

Chosen set of Add-Ons basics II.

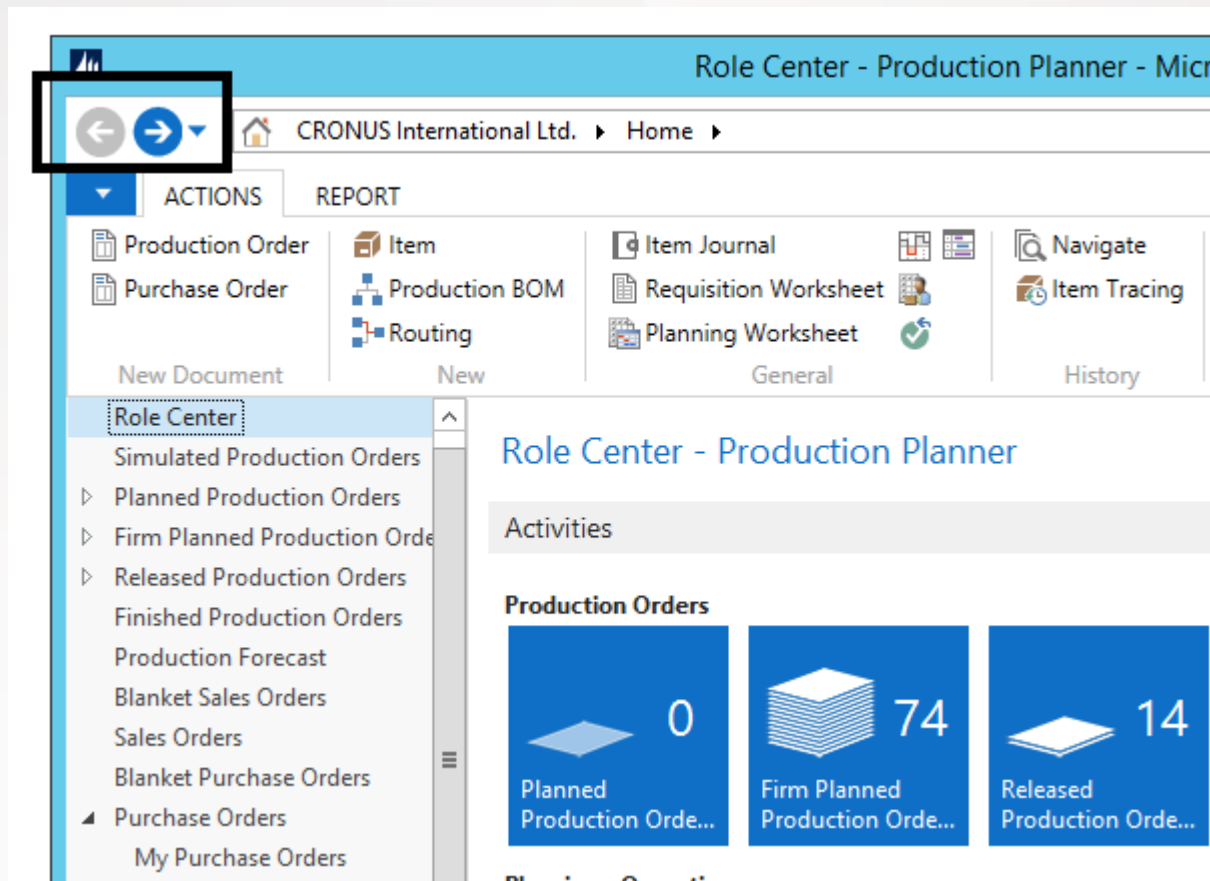


J.Skorkovský  
26.2.2018 Brno

## NAV Operation areas

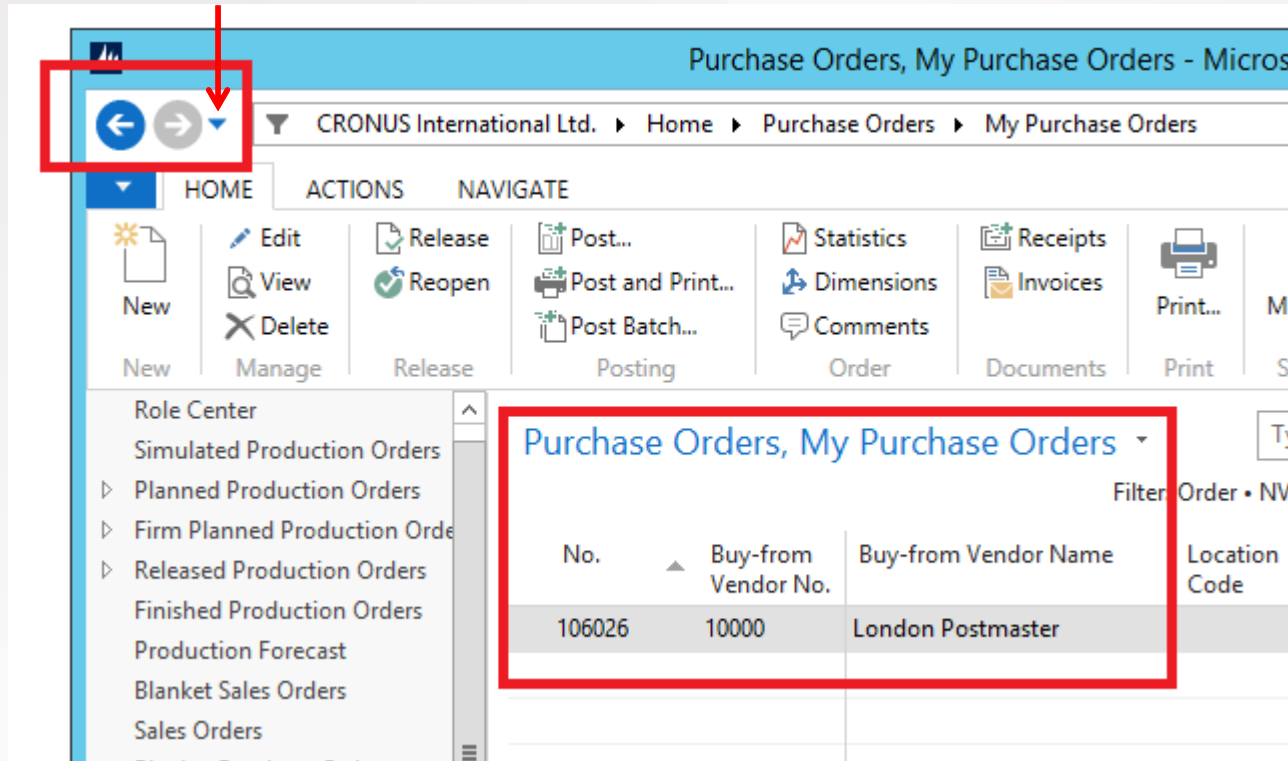
- Backward and forward button
- Address bar
- Searching window
- Ribbon
- Application menu
- Navigation pane
- Main „task“ window page (list, card,...)
- Factbox pane

# Backward and forward button I



# Backward and forward button I

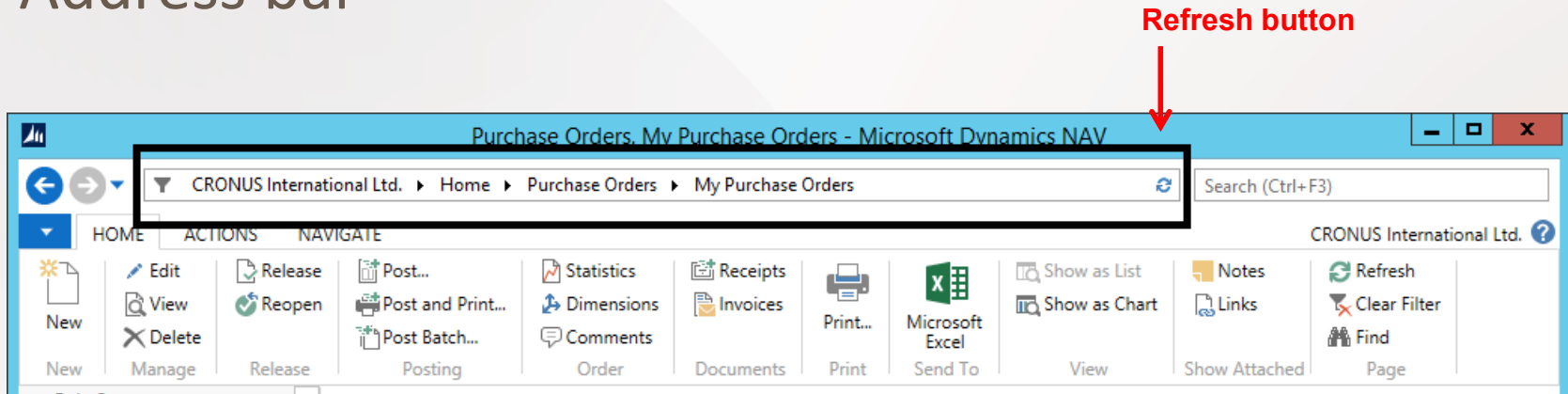
Drop-down button



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 2016 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

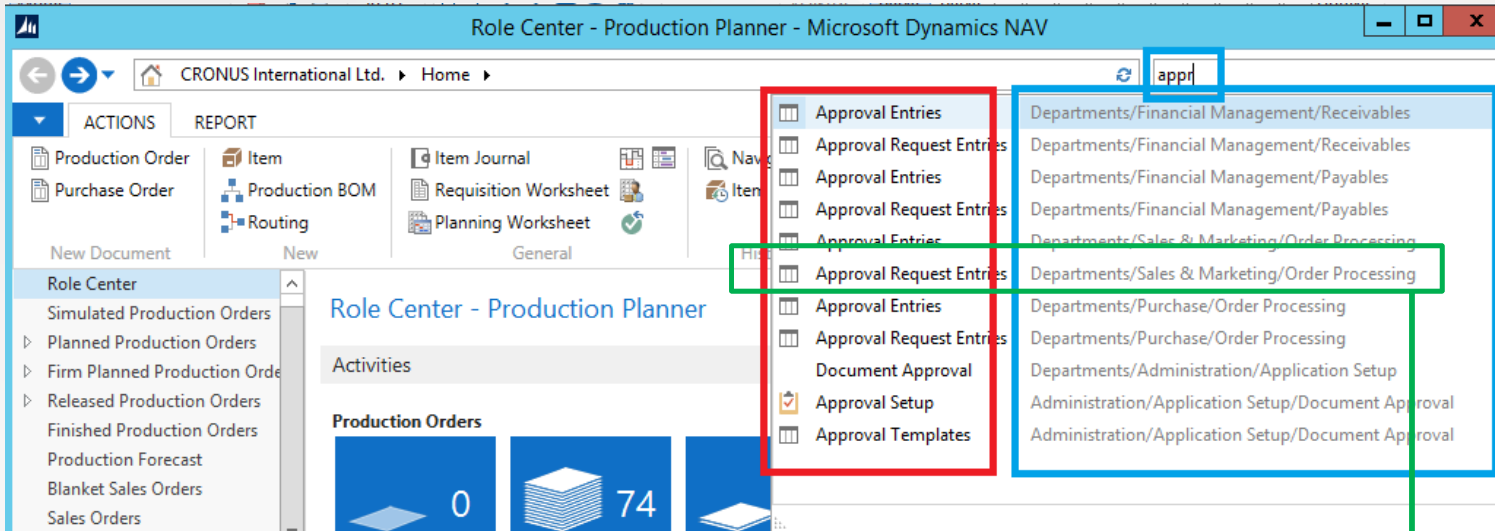
You can find any page, report, or view present on the **Departments** page of your installation by using the **Search** field in the upper-right corner of the address bar.

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



**Approval Request Entries** ▾

Type to filter (F3) | Table ID ▾ | → ▾

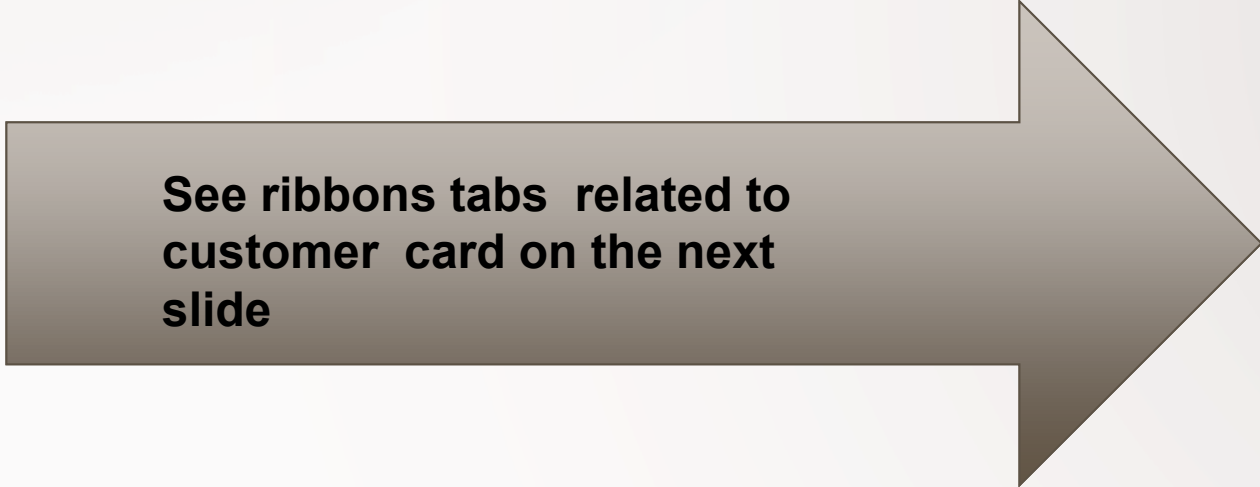
No filters applied

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.

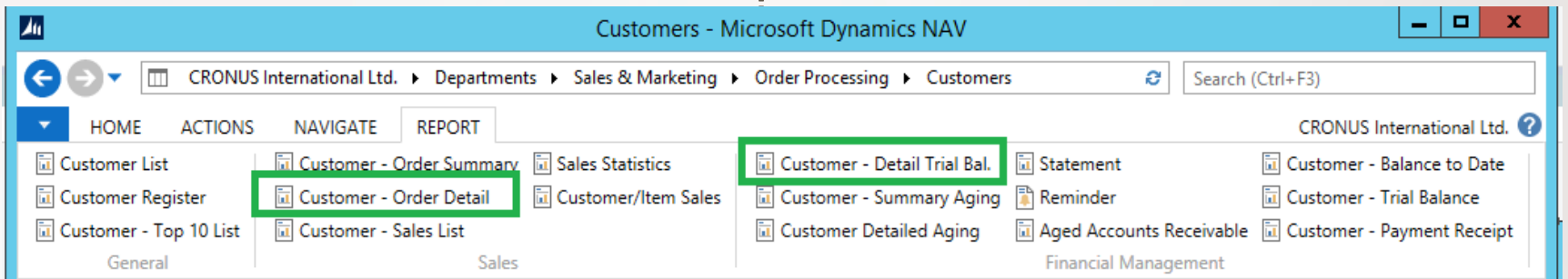
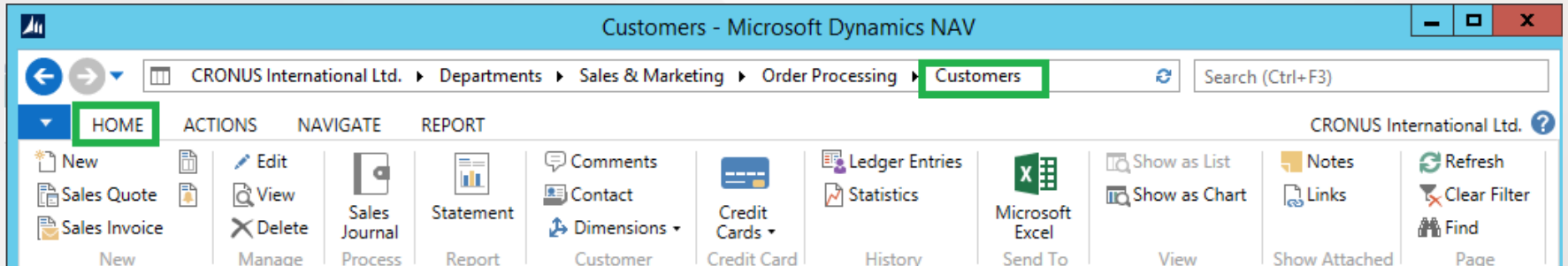
In Microsoft Dynamics NAV 2013, the ribbon is available on most pages and **visible by default.**



**See ribbons tabs related to  
customer card on the next  
slide**



# Ribbons



See reports started from ribbon tab

# Examples of reports (customer ribbon) – I.

## Customer - Order Detail

1 of 2? 100% Find Next

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
<b>01454545 New Concepts Furniture</b>										
		<b>Order No.</b>	<b>1005 13. 8. 2014</b>							
13.08.14	Item	1001	Touring Bicycle	55	55	55	7 174,232	59 187,41	0,00	335 395,35 USD
		<b>Order No.</b>	<b>10*018 23. 1. 2015</b>							
23.01.15	Item	1980-S	MOSCOW Swivel Chair, red	6	6	0	221,146	66,34	0,00	1 260,54 USD
		<b>New Concepts Furniture</b>								<b>336 655,89 USD</b>
<b>10000 The Cannon Group PLC</b>										
		<b>Order No.</b>	<b>1001 16. 6. 2014</b>							
27.05.14	Item	1000	Yellow Bicycle	123	123	123	4 000,00	123 000,00	0,00	369 000,00
		<b>Order No.</b>	<b>1004 22. 1. 2015</b>							
22.01.15	Item	1150	Frnt Hub	300	300	300	500,00	0,00	0,00	150 000,00
		<b>Order No.</b>	<b>10*001 14. 1. 2015</b>							
14.01.15	Item	LS-MAN-10	Manual for Loudspeakers	4	4	4	0,00	0,00	0,00	0,00
		<b>Order No.</b>	<b>10*006 14. 1. 2015</b>							
14.01.15	Item	LS-MAN-10	Manual for Loudspeakers	10	10	10	0,00	0,00	0,00	0,00
		<b>Order No.</b>	<b>10*011 14. 1. 2015</b>							
14.01.15	Item	LS-150	Loudspeaker, Cherry, 150W	10	10	10	129,00	0,00	0,00	1 290,00
		<b>The Cannon Group PLC</b>								<b>520 290,00</b>

# Examples of reports (customer ribbon) – II.

1 of 1 100% Find | Next

**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.
<b>10000</b>	<b>The Cannon Group PLC</b>							
	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
<b>The Cannon Group PLC</b>						<b>293 364,41</b>		

# Microsoft Dynamics Application Menu

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

The image shows the Microsoft Dynamics Application menu and its sub-options. The main menu is on the left, and the sub-menu is on the right. A 'Set Work Date' dialog box is also shown at the top.

**Main Application Menu:**

- Page ▶
- Print & Send ▶
- Set Work Date...
- Select Language...
- Select Server...
- Select Company...
- Customize ▶
- Help ▶
- Exit

**Sub-menu (Customize):**

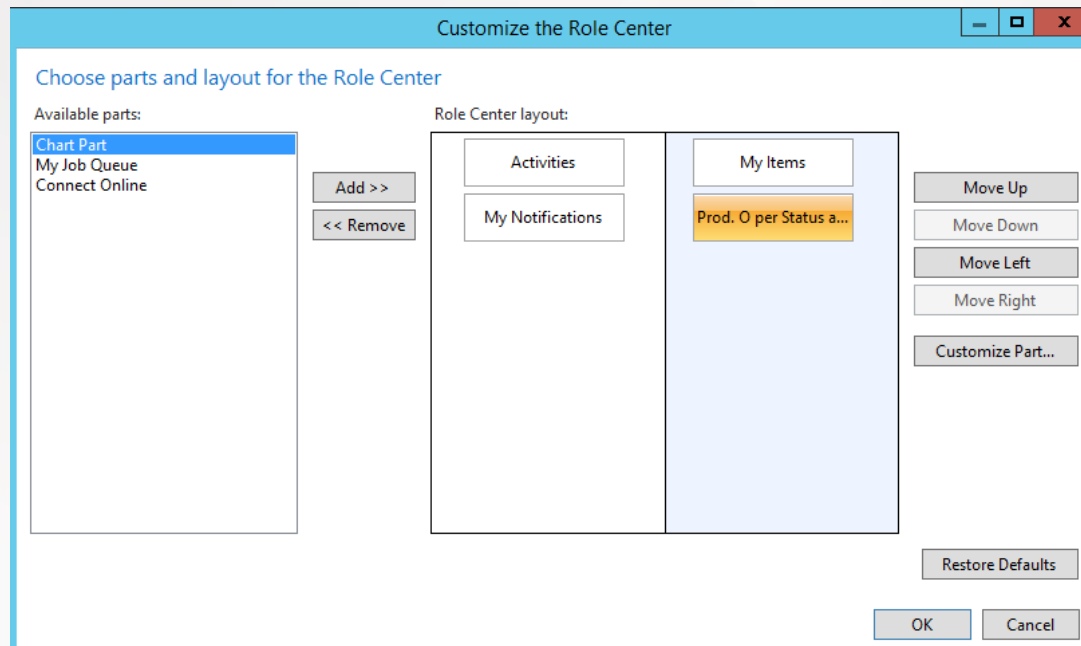
- Filter Pane
- FactBox Pane
- Choose Columns...
- Choose FactBoxes...
- Customize Ribbon...
- Customize Chart...
- Customize This Page...**
- Customize Navigation Pane...

**Set Work Date Dialog:**

Set Work Date

Work Date: 22. 1. 2015

# Customize the Role Center page (only BPH\_PIS1-PIS2)



The customization will part of the next sessions...

# Navigation pane

- Role Center
- Simulated Production Orders
- ▷ Planned Production Orders
- ▷ Firm Planned Production Orders
- ▷ Released Production Orders
- Finished Production Orders
- Production Forecast
- Blanket Sales Orders
- Sales Orders
- Blanket Purchase Orders
- ▲ Purchase Orders
  - My Purchase Orders
  - Transfer Orders
  - Vendors
- ▷ Items
  - Stockkeeping Units
- ▷ Production BOMs
- ▷ Routings
- PlannerOne Production Scheduler
- Home**
- Journals
- Worksheets**
- Product Design
- Capacities
- Departments

### Application Setup

Choose by department

- General
- Users
- Financial Management
  - Finance
  - Posting Groups**
  - VAT Posting Group
  - VAT Rate Change
  - Trail Codes
  - Dimensions
- Sales & Marketing
  - Sales
  - Marketing
- Purchase
  - Intercompany Postings
  - Intrastat
  - Fixed Assets
  - Cash Flow
  - General

### Posting Groups

**Lists**

- Gen. Business Posting Groups
- Gen. Product Posting Groups
- Customer Posting Groups
- Vendor Posting Groups
- Bank Account Posting Groups
- Inventory Posting Groups

- Departments
- ▷ Financial Management
- ▷ Sales & Marketing
- ▷ Purchase
- ▷ Warehouse
- ▷ Manufacturing
- Jobs
- Resource Planning
- ▷ Service
- Human Resources
- ▷ Administration**

See next slide

# Posting group

Navigation: Departments > Administration > Application Setup > Financial Management > Posting Groups > Gen. Business Posting Groups

**ACTIONS**

- New
- Edit List
- Delete
- Setup** (Process)
- Show as List
- Show as Chart
- Notes
- Links
- Refresh
- Clear Filter
- Find

Departments

- Financial Management
- Sales & Marketing
- Purchase
- Warehouse
- Manufacturing
- Jobs
- Resource Planning
- Service
- Human Resources
- Administration

Gen. Business Posting Groups

Type to filter (F3)

Code	Description	Def. VAT Bus. Posting Group	Auto Insert Default
EU	Customers and vendors in EU	EU	<input checked="" type="checkbox"/>
EXPORT	Other customers and vendo...	EXPORT	<input checked="" type="checkbox"/>
INTERCOMP	Intercompany		<input checked="" type="checkbox"/>
<b>NATIONAL</b>	<b>Domestic customers and ve...</b>	<b>NATIONAL</b>	<input checked="" type="checkbox"/>

View - General Posting Setup - NATIONAL - Domestic customers and vendors

**ACTIONS**

- New
- Edit
- View
- Delete
- Copy...
- Show as List
- Show as Chart
- Notes
- Links
- Refresh
- Clear Filter
- Find

General Posting Setup

Type to filter (F3) | Gen. Bus. Posting Group

Filter: NATIONAL

Gen. Bus. Posting Group	Gen. Prod. Posting Group	Sales Account	Sales Credit Memo Account	Sales Line Disc. Account	Sales Inv. Disc. Account	Sales Pmt. Disc. Debit Acc.	Sales Pmt. Disc. Credit Acc.	Sales Pmt. Tol. Debit Acc.	Sales Pmt. Tol. Credit Acc.	Purch. Account	Purch. Credit Memo Account	Purch. Line Disc. Account	Purch. Inv. Disc. Account
NATIONAL	SERVICES	6410	6410	6910	6910					7110	7110	7140	7140
NATIONAL	RETAIL	6110	6110	6910	6910					7110	7110	7140	7140
NATIONAL	RAW MAT	6210	6210	6910	6910					7210	7210	7240	7240
NATIONAL	NO VAT	6110	6110	6910	6910					7110	7110	7140	7140
NATIONAL	MISC	6110	6110	6910	6910					7110	7110	7140	7140
NATIONAL	MANUFACT	6110	6110	6910	6910					7110	7110	7140	7140

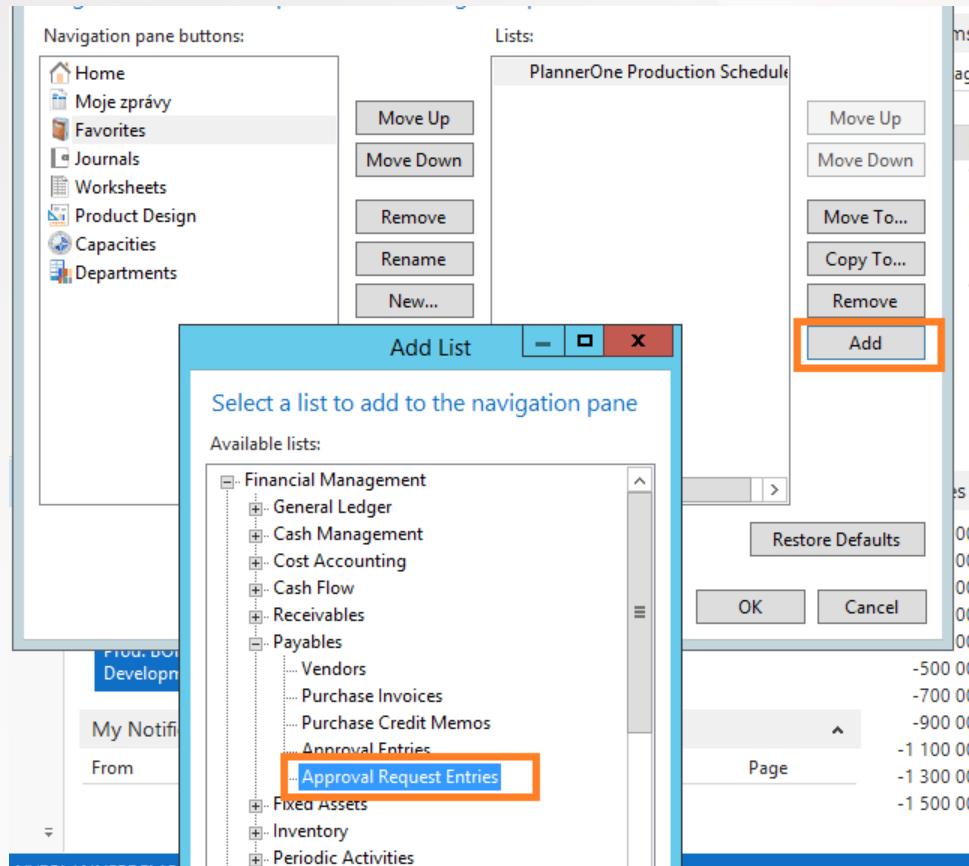
# Simple customization of the Navigation pane (only PIS1-PI2)

The image illustrates the process of customizing the navigation pane. It shows three main components:

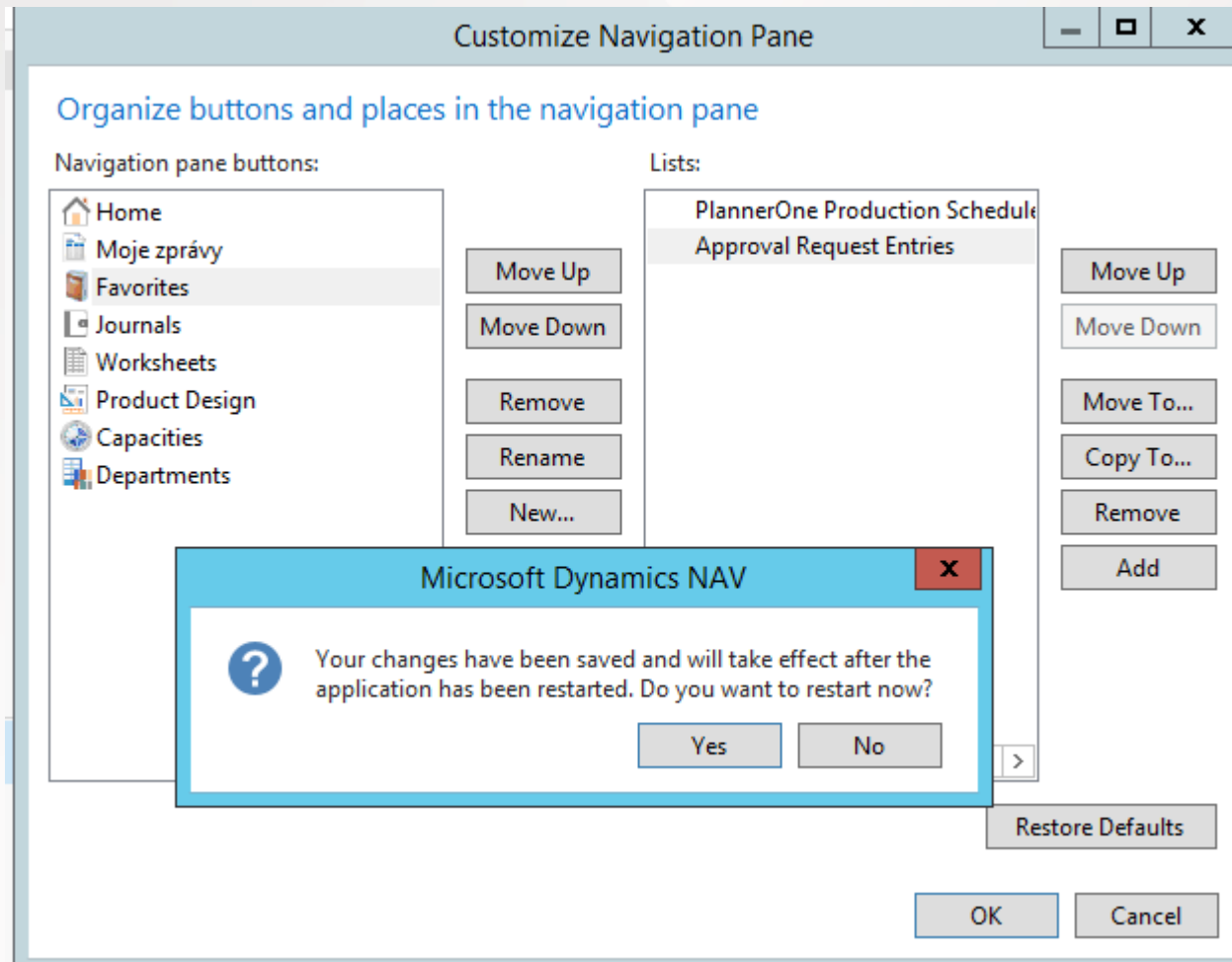
- Customization Panel:** A list of options for customizing the interface. The 'Customize Navigation Pane...' option at the bottom is highlighted with a green box.
- Context Menu:** A menu that appears after clicking the highlighted option. It contains buttons for 'Move Up', 'Move Down', 'Remove', 'Rename', and 'New...'. A green arrow points from the text 'Enter NEW' to the 'New...' button.
- New Activity Button Dialog:** A dialog box titled 'New Activity Button' with a 'Name' field containing 'Favorites' and a grid of icons for selection. A large orange arrow points from the right side of the dialog towards the right edge of the slide.



# Simple customization of the Navigation pane



# Simple customization of the Navigation pane



# Simple customization of the Navigation pane

PlannerOne Production Scheduler

Approval Request Entries

Approval Request Entries

Table ID ▼

→
▼

No filters applied

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...	Approve
	38	Order	104012	2	P-ORDER	NVRPLAN...		NVRPLAN...	Approve
	38	Order	106026	1	P-ORDER	NVRPLAN...	RL	NVRPLAN...	Approve
	38	Order	106026	2	P-ORDER	NVRPLAN...		NVRPLAN...	Approve

# Customer list page

The screenshot shows the Microsoft Dynamics NAV interface for the 'Customers' list. The ribbon at the top (1) contains various actions like 'New', 'Sales Invoice', 'Edit', 'View', 'Delete', 'Sales Journal', 'Statement', 'Comments', 'Contact', 'Dimensions', 'Credit Cards', 'Ledger Entries', 'Statistics', 'Microsoft Excel', 'Show as List', 'Show as Chart', 'OneNote', 'Notes', and 'Links'. Below the ribbon is a filter pane (2) with a search box and a dropdown menu. The main area (3) is a table of customer records. The table has columns for 'No.', 'Name', 'Responsi...', 'Location ...', 'Phone No.', 'Contact', 'Search N...', and 'Blo'. The table is sorted by 'No.' (4). On the right side, there are two fact boxes: 'Sell-to Customer Sal...' (5) and 'Customer Statistics -...'. The fact boxes show various financial metrics for the selected customer.

No.	Name	Responsi...	Location ...	Phone No.	Contact	Search N...	Blo
01121212	Spotsmeyer's Furnishings		YELLOW		Mr. Mike Nash	SPOTSM...	
01445544	Progressive Home Furnishi...		YELLOW		Mr. Scott Mitchell	PROGRESS...	
01454545	New Concepts Furniture		YELLOW		Ms. Tammy L. McDonald	NEW CON...	
01905893	Candoxy Canada Inc.		YELLOW		Mr. Rob Young	CANDOXY...	
01905899	Elkhorn Airport		YELLOW		Mr. Ryan Danner	ELKHORN ...	
01905902	London Candoxy Storage C...		YELLOW		Mr. John Kane	LONDON ...	
10000	The Cannon Group PLC	BIRMINGH...	BLUE		Mr. Andy Teal	THE CAN...	
20000	Selangorian Ltd.				Mr. Mark McArthur	SELANGO...	
20309920	Metatorad Malaysia Sdn Bhd		YELLOW		Mrs. Azleen Samat	METATOR...	
20312912	Highlights Electronics Sdn ...		GREEN		Mr. Mark Darrell Boland	HIGHLIGHT...	
20339921	TraxTonic Sdn Bhd		YELLOW		Mrs. Rubina Usman	TRAXTONI...	
21233572	Somadis		YELLOW		M. Syed ABBAS	SOMADIS	
21245278	Maronegoce		BLUE		Mme. Fadoua AIT MOUSSA	MARONEG...	
21252947	ElectroMAROC		YELLOW			ELECTRO...	
27090917	Zanlan Corp.		YELLOW		Mr. Derik Stenerson	ZANLAN C...	
27321782	Karoo Supermarkets		YELLOW		Mr. Pieter Wycoff	KAROO SU...	
27489991	Durbandit Fruit Exporters		YELLOW		Mr. Eric Lang	DURBANDI...	

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.

Customers ▾

| Location Code ▾ | →

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	SOMAD
21252947	ElectroMAROC		YELLOW			ELECTR

# Simple use of filtering II.

Customers ▾

Type to filter (F3) | Location Code ▾ | → | ▲

**Show results:**

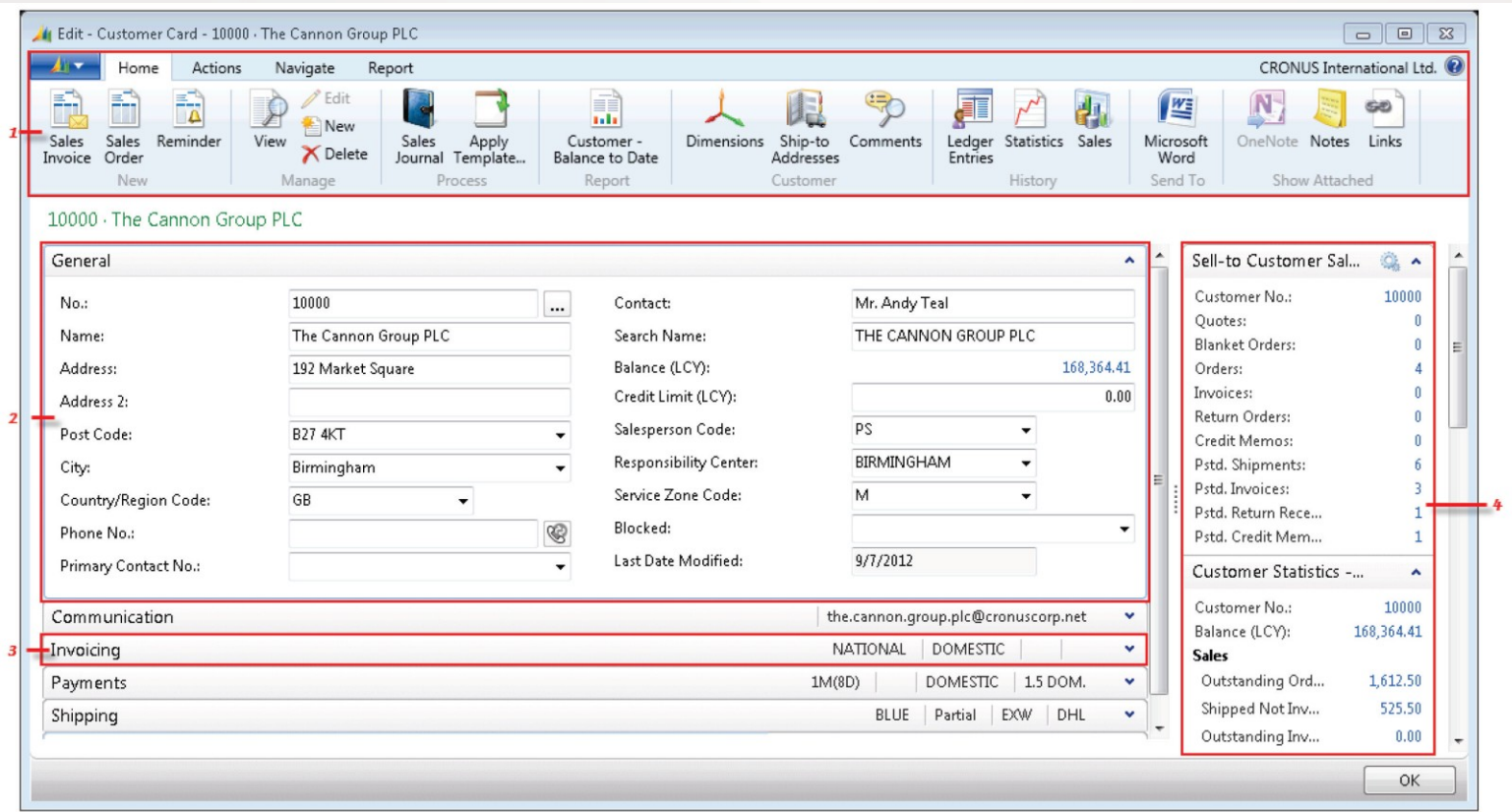
✗ Where No. ▾ is 2\*

✗ And Name ▾ is

+ Add Filter

No.	Name	Responsi... Center	Location Code	Phone No.	Contact	Search Name
20309920	Metatorad Malaysia Sdn Bhd		YELLOW		Mrs. Azleen Samat	METATOR
21245278	Maronegoce		BLUE		Mme. Fadoua AIT MOUSSA	MARONEC

# Card page



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

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

My Items

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



Edit - My Items - NVRPLANNERDEMO2\DEMO - 1000

Item No.	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



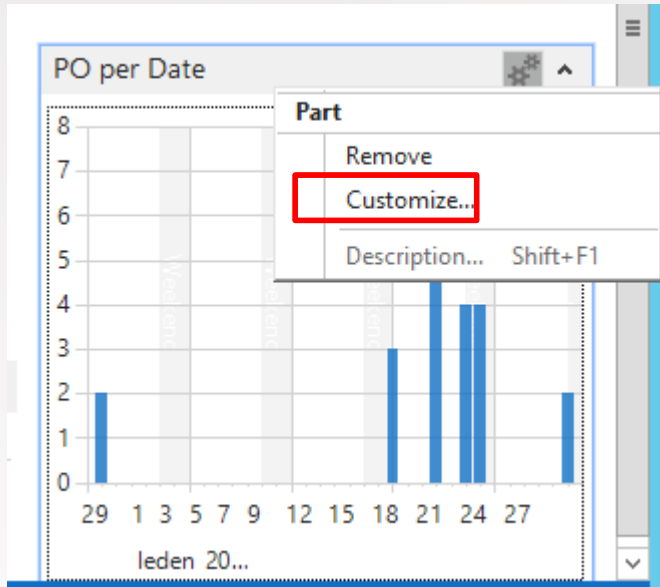
My Items

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



# Changing charts



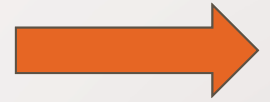
Customize Chart - □ X

Select chart

Available charts:

ID	Name
Q54...	Delayed Prod. Orders - By Cost
Q54...	Pending Prod. Orders - By Cost
Q54...	Top-10 Prod. Orders
Q54...	My Prod. Orders - By Cost
Q54...	My Delayed Prod. Orders
Q91...	Customer Sales and Profit
Q91...	Vendor Balance and Inv. Amount
Q91...	My Production Orders
T18...	Customers per Salesperson
T270...	Balances per Bank Account
T272...	Open Checks per Bank Account
T36...	SO per Currency
T36...	SO per Status
T36...	Sales Crdt Memos per Status
T36...	SO - EURO
T36...	SO per Location
T36...	SO per Currency and Location
T36...	Sales Crdt Memos per Slsperson
T36...	SO per Date
T37...	SO Lines per Location

OK Cancel



## Role Center - Production Planner

### Production Orders



0

Planned  
Production Orde...



74


Firm Planned  
Production Orde...



14

Released  
Production Orde...


### Planning - Operations



1


My Purchase  
Orders

### Design



0

Prod. BOMs under  
Development



0

Routings under  
Development

### My Notifications

From	Created D...	Note	Page

Change Producti...  
New Production ...  
Navigate

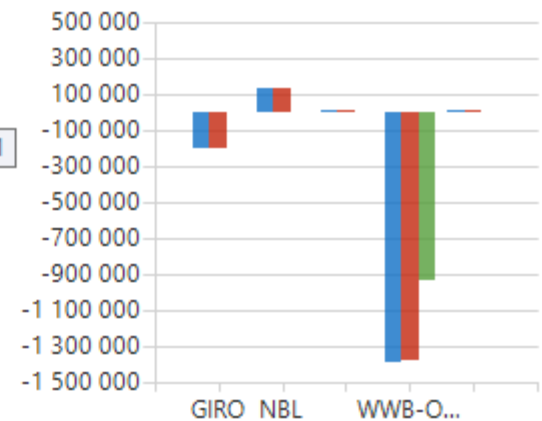
New Purchase O...  
Edit Planning W...  
Edit Subcontract...

New Item  
New Production ...  
New Production BOM

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





THANKS FOR YOUR ATTENTION AND TIME