Introduction to MS Dynamics NAV
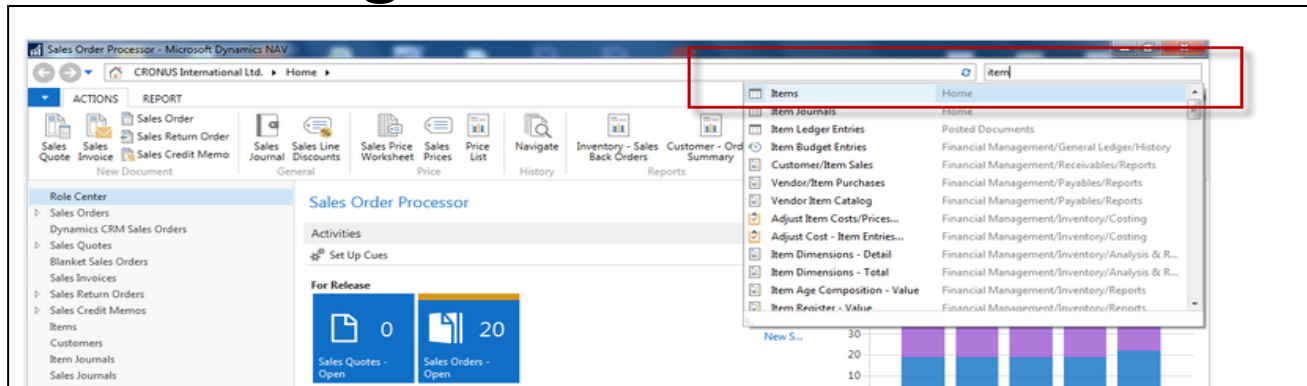
(Filtering Searching and Basic orientation in MS Dynamics workspace)

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Simple filter

- Searching window->Item

- You have just accessed Item list window

Simple filter

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

L*   Description

Multiple filter

Multiple filter

Factbox information

Factbox information- continuation

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

Posted Sales Invoices

Type to filter (F3)   No.

Filter: 10000

Customer

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 ▾   Find   Filter   Clear Filter

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

Posting 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	Credit Me...	104001	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=63473+33852+….+8182

Navigation

Customer Ledger Entries ▾

Type to filter (F3) | Posting Date

Show results:

✕ Where   Customer No. ▾ is   10000
✕ And   Open ▾ is   Yes
✚ Add Filter

Posting 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	*Credit Me...*	*104001*	10000		Credit Memo 104001		-292,84	-292,84	-292,84	*13.1.2019*
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

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 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	

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

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

Entering dates and periods
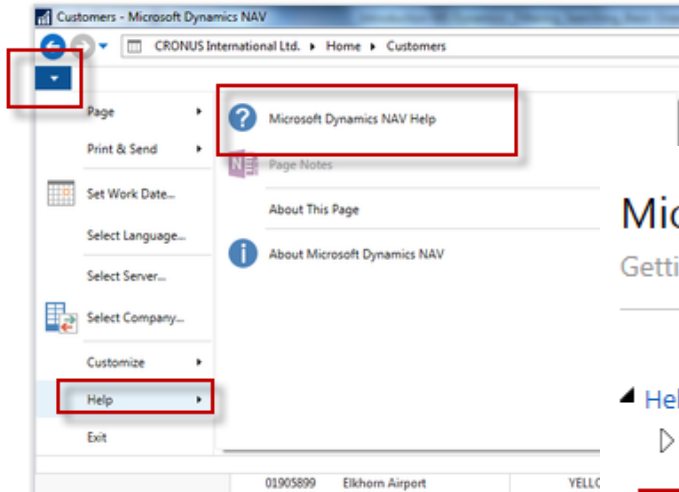
12.2.2017 -> 120217
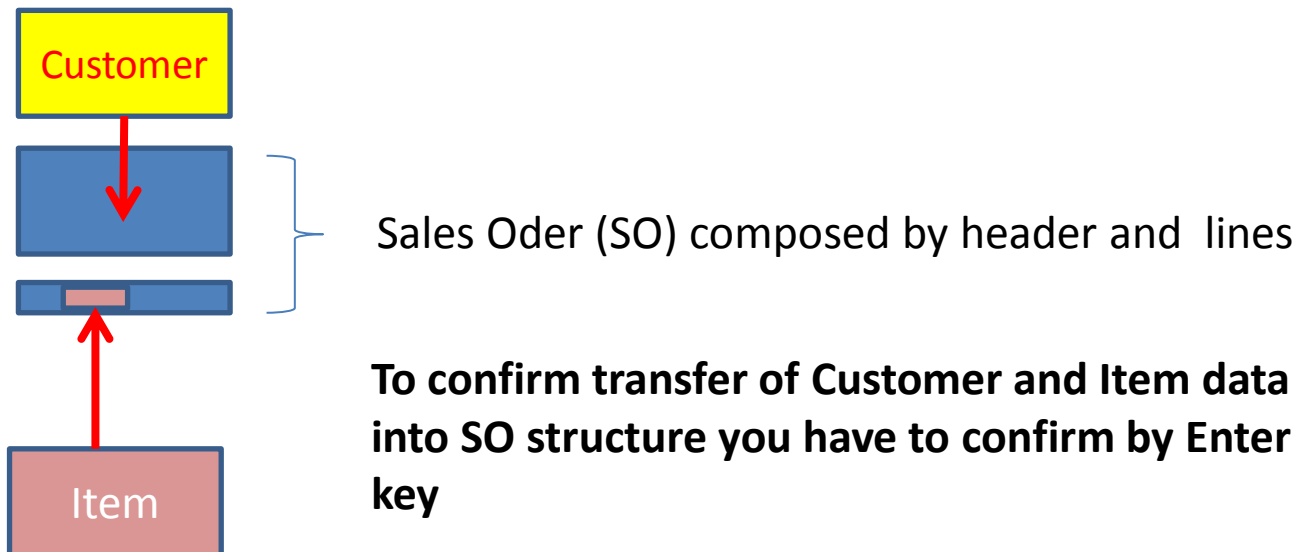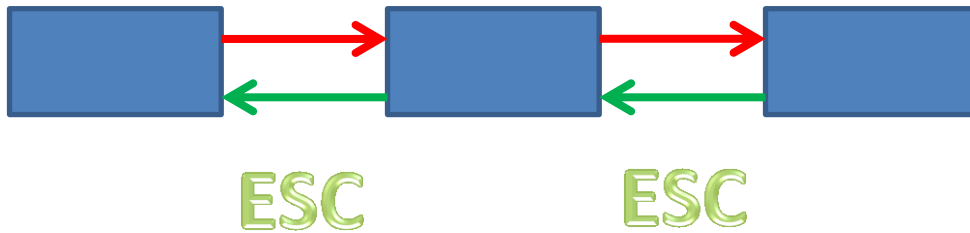
7 days =7D = 1W
1 month = 1M ….and so on

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)

ESC   **ESC**

Customer

Sales Oder (SO) composed by header and lines

Item

To confirm transfer of Customer and Item data into SO structure you have to confirm by Enter key

End of the section

(Filtering Searching and Basic orientation in MS Dynamics workspace)