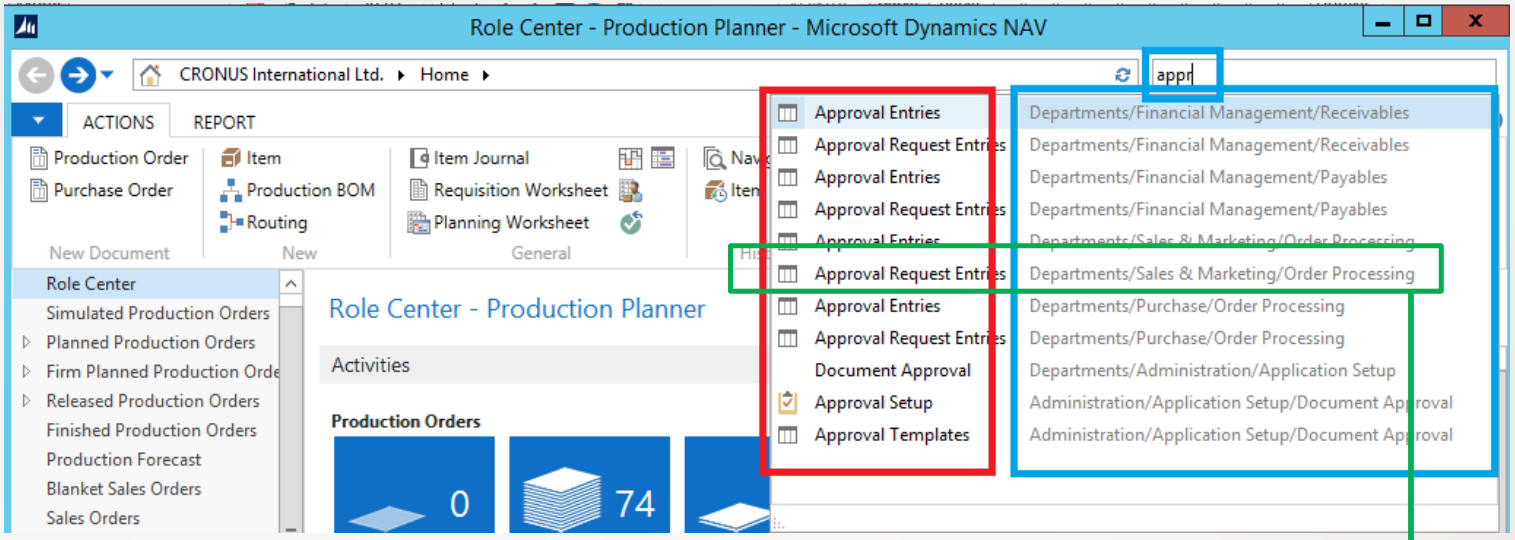
You can find any page, report, or view present on the **Departments** page of your installation by using the **Search** field in the upper-right corner of the address bar.

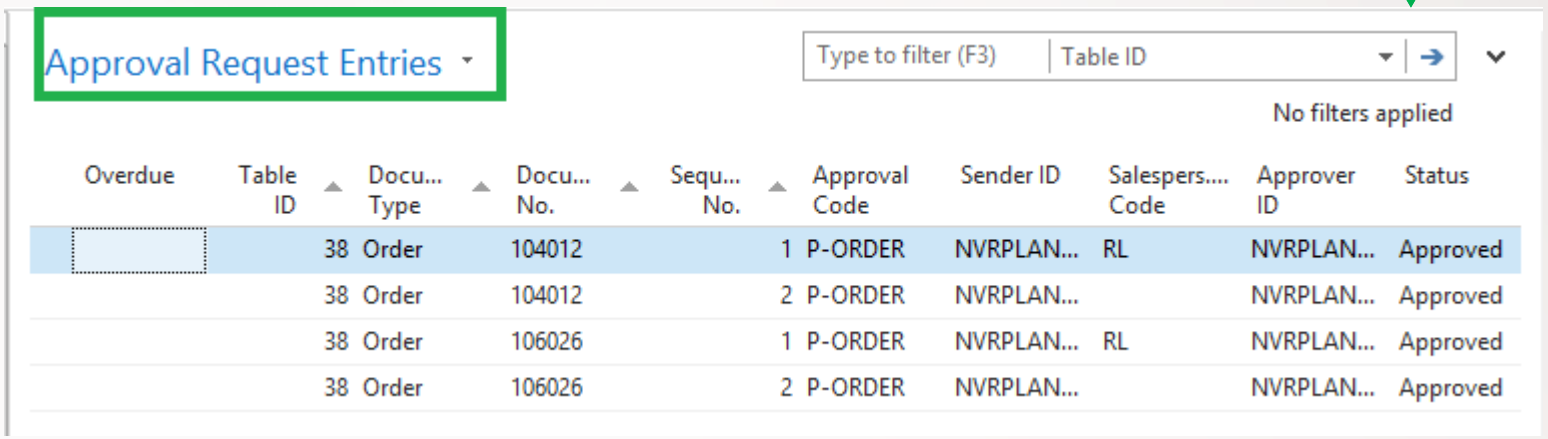
When you start to type characters in the **Search** field, a drop-down list shows page names that contain the characters that you type.

The drop-down list changes as you type more characters, and you can select the correct page from the list when it is displayed.

The second column in the drop-down list shows the navigation paths to the found pages, and it is sorted by the structure of the **Departments** page.

Searching window



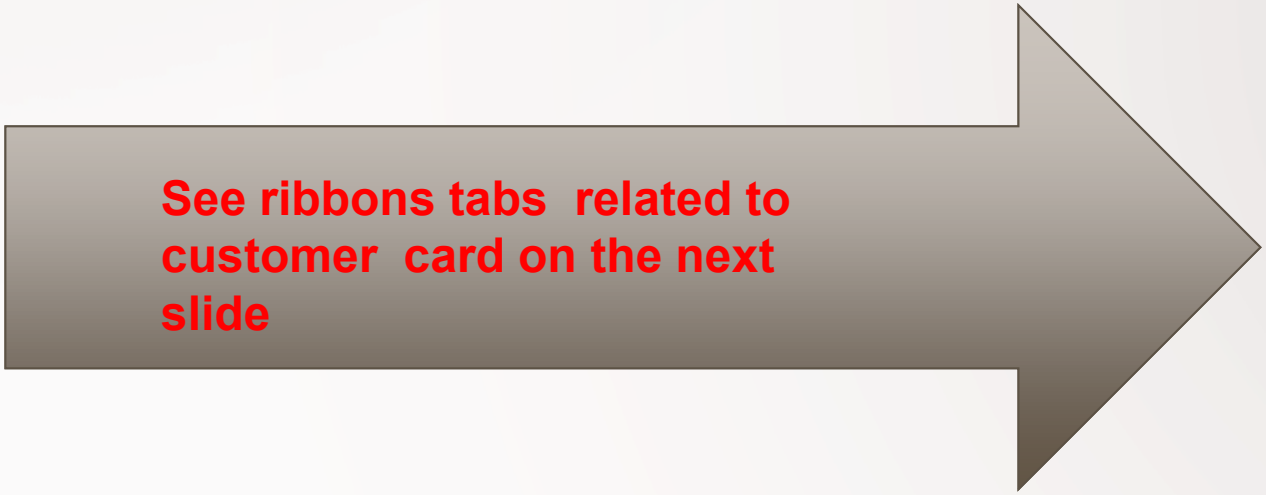


Overdue	Table ID	Docu... Type	Docu... No.	Sequ... No.	Approval Code	Sender ID	Salespers.... Code	Approver ID	Status
	38	Order	104012	1	P-ORDER	NVRPLAN...	RL	NVRPLAN...	Approved
	38	Order	104012	2	P-ORDER	NVRPLAN...		NVRPLAN...	Approved
	38	Order	106026	1	P-ORDER	NVRPLAN...	RL	NVRPLAN...	Approved
	38	Order	106026	2	P-ORDER	NVRPLAN...		NVRPLAN...	Approved

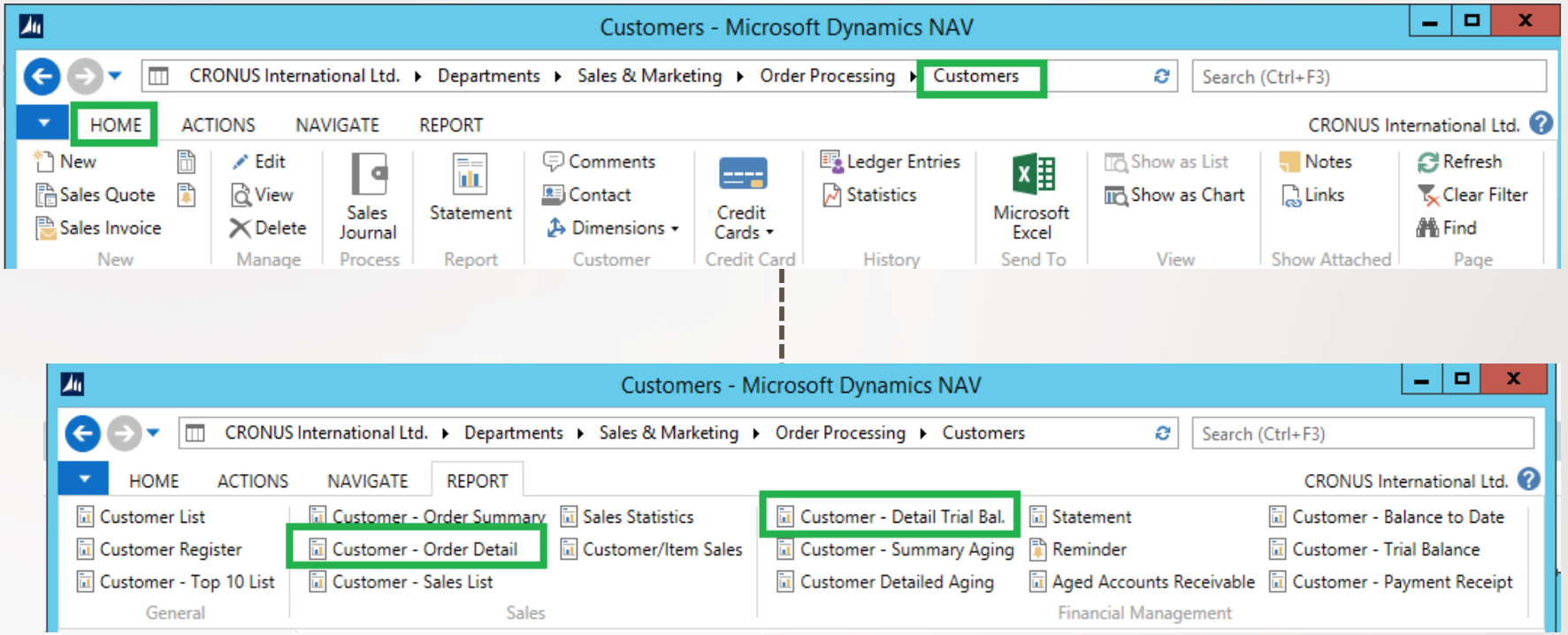
Ribbon

A ribbon is a command bar that organizes a program's features into a series of tabs at the top of a window. Using a ribbon increases discoverability of features and functions, enables quicker learning of the program, and makes users feel more in control of their experience. A ribbon can replace both the traditional menu bar and toolbars.

In Microsoft Dynamics NAV 2013, the ribbon is available on most pages and **visible by default.**

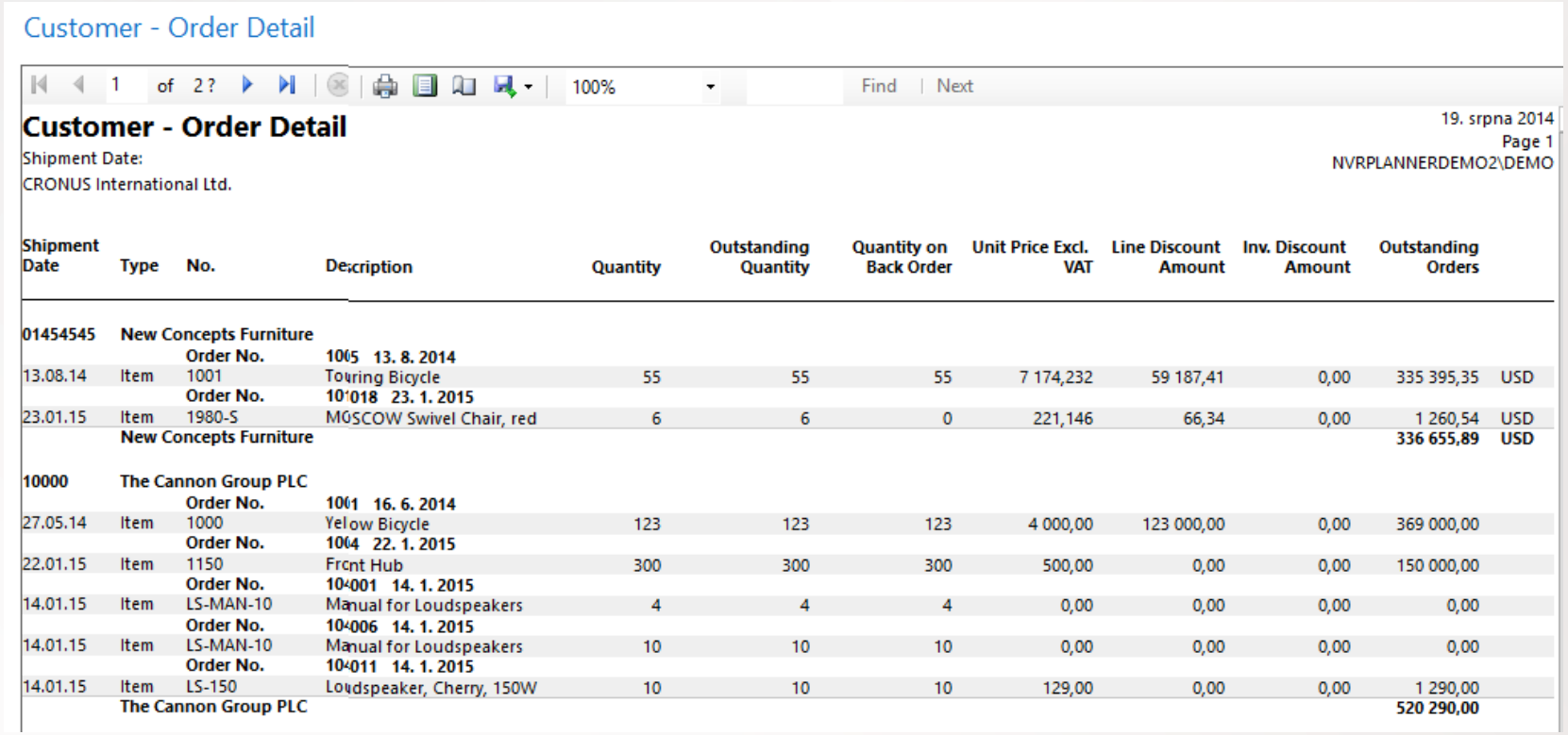


Ribbons



See reports started from ribbon tab

Examples of reports (customer ribbon) – I.



Customer - Order Detail

1 of 2? 100% Find | Next

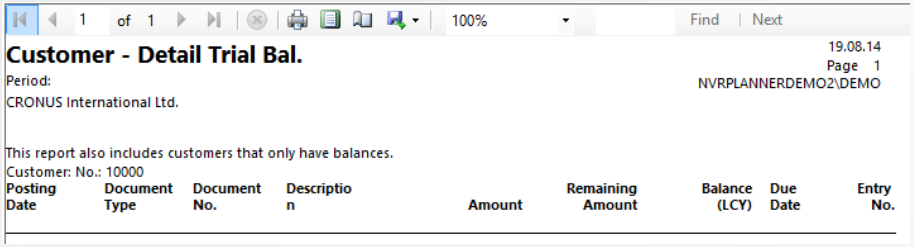
Customer - Order Detail

19. srpna 2014
Page 1
NVRPLANNERDEMO2\DEMO

Shipment Date:
CRONUS International Ltd.

Shipment Date	Type	No.	Description	Quantity	Outstanding Quantity	Quantity on Back Order	Unit Price Excl. VAT	Line Discount Amount	Inv. Discount Amount	Outstanding Orders	
01454545	**New Concepts Furniture**										
		Order No.	**1005 13. 8. 2014**								
13.08.14	Item	1001	Touring Bicycle	55	55	55	7 174,232	59 187,41	0,00	335 395,35	USD
		Order No.	**1001018 23. 1. 2015**								
23.01.15	Item	1980-S	MOSCOW Swivel Chair, red	6	6	0	221,146	66,34	0,00	1 260,54	USD
	New Concepts Furniture									**336 655,89**	**USD**
10000	**The Cannon Group PLC**										
		Order No.	**1001 16. 6. 2014**								
27.05.14	Item	1000	Yellow Bicycle	123	123	123	4 000,00	123 000,00	0,00	369 000,00	
		Order No.	**1004 22. 1. 2015**								
22.01.15	Item	1150	Front Hub	300	300	300	500,00	0,00	0,00	150 000,00	
		Order No.	**1001001 14. 1. 2015**								
14.01.15	Item	LS-MAN-10	Manual for Loudspeakers	4	4	4	0,00	0,00	0,00	0,00	
		Order No.	**1001006 14. 1. 2015**								
14.01.15	Item	LS-MAN-10	Manual for Loudspeakers	10	10	10	0,00	0,00	0,00	0,00	
		Order No.	**1001011 14. 1. 2015**								
14.01.15	Item	LS-150	Loudspeaker, Cherry, 150W	10	10	10	129,00	0,00	0,00	1 290,00	
	The Cannon Group PLC									**520 290,00**	

Examples of reports (customer ribbon) – II.



Customer - Detail Trial Bal.

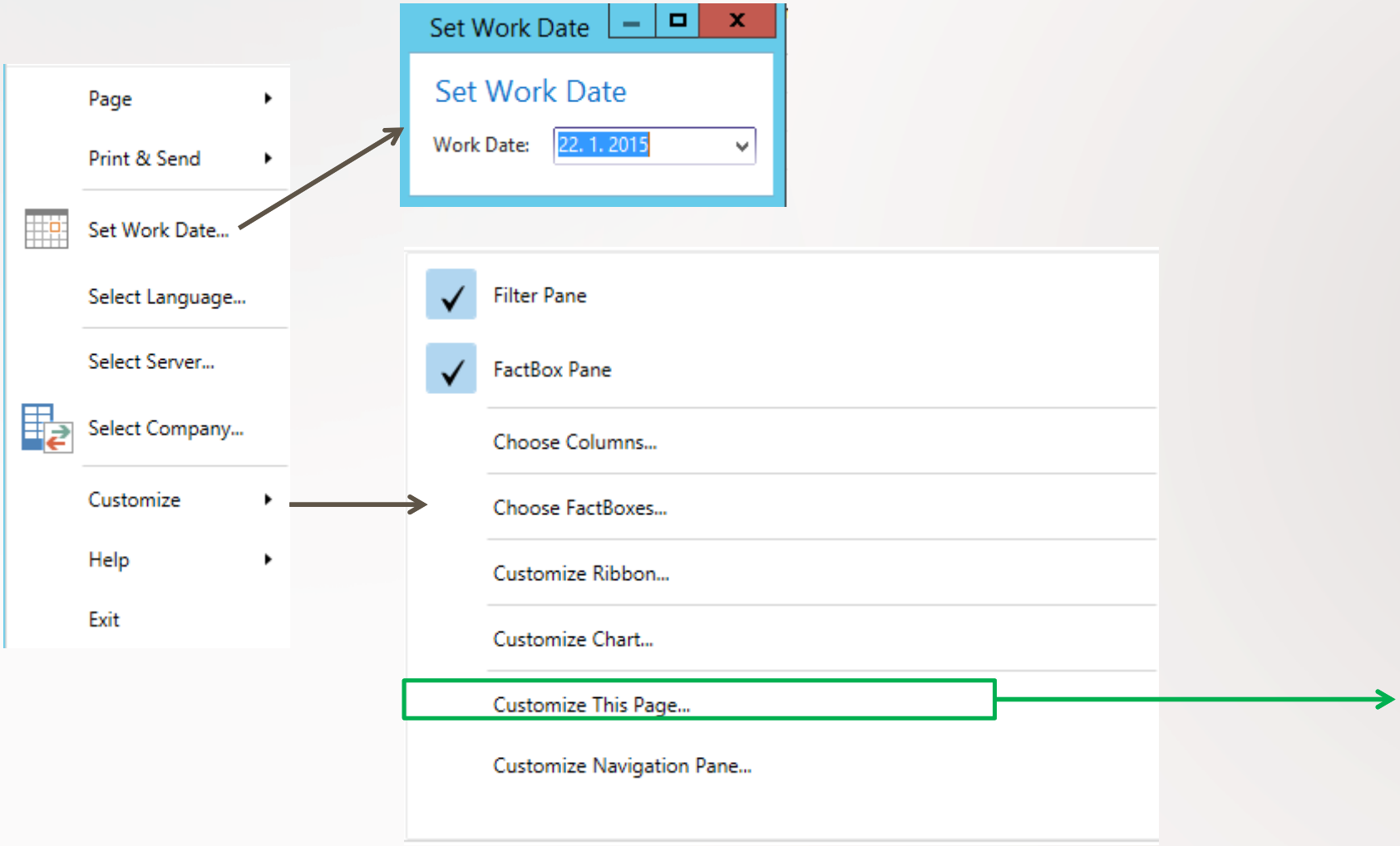
19.08.14
Page 1
Period:
NVRPLANNERDEMO2\DEMO
CRONUS International Ltd.

This report also includes customers that only have balances.
Customer: No.: 10000

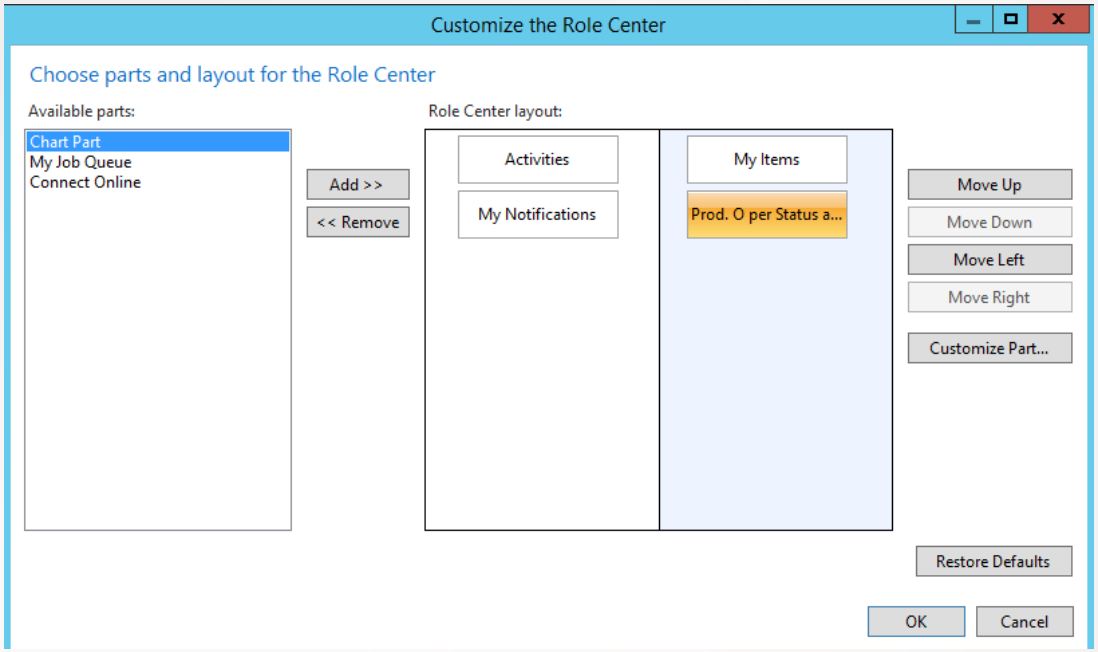
Posting Date	Document Type	Document No.	Description	Amount	Remaining Amount	Balance (LCY)	Due Date	Entry No.
10000	**The Cannon Group PLC**							
	Phone No.							
31.12.14	Invoice	00-1	Opening Entries, Customers	25 389,25	0,00	25 389,25	01.01.15	2467
31.12.14	Invoice	00-11	Opening Entries, Customers	63 473,13	63 473,13	88 862,38	31.01.15	2471
31.12.14	Invoice	00-16	Opening Entries, Customers	33 852,35	33 852,35	122 714,73	31.01.15	2481
31.12.14	Invoice	00-3	Opening Entries, Customers	50 778,50	0,00	173 493,23	01.01.15	2487
31.12.14	Invoice	00-6	Opening Entries, Customers	67 704,67	0,00	241 197,90	05.01.15	2493
31.12.14	Invoice	00-9	Opening Entries, Customers	50 778,50	50 778,50	291 976,40	31.01.15	2499
04.01.15	Invoice	103005	Order 101001	8 269,04	8 269,04	300 245,44	01.02.15	2553
11.01.15	Credit Memo	104001	Credit Memo 104001	-292,84	-292,84	299 952,60	11.01.15	2590
11.01.15	Payment	2596	Payment 2015	-25 389,25	0,00	274 563,35		2591
11.01.15	Payment	2596	Payment 2015	-50 778,50	0,00	223 784,85		2593
11.01.15	Payment	2596	Payment 2015	-67 704,67	0,00	156 080,18		2595
14.01.15	Invoice	103018	Order 6005	4 101,88	4 101,88	160 182,06	14.02.15	2762
19.01.15	Invoice	103001	Invoice 103001	8 182,35	8 182,35	168 364,41	19.02.15	2699
22.01.15	Invoice	103022	Order 1003	125 000,00	125 000,00	293 364,41	22.02.15	2778
22.01.15	Invoice	103023	Invoice 1004	125 000,00	0,00	418 364,41	22.02.15	2793
22.01.15		G00004	The Cannon Group PLC	-125 000,00	0,00	293 364,41	22.01.15	2795
	The Cannon Group PLC					293 364,41		

Microsoft Dynamics Application Menu

At the upper-left side of the ribbon, you can find the **Application** menu:

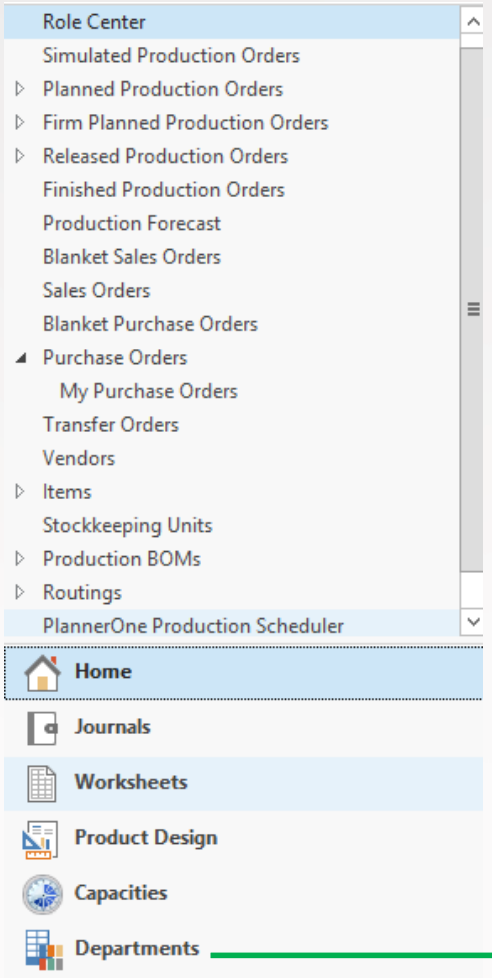


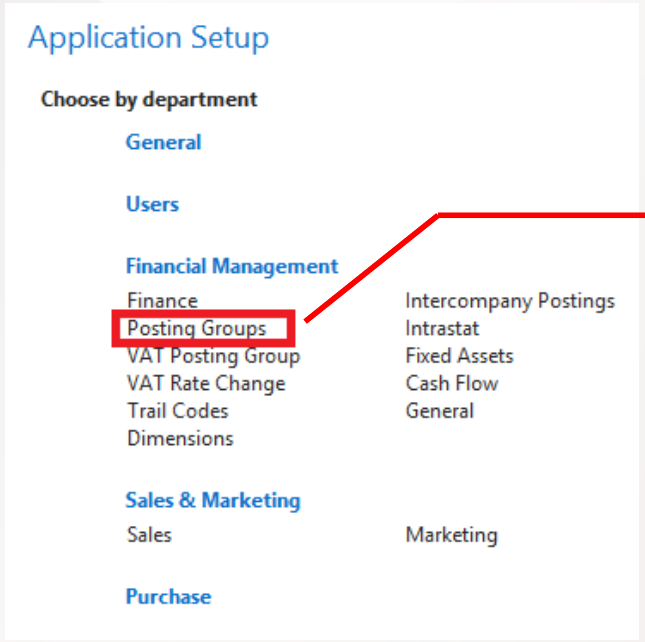
Customize the Role Center page

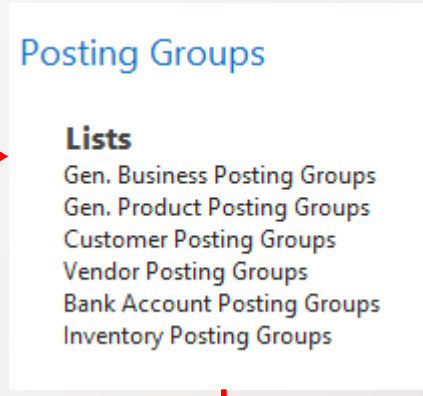


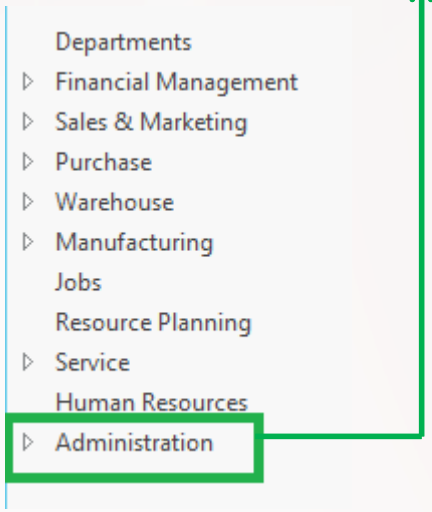
The customization will part of the next sessions…

Navigation pane



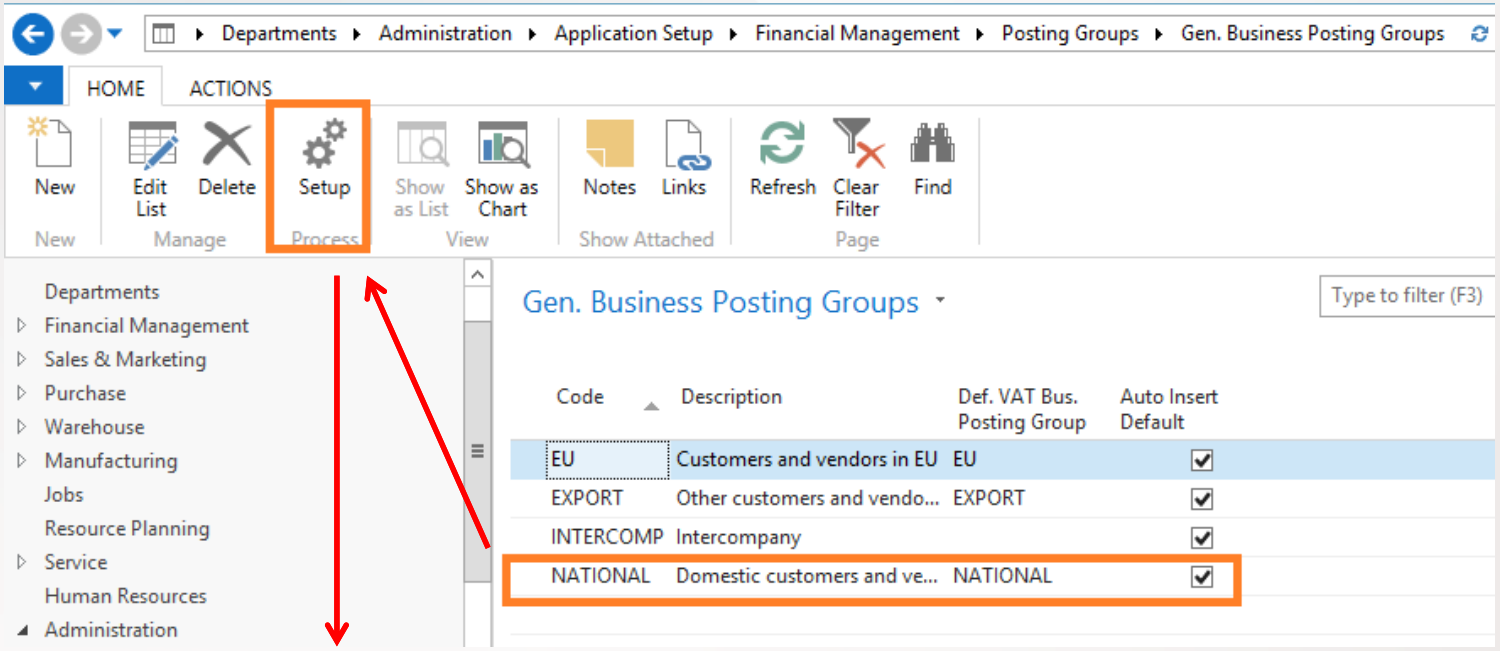


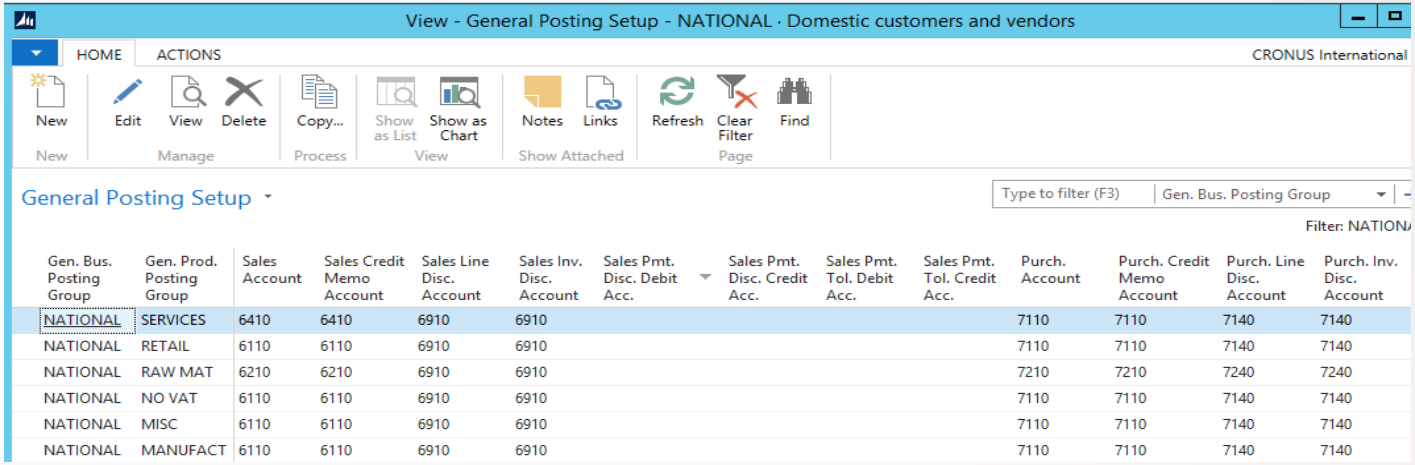




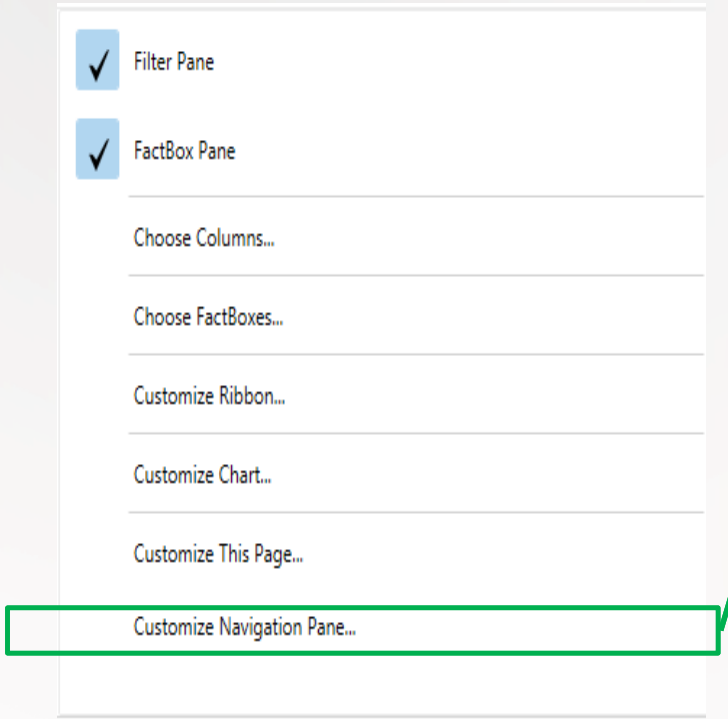
See next slide

Posting group

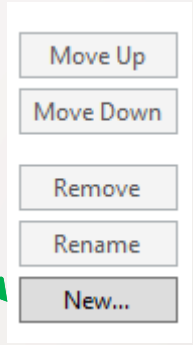


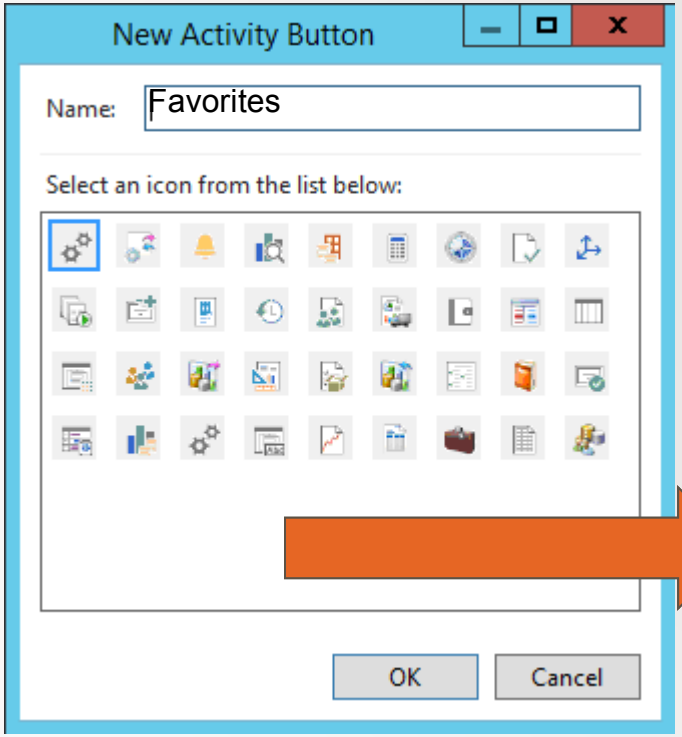


Simple customization of the Navigation pane

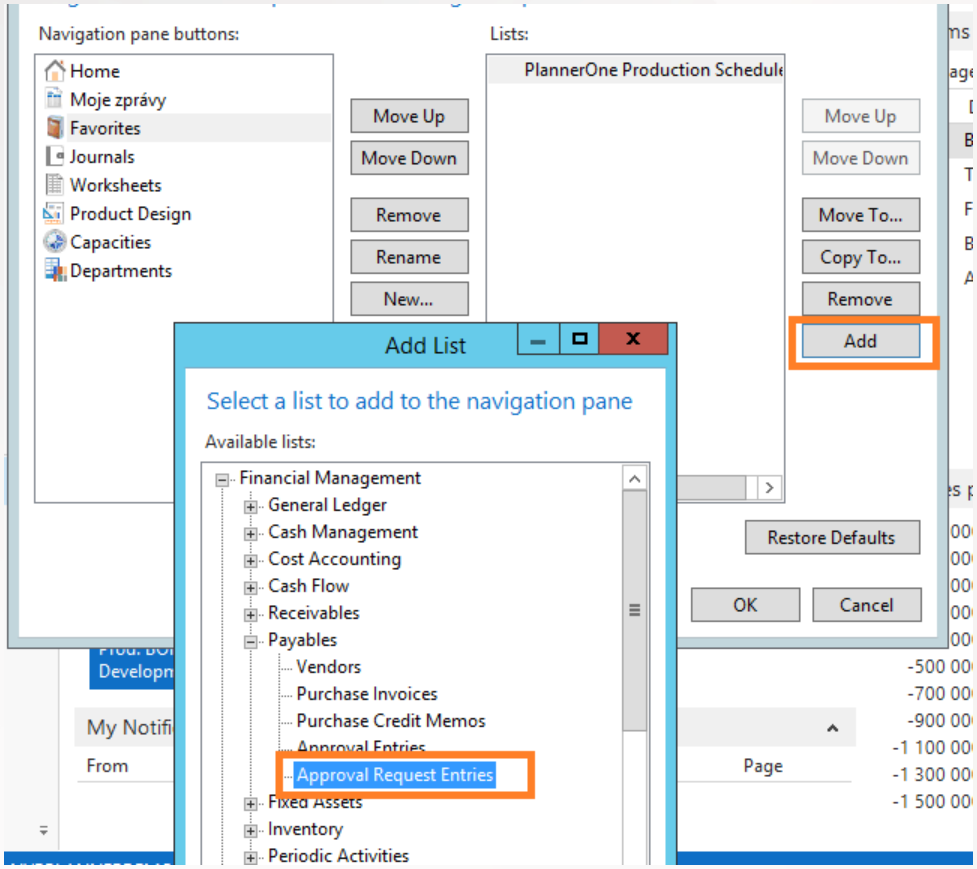


Enter NEW

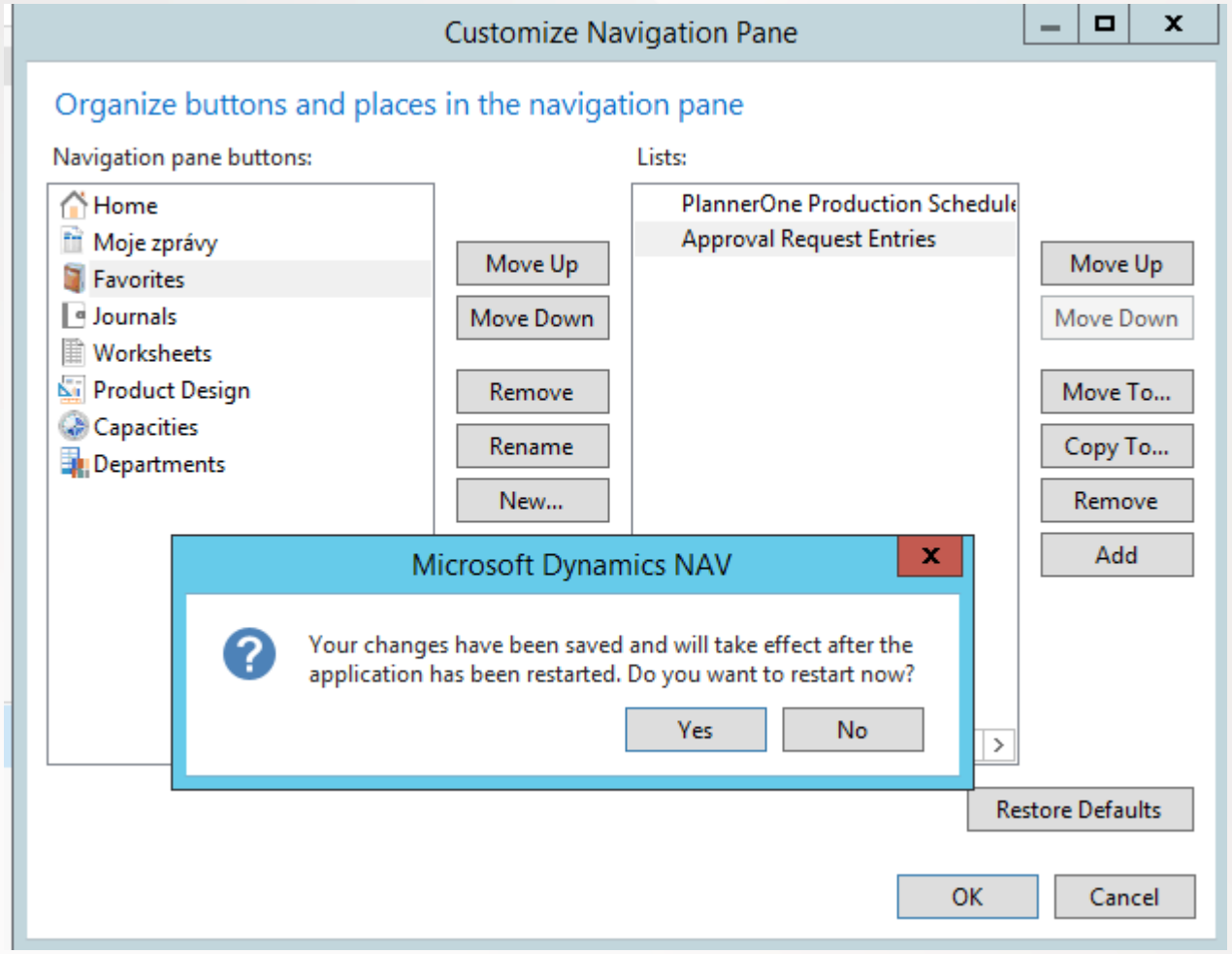




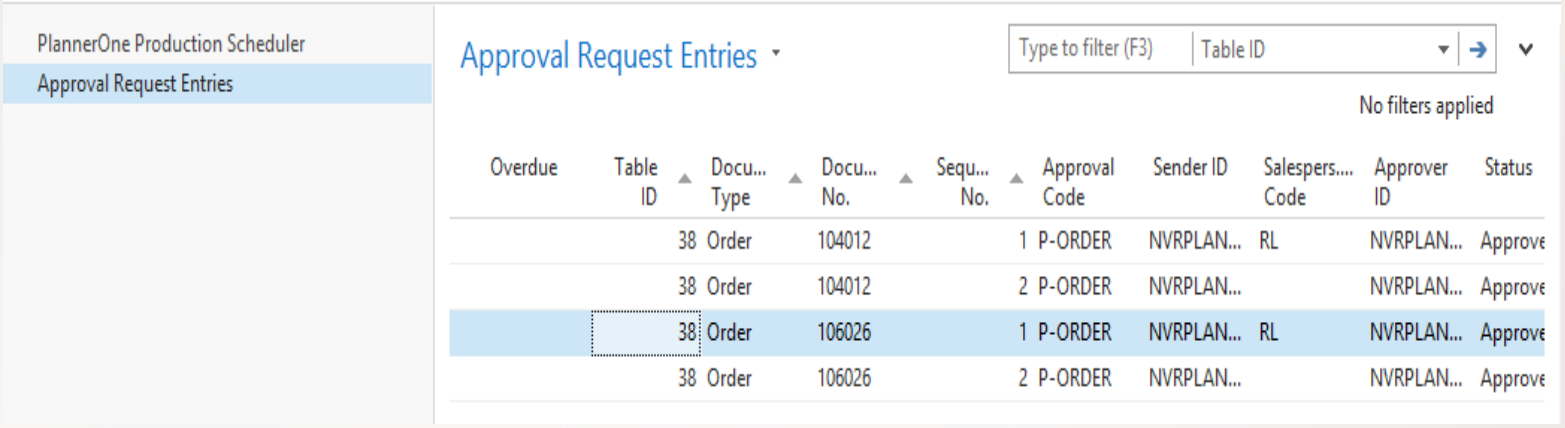
Simple customization of the Navigation pane



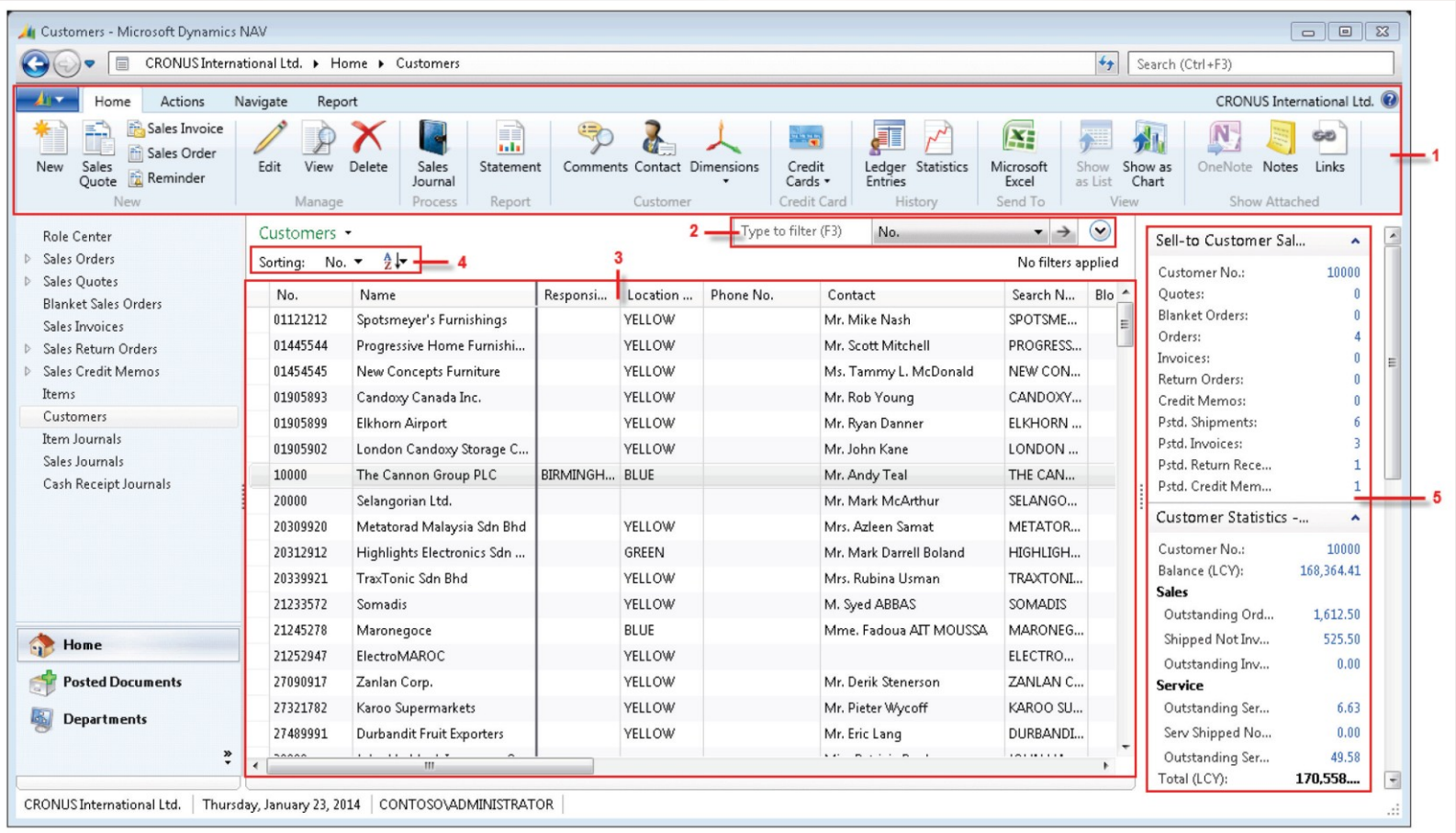
Simple customization of the Navigation pane



Simple customization of the Navigation pane



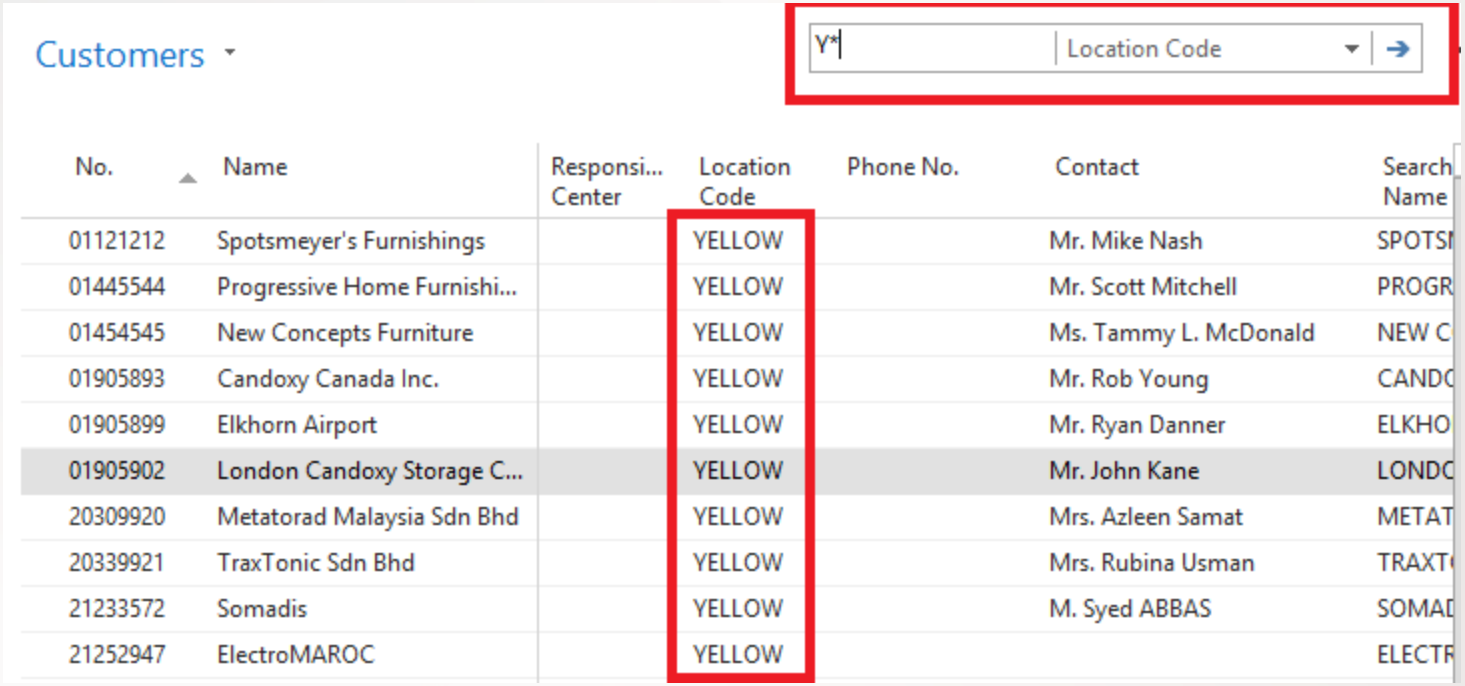
Customer list page



1- Ribbon, 2- Filter pane, 3-List, 4-Sorting pane, 5-Fact-box pane

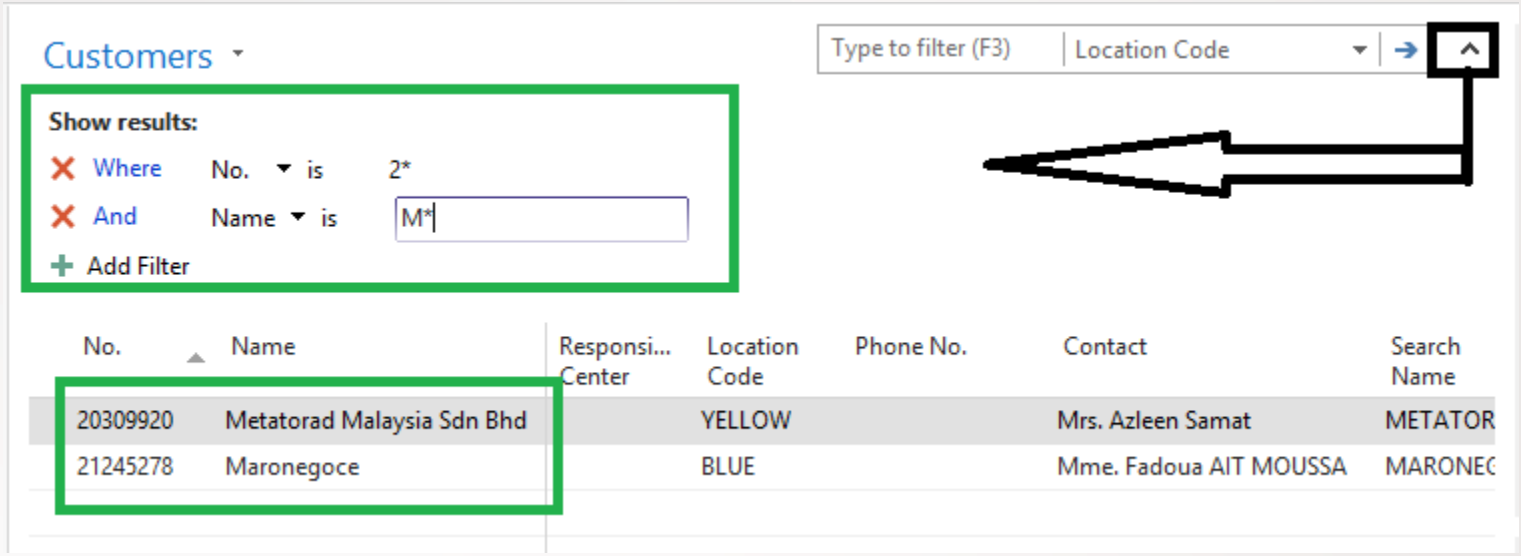
Use of the filter pane from List page see next two slides

Simple use of filtering I.

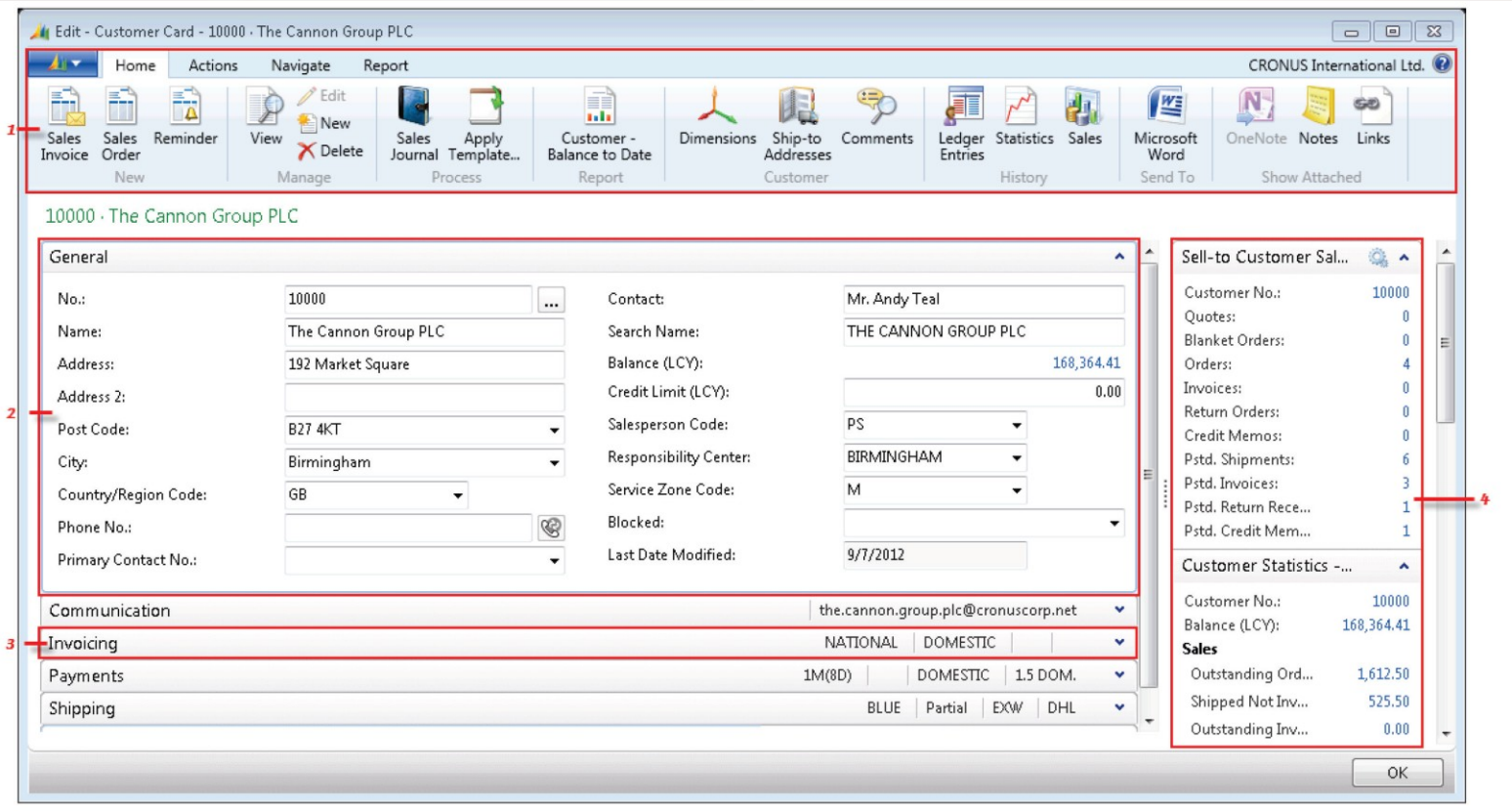


No.	Name	Responsi... Center	Location Code	Phone No.	Contact	Search Name
01121212	Spotsmeyer's Furnishings		YELLOW		Mr. Mike Nash	SPOTSI
01445544	Progressive Home Furnishi...		YELLOW		Mr. Scott Mitchell	PROGR
01454545	New Concepts Furniture		YELLOW		Ms. Tammy L. McDonald	NEW C
01905893	Candoxy Canada Inc.		YELLOW		Mr. Rob Young	CANDC
01905899	Elkhorn Airport		YELLOW		Mr. Ryan Danner	ELKHO
01905902	London Candoxy Storage C...		YELLOW		Mr. John Kane	LONDC
20309920	Metatorad Malaysia Sdn Bhd		YELLOW		Mrs. Azleen Samat	METAT
20339921	TraxTonic Sdn Bhd		YELLOW		Mrs. Rubina Usman	TRAXT
21233572	Somadis		YELLOW		M. Syed ABBAS	SOMAI
21252947	ElectroMAROC		YELLOW			ELECTF

Simple use of filtering II.

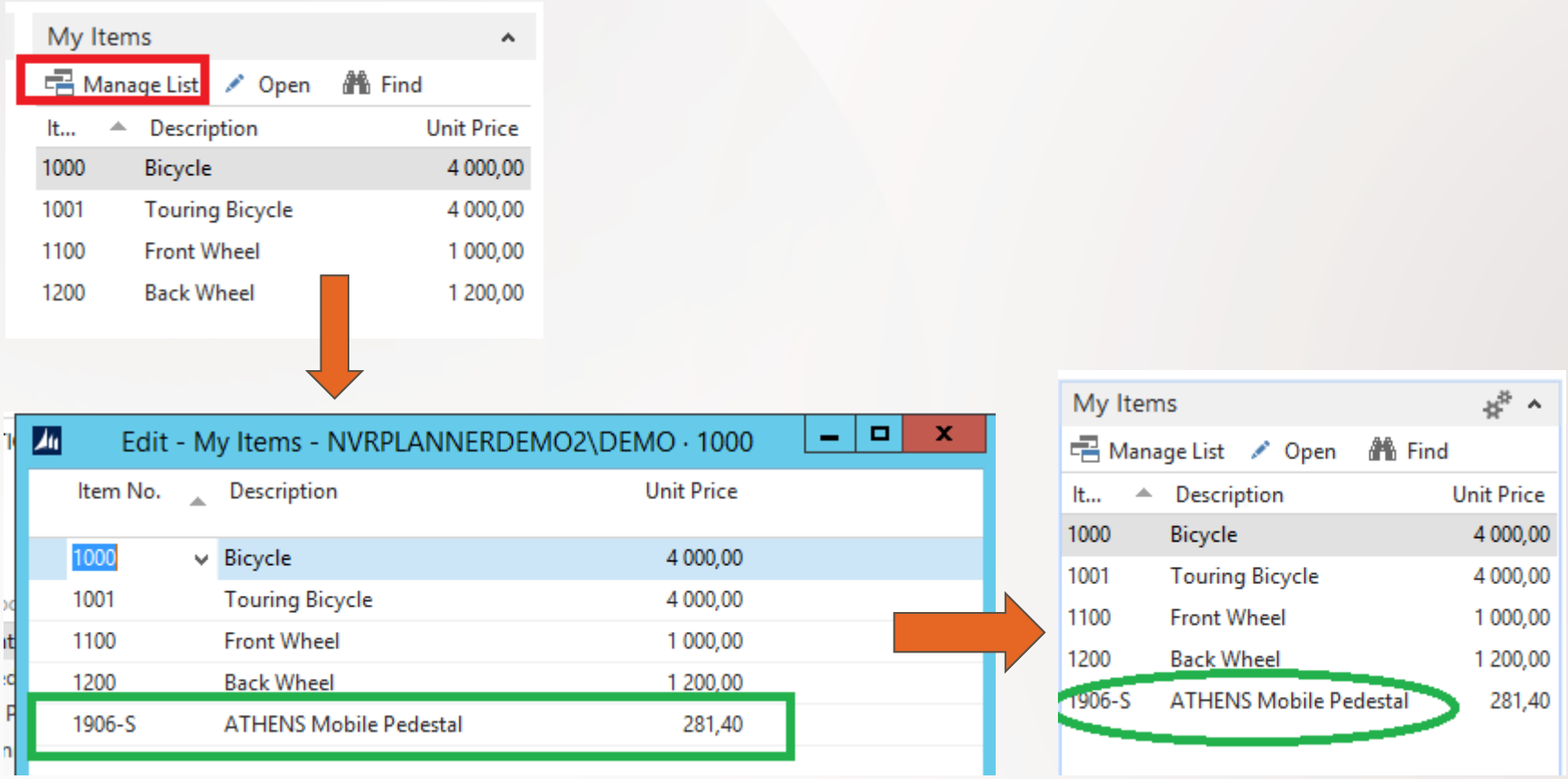


Card page

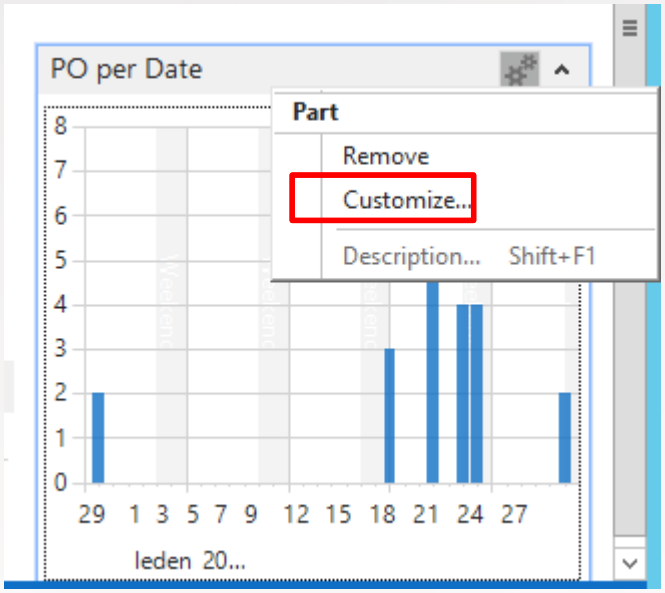


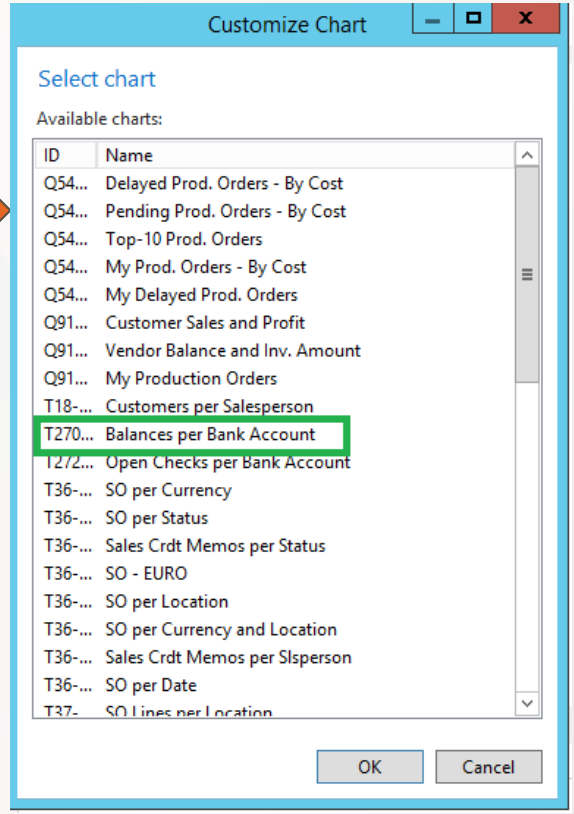
1-Ribbon, 2- extended FastTab, 3 – Collapsed FastTab, 4-FactBox Pane

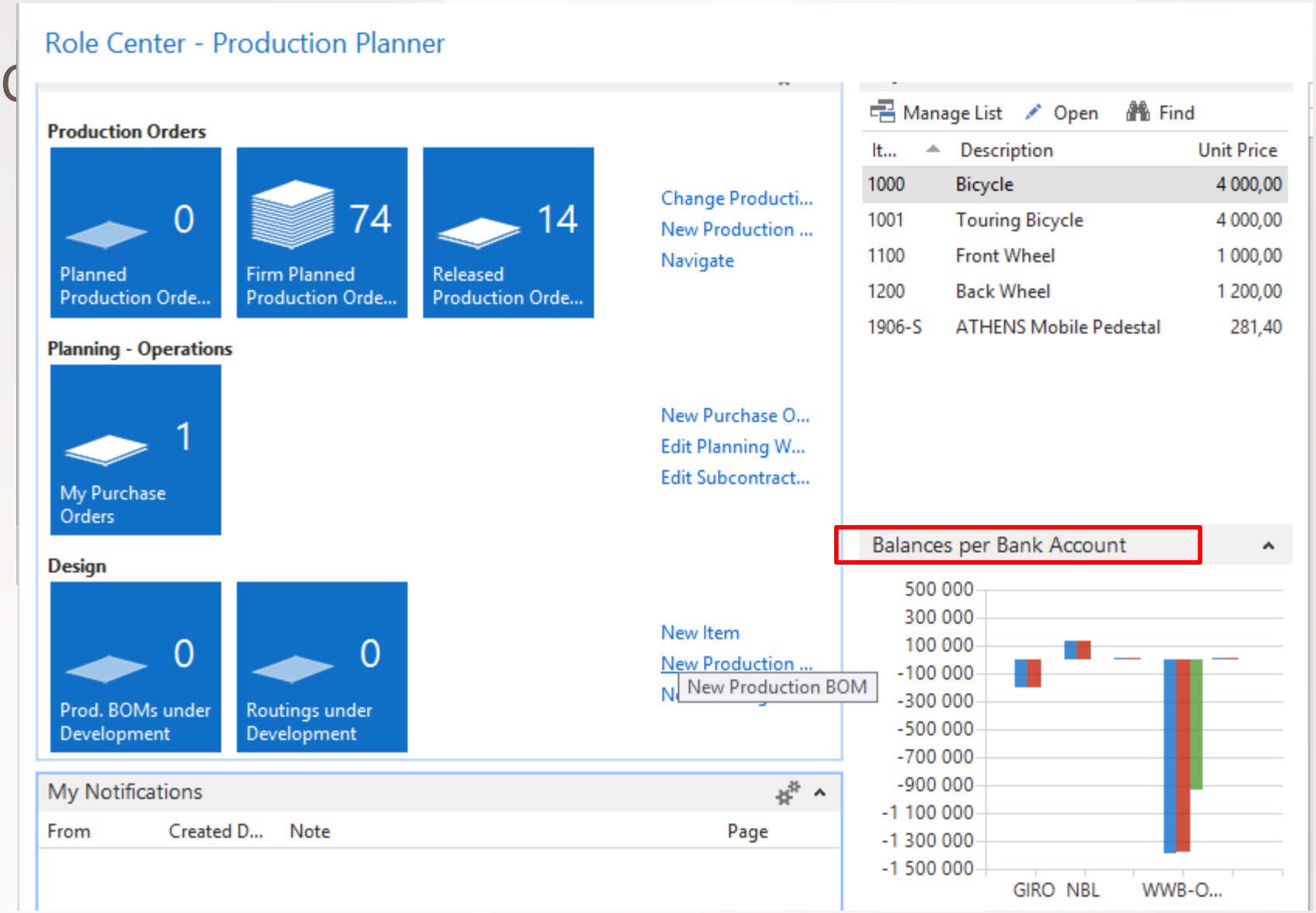
Role center- adding new preferred objects (Items, Customers,..)



Changing charts






Role Center - Production Planner
Production Orders
0
Planned Production Orde...
74
Firm Planned Production Orde...
14
Released Production Orde...
Change Producti...
New Production ...
Navigate
Planning - Operations
1
My Purchase Orders
New Purchase O...
Edit Planning W...
Edit Subcontract...
Design
0
Prod. BOMs under Development
0
Routings under Development
New Item
New Production ...
New Production BOM
My Notifications
From
Created D...
Note
Page
Manage List
Open
Find
It...
Description
Unit Price
1000 Bicycle 4 000,00
1001 Touring Bicycle 4 000,00
1100 Front Wheel 1 000,00
1200 Back Wheel 1 200,00
1906-S ATHENS Mobile Pedestal 281,40
Balances per Bank Account
500 000
300 000
100 000
-100 000
-300 000
-500 000
-700 000
-900 000
-1 100 000
-1 300 000
-1 500 000
GIRO
NBL
WWB-O...

THANKS FOR YOUR ATTENTION AND TIME