

# Using the Web Client

for Microsoft Dynamics NAV 2017



Microsoft Dynamics NAV



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## 2 Introduction

The purpose of this document is to guide new users through their first experiences with the Web Client for Microsoft Dynamics NAV 2017.

However, if you are an existing Dynamics NAV user or are more used to working inside the Windows Client, don't worry, you will find tips and tricks in this document to ensure you get the most out of the latest product enhancements.

The Web Client offers a great balance of simplicity and productivity for any Dynamics NAV user and at the end of this short document you will be able to confidently get started with Dynamics NAV 2017.

The video playlist to accompany this document can be found on our YouTube channel and is titled "**Dynamics Training: NAV 2017 Web client – User Guide**". The link to it is:

<https://www.youtube.com/playlist?list=PLoS7gV-LINmm9M7ahvsh4C1MP40NSfD5M>

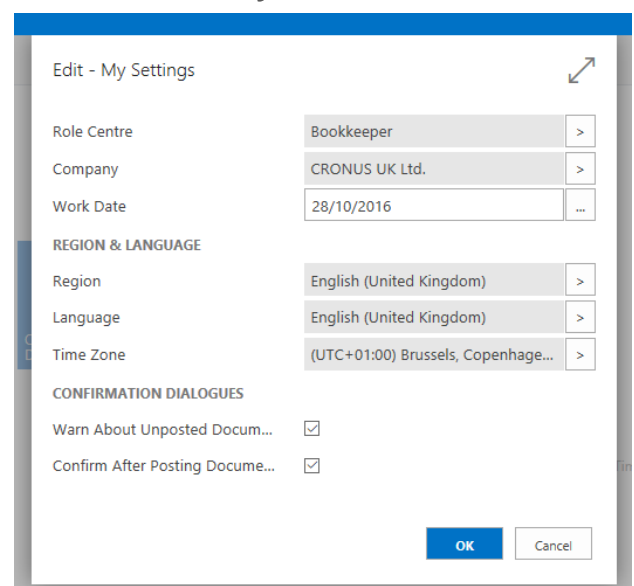
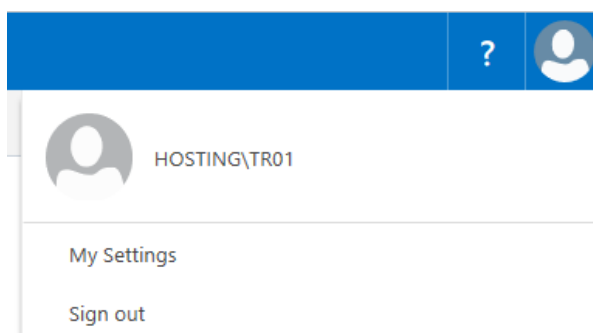
### 2.1 Why use the web client?

The Dynamics NAV Web Client has been greatly enhanced for the 2016 and now 2017 version, it now offers:

- Balance of simplicity and productivity that will suit most users
- Fast and fluid interface, designed for keyboard and mouse
- Easy zero footprint deployment – no need to install Windows Desktop Client for most users
- Easy to access from anywhere with internet access, gives workers greater flexibility
- Start-up time improved compared to previous versions
- Quicker navigation between pages
- Supports the keyboard shortcuts that are supported by most web browsers

### 2.2 Office 2016 and Office 365 familiarity

- Strong resemblance to **Office 365**, to make the user comfortable, including use of fonts and spacing
- Thick blue **App bar** on the top makes links to **Help** more accessible
- **My Settings** – gathers together user definable settings such as Role Centre and Time Zone

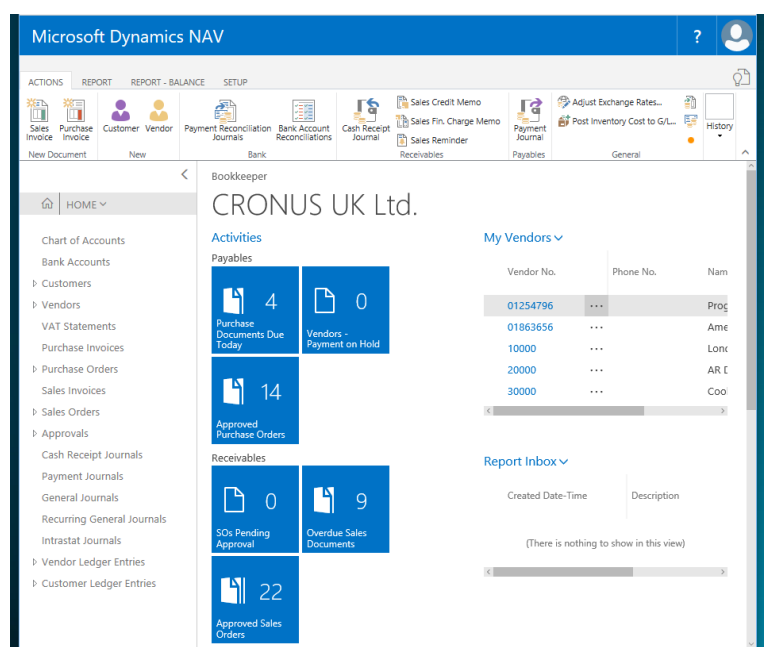
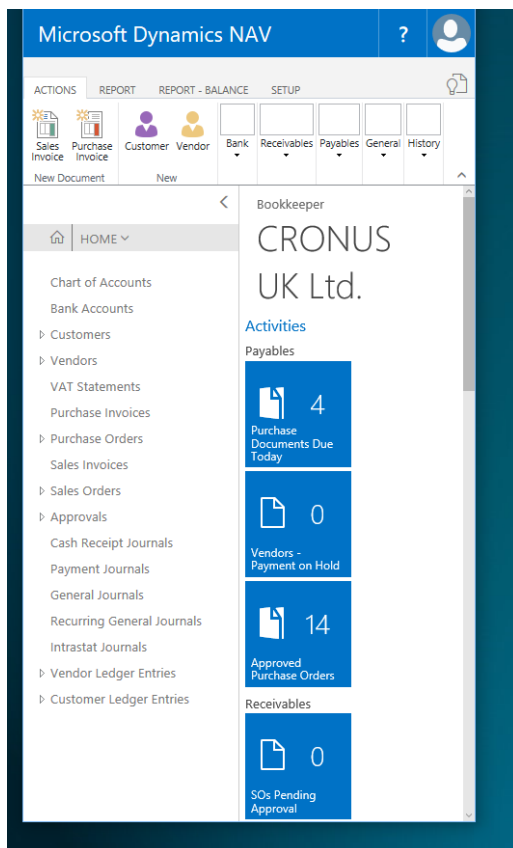
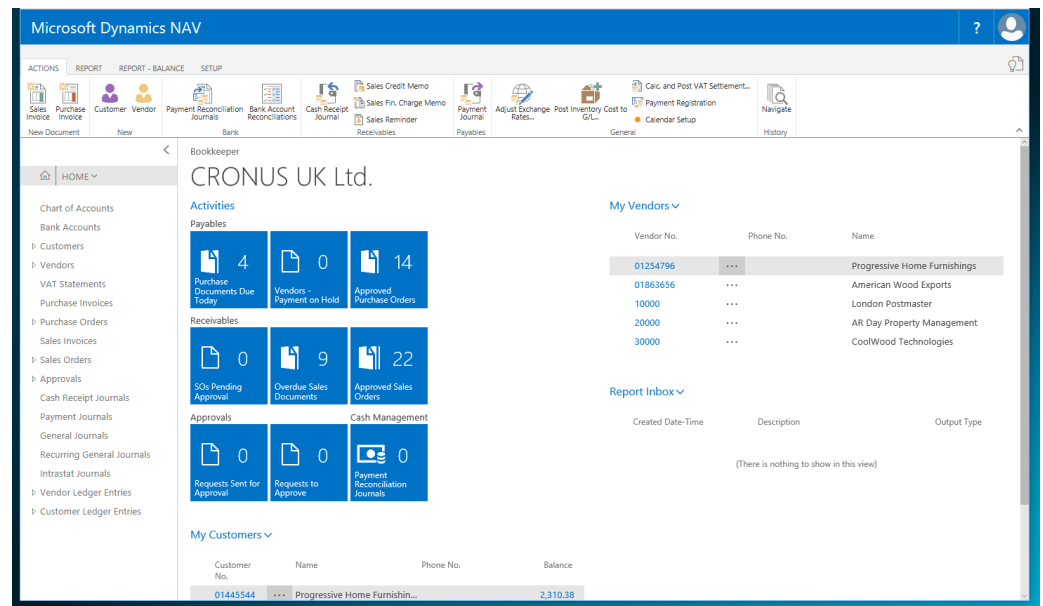


## 3 Exploring the user interface

### 3.1 Dynamic Resizing

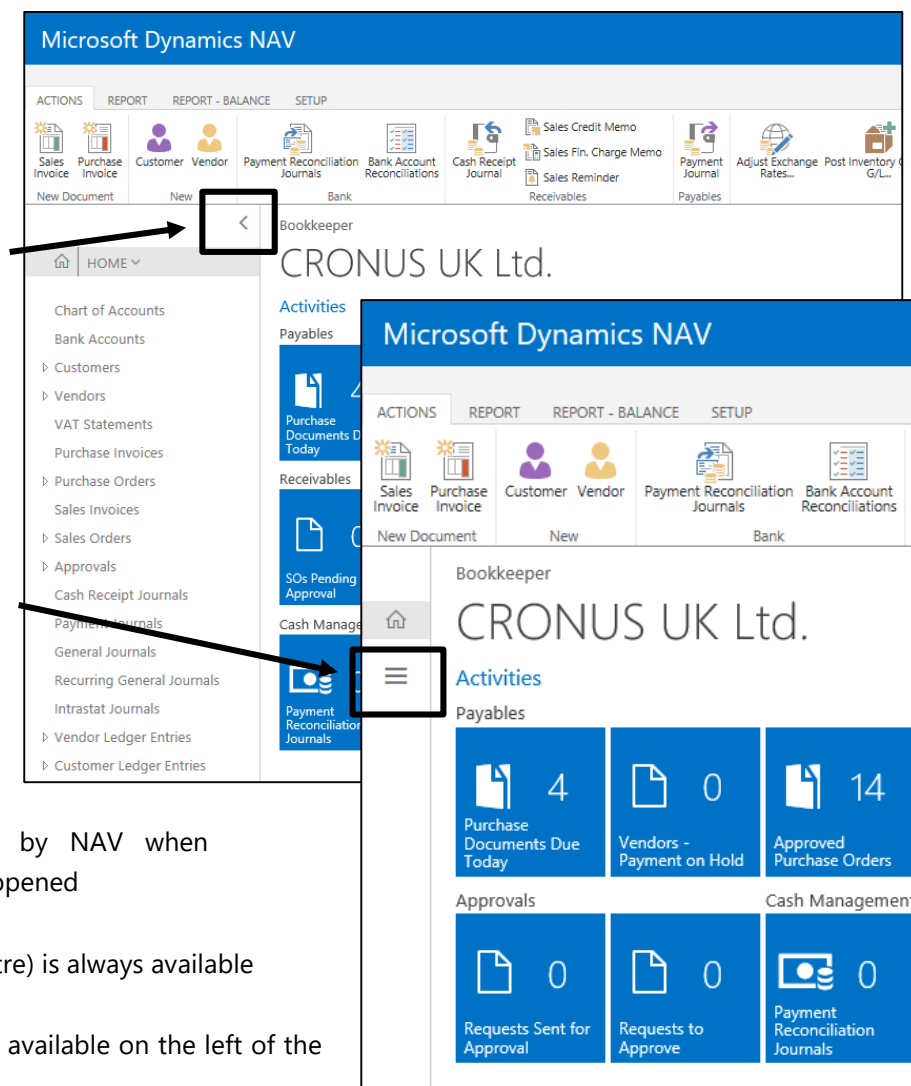
Dynamic resizing means there is a flow of the **Role Centre parts**, when the window is resized or for varied screen widths, they resize to fit.

- This preserves the order of importance of the Role Centre Parts, Cues has priority, then Charts, then the others
- The **Home button** and **Navigation Pane** remain visible when resizing

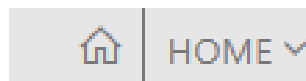


## 3.2 Navigation Pane

- Gives you quick access to areas connected to your job role
- Click **arrow** to collapse the **Navigation Pane** to the side, to gain working space
- Click the **menu icon** (Hamburger menu) to expand to see NAV pane
- Choice is remembered by NAV when browser is closed and reopened
- **Home button** (Role Centre) is always available
- **Navigation pane** always available on the left of the screen



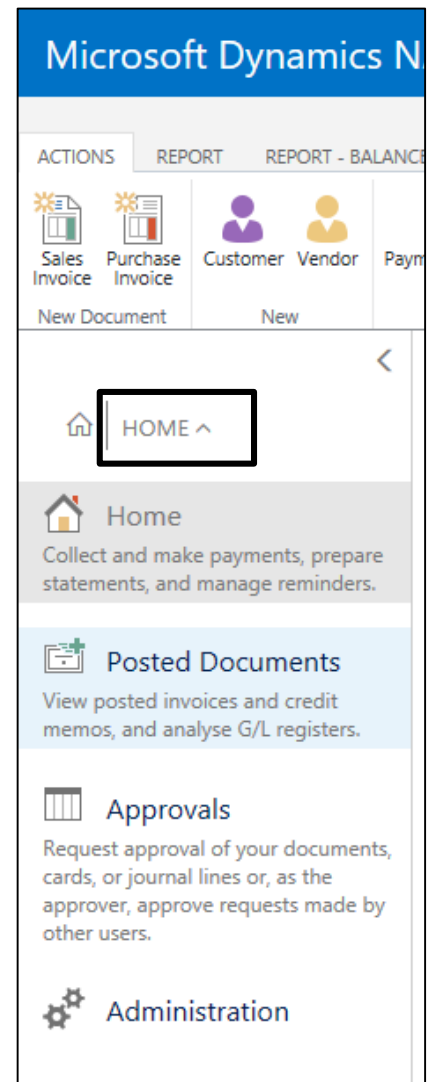
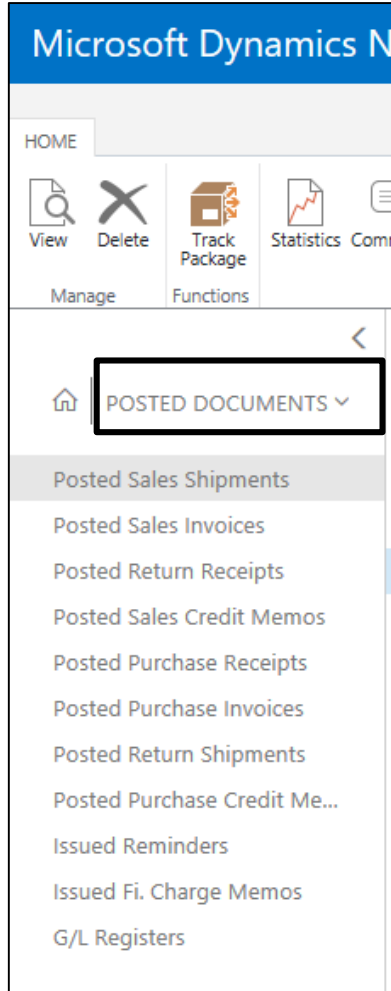
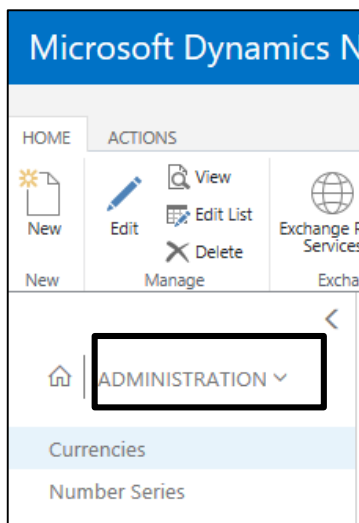
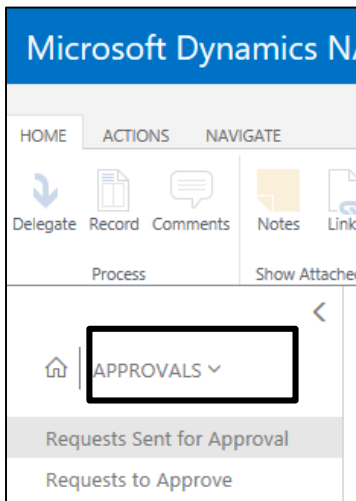
### 3.2.1 Home Button



- Returns the user to the **Role Centre** from any page, irrespective of the Activity Button menu in use
- Works in both **Expanded** and **Collapsed** view of the Navigation Pane

## 3.2.2 Activity Buttons

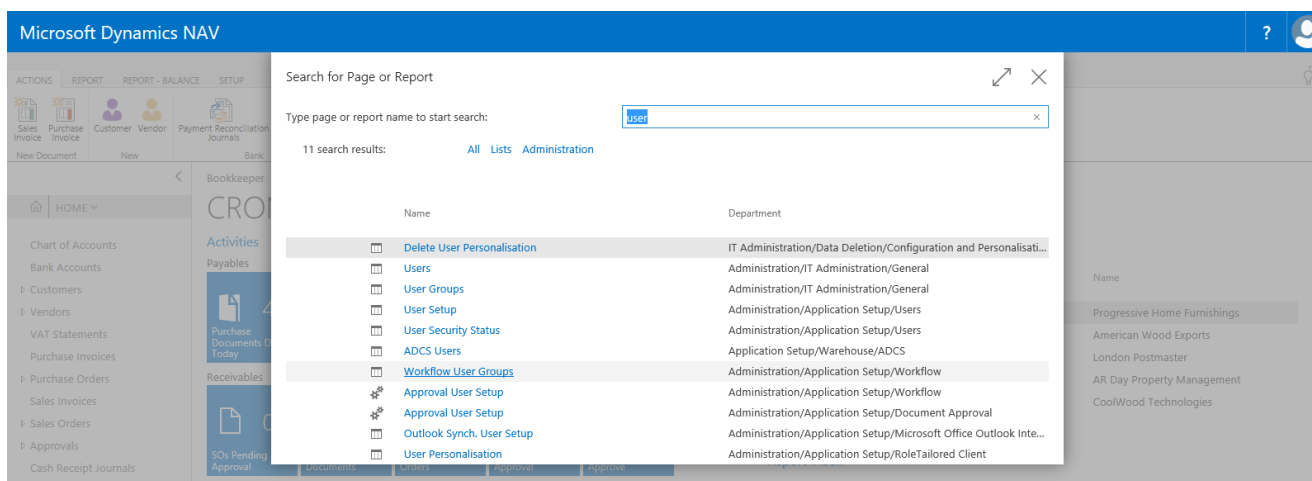
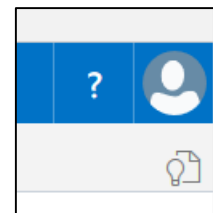
- Can be found in the **Navigation Pane** (in previous versions they were below it)
- Use the **upwards arrow** next to **Home** to alternate between showing the **Activity Buttons** as top level menus or the **list places** contained within them
- When in an **Activity Button menu** other than **Home**, its name will display and the arrow will point downwards



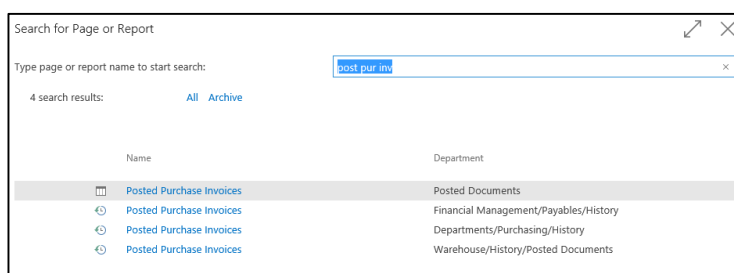
The actual **Activity Buttons** available will vary depending on the **Role Centre** of the user.

### 3.3 Search

- Search for pages that the user has permission to access
- Pages show as a list, with icons showing page type, page name and then location within the Departments structure
- Only needs first few letters of each word in page name ("use pers" will find "user personalisation" easily, or "post pur inv" to find "Posted Purchase Invoices"



- To see a range of options, type a key word, e.g. "purch" will bring up all the pages which refer to purchase in the title
- The double ended arrow will maximise the results page or size it back down
- Keyboard arrow keys can be used to scroll the list up and down



Documents

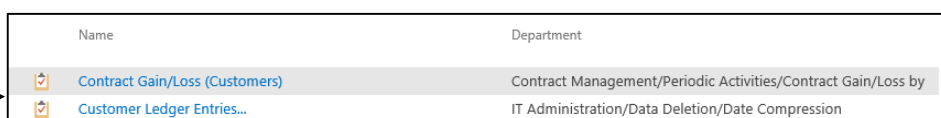
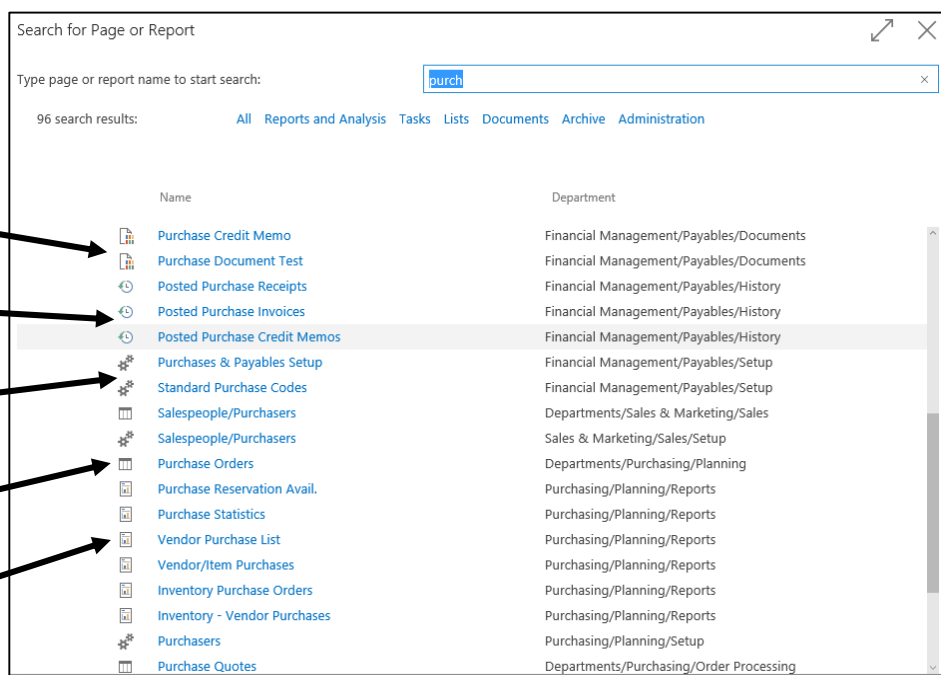
Archives

Administration /  
Setup

List page

Report &  
Analysis

Tasks

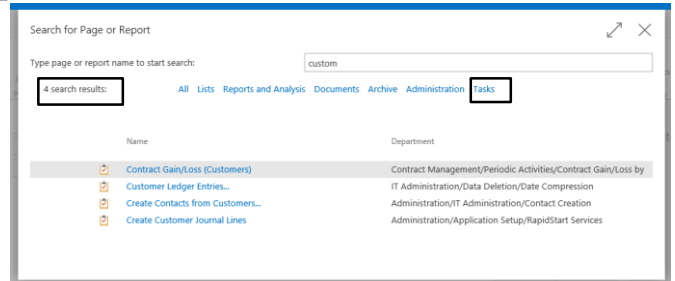
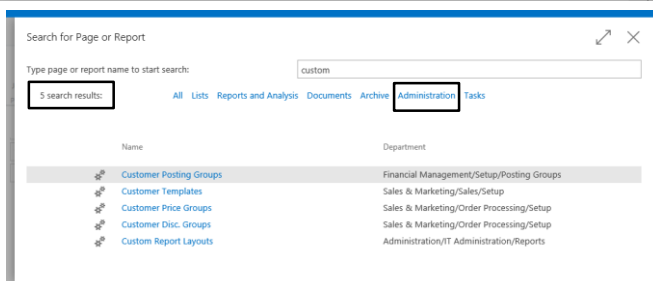
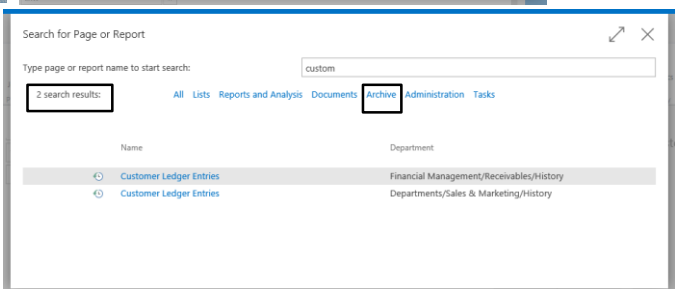
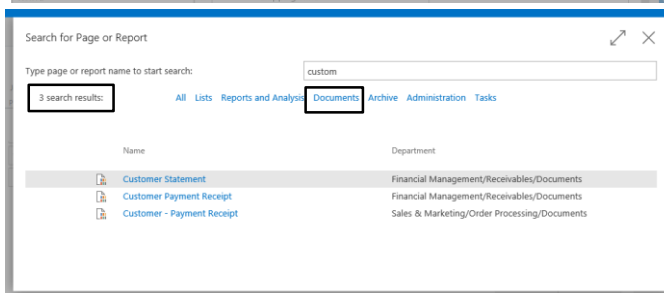
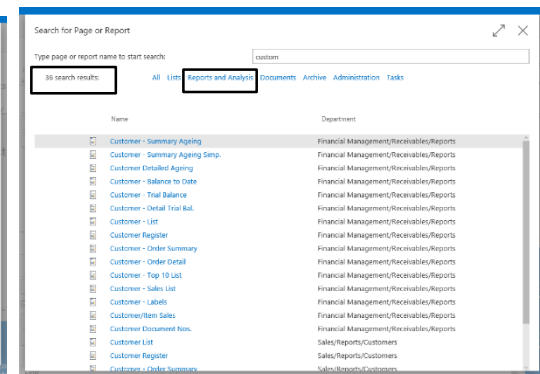
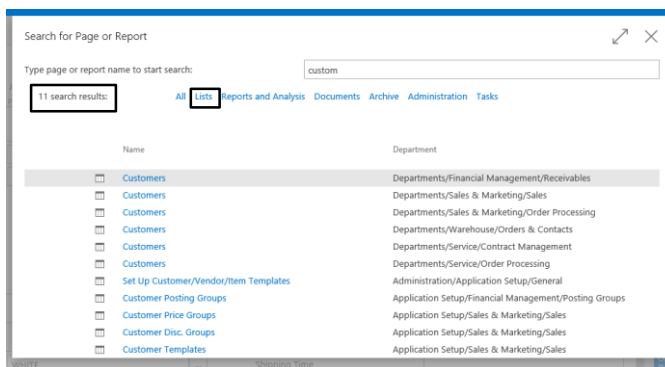
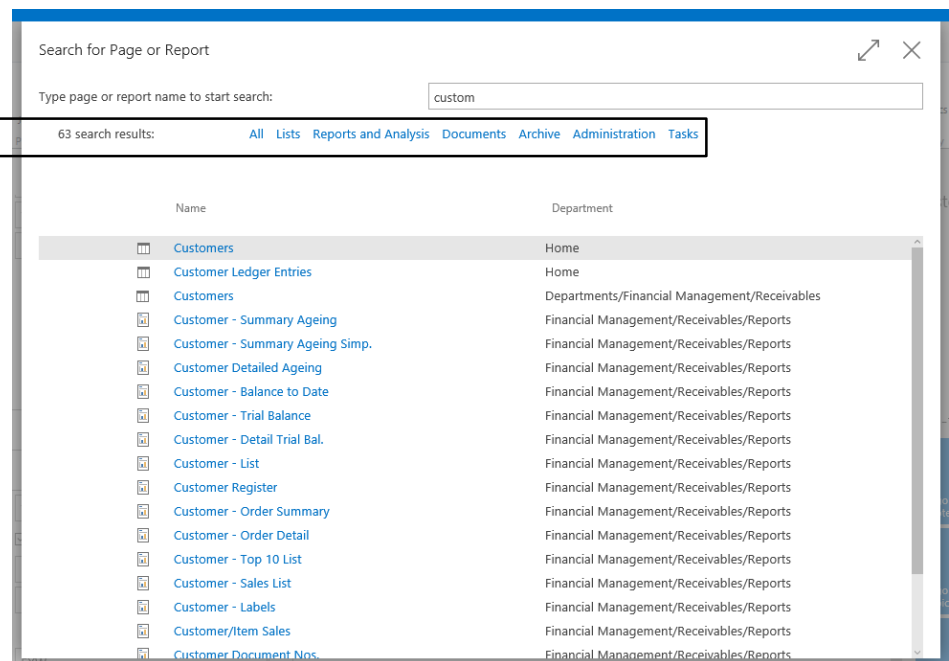




Page search now has a **filter**, to narrow down the results by **page type**.

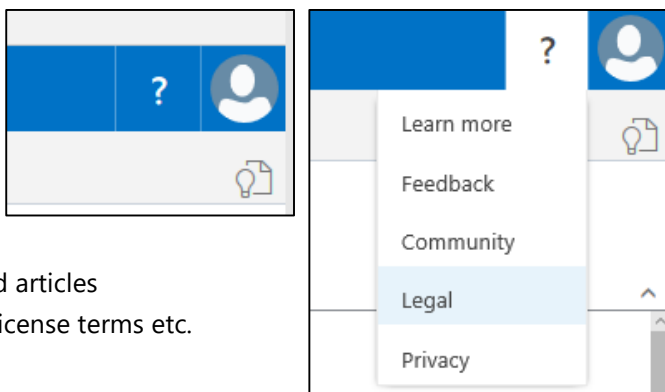
**Number of results found** is shown, with blue links to the right indicating the type of pages found.

Selecting one of these links will filter the list down to display just that type of result, i.e. all the **List pages**, all the **Documents**, all the **Tasks** etc. A total for the results of that type will then be shown.



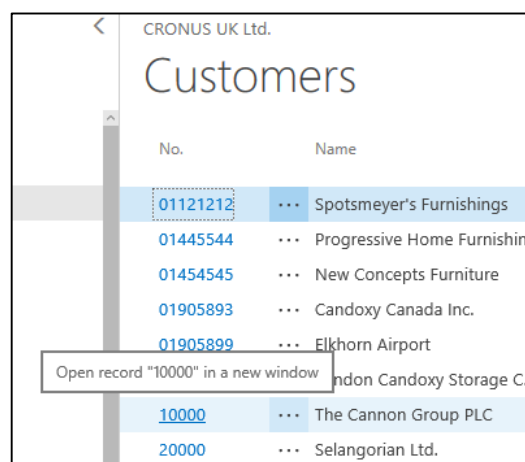
## 3.4 Help

- Click the **Question Mark** to open the help options menu
- Learn More** loads the online help webpage
- Feedback** goes to connect.microsoft.com to allow the user to feed back to Microsoft directly
- Community** gives access to forums, blogs and articles
- Legal & Privacy** have information regarding license terms etc.

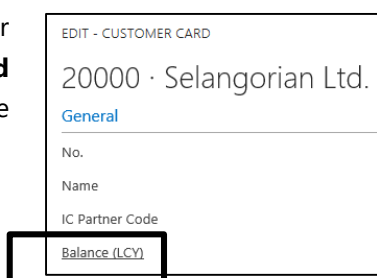


## 3.5 In-application help

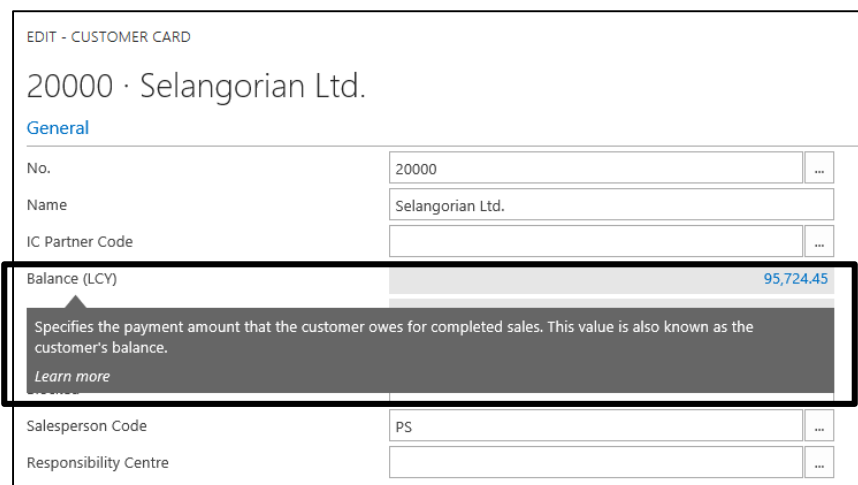
- On a page such as a list page, **tool tips** guide the user



- On a card page for example, **each field underlines** when the mouse hovers over it

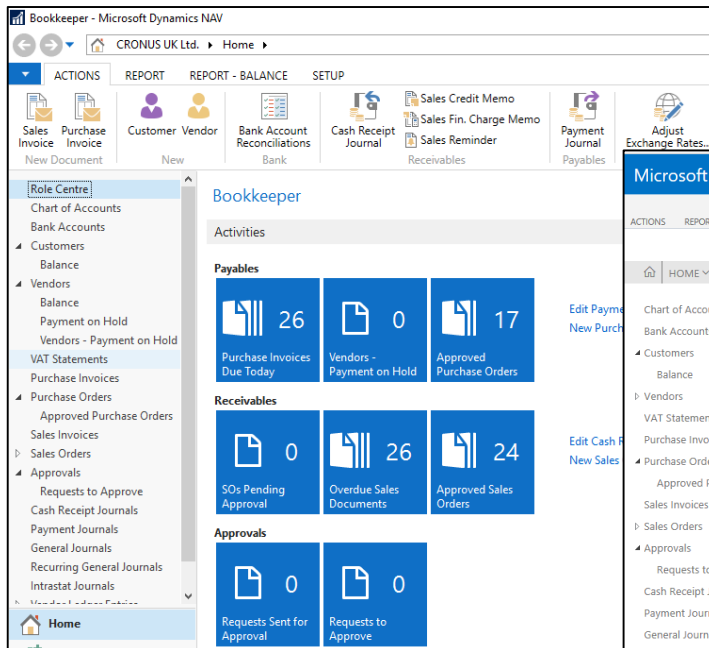


- Clicking the field** reveals an extended tool tip which gives a brief explanation of that field
- Clicking '**Learn More**' will take the user to the dedicated help page within the online help if one exists on that topic, or will load the general online help "Get Started" page



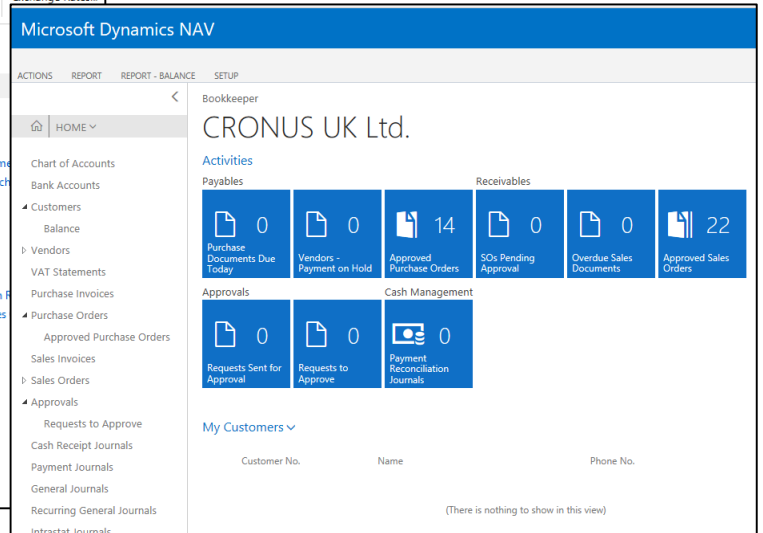
## 3.6 Cues

- **Cues** are live tiles that give a visual overview of the number of outstanding pieces of work of a specific type
- When clicked, a **Cue** takes the user to a filtered view showing those outstanding documents
- Not all **Cues** show in the **Navigation Pane** automatically, to avoid overcrowding and allow more room for user defined **Views**.

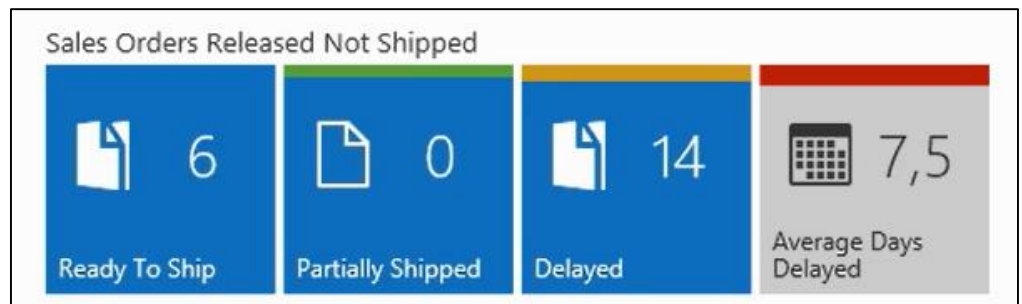


user defined **Views**.

For example, the **Vendors Payments on Hold** cue is now not in the **Navigation Pane**.

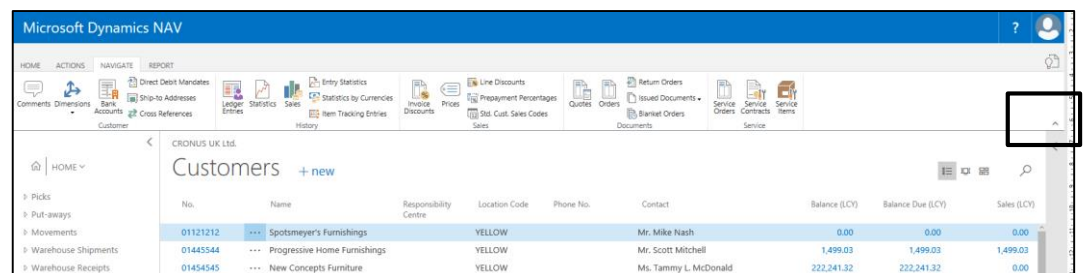
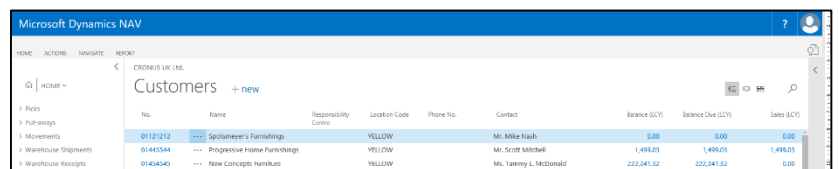


- Images on Cues are now scalable, so they look better on high resolution devices
- Height of the **coloured 'sentiment' band** on the cues varies, to help user with colour blindness differentiate between them
- All improvements to cues also apply to tablet and phone clients



## 3.7 Ribbon

- **Ribbon** is collapsed by default (like in Office 365)
- Clicking a **tab** will expand it
- **Double click to collapse** it, or click the **upward arrow** in the bottom far right corner of the ribbon
- NAV will remember your choice of expanded or collapsed



## 4 My Settings

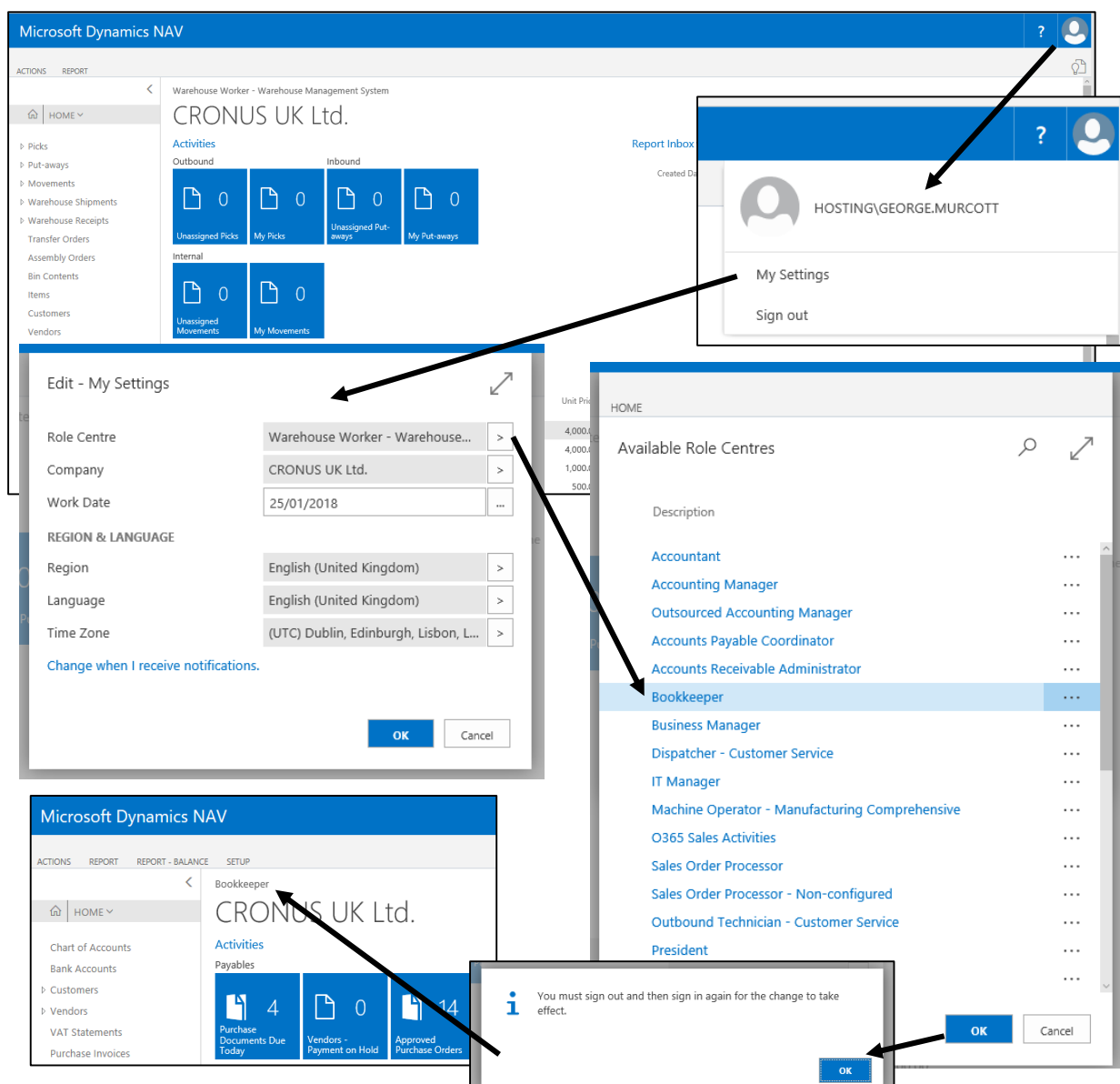
The **My Settings** page gathers together the user definable settings and is a visual link with Office 365. This is fully customisable, however, personalisation can only be done within the Windows Client, but this will then flow through to the user's view in the Web Client (after they **Sign Out** and back in).

- Click the **User** symbol top right to view **MY SETTINGS**, here the **Role Centre**, **Company**, **Work Date**, **Region**, **Language** and **Time Zone** can be set.

### 4.1 Change Role Centre

To change a user's Role Centre, go to the **USER PERSONALISATION** page or **MY SETTINGS** page.

- Click the **User** symbol top right to view **MY SETTINGS**,
- Choose the **Role Centre** menu, choose from the available Role Centres, **OK**, then **Sign Out** and back in

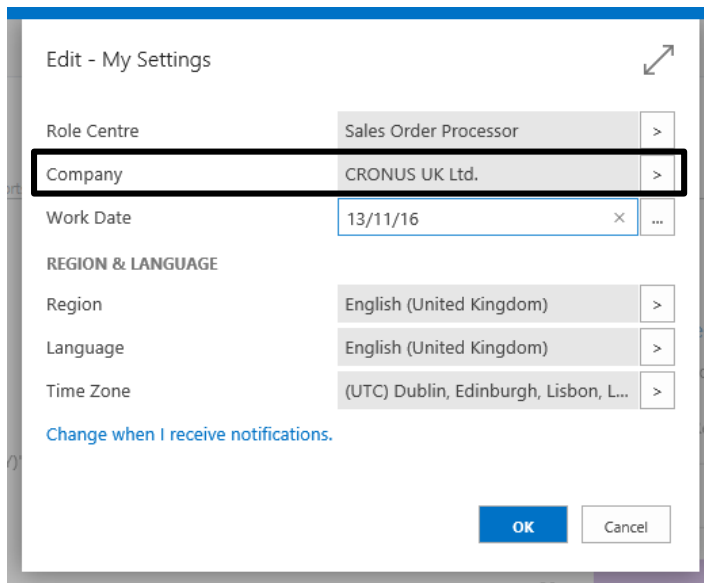


## 4.2 Change Company

This lets the user specify the database company that the user will work in. This requires the user to be granted **Permissions** on that company, otherwise they will not see the other options.

Users must **sign out** and then sign in again for the change to take effect.

- Click the **User** symbol top right to view **MY SETTINGS**



Edit - My Settings

Role Centre: Sales Order Processor

**Company: CRONUS UK Ltd.**

Work Date: 13/11/16

REGION & LANGUAGE

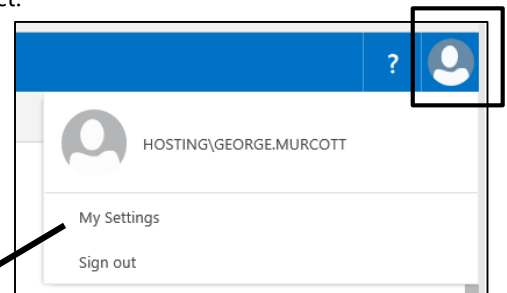
Region: English (United Kingdom)

Language: English (United Kingdom)

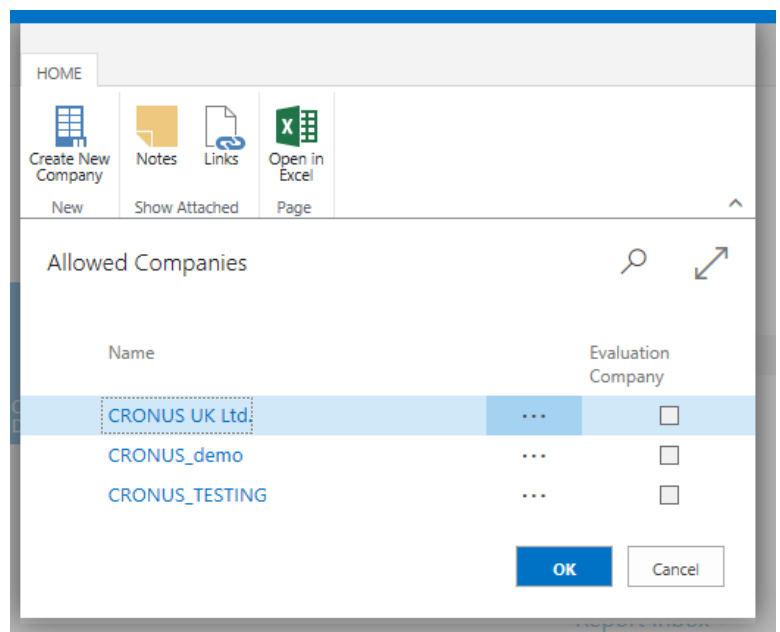
Time Zone: (UTC) Dublin, Edinburgh, Lisbon, L...

[Change when I receive notifications.](#)

OK Cancel



- Choose the **Company** menu
- Choose from the **Allowed Companies**
- OK**, then **Sign Out** and back in



HOME

Create New Company Notes Links Open in Excel

New Show Attached Page

Allowed Companies

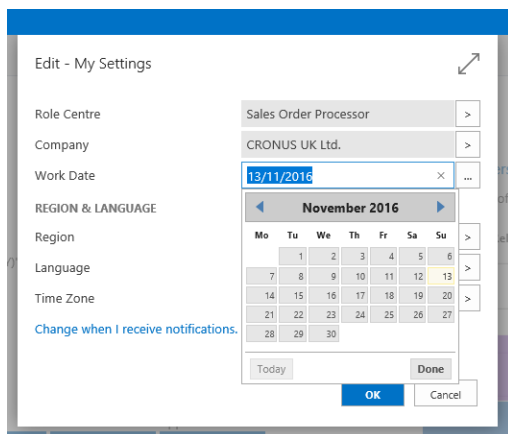
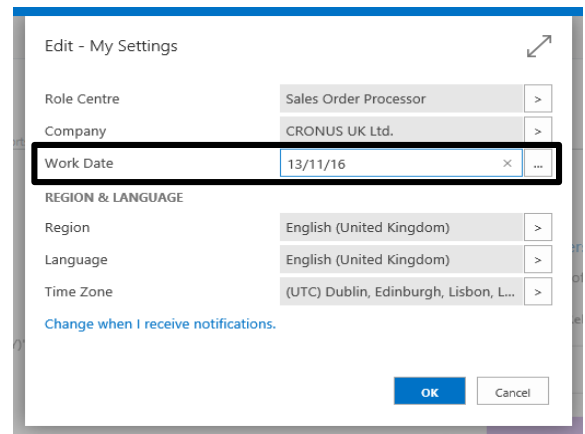
| Name           | Evaluation Company       |
|----------------|--------------------------|
| CRONUS UK Ltd. | <input type="checkbox"/> |
| CRONUS_demo    | <input type="checkbox"/> |
| CRONUS_TESTING | <input type="checkbox"/> |

OK Cancel

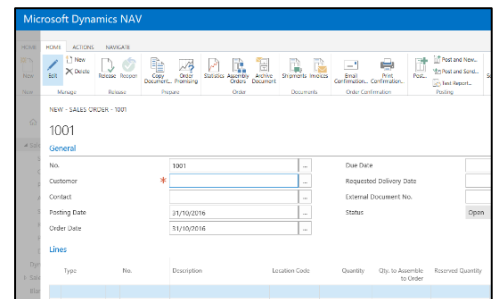
## 4.3 Change Work date

This specifies the date that will be entered on transactions, typically today's date. This affects the date on new transactions as the user creates them.

- Click the **User** symbol top right to view the **MY SETTINGS** page
- Choose **Work Date**
- Use the **Date Picker** to select the desired date (or type the date)
- **Date picker** functionality works well with touch screens, also available in the Phone and Tablet clients



No need to sign out, it has immediate effect, so for example when raising a sales order it will now be done as of 31/10/16.



**Work Date restrictions** are still applied in **User Setup** and in **General Ledger Setup**, to limit the dates that users can set their work date to.

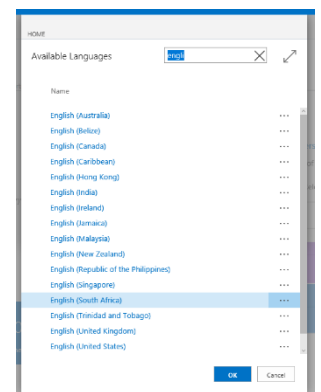
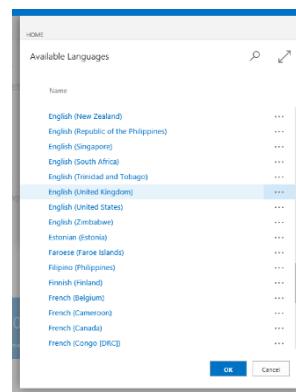
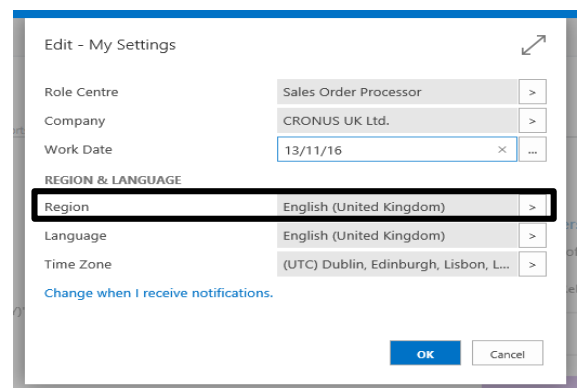
## 4.4 Change Region

Allows the users to select their preferred regionalisation settings.

This specifies the regional settings, such as date and numeric format, on all devices.

You must sign out and then sign in again for the change to take effect.

- Click the **User** symbol top right to view **MY SETTINGS**
- Choose **Region**, choose from the available region/languages, **OK**, then **Sign Out** and back in
- The list can be filtered or simply scrolled up and down

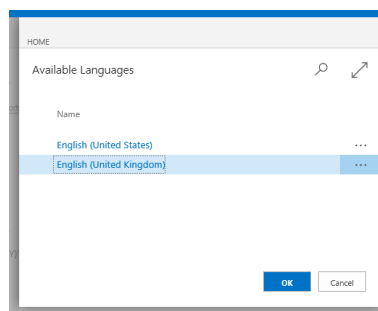
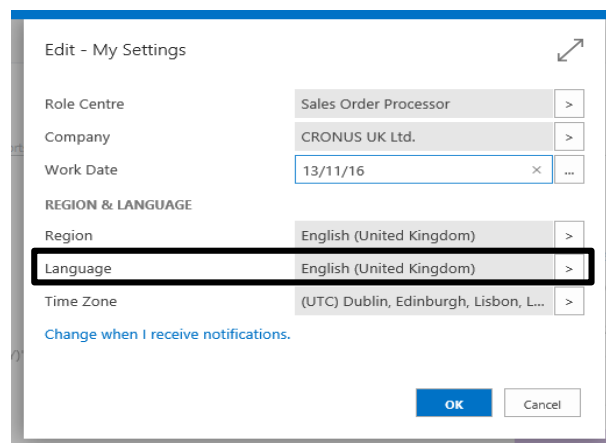
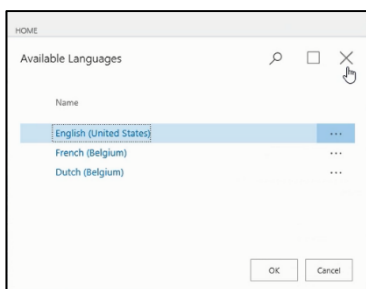


## 4.5 Change Language

Allows the users to select from the languages available under their Dynamics NAV licence.

Specifies the display language, on all devices. You must sign out and then sign in again for the change to take effect.

- Click the **User** symbol top right to view **MY SETTINGS**
- Choose **Language**, choose from the available languages, **OK**, then **Sign Out** and back in

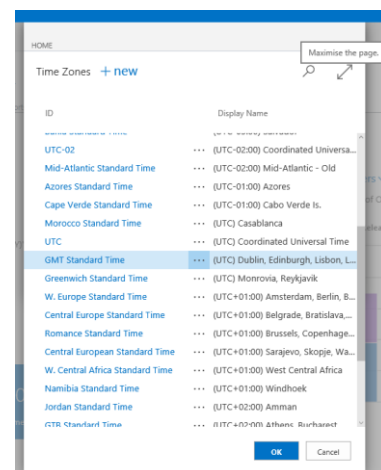
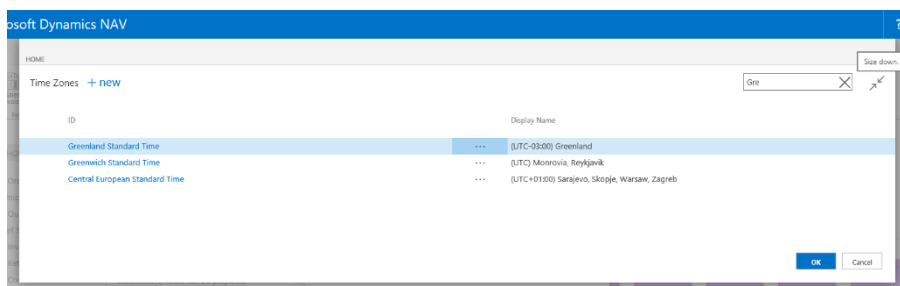
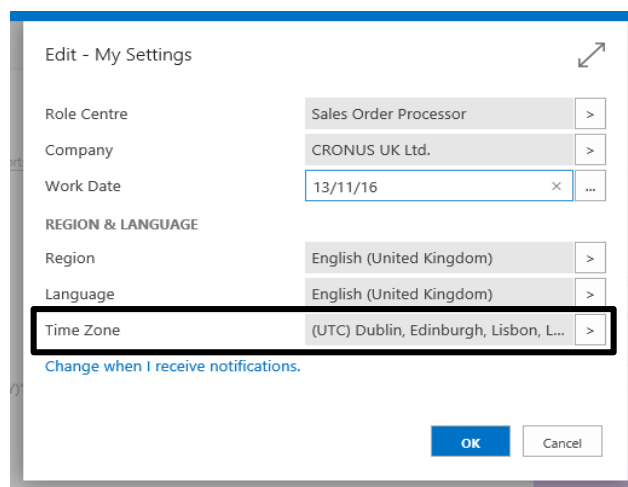


## 4.6 Change Time Zone

Allows the user to specify the time zone to work in.

Users must sign out and then sign in again for the change to take effect.

- Click the **User** symbol top right to view **MY SETTINGS**
- Choose **Time Zone**, choose from the available time zones, **OK**, then **Sign Out** and back in
- The **maximise the page** option maybe helpful to view the full descriptions
- The **search box** offers **filter as you type** to make choosing easier
- **Size down** will return the options list to its default size



## 4.7 Notifications

Dynamics NAV 2017 features smart notifications

These work in context and are designed to warn less experienced users of a possible issue, in the form of discreet tips in the context of the task being done.

For example, when raising a sales order on a customer account that is over its credit limit, a user sees this:

Clicking **Details** shows the user a summary box, with some possible options the user may wish to take.

These are purely advisory and the user can choose whether to follow the advice or not.

Multiple notifications in the same document will display on one line to save space, clicking the down arrow will show each on a separate line.

A user can turn these off individually by unticking the enabled box against a notification.

- Click the **User** symbol top right to view **MY SETTINGS**
- Choose **Change when I receive notifications**, choose to enable or disable the available notifications, then **Close**



## 5 Working with List pages

List pages have many features to make them easy and efficient to work with, such as:

- Vertical scrolling using the arrow keys/touch or scroll wheel
- A “continuous scrolling experience”, which means the program loads records on demand rather than everything up front. This gives better performance when viewing long lists or using slower networks
- “Fetching more data” will appear briefly under last displayed list item, when more records are being retrieved

| No.    | Description              | Type      | Inventory | Subst... Exist | Assem... BOM | Production BOM No. | Routing No. | Base Unit of Measure | Cost is Adjust |
|--------|--------------------------|-----------|-----------|----------------|--------------|--------------------|-------------|----------------------|----------------|
| 1320   | Chain Wheel Front        | Inventory | 100       | No             | No           |                    |             | PCS                  |                |
| 1330   | Chain Wheel Back         | Inventory | 100       | No             | No           |                    |             | PCS                  |                |
| 1400   | Mudguard front           | Inventory | 152       | No             | No           |                    |             | PCS                  |                |
| 1450   | Mudguard back            | Inventory | 152       | No             | No           |                    |             | PCS                  |                |
| 1500   | Lamp                     | Inventory | 152       | No             | No           |                    |             | PCS                  |                |
| 1600   | Bell                     | Inventory | 152       | No             | No           |                    |             | PCS                  |                |
| 1700   | Brake                    | Inventory | 152       | No             | No           | 1700               |             | PCS                  |                |
| 1710   | Hand rear wheel Brake    | Inventory | 200       | No             | No           |                    |             | PCS                  |                |
| 1720   | Hand front wheel Brake   | Inventory | 200       | No             | No           |                    |             | PCS                  |                |
| 1800   | Handlebars               | Inventory | 152       | No             | No           |                    |             | PCS                  |                |
| 1850   | Saddle                   | Inventory | 152       | No             | No           |                    |             | PCS                  |                |
| 1896-S | ATHENS Desk              | Inventory | 254       | No             | No           |                    |             | PCS                  |                |
| 1900   | Frame                    | Inventory | 152       | No             | No           |                    |             | PCS                  |                |
| 1900-S | PARIS Guest Chair, black | Inventory | 254       | No             | No           |                    |             | PCS                  |                |

### 5.1 Viewing the list

**List pages** now have an interesting new range of views that are not all in the **Windows Client**.

A list page can be viewed as:

a **list**,

| No.      | Name                        | Responsibility Centre | Location Code | Phone No. | Contact               | Balance    |
|----------|-----------------------------|-----------------------|---------------|-----------|-----------------------|------------|
| 01121212 | Spotsmeyer's Furnishings    |                       | YELLOW        |           | Mr. Mike Nash         | 0.00       |
| 01445544 | Progressive Home Furnish... |                       | YELLOW        |           | Mr. Scott Mitchell    | 1,499.03   |
| 01454545 | New Concepts Furniture      |                       | YELLOW        |           | Ms. Tammy L. McDonald | 222,241.32 |
| 01905893 | Candoxy Canada Inc.         |                       | YELLOW        |           | Mr. Rob Young         | 0.00       |
| 01905899 | Elkhorn Airport             |                       | YELLOW        |           | Mr. Ryan Danner       | 0.00       |

as a **large tile grid**,

| No.      | Name   | Balance    |
|----------|--|------------|
| 01121212 | Spotsmeyer's Furnishings<br>Mr. Mike Nash      | 0.00       |
| 01445544 | Progressive Home Fur...<br>Mr. Scott Mitchell  | 1,499.03   |
| 01454545 | New Concepts Furni...<br>Ms. Tammy L. McDonald | 222,241.32 |

or a **compact tile grid/brick view**.

- Clicking the **view icon** changes how the records display
- Use arrow keys or mouse to move around the list/grid

| No.      | Name   | Balance    |
|----------|--|------------|
| 01121212 | Spotsmeyer's Furnishings<br>Mr. Mike Nash      | 0.00       |
| 01445544 | Progressive Home Fur...<br>Mr. Scott Mitchell  | 1,499.03   |
| 01454545 | New Concepts Furni...<br>Ms. Tammy L. McDonald | 222,241.32 |
| 01905893 | Candoxy Canada Inc.<br>Mr. Rob Young           | 0.00       |
| 01905899 | Elkhorn Airport<br>Mr. Ryan Danner             | 0.00       |
| 01905902 | London Candoxy Storage C...<br>Mr. John Kane   | 0.00       |

## 5.2 Freeze Panes

List pages with more columns than can be viewed on the screen have a **Freeze Pane** by default, so the first two columns will be fixed, always visible so the user knows which record the information relates to.

Through user personalisation (which must be done in the Windows Client) the position of the freeze pane can be altered.

When scrolling across a List Page with many columns, it snaps one column at a time, so the columns are fully visible.

This screenshot shows the 'Sales Orders' list page in Microsoft Dynamics NAV. The first two columns, 'No.' and 'Sell-to Customer No.', are highlighted with a black box to indicate they are frozen. The table contains multiple rows of sales order data, including order numbers, customer names, and statuses.

| No.    | Sell-to Customer No. | Customer Name              | Status   |
|--------|----------------------|----------------------------|----------|
| 1001   | ...                  | The Cannon Group PLC       | Open     |
| 1002   | ...                  | John Haddock Insurance Co. | Released |
| 101005 | ...                  | MEMA Ljubljana d.o.o.      | Released |
| 101011 | ...                  | Designstudio Grunden       | Released |
| 101013 | ...                  | Englands Kontor GmbH       | Released |
| 101015 | ...                  | Autobuss Mielberg KG       | Released |
| 101016 | ...                  | The Cannon Group PLC       | Released |
| 101017 | ...                  | Selargorian Ltd.           | Open     |
| 101018 | ...                  | New Concepts Furniture     | Released |
| 101019 | ...                  | Candoy Nederland BV        | Released |
| 101020 | ...                  | Lovina Contractors         | Open     |
| 101022 | ...                  | MEMA Ljubljana d.o.o.      | Open     |
| 104001 | ...                  | John Haddock Insurance Co. | Open     |
| 104002 | ...                  | The Cannon Group PLC       | Open     |
| 104004 | ...                  | Deerfield Graphics Company | Open     |

This screenshot shows the 'Sales Orders' list page with the first four columns frozen: 'No.', 'Sell-to Customer No.', 'Bill-to Contact', and 'Currency Code'. The table displays sales order data with additional contact and currency information.

| No.    | Sell-to Customer No. | Bill-to Contact       | Currency Code |
|--------|----------------------|-----------------------|---------------|
| 1001   | ...                  | The Cannon Group PLC  | EUR           |
| 1002   | ...                  | Mr. Andy Teal         | EUR           |
| 101005 | ...                  | Miss Patricia Doyle   | EUR           |
| 101009 | ...                  | g. Bostjan Lukan      | EUR           |
| 101011 | ...                  | Fr. Brigitte Verghael | EUR           |
| 101013 | ...                  | Englands Kontor GmbH  | EUR           |
| 101015 | ...                  | Autobuss Mielberg KG  | EUR           |
| 101016 | ...                  | The Cannon Group PLC  | EUR           |
| 101017 | ...                  | Mr. Mark McArthur     | EUR           |
| 101018 | ...                  | Ms. Tammy L. McDonald | USD           |
| 101019 | ...                  | Rob Verhoof           | EUR           |
| 101020 | ...                  | Hans Visser           | EUR           |
| 101022 | ...                  | g. Bostjan Lukan      | EUR           |
| 104001 | ...                  | Miss Patricia Doyle   | EUR           |
| 104002 | ...                  | Mr. Andy Teal         | EUR           |
| 104004 | ...                  | Mr. Mark McArthur     | EUR           |
| 104004 | ...                  | Mr. Kevin Wright      | EUR           |

This screenshot shows the 'Sales Orders' list page with the first six columns frozen: 'No.', 'Sell-to Customer No.', 'Bill-to Contact', 'Currency Code', 'Document No.', and 'Posting Date'. The table displays sales order data with document and posting information.

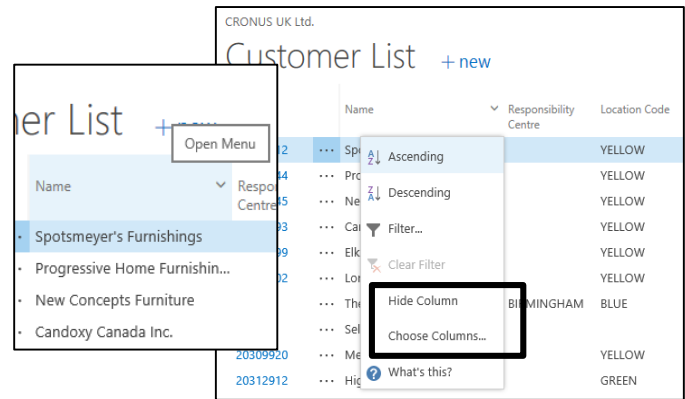
| No.    | Sell-to Customer No. | Bill-to Contact       | Currency Code | Document No. | Posting Date |
|--------|----------------------|-----------------------|---------------|--------------|--------------|
| 1001   | ...                  | The Cannon Group PLC  | EUR           | 0            | 31/10/2016   |
| 1002   | ...                  | Mr. Andy Teal         | EUR           | 2 SALES      | 25/01/2018   |
| 101005 | ...                  | Miss Patricia Doyle   | EUR           | 0            | 11/01/2018   |
| 101009 | ...                  | g. Bostjan Lukan      | EUR           | 2 SALES      | 19/01/2018   |
| 101011 | ...                  | Fr. Brigitte Verghael | EUR           | 0            | 12/01/2018   |
| 101013 | ...                  | Englands Kontor GmbH  | EUR           | 2 SALES      | 18/01/2018   |
| 101015 | ...                  | Autobuss Mielberg KG  | EUR           | 0            | 21/01/2018   |
| 101016 | ...                  | The Cannon Group PLC  | EUR           | 2 SALES      | 25/01/2018   |
| 101017 | ...                  | Mr. Mark McArthur     | EUR           | 0            | 26/01/2018   |
| 101018 | ...                  | Ms. Tammy L. McDonald | USD           | 0 SALES      | 26/01/2018   |
| 101019 | ...                  | Rob Verhoof           | EUR           | 0 SALES      | 22/01/2018   |
| 101020 | ...                  | Hans Visser           | EUR           | 0 SALES      | 26/01/2018   |
| 101022 | ...                  | g. Bostjan Lukan      | EUR           | 0 SALES      | 04/02/2018   |
| 104001 | ...                  | Miss Patricia Doyle   | EUR           | 2 SALES      | 21/02/2018   |
| 104002 | ...                  | Mr. Andy Teal         | EUR           | 0 SALES      | 17/01/2018   |
| 104004 | ...                  | Mr. Mark McArthur     | EUR           | 0 SALES      | 17/01/2018   |
| 104004 | ...                  | Mr. Kevin Wright      | EUR           | 0 SALES      | 17/01/2018   |

## 5.3 Choose Columns

Users can choose which columns display on a list page within the Web client.

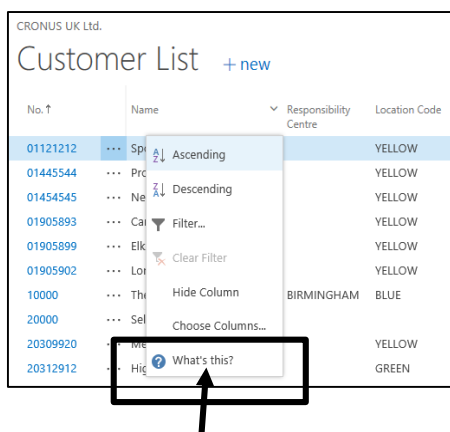
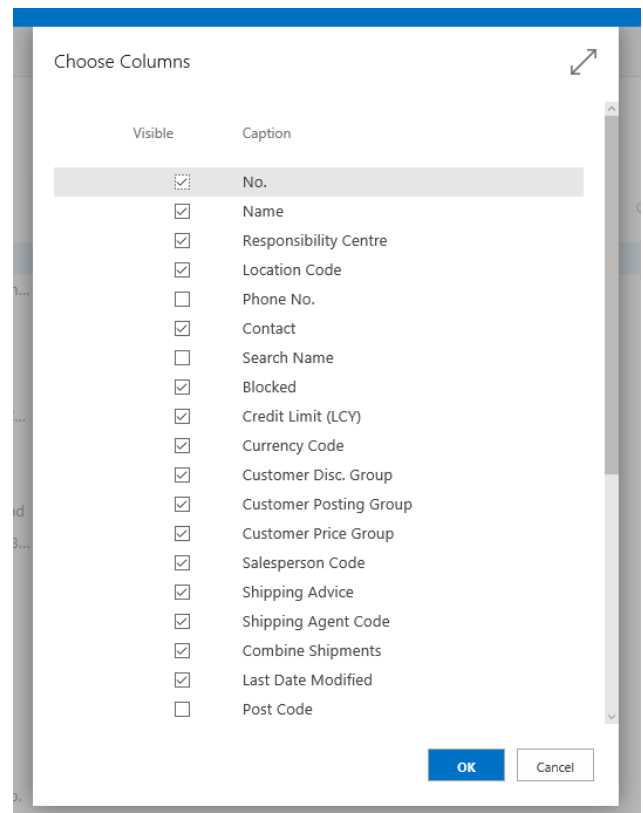
Hovering over a column will show the Tooltip for the arrow which will open the **menu** (right clicking also does this).

**Hide Column** will hide the specific column that the user clicked on to open the menu.

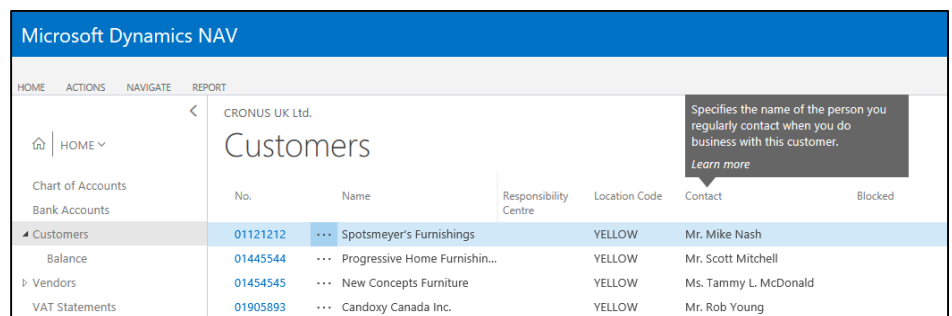


**Choose Columns** will allow the user to turn visibility on or off for multiple columns from those available.

The user can only choose from the list of available columns.



Choosing the **"What's This?"** option will show the user the extended tooltip help that explains the use of that field/column. There is also an option to **"Learn More"** and go to the online help pages.



## 5.4 Fact Boxes

- FactBoxes give summary information regarding a record on a list page
- As the user moves from record to record (row to row / tile to tile), the FactBoxes will update
- The **Sell-to Customer Sales History FactBox** has clickable tiles that lead to a filtered view of the relevant documents for that customer
- The **Customer Statistics FactBox** has key account information, shown as **FlowFields** (in blue) these are also clickable and lead to a filtered view of the entries that make up that figure
- The **FactBox Pane** can be collapsed to give more room on screen, using the arrow

The screenshot shows the Microsoft Dynamics NAV 2017 interface. The main window displays the 'Customers' list page for 'CRONUS UK LTD.'. The FactBox pane on the right is expanded, showing the 'Sell-to Customer Sales History' and 'Customer Statistics'. Arrows indicate the collapse and expand actions.

The detailed view shows the FactBoxes and their corresponding data tables. The Sell-to Customer Sales History FactBox is shown with its tiles and the corresponding table view. The Customer Statistics FactBox is shown with its tiles and the corresponding table view.

**Sell-to Customer Sales History**

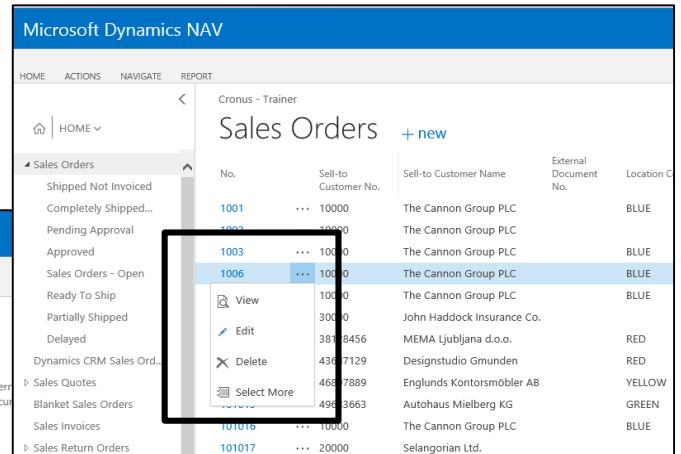
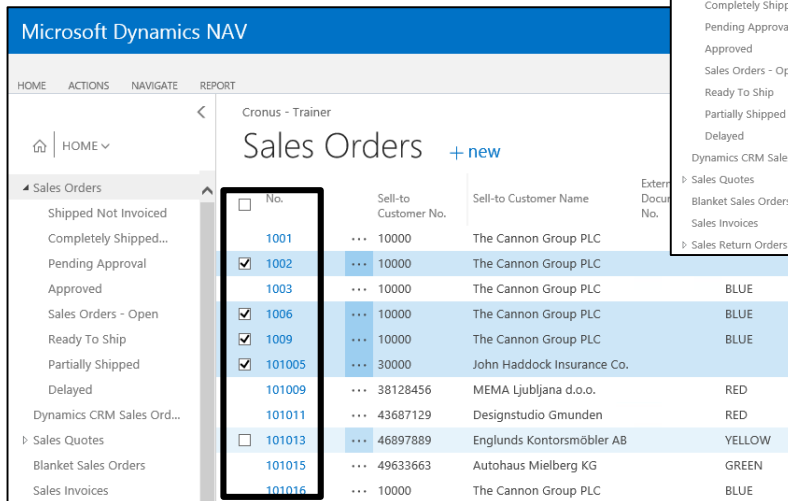
| No.    | Sell-to Customer No. | Sell-to Customer Name | External Document No. | Location Code | Assigned User ID | Document Date | Status   | Compl. Shipped | Amount   | Amount Includ V |
|--------|----------------------|-----------------------|-----------------------|---------------|------------------|---------------|----------|----------------|----------|-----------------|
| 101017 | 20000                | Selangorian Ltd.      |                       |               |                  | 26/01/2018    | Open     | No             | 1,109.07 | 1,330           |
| 104002 | 20000                | Selangorian Ltd.      |                       |               |                  | 17/01/2018    | Open     | No             | 2,498.00 | 2,997           |
| 104007 | 20000                | Selangorian Ltd.      |                       |               |                  | 17/01/2018    | Open     | No             | 2,632.00 | 3,158           |
| 104012 | 20000                | Selangorian Ltd.      |                       |               |                  | 17/01/2018    | Released | No             | 1,242.00 | 1,490           |

**Customer Statistics**

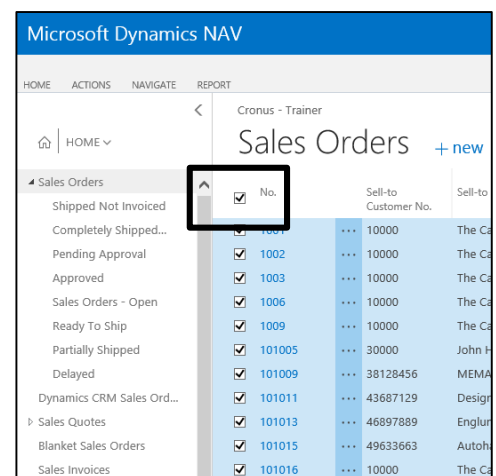
| Posting Date | Document Type | Document No. | Customer No. | Message to Recipient | Description                | Currency Code | Original Amount | Amount    |
|--------------|---------------|--------------|--------------|----------------------|----------------------------|---------------|-----------------|-----------|
| 22/01/2018   | Invoice       | 103002       | 20000        |                      | Invoice 103002             |               | 6,654.88        | 6,654.88  |
| 22/01/2018   | Invoice       | 103024       | 20000        |                      | Order 101007               |               | 1,099.51        | 1,099.51  |
| 16/01/2018   | Invoice       | 103019       | 20000        |                      | Order 101012               |               | 207.19          | 207.19    |
| 14/01/2018   | Invoice       | 103018       | 20000        |                      | Order 101004               |               | 755.90          | 755.90    |
| 31/12/2017   | Invoice       | 00-8         | 20000        |                      | Opening Entries, Customers |               | 50,778.50       | 50,778.50 |
| 31/12/2017   | Invoice       | 00-14        | 20000        |                      | Opening Entries, Customers |               | 38,083.88       | 38,083.88 |

## 5.5 Selecting multiple items

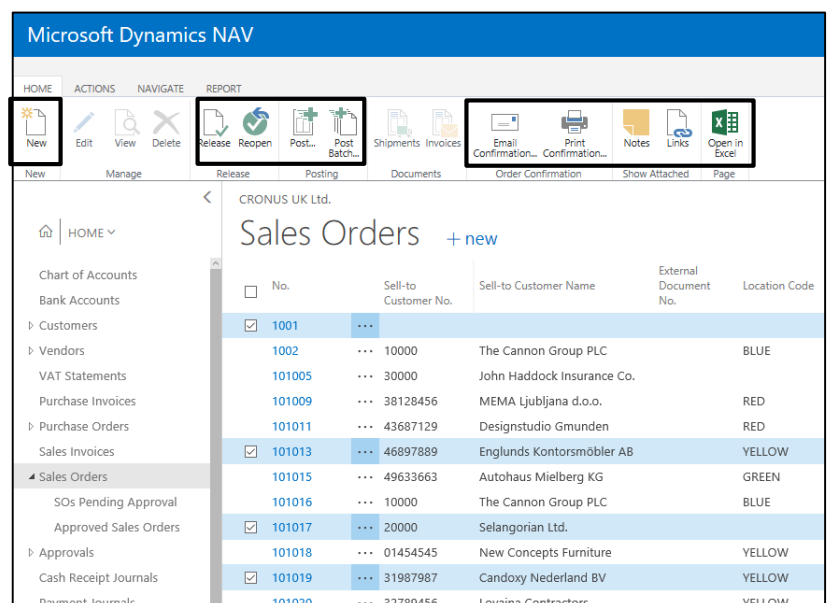
- To select more than one item in a list view, you first need to left click one of the lines and choose **"Select More"**
- You can then select the required records



- Or tick the top box to select all the records



When selecting multiple records, only certain functions are available from the ribbon, others are greyed out (only the ones that can be applied to multiple records will be available).



## 5.6 Sorting a List page

- To sort a list page, click the column name you wish to sort by, choose **Ascending** or **Descending**
- The sort is then applied, the direction of sort is shown above the column with an upwards arrow for ascending and a downwards arrow for descending
- Clicking the column name again will reverse the sort order
- Clicking the **open menu** on the column allows a choice of **Ascending** or **Descending**

CRONUS UK Ltd.

Customer List + new

| No.      | Name                  |
|----------|-----------------------|
| 44180220 | Afrifield Corporation |
| 32656565 | Antarctcopy           |
| 49633663 | Autohaus Mielberg KG  |
| 49525252 | Beef House            |
| 35122112 | Bilabankinn           |
| 60000    | Blanemark Hifi Shop   |
| 42147258 | BYT-KOMPLET s.r.o.    |
| 01905893 | Candoxy Canada Inc.   |

Customer List + new

Open Menu

| Name                          | Responsibility Centre |
|-------------------------------|-----------------------|
| Spotsmeyer's Furnishings      |                       |
| Progressive Home Furnishin... |                       |
| New Concepts Furniture        |                       |
| Candoxy Canada Inc.           |                       |

CRONUS UK Ltd.

Customer List + new

| No. ↑    | Name   | Responsibility Centre | Location Code |
|----------|--------|-----------------------|---------------|
| 01121212 | Sp...  |                       | YELLOW        |
| 01445544 | Pro... |                       | YELLOW        |
| 01454545 | Ne...  |                       | YELLOW        |
| 01905893 | Ca...  |                       | YELLOW        |
| 01905899 | Elk... |                       | YELLOW        |
| 01905902 | Lo...  |                       | YELLOW        |
| 10000    | Th...  | BIRMINGHAM            | BLUE          |
|          | Se...  |                       | YELLOW        |
|          | Me...  |                       | YELLOW        |
|          | Hi...  |                       | GREEN         |

Ascending  
Descending  
Filter...  
Clear Filter  
Hide Column  
Choose Columns...  
What's this?

## 5.7 Date Picker

The **Date Picker** can be used on date fields in editable lists, such as the **Planned Delivery Date** on the lines of a sales order.

This works well on touch screens.

EDIT - SALES ORDER - 101017 - SELANGORIAN LTD.

|                       |                  |                         |            |
|-----------------------|------------------|-------------------------|------------|
| Sell-to Customer No.  | 20000            | Document Date           | 27-01-2017 |
| Sell-to Customer Name | Selangorian Ltd. | Requested Delivery Date |            |
| Sell-to City          | Coventry         | External Document No.   |            |
| Posting Date          | 27-01-2017       | Salesperson Code        | PS         |
| Order Date            | 27-01-2017       | Status                  | Open       |

Lines

| Type | No.    | Qty. Assigned | Planned Deliv. Date | Planned Deliv. Date | Shipment Date | Drop Shipm | Purc Code |
|------|--------|---------------|---------------------|---------------------|---------------|------------|-----------|
| Item | 1928-W |               | 28-01-2017          | 28-01-2017          | 27-01-2017    |            |           |
| Item | 1964-W |               | 28-01-2017          | 28-01-2017          | 27-01-2017    |            |           |
| Item | 1976-W |               | 28-01-2017          | 28-01-2017          | 27-01-2017    |            |           |

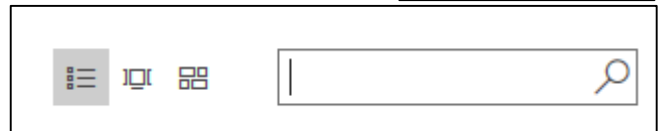
January 2017

| Mo | Tu | We | Th | Fr | Sa | Su |
|----|----|----|----|----|----|----|
|    |    |    |    |    |    | 1  |
| 2  | 3  | 4  | 5  | 6  | 7  | 8  |
| 9  | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 31 |    |    |    |    |    |

Today Done

## 5.8 Searching (filtering) on a List Page

- **Search across all columns** – means users can enter text to be searched for without specifying which column it should be in. The system will display all records that feature the text in any of the visible columns
- Click the **magnifying glass** on a list page to expand the search box
- Search does not need telling what field you wish to search on, i.e. on the sales orders list page, typing 10000 makes it filter to just the records relating to customer number 10000



Microsoft Dynamics NAV

HOME ACTIONS NAVIGATE REPORT

Cronus - Trainer

Sales Orders + new

| No.    | Sell-to Customer No. | Sell-to Customer Name | External Document No. | Location Code | Assigned User ID | Status   | Salesperson Code | Campaign |
|--------|----------------------|-----------------------|-----------------------|---------------|------------------|----------|------------------|----------|
| 1001   | 10000                | The Cannon Group PLC  |                       | BLUE          |                  | Open     | PS               |          |
| 1002   | 10000                | The Cannon Group PLC  |                       | BLUE          |                  | Open     | PS               |          |
| 1003   | 10000                | The Cannon Group PLC  |                       | BLUE          |                  | Open     | PS               |          |
| 1006   | 10000                | The Cannon Group PLC  |                       | BLUE          |                  | Open     | PS               |          |
| 1009   | 10000                | The Cannon Group PLC  |                       | BLUE          |                  | Open     | PS               |          |
| 101016 | 10000                | The Cannon Group PLC  |                       | BLUE          |                  | Released | PS               |          |
| 104001 | 10000                | The Cannon Group PLC  |                       | BLUE          |                  | Open     | PS               |          |
| 104006 | 10000                | The Cannon Group PLC  |                       | BLUE          |                  | Open     | PS               |          |
| 104011 | 10000                | The Cannon Group PLC  |                       | BLUE          |                  | Released | PS               |          |

The search does a quick filter but over all of the visible columns. Just like in the Windows client, this quick filter is actually a case insensitive wildcard filter.

For example, entering "ell" (part of the word **Yellow**, as in the Yellow warehouse location) will produce a result that

includes all of the **Yellow** location records and one of the **Green** location records, due to the contact being called **Darrell**.

The search criteria was actually **@\*ell\*** (@ means case insensitive, \* means any character – see **Appendix B** for more on filter criteria).

CRONUS UK Ltd.

Customers

| No.      | Name                            | Responsibility Centre | Location Code | Contact ↓                    | Blocked | Credit Limit (LCY) | Currency Code |
|----------|---------------------------------|-----------------------|---------------|------------------------------|---------|--------------------|---------------|
| 31987987 | Candoxy Nederland BV            |                       | YELLOW        | Rob Verhoff                  |         | 0.00               | EUR           |
| 35451236 | Gagn & Gaman                    |                       | YELLOW        | Ragnheidur K. Gudmundsdottir |         | 895.59             | ISK           |
| 01454545 | New Concepts Furniture          |                       | YELLOW        | Ms. Tammy L. McDonald        |         | 0.00               | USD           |
| 20339921 | TraxTonic Sdn Bhd               |                       | YELLOW        | Mrs. Rubina Usman            |         | 0.00               | MYR           |
| 20309920 | Metatorad Malaysia Sdn Bhd      |                       | YELLOW        | Mrs. Azleen Samat            |         | 0.00               | MYR           |
| 01445544 | Progressive Home Furnishin...   |                       | YELLOW        | Mr. Scott Mitchell           |         | 0.00               | USD           |
| 01905899 | Elkhorn Airport                 |                       | YELLOW        | Mr. Ryan Danner              |         | 0.00               | CAD           |
| 01905893 | Candoxy Canada Inc.             |                       | YELLOW        | Mr. Rob Young                |         | 0.00               | CAD           |
| 27321782 | Karoo Supermarkets              |                       | YELLOW        | Mr. Pieter Wycoff            |         | 0.00               | ZAR           |
| 01121212 | Spotsmeyer's Furnishings        |                       | YELLOW        | Mr. Mike Nash                |         | 0.00               | USD           |
| 20312912 | Highlights Electronics Sdn B... |                       | GREEN         | Mr. Mark Darrell Boland      |         | 0.00               | MYR           |
| 40000    | Deerfield Graphics Company      |                       | YELLOW        | Mr. Kevin Wright             |         | 0.00               |               |
| 01905902 | London Candoxy Storage C...     |                       | YELLOW        | Mr. John Kane                |         | 0.00               | CAD           |



**Search as you type function** means records will be narrowed down as the user types more in the search box.

So, "Chai" produces these results:

Microsoft Dynamics NAV

VIEW - ITEM LIST + new

Search box: chai

| No.    | Description                     | Type      | Inventory | Substi...<br>Exist | Assem...<br>BOM | Production<br>BOM No. | Routing No. | Base Unit of<br>Measure | Cost<br>is<br>Adjust                | Unit Cost |
|--------|---------------------------------|-----------|-----------|--------------------|-----------------|-----------------------|-------------|-------------------------|-------------------------------------|-----------|
| 1300   | ... Chain Assy                  | Inventory | 152       | No                 | No              | 1300                  |             | PCS                     | <input type="checkbox"/>            | 13.1565   |
| 1310   | ... Chain                       | Inventory | 100       | No                 | No              |                       |             | PCS                     | <input checked="" type="checkbox"/> | 1.99      |
| 1320   | ... Chain Wheel Front           | Inventory | 100       | No                 | No              |                       |             | PCS                     | <input checked="" type="checkbox"/> | 4.66      |
| 1330   | ... Chain Wheel Back            | Inventory | 100       | No                 | No              |                       |             | PCS                     | <input checked="" type="checkbox"/> | 5.88      |
| 1900-S | ... PARIS Guest Chair, black    | Inventory | 299       | No                 | No              |                       |             | PCS                     | <input type="checkbox"/>            | 97.50     |
| 1908-S | ... LONDON Swivel Chair, blue   | Inventory | 305       | No                 | No              |                       |             | PCS                     | <input type="checkbox"/>            | 96.10     |
| 1936-S | ... BERLIN Guest Chair, yellow  | Inventory | 136       | No                 | No              |                       |             | PCS                     | <input type="checkbox"/>            | 97.50     |
| 1960-S | ... ROME Guest Chair, green     | Inventory | 177       | No                 | No              |                       |             | PCS                     | <input type="checkbox"/>            | 97.50     |
| 1964-S | ... TOKYO Guest Chair, blue     | Inventory | 113       | No                 | No              |                       |             | PCS                     | <input type="checkbox"/>            | 97.50     |
| 1968-S | ... MEXICO Swivel Chair, black  | Inventory | 265       | Yes                | No              |                       |             | PCS                     | <input type="checkbox"/>            | 96.10     |
| 1972-S | ... MUNICH Swivel Chair, yellow | Inventory | 122       | No                 | No              |                       |             | PCS                     | <input type="checkbox"/>            | 96.10     |
| 1980-S | ... MOSCOW Swivel Chair, red    | Inventory | 100       | Yes                | No              |                       |             | PCS                     | <input type="checkbox"/>            | 96.10     |
| 1988-S | ... SEOUL Guest Chair, red      | Inventory | 167       | Yes                | No              |                       |             | PCS                     | <input checked="" type="checkbox"/> | 97.50     |
| 2000-S | ... SYDNEY Swivel Chair, green  | Inventory | 163       | No                 | No              |                       |             | PCS                     | <input checked="" type="checkbox"/> | 96.10     |

Whereas continuing to type so it becomes "chair" gives this:

Microsoft Dynamics NAV

VIEW - ITEM LIST + new

Search box: chair

| No.    | Description                     | Type      | Inventory | Substi...<br>Exist | Assem...<br>BOM | Production<br>BOM No. | Routing No. | Base Unit of<br>Measure | Cost<br>is<br>Adjust                | Unit Cost |
|--------|---------------------------------|-----------|-----------|--------------------|-----------------|-----------------------|-------------|-------------------------|-------------------------------------|-----------|
| 1900-S | ... PARIS Guest Chair, black    | Inventory | 299       | No                 | No              |                       |             | PCS                     | <input type="checkbox"/>            | 97.50     |
| 1908-S | ... LONDON Swivel Chair, blue   | Inventory | 305       | No                 | No              |                       |             | PCS                     | <input type="checkbox"/>            | 96.10     |
| 1936-S | ... BERLIN Guest Chair, yellow  | Inventory | 136       | No                 | No              |                       |             | PCS                     | <input type="checkbox"/>            | 97.50     |
| 1960-S | ... ROME Guest Chair, green     | Inventory | 177       | No                 | No              |                       |             | PCS                     | <input type="checkbox"/>            | 97.50     |
| 1964-S | ... TOKYO Guest Chair, blue     | Inventory | 113       | No                 | No              |                       |             | PCS                     | <input type="checkbox"/>            | 97.50     |
| 1968-S | ... MEXICO Swivel Chair, black  | Inventory | 265       | Yes                | No              |                       |             | PCS                     | <input type="checkbox"/>            | 96.10     |
| 1972-S | ... MUNICH Swivel Chair, yellow | Inventory | 122       | No                 | No              |                       |             | PCS                     | <input type="checkbox"/>            | 96.10     |
| 1980-S | ... MOSCOW Swivel Chair, red    | Inventory | 100       | Yes                | No              |                       |             | PCS                     | <input type="checkbox"/>            | 96.10     |
| 1988-S | ... SEOUL Guest Chair, red      | Inventory | 167       | Yes                | No              |                       |             | PCS                     | <input checked="" type="checkbox"/> | 97.50     |
| 2000-S | ... SYDNEY Swivel Chair, green  | Inventory | 163       | No                 | No              |                       |             | PCS                     | <input checked="" type="checkbox"/> | 96.10     |

If the user wishes to combine search terms this can be done with a pipe ("|" - press Shift and backslash to insert it) to give an either/or search (but you do need to include the wildcard \* if you do not type the full text).

Microsoft Dynamics NAV

VIEW - ITEM LIST + new

Search box: lon\*|par\*

| No.    | Description                   | Type      | Inventory | Substi...<br>Exist | Assem...<br>BOM | Production<br>BOM No. | Routing No. | Base Unit of<br>Measure | Cost<br>is<br>Adjust     | Unit Cost |
|--------|-------------------------------|-----------|-----------|--------------------|-----------------|-----------------------|-------------|-------------------------|--------------------------|-----------|
| 1900-S | ... PARIS Guest Chair, black  | Inventory | 299       | No                 | No              |                       |             | PCS                     | <input type="checkbox"/> | 97.50     |
| 1908-S | ... LONDON Swivel Chair, blue | Inventory | 305       | No                 | No              |                       |             | PCS                     | <input type="checkbox"/> | 96.10     |

See **Appendix B** for more filter criteria.



## 5.9 Filtering on a list

Users can easily apply a filter to a list page though the filter option on the column menu.

They can then either type the value

Only show lines where "Location Code" is

OK Cancel

Or choose the desired value from the drop down list (click the **assist edit button** – three dots, or press Alt and the down arrow).

Only show lines where "Location Code" is

| Code   | Name             |
|--------|------------------|
| BLUE   | Blue Warehouse   |
| GREEN  | Green Warehouse  |
| RED    | Red Warehouse    |
| SILVER | Silver Warehouse |
| WHITE  | White Warehouse  |
| YELLOW | Yellow Warehouse |

+ new Select from full list

The filter will then be applied. The filtered column will have the **funnel symbol** at the top

Microsoft Dynamics NAV

CRONUS UK Ltd.

| No.      | Name                   | Responsibility Centre | Location Code | Contact 4                   | Blocked | Credit Limit (LCY) | Currency Code |
|----------|------------------------|-----------------------|---------------|-----------------------------|---------|--------------------|---------------|
| 34010199 | Corporación Beta       |                       | BLUE          | Srta. Vanessa García García |         | 0.00               | EUR           |
| 34010100 | Libros S.A.            |                       | BLUE          | Sr. Oscar Alfonso Cáceres   |         | 0.00               | EUR           |
| 44180220 | Alfrifield Corporation |                       | BLUE          | Mrs. Ariane Peeters         |         | 0.00               |               |
| 44756404 | London Light Company   |                       | BLUE          | Mr. Matthew Charles         |         | 0.00               |               |
| 44171511 | Zuri Home Crafts Ltd.  |                       | BLUE          | Mr. James R. Hamilton       |         | 0.00               |               |
| 10000    | The Cannon Group PLC   | BIRMINGHAM            | BLUE          | Mr. Andy Teal               |         | 1,000.00           |               |
| 21245278 | Maronegoce             |                       | BLUE          | Mme. Fadoua AIT MOUSSA      |         | 0.00               | MAD           |
| 41597832 | Möbel Scherrer AG      |                       | BLUE          | Herrn Stefan Delmarco       |         | 0.00               | CHF           |
| 41497647 | Pilatus AG             |                       | BLUE          | Fr. Gabriele Dickmann       |         | 0.00               | CHF           |

Formulae can be added to filter the results, for example to see orders above a certain value,

Microsoft Dynamics NAV

CRONUS UK Ltd.

| Due Date   | Payment Terms Code | Payment Discount % | Department Code | Project Code | Compl. Shipped | Amount    | Amount Including VAT |
|------------|--------------------|--------------------|-----------------|--------------|----------------|-----------|----------------------|
| 25/02/2018 | 1M(8D)             | 2                  | SALES           |              | No             | 4,000.00  | 4,800.00             |
| 19/02/2018 | 1M(8D)             | 2                  | SALES           |              | No             | 2,887.11  | 2,887.11             |
| 12/02/2018 | 1M(8D)             | 2                  | SALES           |              | No             | 6,983.44  | 6,983.44             |
| 31/01/2018 | CM                 | 0                  | SALES           |              | No             | 12,253.79 | 12,253.79            |
| 04/02/2018 | 14 DAYS            | 0                  | SALES           |              | No             | 19,395.95 | 19,395.95            |
| 31/01/2018 | CM                 | 0                  | SALES           |              | No             | 5,179.48  | 5,179.48             |
| 31/01/2018 | CM                 | 0                  | SALES           |              | No             | 5,132.11  | 5,132.11             |
| 04/03/2018 | 1M(8D)             | 2                  | SALES           |              | No             | 2,998.30  | 2,998.30             |

or between certain values,

Microsoft Dynamics NAV

CRONUS UK Ltd.

| Sell-to Customer No. | Payment Terms Code | Payment Discount % | Department Code | Project Code | Compl. Shipped | Amount   | Amount Including VAT |
|----------------------|--------------------|--------------------|-----------------|--------------|----------------|----------|----------------------|
| 30000                | CM                 | 0                  | SALES           |              | Yes            | 1,597.52 | 1,917.02             |
| 20000                | 14 DAYS            | 0                  | SALES           |              | No             | 1,109.07 | 1,330.88             |
| 01454545             | CM                 | 0                  | SALES           |              | No             | 1,083.21 | 1,083.21             |
| 30000                | CM                 | 0                  | SALES           |              | No             | 1,032.00 | 1,238.40             |
| 40000                | 1M(8D)             | 2                  | SALES           |              | No             | 1,770.00 | 2,124.00             |
| 40000                | 1M(8D)             | 2                  | SALES           |              | No             | 1,740.00 | 2,088.00             |
| 60000                | 1M(8D)             | 2                  | SALES           |              | No             | 1,180.00 | 1,416.00             |
| 10000                | 1M(8D)             | 2                  | SALES           |              | No             | 1,290.00 | 1,548.00             |
| 20000                | 14 DAYS            | 0                  | SALES           |              | No             | 1,242.00 | 1,490.40             |
| 61000                | 1M(8D)             | 2                  | SALES           |              | No             | 1,318.00 | 1,581.60             |

Or a specific date range, for example orders shipped in January.

Microsoft Dynamics NAV

HOME ACTIONS NAVIGATE REPORT

CRONUS UK Ltd.

## Sales Orders + new

| No.    | Sell-to Customer No. | Shipment Date ↑ | Due Date   | Payment Terms Code | Payment Discount % | Department Code | Project Code | Compl... Shipped | Amount   | Amount Including VAT |
|--------|----------------------|-----------------|------------|--------------------|--------------------|-----------------|--------------|------------------|----------|----------------------|
| 101005 | ...                  | 30000           | 11/01/2018 | 31/01/2018         | CM                 | 0               | SALES        | Yes              | 1,597.52 | 1,917.02             |
| 101011 | ...                  | 43687129        | 12/01/2018 | 12/02/2018         | 1M(8D)             | 2               | SALES        | No               | 6,983.44 | 6,983.44             |
| 104001 | ...                  | 10000           | 17/01/2018 | 17/02/2018         | 1M(8D)             | 2               | SALES        | No               | 0.00     | 0.00                 |
| 104002 | ...                  | 20000           | 17/01/2018 | 31/01/2018         | 14 DAYS            | 0               | SALES        | No               | 2,498.00 | 2,997.60             |
| 104003 | ...                  | 30000           | 17/01/2018 | 31/01/2018         | CM                 | 0               | SALES        | No               | 1,032.00 | 1,238.40             |
| 104004 | ...                  | 40000           | 17/01/2018 | 17/02/2018         | 1M(8D)             | 2               | SALES        | No               | 1,770.00 | 2,124.00             |
| 104005 | ...                  | 60000           | 17/01/2018 | 17/02/2018         | 1M(8D)             | 2               | SALES        | No               | 4,902.00 | 5,882.40             |
| 104006 | ...                  | 10000           | 17/01/2018 | 17/02/2018         | 1M(8D)             | 2               | SALES        | No               | 0.00     | 0.00                 |
| 104007 | ...                  | 20000           | 17/01/2018 | 31/01/2018         | 14 DAYS            | 0               | SALES        | No               | 2,632.00 | 3,158.40             |
| 104008 | ...                  | 30000           | 17/01/2018 | 31/01/2018         | CM                 | 0               | SALES        | No               | 880.00   | 1,056.00             |
| 104009 | ...                  | 40000           | 17/01/2018 | 17/02/2018         | 1M(8D)             | 2               | SALES        | No               | 1,740.00 | 2,088.00             |
| 104010 | ...                  | 60000           | 17/01/2018 | 17/02/2018         | 1M(8D)             | 2               | SALES        | No               | 1,180.00 | 1,416.00             |
| 104011 | ...                  | 10000           | 17/01/2018 | 17/02/2018         | 1M(8D)             | 2               | SALES        | No               | 1,290.00 | 1,548.00             |
| 104012 | ...                  | 20000           | 17/01/2018 | 31/01/2018         | 14 DAYS            | 0               | SALES        | No               | 1,242.00 | 1,490.40             |
| 104013 | ...                  | 30000           | 17/01/2018 | 31/01/2018         | CM                 | 0               | SALES        | No               | 948.00   | 1,137.60             |

Only show lines where "Shipment Date" is

OK Cancel

A filter on multiple values can be applied, simply repeat this on other columns

CRONUS UK Ltd.

## Customers

| No.      | Name | Responsibility Centre | Location Code ↑ | Contact            | Blocked | Credit Limit (LCY) | Currency Code | Customer Disc. Group | Customer Posting Group | Customer Price Group |
|----------|------|-----------------------|-----------------|--------------------|---------|--------------------|---------------|----------------------|------------------------|----------------------|
| 31987987 | ...  | Candoxy Nederland BV  | YELLOW          | Rob Verhoff        |         | 0.00               | EUR           | LARGE ACC            | EU                     |                      |
| 32789456 | ...  | Lovaina Contractors   | YELLOW          | Hans Visser        |         | 0.00               | EUR           | LARGE ACC            | EU                     |                      |
| 33022842 | ...  | Livre Importants      | YELLOW          | M. Lionel PENUCHOT |         | 0.00               | EUR           | LARGE ACC            | EU                     |                      |

Only show lines where "Location Code" is

Code Name

BLUE Blue Warehouse

GREEN Green Warehouse

RED Red Warehouse

SILVER Silver Warehouse

WHITE White Warehouse

YELLOW Yellow Warehouse

+ new Select from full list

Only show lines where "Currency Code" is

Code Description

CAD Canadian dollar

CHF Swiss franc

CZK Czech koruna

DKK Danish krone

DZD Algerian dinar

EUR Euro

+ new Select from full list

Only show lines where "Customer Disc. Group" is

Code Description

LARGE ACC Large account

RETAIL Retail

+ new Select from full list

The filter can be removed, by choosing **Clear Filter** from each filtered column.

See **Appendix B** for more detail on filter criteria.

Responsibility Centre Location Code Con

Ascending

Descending

Filter...

Clear Filter

Hide Column

Choose Columns...

What's this?

## 6 Card Pages

- NAV will automatically focus on the first field of the first FastTab on a card page when it is opened
- First time opening a specific card page, i.e. a customer page, the default behaviour is that the first two FastTabs will be expanded, the remaining ones will be collapsed
- The user's choice will be remembered, so if the user closes a customer card with the Shipping FastTab expanded, this choice will be remembered when they reopen that card and also when they open a different customer card it will open with the same choice of FastTabs expanded **(1)**
- Promoted Fields** will be displayed in the header bar of a collapsed FastTab **(2)**
- Additional Fields** can be viewed (where available) by selecting the '**Show More**' option **(3)**, and hidden again using the '**Show Less**' option **(4)**

The screenshots illustrate the Microsoft Dynamics NAV 2017 Web Client interface for editing a customer card. The top screenshot shows the 'Shipping' FastTab expanded, with numbered callouts 1 through 7. Callout 1 points to the 'Shipping' FastTab header, 2 to the 'Promoted Fields' header, 3 to the 'Show more' button, 4 to the 'Show less' button, 5 to the 'Close' button (X), and 6 to the left navigation pane. Callout 7 points to the 'Expand/Collapse' arrow on the right. The bottom screenshot shows the same card with the 'FactBox' on the right expanded, with callout 7 pointing to the 'Expand/Collapse' arrow.

- To close a page, click the **X (5)**, hit the **Escape key**, or click/touch the grey area on the left **(6)**
- The **FactBox pane** on the right can be expanded or collapsed using the **arrow symbol (7)**. It can be expanded to show summary information for the record (i.e. the individual customer/vendor/item), or can be collapsed to allow more room on the screen for the page
- Personalisation of the user's view (or customisation of the Role Centre for multiple users) can be done within the Windows client only. These changes will then be immediately visible in how the Web Client displays information
- Personalisation/Customisation could include setting which fields show as Promoted fields and which ones are Additional fields on a card page, for example

**Tooltips** operate on card pages to guide the user, all fields underline when the user hovers over them, if clicked then a brief description of the field is given to help the user, along with a link ("**Learn More**") which will load the relevant page in the online help system or if there is no specific help page on that topic then the Help / Getting Started page will be shown.

**Microsoft Dynamics NAV**

HOME ACTIONS NAVIGATE

EDIT - ITEM CARD

Safety Lead Time

Defines a date formula to indicate a safety lead time that can be used as a buffer period for production and other delays.

[Learn more](#)

Lot Accumulation Period

Rescheduling Period

**Microsoft Dynamics NAV 2017**

Getting Started Community MSDN

**Welcome to Dynamics NAV**

Dynamics NAV is a business management solution for small and mid-sized organizations that automates and streamlines business processes and helps you manage your business. The demonstration company contains sample data, but you can create your own sales documents, for example, or set up a bank account.

In the Business Owner role center, you can find the **Assisted Setup & Tasks** action. Here you see a list of assisted setup that can help you getting started. In the **Assisted Setup** window, you will find the following:

| Assisted Setup                 | Description  |
|--------------------------------|--|
| Set Up Company                 | Creates a new trial company for you to enter data and try our Dynamics NAV. If you went through the Getting Started tour this is probably already <b>Completed</b> .                             |
| Migrate Business Data          | Lets you import your existing company data such as vendors, customers, and items from Excel or Quickbooks.   |
| Set Up Sales Tax               | Gets you started with default Tax groups and assigning Tax area codes that you can assign to customers and vendors in order to automatically calculate sales tax in sales or purchase documents. |
| Set Up Email                   | Gets you ready for sending email messages directly from, for example, sales orders or contacts in Dynamics NAV.  |
| Set Up Office Add-Ins          | Sets up the ability to use and launch Dynamics NAV from Outlook.   |
| Set Up Approval Workflow       | Sets up the ability to automatically notify an approver when a user tries to create or change certain values on documents, journal lines, or cards, such as an amount above a specified limit.   |
| Set Up Email Logging           | Sets up the capability to log email correspondence in Dynamics NAV to follow up on interactions.   |
| Set Up Dynamics CRM Connection | Sets up a connection to Dynamics CRM which allows you to synchronise data such as contacts and sales order information.  |

When you have run an assisted setup, it is marked as **Completed**. To run the assisted setup, you choose the three dots also called the context menu, and then you select **Start Setup**.

To activate a lookup field, the keyboard shortcut **Alt + down arrow** can be used, as an alternative to clicking the assist edit button (three dots).

Freeze panes and continuous scrolling also apply to subpages and drop down options.

Search across columns and filter as you type also apply here.

**NEW - SALES ORDER - 1003**

1003

**General**

No. 1003 Due Date

Customer \* Requested Delivery Date

Contact

Posting Date

Order Date

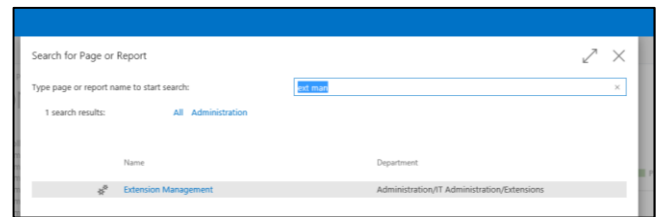
**Lines**

| No.      | Name                          | City        | Post Code    | Phone |
|----------|-------------------------------|-------------|--------------|-------|
| 01121212 | Spotsmeyer's Furnishings      | Miami       | US-FL 37125  |       |
| 01445544 | Progressive Home Furnishin... | Chicago     | US-IL 61236  |       |
| 01454545 | New Concepts Furniture        | Atlanta     | US-GA 31772  |       |
| 01905893 | Candoxy Canada Inc.           | Thunder Bay | CA-ON P7B... |       |
| 01905899 | Elkhorn Airport               | Elkhorn     | CA-MB R0M... |       |

+ new Select from full list

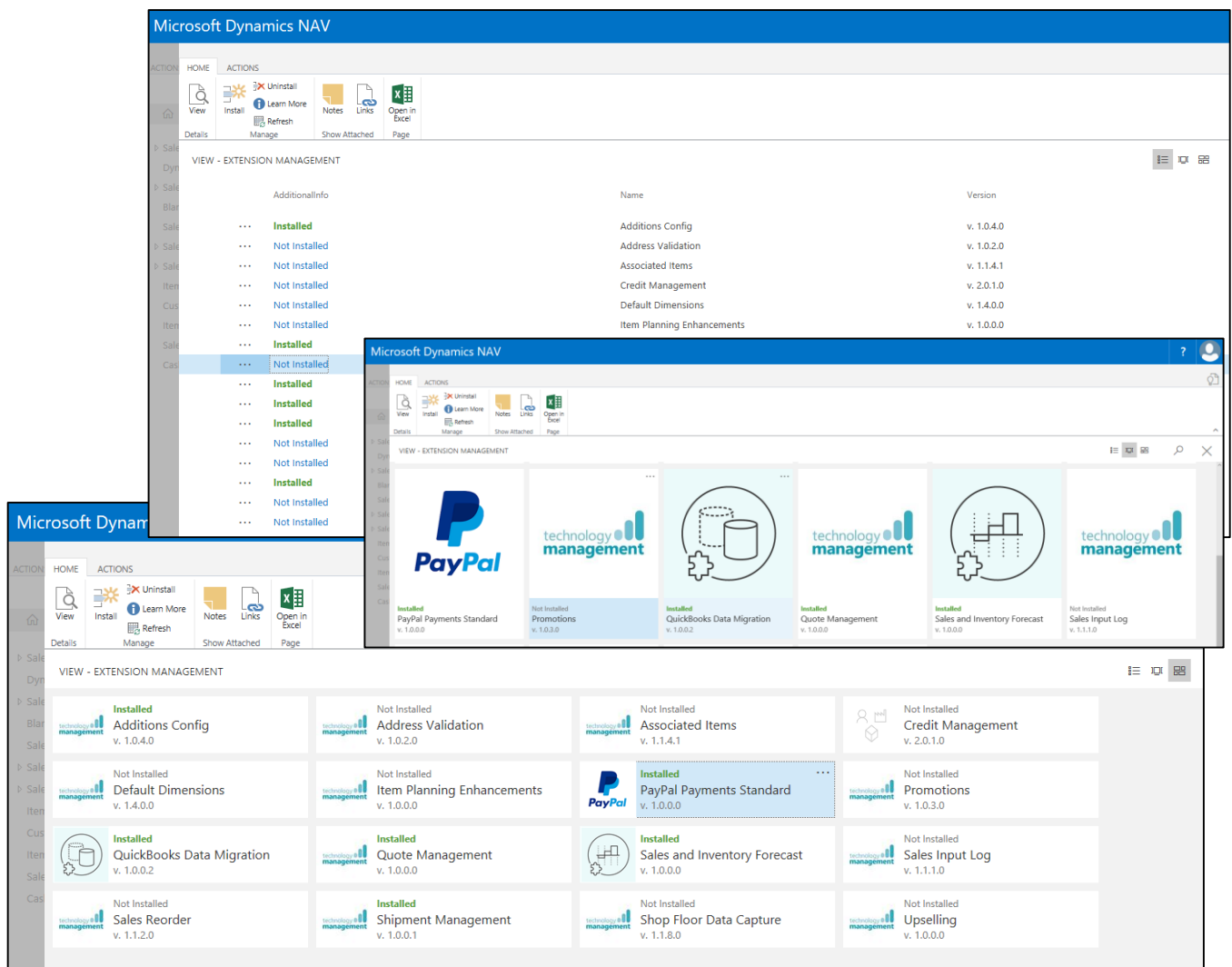
## 7 Extension Management

**Extensions** are a new way of extending the functionality of Dynamics NAV. They are written to not impact on the code of the standard application. This makes them simpler to add and remove, which a NAV user can now do using the **Extension Management** page.

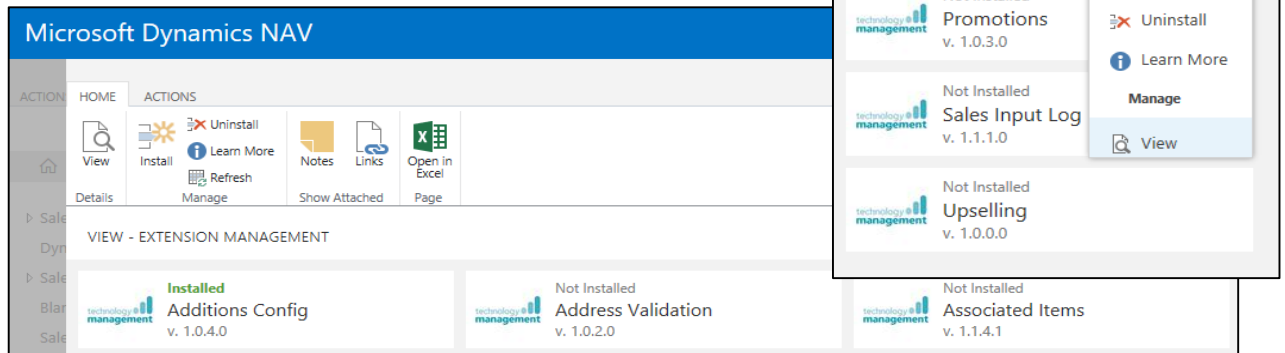


- The Extension Management page lists all of the Extensions that are available to the user. The user can then choose if they wish to install and use them or not
- Microsoft provide a couple as default, for example PayPal Payments
- Technology Management have a wide range of Extensions which can be purchased directly from us
- Ultimately users will be able to purchase Extensions direct from [apps.source.microsoft.com](https://apps.source.microsoft.com)

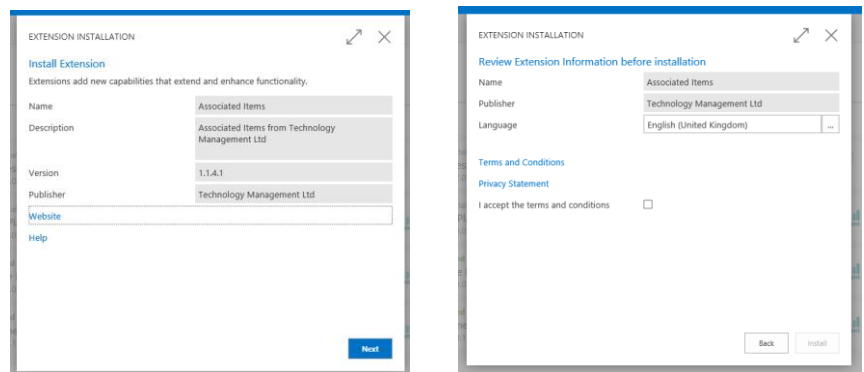
The **Extension Management** Page has three views, a list, tiles and cards. All of which give the user an overview of the Extension name, its status and version number.



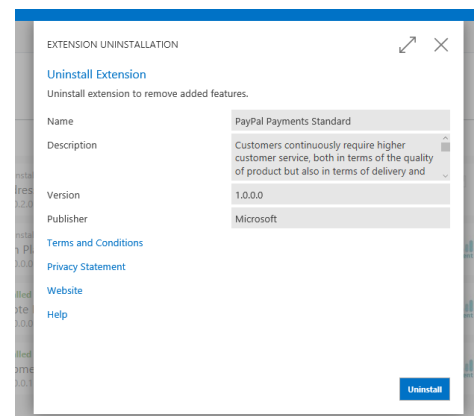
Clicking the **assist edit button** (the three dots) gives the user options, similar to those on the ribbon, so they can install, uninstall, or manage the Extension.



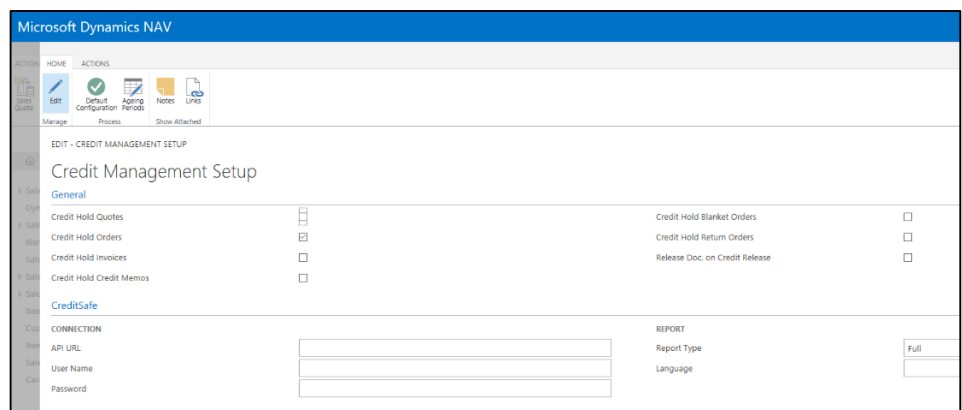
Choosing **Install** on an available **Extension** will take the user through a few simple steps to complete the installation process.



Choosing **Uninstall** will take the user through a few simple steps to remove the **Extension** and its functionality. The data tables will remain within the database and so will be available for reporting and for if/when the **Extension** is reinstalled in the future.



Most **Extensions** will have their own **setup page** to allow the user to then configure the new functionality. The **Extensions** from **Technology Management** also come with the option to import a **Default Configuration** to get users up and running quickly.



## 8 Differences from NAV Windows Client

**Microsoft Dynamics NAV Web Client** supports most of the same Microsoft Dynamics NAV objects and features as **Microsoft Dynamics NAV Windows Client**, but there are some small differences, some features are not supported or are partially supported.

### 8.1 User Personalisation / Customisation

You cannot perform configuration using the Microsoft Dynamics NAV Web client. Instead, you use the Microsoft Dynamics NAV Windows client.

- You perform the customisation tasks in the Microsoft Dynamics NAV Windows client, which means that any customisation that is performed applies to both the Microsoft Dynamics NAV Windows client and Microsoft Dynamics NAV Web client

### 8.2 Departments button

The **Departments** button does not appear in the navigation pane of Role Centre in the Microsoft Dynamics NAV Web client.

- Instead **Page Search** is available from an action in the navigation pane of the Role Centre and on the top right corner of a page

### 8.3 Application Menu

System actions available from the **Application Menu** such as Copy link to page; Recipient as Attachment, Microsoft Word, Print Page, Show as List, OneNote.

- You can use the action Open in Excel on list places and transfer all data in the list to an Excel spreadsheet
- You can use Internet Explorer functions to print a page and to create links on a page

### 8.4 Using FlowFilters (Limit Totals)

**Limit Totals** is not supported. This is expected to change in the next version of the Web Client.

- Use **Filter on column** instead or apply the Limit Totals in the Windows Client, save the result as a **View** and it will be available in your **Role Centre** in the Web Client (once you Sign Out and back in)

### 8.5 Vertical resizing of columns

Vertical resizing of controls is not supported on the Microsoft Dynamics NAV Web client. A multiline textbox, for example, will not increase in vertical size when the user drags to increase the size of the page. This applies to all controls that can take advantage of vertical or horizontal resizing, such as charts, grids, multiline, textboxes, and control add-ins.

### 8.6 Multiple Windows

Unlike the Windows Client, users cannot 'pop out' a window and so have multiple windows open. If users need to view information simultaneously / in multiple windows they can simply open a second browser session.



## 9 Browser Limitations

Microsoft Dynamics NAV Web client supports several browsers. Some features are not supported by all browsers.

| Feature  | Description  | Browser  | Remarks  |
|--|--|--|--|
| Previewing a report  | The <b>Preview</b> button does not appear on the request pages of reports.                       | Google Chrome<br>Mozilla Firefox<br>Safari                     |  |
| Printing a report from the report preview                              | If you try to print a report from the report preview, then you will get a script error message.  | Internet Explorer 10 (in the Windows 8-style UI mode)          | This is because Windows 8-style UI does not support plugins. To print a report, open the report as a PDF, and then print the report from the PDF viewer. |
| Tooltips in the ribbon   | Tooltips do not appear when you pause on an action with the pointer.                             | Safari   |  |
| Tooltips for error messages and icons on pages                         | Tooltips do not appear when you pause on an error message or an icon on a page with the pointer. | Internet Explorer 10 (on tablets that run Windows 8)<br>Safari | To see the tooltip, you must tap the message or icon.  |
| Dragging the cursor in a field   | If you drag the cursor in a field, then the field becomes blocked and you cannot enter any data. | Safari   | To make it possible to enter data, refresh the browser or start a new browser session.   |
| Scrolling a list by using one finger                                   | You cannot scroll a list by using a one finger scrolling gesture.                                | Safari   | To scroll a list, use a two finger scrolling gesture.  |
| Windows authentication   | Validating user credentials by using Windows authentication is not supported.                    | Safari   | For more information about authentication and credentials, see <a href="#">Users and Credential Types</a> .  |
| Documentation Feedback link in the Microsoft Dynamics NAV Online Help. | Using the Documentation Feedback link does not work.   | Mozilla Firefox  | Use a different browser to provide feedback.   |

### 9.1 Microsoft Dynamics NAV 2017 Web Client Requirements (minimum)

|                                   |  |
|-----------------------------------|--|
| Supported browsers                | Microsoft Edge, Internet Explorer 11, Google Chrome 53.0 for Windows, Mozilla Firefox 49.0 for Windows, Safari 9.0 and 10.0 on OSX.  |
| Business inbox in Outlook         | Microsoft Office 365   |
| Sending data to Excel             | Microsoft Office 2016, Microsoft Office 2013 SP1, Microsoft Office 2010 SP2, or Microsoft Office 365.  |
| SharePoint Online links           | Microsoft Office 2016, Microsoft Office 2013 SP1, Microsoft Office 2010 SP2, or Microsoft Office 365.  |
| Printing reports to Excel or Word | Microsoft Office 2016, Microsoft Office 2013 SP1, Microsoft Office 2010 SP2, or Microsoft Office 365.  |
| Additional information            | The browser must be able to install the Report Viewer ActiveX control to be able to print. If experiencing problems, turn off browser tools, like translator tools that may run in the background. |



# 10 Appendices

## 10.1 Appendix A: Useful web links

We now offer regular scheduled **Dynamics NAV training** at Technology Management HQ called **NAV Learning**.

Our courses are a full day of instruction; at which you will be working in our dedicated 'classroom' environment with our in-house professional trainers. Whether you are new to the system or simply want to enhance your understanding and optimise the way you work – we will have a course to suit you. All our courses come with a comprehensive manual of course notes; this 'guided manual' is in place so you can focus on learning rather than on making notes, safe in the knowledge that you have a detailed reference document that will be invaluable later when you go it alone.

For more information on courses, dates and prices please see <https://www.tecman.co.uk/Resources/NAV-Learning>

Our **YouTube Channel** features specific training playlists: <https://www.youtube.com/user/TecmanOnline/playlists>

The video playlist to accompany this document can be found on our YouTube channel and is titled "**Dynamics Training: NAV 2017 Web client – User Guide**". The link to it is:

<https://www.youtube.com/playlist?list=PLoS7gV-LINmm9M7ahvsh4C1MP40NSfD5M>

Some other Dynamics NAV playlists which contain introductory information that you may find helpful are:

<https://www.youtube.com/playlist?list=PLoS7gV-LINmnV0DWUgFo9ZTlZddqHLXli> (Introducing NAV 2016)

<https://www.youtube.com/playlist?list=PLoS7gV-LINmmqE6R7tFLiQmbISraQRfg> (Personalising NAV 2016)

We also have many playlists that demonstrate and introduce our ever increasing range of **Additions** (and **Extensions**) for Microsoft Dynamics NAV, along with others such as Jet Reports, Power BI and PlannerOne which enhance the capabilities of NAV. They can all be found as playlists at: <https://www.youtube.com/user/TecmanOnline/Playlists>

We offer our customers free monthly **Workshops** as an on-site seminar in the morning and a webinar in the afternoon, which are free for our customers, please see our website (<https://www.tecman.co.uk/Resources/Events>) for the program and signup details. The playlist for the webinars from 2016 can be found at: <https://www.youtube.com/playlist?list=PLoS7gV-LINmkG4veNzbfUvvcP59vRjYXp>

The '**Additions**' (most of which are also 'extension capable' for NAV 2017) that we offer, extend the functionality of Dynamics NAV and are listed on our website at: <https://www.tecman.co.uk/Software/Dynamics-Additions>

Our **blog** at <http://www.softwareanswers.co.uk/> has loads of features on the latest tips and news regarding NAV, CRM, Jet Reports, Power BI and much more.

**MSDN** (Microsoft Developer Network) has online help articles that replace the previously published NAV manuals. [https://msdn.microsoft.com/en-us/library/hh173988\(v=nav.90\).aspx](https://msdn.microsoft.com/en-us/library/hh173988(v=nav.90).aspx)

**CustomerSource** from Microsoft has specific help for customers, you will have been send a login for this by us when you started with Technology Management. Please contact our Customer Services team for further info. <https://mbs.microsoft.com/customersource/Global/home>

We strongly recommend reading this **blog** post from our MD on avoiding becoming victim of fraudulent payment scams and spoof emails.

<http://www.dynamicsbusiness.co.uk/2016/03/using-dynamics-nav-to-avoiding-a-growing-significant-fraud.html>

## 10.2 Appendix B: Filter Criteria

| Symbol   | Name   | Sample Expression | Records Displayed   |
|--|--|-------------------|---|
| ..   | Interval   | 1100..2100        | Numbers 1100 through 2100   |
| ..   | Interval   | ..2500            | Up to and including 2500  |
| ..   | Interval   | ..12 31 00        | Dates up to and including 12 31 00  |
| ..   | Interval   | P8..              | Information for accounting period 8 and thereafter  |
| ..   | Interval   | ..23              | From the beginning date until 23-current month-current year 23:59:59  |
| ..   | Interval   | 23..              | From 23-current month-current year 0:00:00 until the end of time  |
| ..   | Interval   | 22..23            | From 22-current month-current year 0:00:00 until 23-current month-current year 23:59:59   |
|  | Either/or (Pipe)   | 1200 1300         | Numbers with 1200 or 1300   |
| <>   | Not equal to   | <>0               | All numbers except 0  |
| <>   | Not equal to   | <>A*              | All text except text starting with A  |
| >  | Greater than   | >1200             | Numbers greater than 1200   |
| >=   | Greater than or equal to                                       | >=1200            | Numbers greater than or equal to 1200   |
| <  | Less than  | <1200             | Numbers less than 1200  |
| <=   | Less than or equal to  | <=1200            | Numbers less than or equal to 1200  |
| &  | And  | >200&<1200        | Numbers greater than 200 and less than 1200   |
| ' '  | An exact character match                                       | 'man'             | Text that matches man exactly and is case sensitive.  |
| @  | Case insensitive   | @man*             | Text that starts with man or Man (case insensitive).  |
| *  | An indefinite number of unknown characters                     | *Co*              | Text that contains "Co"   |
| *  | An indefinite number of unknown characters                     | *Co               | Text that ends with "Co"  |
| *  | An indefinite number of unknown characters                     | Co*               | Text that begins with "Co"  |
| ?  | One unknown character  | Hans?n            | Text such as Hansen or Hanson   |
|  | Combined format expressions                                    | 5999 8100..8490   | Include any records with the number 5999 or a number from the interval 8100 through 8490.   |
|  | Combined format expressions                                    | ..1299 1400..     | Include records with a number less than or equal to 1299 or a number equal to 1400 or greater (all numbers except 1300 through 1399). |
|  | Combined format expressions                                    | >50&<100          | Include records with numbers that are greater than 50 and less than 100 (numbers 51 through 99).                                      |
|  | Exact character match on fields that contain the above symbols | 'S&R'             | All records that start with the text 'S&R'  |
| <ul style="list-style-type: none"> <li>• If plain text is entered, this is case insensitive by default and will search for records containing that text</li> <li>• If text is entered containing symbols, search criteria are interpreted exactly as entered and case sensitive</li> </ul> |  |                   |   |

## 10.3 Appendix C: Dates in NAV

| Code                                     | Effect in a Date Field  |  |
|--|---|--|
| t  | Today's date will be inserted (system date from the computer)   |  |
| w  | Currently set Work Date will be inserted  |  |
| 12                                       | 12 <sup>th</sup> day + month and year from current Work Date  |  |
| 12 03 or 1203                            | 12 <sup>th</sup> of March + year from current Work Date   |  |
| 12 03 16 or 120316 or 12/3/16 or 12-3-17 | 12 <sup>th</sup> of March 2016. You can enter dates with or without separators.   |  |
| Mon25 or mon25                           | Will enter the date of the Monday in Week 25 of year in current Work Date   |  |
| Mon2517                                  | Will enter the date of the Monday in Week 25 of 2017  |  |
| C311216                                  | Will enter a closing date (for closing fiscal year) 31 <sup>st</sup> December 2016                                      |  |
| Date Ranges                              |   |  |
| 15 12 00                                 | Only those entries posted on 15 <sup>th</sup> December 2000   |  |
| 15 12 00..15 01 01                       | Entries posted on dates between 15 <sup>th</sup> December 2000 and 15 <sup>th</sup> January 2001 (inclusive)            |  |
| ..15 12 00                               | Entries posted up to and including 15 <sup>th</sup> December 2000   |  |
| 15 12 00 01 12 00..10 12 00              | Entries posted either on 15 <sup>th</sup> December 2000 or between 1 <sup>st</sup> and 10 <sup>th</sup> Dec (inclusive) |  |
| Date formulas                            |   |  |
| C  | Current   | <u>Note:</u> In date formulas one day is automatically included to cover today, so 1W will actually be 8 days including today. To specify one week including today then use 6D or 1W-1D. Date calculation formula can contain up to 20 characters, including both letters and numbers. |
| D  | Day(s)  |  |
| W  | Week(s)   |  |
| M  | Month(s)  |  |
| Q  | Quarter(s)  |  |
| Y  | Year(s)   | 4 ways to construct a date formula   |
| CW                                       | Current week  | Current + a time unit  |
| CM                                       | Current month   |  |
| 10D                                      | 10 days from today  | Number + a time unit   |
| 2W                                       | 2 weeks from today  |  |
| D10                                      | The next 10 <sup>th</sup> day of a month  | Time unit + a number   |
| WD4                                      | The next 4 <sup>th</sup> day of a week (Thursday)   |  |
| CM+10D                                   | Current month plus 10 days  | Combination of the above 3 forms   |
| -1Y                                      | 1 year ago from today   | Use minus sign to indicate a date in the past  |

## 10.4 Appendix D: Times in NAV

| Entry               | Interpretation                                     |  |
|---------------------|--|--|
| 5                   | 05:00:00   | <u>Notes:</u> <ul style="list-style-type: none"><li>Any separator can be used but is not required</li><li>Do not have to write minutes or seconds</li><li>Do not have to write AM or PM</li><li>Must enter two digits for each unit of time if not using a separator</li></ul> |
| 5:30                | 05:30:00   |  |
| 0530                | 05:30:00   |  |
| 5:30:5              | 05:30:05   |  |
| 053005              | 05:30:05   |  |
| 5:30:5,50           | 05:30:05.5   |  |
| 053005050           | 05:30:05.05  |  |
| Entering Datetimes  |  |  |
| 131202 132455       | 13-12-02 13:24:55                                  | <u>Note:</u> When entering datetimes a space must be entered between the date and the time.  |
| 1-12-02 10          | 01-12-02 10:00:00                                  |  |
| 1.12.02 5           | 01-12-02 05:00:00                                  |  |
| 1.12.02             | 01-12-02 00:00:00                                  |  |
| 11 12               | 11-current month-current year 12:00:00             |  |
| 1112 12             | 11-12-current year 12:00:00                        |  |
| t or today          | today's date 00:00:00                              |  |
| t time              | today's date actual time                           |  |
| t 10:30             | today's date 10:30:00                              |  |
| t 3:3:3             | today's date 03:03:03                              |  |
| w or workdate       | the working date 00:00:00                          |  |
| m or Monday         | Monday of the current week 00:00:00                |  |
| tu or Tuesday       | Tuesday of the current week 00:00:00               |  |
| we or Wednesday     | Wednesday of the current week 00:00:00             |  |
| th or Thursday      | Thursday of the current week 00:00:00              |  |
| f or Friday         | Friday of the current week 00:00:00                |  |
| s or Saturday       | Saturday of the current week 00:00:00              |  |
| su or Sunday        | Sunday of the current week 00:00:00                |  |
| tu 10:30            | Tuesday of the current week 10:30:00               |  |
| tu 3:3:3            | Tuesday of the current week 03:03:03               |  |
| Entering Duration   |  |  |
| 6h                  | 6 hours  | <u>Note:</u> Entering just a number will be automatically converted to the default unit of measure for the duration field  |
| 6.5h                | 6 hours 30 mins                                    |  |
| 90m                 | 1 hour 30 min                                      |  |
| 2d 6h 30m 56s 600ms | 2 days 6 hours 30 mins 56 seconds 600 milliseconds |  |