

# Introduction to MS Dynamics NAV

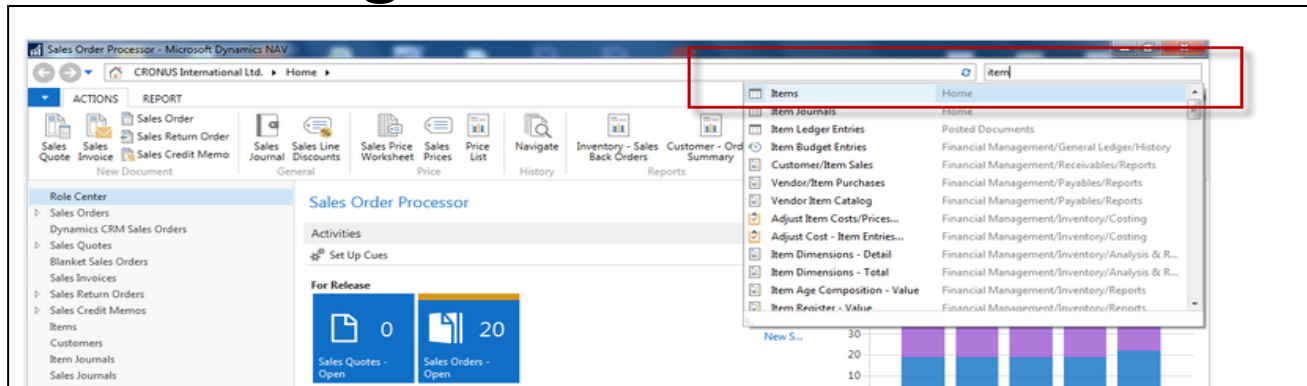
(Filtering Searching and Basic orientation in MS Dynamics workspace)

Ing.J.Skorkovský,CSc.

MASARYK UNIVERSITY BRNO, Czech Republic  
Faculty of economics and business administration  
Department of corporate economy

# Simple filter

- Searching window->Item




- You have just accessed Item list window

The screenshot shows the 'Items' window in Microsoft Dynamics NAV. A search filter is applied, and the results are displayed in a table. The search filter is 'Type to filter (F3) | No.' and the results are filtered to show items with 'No.' in the 'Where' field.

No.	Description	As... BO...	Base Unit of Measure	Cost is ...	Unit Cost	Unit Price	Vendor No.	Search Descripti
1400	Mudguard front	No	PCS		3,90	0,00	32456123	MUDGUA
1450	Mudguard back	No	PCS		3,90	0,00	32456123	MUDGUA
1500	Lamp	No	PCS		5,20	0,00	45774477	LAMP
1600	Bell	No	PCS		2,70	0,00	32456123	BELL
1700	Brake	No	PCS		9,765	600,00		BRAKE
1710	Hand rear wheel Brake	No	PCS		4,50	0,00	32456123	HAND RE

# Simple filter

L\* Description



No.	Description	As... BO...	Base Unit of Measure	Cost is ...	Unit Cost	Unit Price	Vendor No.	Search Description
1500	Lamp	No	PCS	<input type="checkbox"/>	5,20	0,00	45774477	LAMP
1908-S	LONDON Swivel Chair, blue	No	PCS	<input type="checkbox"/>	96,10	123,30	30000	LONDON ...
LS-100	Loudspeaker 100W Oakwoo...	Yes	PCS	<input type="checkbox"/>	15,00	21,00		LOUDSPEA...
LS-10PC	Loudspeakers, White for PC	No	BOX	<input type="checkbox"/>	25,00	59,00		LOUDSPEA...
LS-120	Loudspeaker, Black, 120W	No	PCS	<input type="checkbox"/>	45,00	88,00		LOUDSPEA...
LS-150	Loudspeaker, Cherry, 150W	No	PCS	<input type="checkbox"/>	72,00	129,00		LOUDSPEA...
LS-75	Loudspeaker, Cherry, 75W	No	PCS	<input type="checkbox"/>	36,00	79,00		LOUDSPEA...
LS-81	Loudspeaker, Walnut, 80W	No	PCS	<input checked="" type="checkbox"/>	36,00	79,00		LOUDSPEA...

# Multiple filter

history | report | send to | list

Type to filter (F3) | Description | → ^

Items ▾

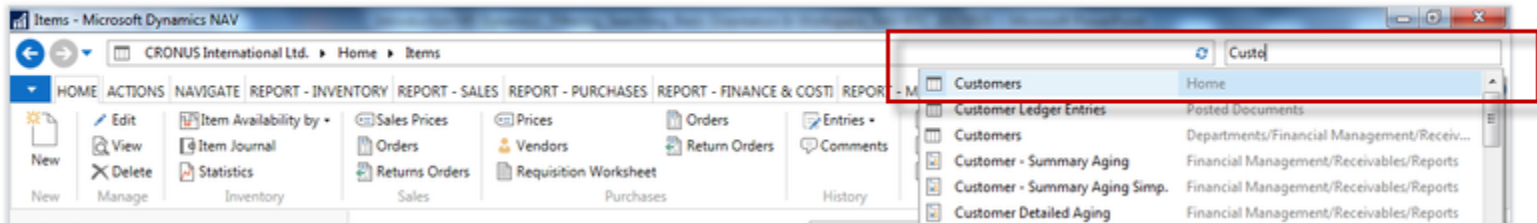
Type to filter (F3) | Description | → ^

**Show results:**

- ✗ Where No. ▾ is 1\*
- ✗ And Description ▾ is B\*
- ✗ And Unit Cost ▾ is >100
- + Add Filter

No.	Description	As... BO...	Base Unit of Measure	Cost is ...	Unit Cost	Unit Price	Vendor No.	Search Description
1000	Bicycle	No	PCS	<input type="checkbox"/>	350,594	4 000,00		BICYCLE
1200	Back Wheel	No	PCS	<input type="checkbox"/>	129,6815	1 200,00		BACK WH...

# Multiple filter



Customers ▾

Type to filter (F3) | No. ▾ → ^

Show results:

✗ Where No. ▾ is 2\*

✗ And Location Code ▾ is YELLOW

✗ And Currency Code ▾ is ZAR

+ Add Filter

No.	Name	Responsi... Center	Location Code	Phone No.	Contact	Search Name
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...

# Factbox information

Customers ▾ Type to filter (F3) | No. ▾ →

Show results:  
+ Add Filter

No.	Name	Resp... Center	Location Code	Ph... No.	Contact	Search Name	Blocked	Credit Li... (L)
01121212	Spotsmeyer's Furnishings		YELLOW		Mr. Mike Nash	SPOTSME...		
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	BIRMI...	BLUE		Mr. Andy Teal	THE CAN...		
20000	Selangorian Ltd.				Mr. Mark McArthur	SELANGO...		

Sell-to Customer Sal... ^

Customer No.: 10000

Quotes: 0

Blanket Orders: 0

Orders: 4

Invoices: 0

Return Orders: 0

Credit Memos: 0

Pstd. Shipments: 6

Pstd. Invoices: 3

Pstd. Return Rece... 1

Pstd. Credit Mem... 1

Customer Statistics ^

Customer No.: 10000

Balance (LCY): 168 364,41

Posted Sales Invoices ▾ Type to filter (F3) | No. ▾ → Filter: 10000

No.	Sell-to Custom...	Sell-to Customer Name	Currency Code	Amount	Amount Including VAT	Location Code	No. Printed	Document Exchange...
103001	10000	The Cannon Group PLC		7 438,50	8 182,35	BLUE	0	Not Sent
103015	10000	The Cannon Group PLC		6 615,23	8 269,04	BLUE	0	Not Sent
103028	10000	The Cannon Group PLC		3 281,50	4 101,88	BLUE	0	Not Sent

# Factbox information- continuation

Posted Sales Invoices ▾ Type to filter (F3) | No. ▾ | →

Filter: 10000

No.	Sell-to Custom...	Sell-to Customer Name	Currency Code	Amount	Amount Including VAT	Location Code	No. Printed	Document Exchange...
103001	10000	The Cannon Group PLC		7 438,50	8 182,35	BLUE	0	Not Sent
103015	10000	The Cannon Group PLC		6 615,23	8 269,04	BLUE	0	Not Sent
103028	10000	The Cannon Group PLC		3 281,50	4 101,88	BLUE	0	Not Sent

View - Posted Sales Invoices

HOME ACTIONS NAVIGATE

Edit View Delete Send... Statistics Comments Dimensions Incoming Document

Navigate Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Page Find



Posted invoice composed of header and lines

# Posted document

103001 · The Cannon Group PLC

General			
No.:	103001	Document Date:	21.1.2019
Sell-to Customer No.:	10000	Document Exchange Status:	Not Sent
Sell-to Contact No.:		Quote No.:	
Sell-to Customer Name:	The Cannon Group PLC	Order No.:	
Sell-to Address:	192 Market Square	Pre-Assigned No.:	103001
Sell-to Address 2:		External Document No.:	
Sell-to Post Code:	B27 4KT	Salesperson Code:	PS
Sell-to City:	Birmingham	Responsibility Center:	
Sell-to Contact:	Mr. Andy Teal	No. Printed:	0
Posting Date:	21.1.2019		

Lines								
Line	Type	No.	Description	Quantity	Unit of Measur...	Unit Price Excl. VAT	Line Amount Excl. VAT	Line Disco
	Resource	TIMOTHY	Assembling Furniture, January	25	HOUR	54,00	1 350,00	
	Resource	TIMOTHY	Assembling Furniture, January	120	MILES	54,00	6 480,00	



# Flow field (Calculation field)

10000 - The Cannon Group PLC

General

No.:	10000	Contact:	Mr. Andy Teal
Name:	The Cannon Group PLC	Search Name:	THE CANNON GROUP PLC
Address:	192 Market Square	Balance (LCY):	168 364,41
Address 2:		Credit Limit (LCY):	0,00
Post Code:	B27 4KT	Salesperson Code:	PS
City:	Birmingham	Responsibility Center:	BIRMINGHAM
Country/Region Code:	GB	Service Zone Code:	M
Phone No.:		Blocked:	
Primary Contact No.:		Last Date Modified:	24.8.2017

Customer

Ctrl-F7

Posti... Date	Document Type	Document No.	Cust... No.	Message to Recipient	Description	C... C...	Original Amount	Amount
31.12.2018	Invoice	00-11	10000		Opening Entries, Custo...		63 473,13	63 473,13
31.12.2018	Invoice	00-16	10000		Opening Entries, Custo...		33 852,35	33 852,35
31.12.2018	Invoice	00-9	10000		Opening Entries, Custo...		50 778,50	50 778,50
6.1.2019	Invoice	103015	10000		Order 101001		8 269,04	8 269,04
13.1.2019	<b>Credit Me...</b>	<b>104001</b>	10000		Credit Memo 104001		-292,84	-292,84
16.1.2019	Invoice	103028	10000		Order 6005		4 101,88	4 101,88
21.1.2019	Invoice	103001	10000		Invoice 103001		8 182,35	8 182,35

$$168\ 364 = 63\ 473 + 33\ 852 + \dots + 8\ 182$$

# Navigation

Customer Ledger Entries ▾

Type to filter (F3) | Posting Date

Show results:

✗ Where Customer No. ▾ is 10000



✗ And Open ▾ is Yes

+ Add Filter

Posti... Date	Document Type	Document No.	Cust... No.	Message to Recipient	Description	C... C...	Original Amount	Amount	Remaining Amount	Due Date
31.12.2018	Invoice	00-11	10000		Opening Entries, Custo...		63 473,13	63 473,13	63 473,13	31.1.2019
31.12.2018	Invoice	00-16	10000		Opening Entries, Custo...		33 852,35	33 852,35	33 852,35	31.1.2019
31.12.2018	Invoice	00-9	10000		Opening Entries, Custo...		50 778,50	50 778,50	50 778,50	31.1.2019
6.1.2019	Invoice	103015	10000		Order 101001		8 269,04	8 269,04	8 269,04	3.2.2019
13.1.2019	<b>Credit Me...</b>	<b>104001</b>	10000		Credit Memo 104001		-292,84	-292,84	-292,84	<b>13.1.2019</b>
16.1.2019	Invoice	103028	10000		Order 6005		4 101,88	4 101,88	4 101,88	16.2.2019
21.1.2019	Invoice	103001	10000		Invoice 103001		8 182,35	8 182,35	8 182,35	21.2.2019

View - Customer Ledger Ent

HOME ACTIONS

Navigate  Show Posted Document 

General


Document




Document No.: 103001

Related Entries	No. of Entries
Posted Sales Invoice	1
G/L Entry	5
VAT Entry	2
Cust. Ledger Entry	1
Detailed Cust. Ledg. Entry	1
Res. Ledger Entry	2

Edit - Navigate - Selected - Posted Sales Invoice

HOME ACTIONS

Show Related Entries 

Find  Print...  Find by Document Bu 

Process



# Document after being found by NAVIGATION tool

## 103001 · The Cannon Group PLC

### General

No.:	103001	Document Date:	21.1.2019
Sell-to Customer No.:	10000	Document Exchange Status:	Not Sent
Sell-to Contact No.:		Quote No.:	
Sell-to Customer Name:	The Cannon Group PLC	Order No.:	
Sell-to Address:	192 Market Square	Pre-Assigned No.:	103001
Sell-to Address 2:		External Document No.:	
Sell-to Post Code:	B27 4KT	Salesperson Code:	PS
Sell-to City:	Birmingham	Responsibility Center:	
Sell-to Contact:	Mr. Andy Teal	No. Printed:	0
Posting Date:	21.1.2019		

### Lines

Line Find Filter Clear Filter

Type	No.	Description	Quantity	Unit of Measur...	Unit Price Excl. VAT	Line Amount Excl. VAT	Line Disc
Resource	TIMOTHY	Assembling Furniture, January	25	HOUR	54,00	1 350,00	
Resource	TIMOTHY	Assembling Furniture, January	120	MILES	54,00	6 480,00	

# G/L Entries (transactions) after being found by NAVIGATION tool

Document

Document No.: 103001

Related Entries	No. of Entries
Posted Sales Invoice	1
G/L Entry	5
VAT Entry	2
Cust. Ledger Entry	1
Detailed Cust. Ledg. Entry	1
Res. Ledger Entry	2

File Edit - navigate - selected - Posted Sales Invoice

HOME ACTIONS

Show Related Entries

Find Print... Find by Document Bu

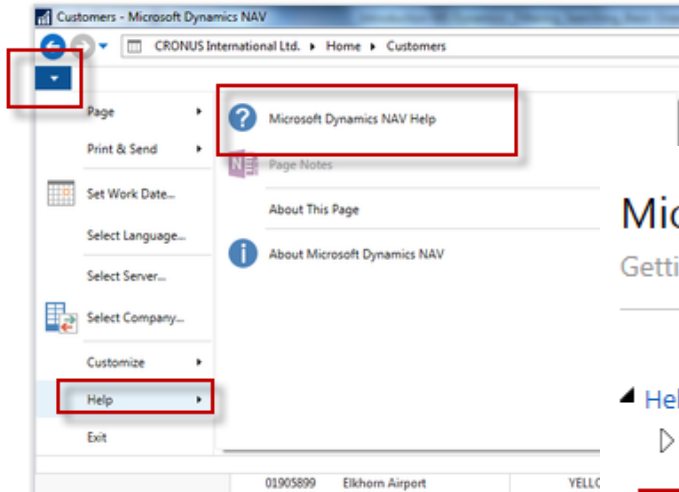
## General Ledger Entries

Type to filter (F3) | Posting Date

Posting Date	Document Type	Document No.	G/L Account	Description	Gen. Posting	Gen. Bus. Posting	Gen. Prod.	Amount	Bal. Account	Bal. Account
21.1.2019	Invoice	103001	6910	Invoice 103001	Sale	NATIONAL	SERVI...	391,50	G/L Account	
21.1.2019	Invoice	103001	5611	Invoice 103001				39,15	G/L Account	
21.1.2019	Invoice	103001	6410	Invoice 103001	Sale	NATIONAL	SERVI...	-7 830,00	G/L Account	
21.1.2019	Invoice	103001	5611	Invoice 103001				-783,00	G/L Account	
21.1.2019	Invoice	103001	2310	Invoice 103001				8 182,35	G/L Account	

SYNTAX : If amount is positive (>0) it was posted to debit side, if negative (<0) it was posted to credit side

# Entering dates and periods



## Microsoft Dynamics NAV 2016

Getting Started Community MSDN

## Microsoft Dynamics NAV 2016

Getting Started Community MSDN [ics NAV](#)

/ 2016

### ▲ Help

▶ Getting Started with Microsoft Dynamics NAV 2016

▲ Working with Microsoft Dynamics NAV 2016

Change Basic Settings

Enter Criteria in Filters

12.2.2017 -> 120217

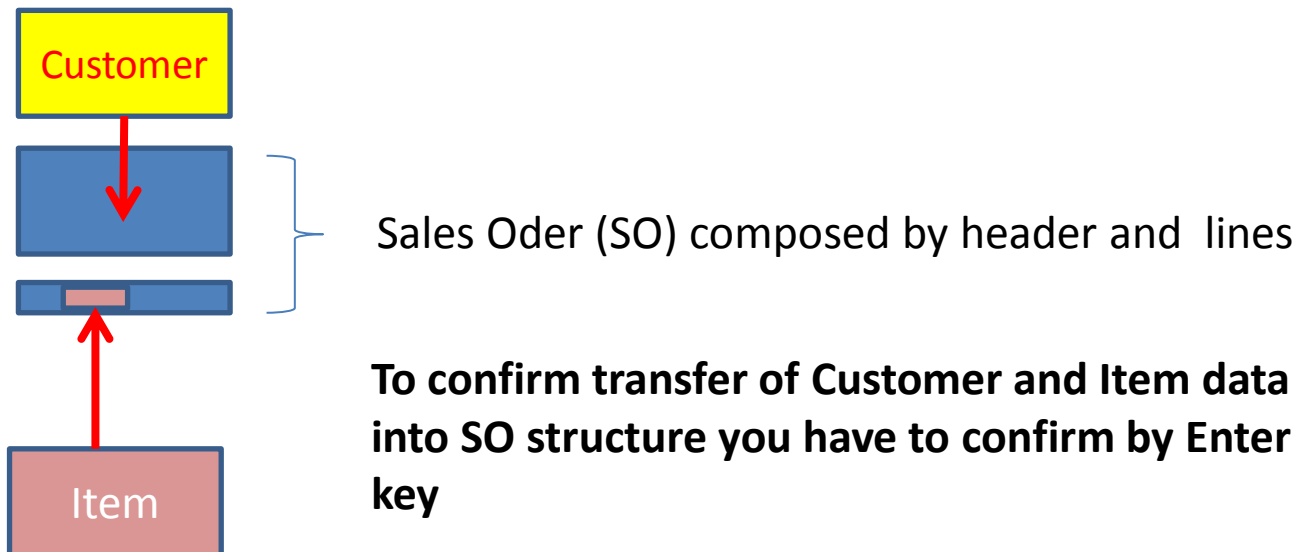
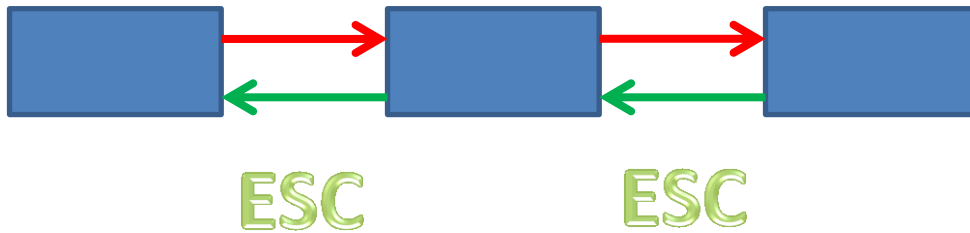
7 days = 7D = 1W

1 month = 1M ....and so on

# Basic keyboard shortcuts

- New – icon New or Ctrl-N
- Delete – icon od Ctrl-Del
- Lookup- F4
- Post document – F9
- Statistics –F7
- Entries – Ctrl-F7
- F1- Help
- F2 Edit

# Orientation between forms (windows)



# End of the section

(Filtering Searching and Basic orientation in MS Dynamics workspace)

