# Using the Web Client for Microsoft Dynamics NAV 2017



**Microsoft Dynamics NAV** 



Version: 1.9

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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

	?	0
HOSTING\TR01		
My Settings		
Sign out		

Edit - My Settings		2
Role Centre	Bookkeeper	>
Company	CRONUS UK Ltd.	>
Work Date	28/10/2016	
REGION & LANGUAGE		_
Region	English (United Kingdom)	>
Language	English (United Kingdom)	>
Time Zone	(UTC+01:00) Brussels, Copenhage	>
CONFIRMATION DIALOGUES		_
Warn About Unposted Docum	$\checkmark$	_
Confirm After Posting Docume		fir
	OK Cano	el

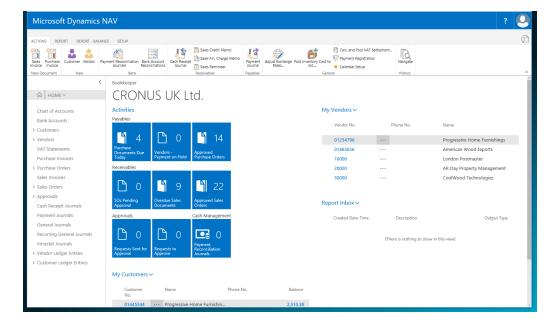


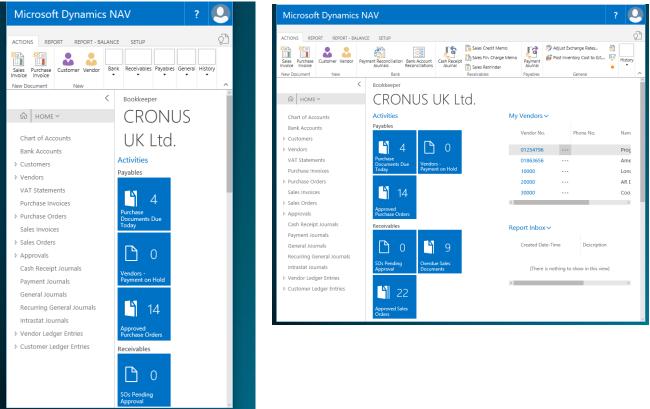
# 3 Exploring the user interface

#### 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

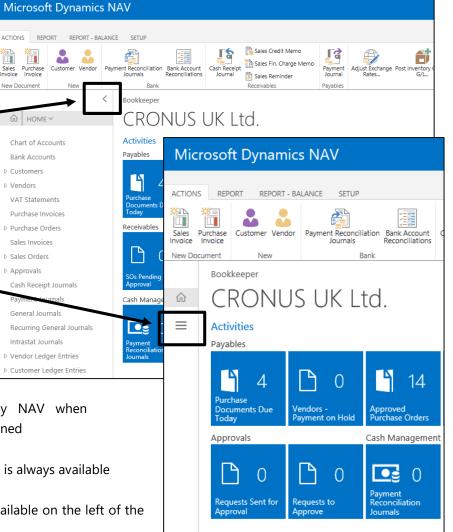






#### 3.2 Navigation Pane

- 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



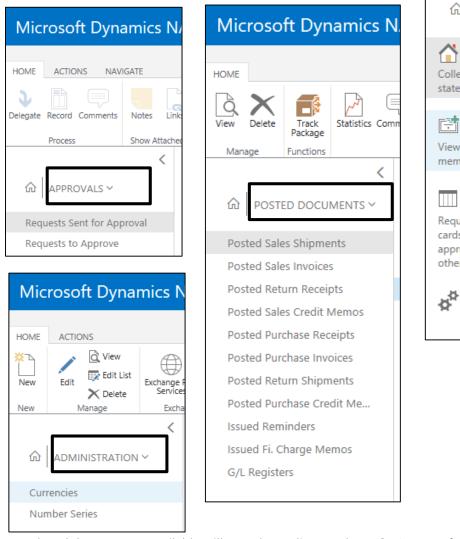
#### 3.2.1 Home Button

- HOME ~
- 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



ACTIONS REPORT **REPORT - BALANCE** Sales Purchase Customer Vendor Payr Invoice Invoice New Document New < ሐ HOME ^ Home Collect and make payments, prepare statements, and manage reminders. Posted Documents View posted invoices and credit memos, and analyse G/L registers. Approvals Request approval of your documents, cards, or journal lines or, as the approver, approve requests made by other users. Administration

**Microsoft Dynamics N** 

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

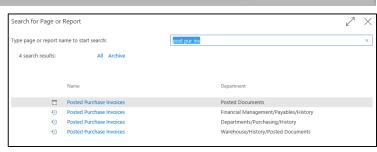


#### 3.3 Search

- 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"

Microsoft Dynamics N	JAV				? 🝳
ACTIONS REPORT REPORT - BALAN		Search for Page or	Report	$\checkmark$ $\times$	<u> </u>
Sales Purchase Customer Vendor Pay	ment Reconciliation	Type page or report n	ame to start search:	Liser ×	
New Document New		11 search results:	All Lists Administration		^
<	Bookkeeper				
€ номе ч	CRO		Name	Department	
Chart of Accounts			Delete User Personalisation	IT Administration/Data Deletion/Configuration and Personalisati	
Bank Accounts	Payables		Users	Administration/IT Administration/General	Name
▷ Customers			User Groups	Administration/IT Administration/General	Name
▷ Vendors			User Setup	Administration/Application Setup/Users	Progressive Home Furnishings
VAT Statements	Purchase		User Security Status	Administration/Application Setup/Users	American Wood Exports
Purchase Invoices	Documents D Today		ADCS Users	Application Setup/Warehouse/ADCS	London Postmaster
Purchase Orders	Receivables		Workflow User Groups	Administration/Application Setup/Workflow	AR Day Property Management
Sales Invoices		*	Approval User Setup	Administration/Application Setup/Workflow	CoolWood Technologies
Sales Orders	Γ	**	Approval User Setup	Administration/Application Setup/Document Approval	
Approvals			Outlook Synch. User Setup	Administration/Application Setup/Microsoft Office Outlook Inte	
	SOs Pending		User Personalisation	Administration/Application Setup/RoleTailored Client	
Cash Receipt Journals	Approval	Documents	Approval App		

- To see a range of options, type a key ٠ 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



	Search for Page or Report	∠ ×
	Type page or report name to start search:	purch ×
	96 search results: All Reports and Analysis	Tasks Lists Documents Archive Administration
Documents	Name	Department
	Purchase Credit Memo	Financial Management/Payables/Documents
	Purchase Document Test	Financial Management/Payables/Documents
	Posted Purchase Receipts	Financial Management/Payables/History
Archives	O Posted Purchase Invoices	Financial Management/Payables/History
	O Posted Purchase Credit Memos	Financial Management/Payables/History
	Purchases & Payables Setup	Financial Management/Payables/Setup
	Standard Purchase Codes	Financial Management/Payables/Setup
Administration /	Salespeople/Purchasers	Departments/Sales & Marketing/Sales
	Salespeople/Purchasers	Sales & Marketing/Sales/Setup
Setup	Purchase Orders	Departments/Purchasing/Planning
	Purchase Reservation Avail.	Purchasing/Planning/Reports
	Purchase Statistics	Purchasing/Planning/Reports
List page	Vendor Purchase List	Purchasing/Planning/Reports
List page	Vendor/Item Purchases	Purchasing/Planning/Reports
	Inventory Purchase Orders	Purchasing/Planning/Reports
	inventory - Vendor Purchases	Purchasing/Planning/Reports
	Purchasers	Purchasing/Planning/Setup
Report &	Purchase Quotes	Departments/Purchasing/Order Processing v
Analysis		
	Name	Department
	Contract Gain/Loss (Customers)	Contract Management/Periodic Activities/Contract Gain/Loss by
Tasks	Customer Ledger Entries	IT Administration/Data Deletion/Date Compression





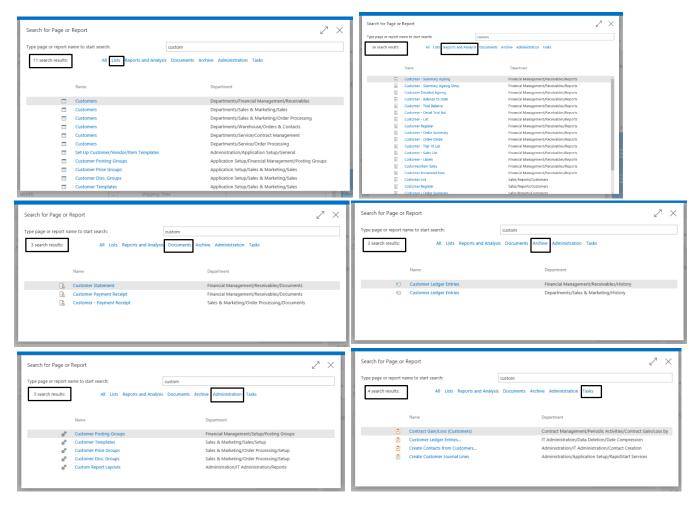
Page search now has a **filter**, to narrow down the results by **page type**.

#### 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.

Search for Page or	Report		∠ ×
Type page or report na	ame to start search:	custom	
63 search results:	All Lists Reports and Analysis	s Documents Archive Administration Tasks	
	Name	Department	
	Customers	Home	^
	Customer Ledger Entries	Home	
	Customers	Departments/Financial Management/Receivables	
	Customer - Summary Ageing	Financial Management/Receivables/Reports	
	Customer - Summary Ageing Simp.	Financial Management/Receivables/Reports	
ii.	Customer Detailed Ageing	Financial Management/Receivables/Reports	
i.	Customer - Balance to Date	Financial Management/Receivables/Reports	
The second se	Customer - Trial Balance	Financial Management/Receivables/Reports	
i.	Customer - Detail Trial Bal.	Financial Management/Receivables/Reports	
	Customer - List	Financial Management/Receivables/Reports	
	Customer Register	Financial Management/Receivables/Reports	
i.	Customer - Order Summary	Financial Management/Receivables/Reports	
E	Customer - Order Detail	Financial Management/Receivables/Reports	
-	Customer - Top 10 List	Financial Management/Receivables/Reports	
-	Customer - Sales List	Financial Management/Receivables/Reports	
	Customer - Labels	Financial Management/Receivables/Reports	
<u>.</u>	Customer/Item Sales	Financial Management/Receivables/Reports	
FXW	Customer Document Nos.	Financial Management/Receivables/Reports	~





#### 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.

EDIT - CUSTOMER CARD

General

No. Name IC Partner Code Balance (LCY)

20000 · Selangorian Ltd.

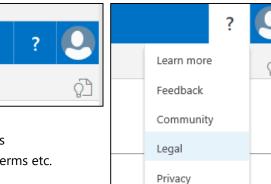
#### 3.5 In-application help

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

<	CRONUS UK Ltd		
	Custor	me	ers
^	No.		Name
	01121212		Spotsmeyer's Furnishings
	01445544		Progressive Home Furnishin.
	01454545		New Concepts Furniture
	01905893		Candoxy Canada Inc.
	01905899		<u>Elk</u> horn Airport
Open recor	d "10000" in a new 1	windo	<sup>w</sup> ndon Candoxy Storage C
	<u>10000</u>		The Cannon Group PLC
	20000		Selangorian Ltd.

- 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

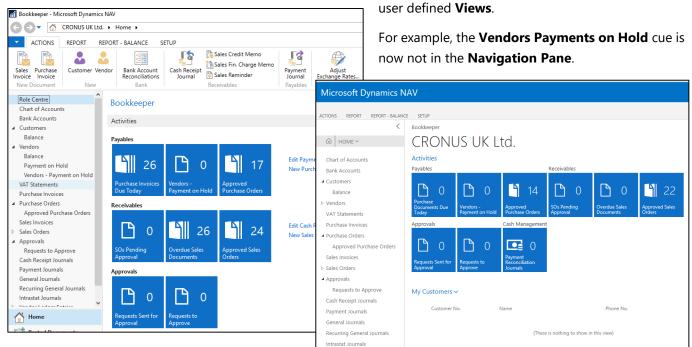
EDIT - CUSTOMER CARD	
20000 · Selangorian Ltd.	
General	
No.	20000
Name	Selangorian Ltd.
IC Partner Code	
Balance (LCY)	95,724.45
Specifies the payment amount that the customer ow customer's balance.	es for completed sales. This value is also known as the
Learn more	
	PS





#### 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



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

Sales Orders Relea	sed Not Shipped		
6	<b>D</b> 0	<b>1</b> 4	7,5
Ready To Ship	Partially Shipped	Delayed	Average Days Delayed

#### 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

5)		HOME ACTIONS NAVIGATE	CRONUS UK Ltd.								Ő.
-)		HOME ~	Custome							-	
ll expand it			Custome	PCS + new						10 BS	2
псярана п		Picks Put-aways	No.	Name	Responsibility L	Location Code Phone	No. Contact	Be	slance (LCV) Balance	Due (LCY)	Sales (LCV)
		> Movements	01121212	Spotsmeyer's Furnishings		ELLOW	Mr. Mike Nash		0.00	0.00	0.00
		Warehouse Shipments		Progressive Home Purnishings		ELLOW	Mr. Scott Mitchell				1,499.03
		Warehouse Receipts	01454545 ····	New Concepts Furniture	YI	ELLOW	Ms. Tammy L. McDonals	1 2	22,241.32 223	1,241.32	0.00
Marrie Daniel M	AN/										
Microsoft Dynamics N	AV										- N
HOME ACTIONS NAVIGATE REPO	DRT										ç
Direct C	Debit Mandates	🖓 📲 🔁 Entry Stati		🕞 🚺 Line Discounts	FL F	🕞 🗿 Return Orders	R R. 🛋				Ş
Comments Dimensions Bank	Addresses	Statistics b	y Currencies Invoice	Prices Prepayment Percenta	ges Quotes Ord	Sers	Service Service Service				ģ
	Addresses		y Currencies Invoice	E Brann ment Barrant		D troug Door	Service Service Service				Ş
Comments Dimensions	Addresses	Statistics Saves	y Currencies Invoice	Prices (1) Std. Cust. Sales Codes		ters issued Docum	Service Service Service Orders Contracts Items				Ş
Comments Dimensions	Addresses eferences CRONUS UK Ltd.	Statistics Sales Sales Important	y Currencies Invoice	Prices (1) Std. Cust. Sales Codes		ters issued Docum	Service Service Service Orders Contracts Items				
Comments Dimensions Accounts & Customer	Addresses eferences	Statistics Sales History	y Currencies Invoice	Prices (1) Std. Cust. Sales Codes		ters issued Docum	Service Service Service Orders Contracts Items			10 23	Q
Comments Dimensions Accounts & Customer	Addresses eferences CRONUS UK Ltd.	Statistics Sales Sales Important	y Currencies Invoice	Frices The Propayment Percenta The Process Sales		ters issued Docum	Service Service Service Orders Contracts Items	Balance (LCY)	Balance Due (LCV		
Commerts Dimensions Commerts Dimensions Bank Accounts Customer HOME ~	cebit Mandates Addresses eferences CRONUS UK Ltd. CUSTOM No.	Statistics Sales S	y Currencies ing Entries Baccurts Responsible Centre	Rices Rices Sales Sa	Quotes Ord	Ses Sisued Docum Banket Order Documents	Service Service Orders Contracts tems Service		Balance Due (LC)	') Sal	D les (LCV)
Comments Direction Comments Direction Market Contract Contract HOME ~	cebit Mandates Addresses eferences CRONUS UK Ltd. CUSTOM No.	Satisfics Satisfic Statisfics Satisfics Satisfic Memory History	y Currencies ing Entries Baccurts Responsible Centre	Frices The Propayment Percenta The Process Sales	Quotes Ord	Sessed Docum Bianket Orden Documents	Service Service Orders Contracts tems Service	Balance (LCY) 0.00		') Sal	٩
Comments Dimensions Among Amon	Addresses Addresses eferences CRONUS UK Ltd. CUSTOM No. 01121212	Statistics Sales S	y Currencies Invoice I	Rices Rices Sales Sa	Quotes Ord	Ses Sisued Docum Banket Order Documents	Service Service Service Orden: Orden: Service Service		Balance Due (LC)	') Sal	, р Ies (LCV)

NAV will

remember your choice of expanded or collapsed



? 🕘 :

Microsoft Dynamics NAV

## 4 My Settings

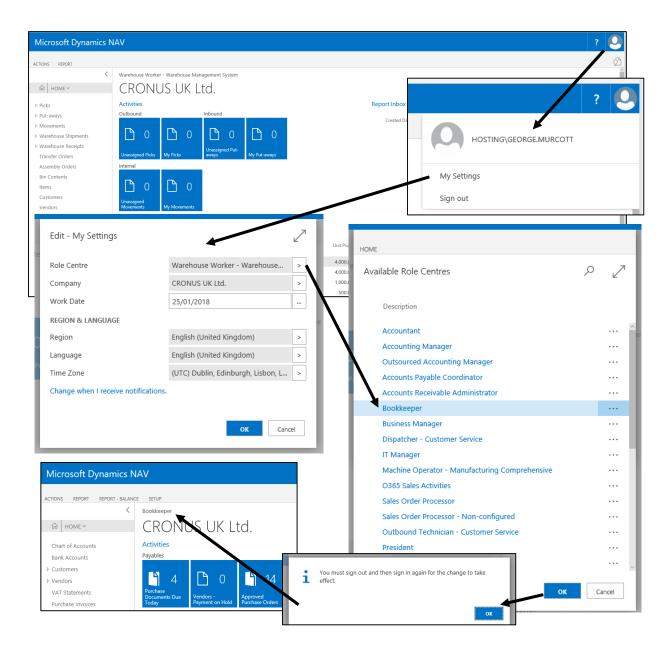
The **My Settings** page gathers together the user definable settings and is a visual link with Office 365. This is fully customisable, however, personalisation can only be done within the Windows Client, but this will then flow through to the user's view in the Web Client (after they **Sign Out** and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

dit - My Settings		2	My Settings
ole Centre	Sales Order Processor		Sign out
ompany	CRONUS UK Ltd.	>	
Vork Date	13/11/16	×	
EGION & LANGUAGE			
egion	English (United Kingdom)	>	
anguage	English (United Kingdom)	>	
ime Zone	(UTC) Dublin, Edinburgh, Lisb	on, L >	
hange when I receive r	otifications.	.e	

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

HOME		
Create New Company		
New Show Attached Page		^
Allowed Companies		∠
Name		valuation ompany
CRONUS UK Ltd.		
CRONUS_demo		
CRONUS_TESTING		
	ок	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

Edit - My Settings								2
Role Centre	Sales	Orde	r Proce	essor				>
Company	CRON	IUS U	K Ltd.					>
Work Date	13/11	/201	5				×	
REGION & LANGUAGE	•	Ν	loven	1ber i	2016		►	
Region	Mo	Tu	We	Th	Fr	Sa	Su	>
Language		1	2	3	4	5	б	>
Language	7	8	9	10	11	12	13	
Time Zone	14	15	16	17	18	19	20	>
	21	22	23	24	25	26	27	
Change when I receive notifications.	28	29	30					
	Toda	y				Do	one	
				C	к		Cance	-

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.

Edit - My Settings		2
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 Cane	el

00	11 Nev		~							_		Post and No	
Nov	Eot X Delate	Release Respon	Copy	Order Promising	Satisfics Ascendy	Archive	Shipments	mecs	Enal Certimation.	Print Confirmation		Mrs Pest and Se	nd.
New	Manage	Release	Pre	pare	Ordar		Docum	rents	Order Car	fimation		Posting	
	NEW - SALES O	8058 - 1001											
6	inen seesse	NOT NOT											
19.2	1001												
_	1001												
# Sole	General												
# Sale	General No.			1001					Due Dat	,			
# SSR			*	1001			-			e od Dolivory Do	ato		
# 53k	No.		*	1001			-		Request				
# 55k	No. Customor		*	1001 31/10/201	16		-		Request	od Dolivory Do			Op
# 5510 5 6 8 8 8 8 8 8	No. Customor Contact		*						Roquest External	od Dolivory Do			Op
# 53k 5 6 8 8 8 8	No. Customor Contact Posting Date Order Date		*	31/10/201					Roquest External	od Dolivory Do			Op
a Sole S C D D D D C	No. Customor Contact Posting Date		*	31/10/201					Roquest External	od Dolivory Do			Op
# Sole S C P A S F C Dyn	No. Customor Contact Posting Date Order Date	No.	*	31/10/201	16				Roquest External	od Dolivory Do	2	Riserved Que	Op

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.

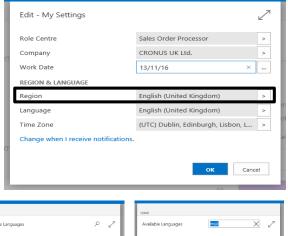
#### 4.4 Change Region

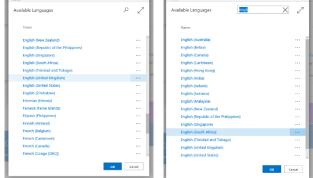
Allows the users to select their preferred regionalisation settings.

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

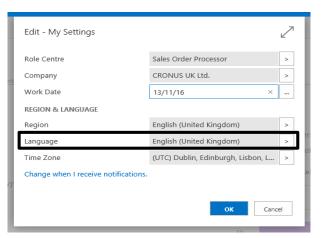
#### 4.6 Change Time Zone

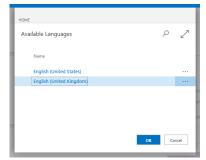
Allows the user to specify the time zone to work in.

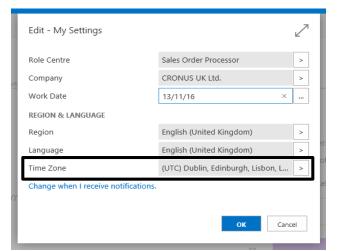
Users must sign out and then sign in again for the change to take effect.

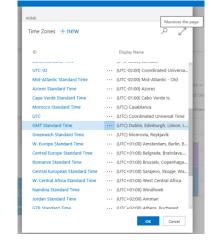
- Click the User symbol top right to view MY
   SETTINGS
- Choose **Time Zone**, choose from the available time zones, **OK**, then **Sign Out** and back in
- The **maximise the page** option maybe helpful to view the full descriptions
- The **search box** offers **filter as you type** to make choosing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

os	oft Dynamics NAV		?
ale	HOME Time Zones + new		Size down.
N	D	Display Name	
10	Greenland Standard Time	(UTC-03:00) Greenland	
	Greenwich Standard Time	··· (UTC) Monrovia, Reykjavík	
On mic Qu et 1 Inv Ref	Central European Standard Time	(UTC+01:00) Sanijeno, Skopje, Wansav, Zagreb	OK Careet











#### 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.

Edit - My Settings		2
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 Cano	el

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

NEW - SALES ORDER - 1002 · THE CA	NNON GROUP PLC	HOME		ł
imes The customer's credit limit has	been exceeded. Details	Finance Charge Customer - Balance to Customer Date New Report Man		^
		View - Credit Limit Notification - 10	1000 · The Cannon Group PLC	<
		The customer's credit limit has been exce	eeded.	~
Clicking Details shows the		Details		
Clicking <b>Details</b> shows the	e use a	No.	10000	ł.
summary box, with some i	possible options the user may wish to take.	Balance (LCY)	The Cannon Group PLC 167,509.37	ł.
	Outstanding Amt. (LCY)	1,601.33		
		Shipped/Ret. Rcd. Not Invd. (LCY)	504.48	
These are purely advisory	and the user can choose whether to follow the	Current Amount (LCY)	0.00	
advice or not.		Total Amount (LCY)	169,615.18	
advice of flot.		Credit Limit (LCY) Overdue Amounts (LCY) as of 25/01/18	1,000.00	
		Invoiced Prepayment Amount (LCY)	-281.12	1
			Gose	]
Mutliple notifications	NEW - SALES ORDER - 1002 - THE CANNON GROUP PLC			$\times$
in the same document	Notifications: 2 The customer's credit limit has been exceeded.   The available inventory for item 1000 is l	ower than the entered quantity		~
will display on one line	1002 · The Cannon Group PLC			
to save space, clicking				
	NEW - SALES ORDER - 1002 · THE CANNON GROUP PLC			$\times$
the down arrow will	Notifications: 2			^
show each on a	× The customer's credit limit has been exceeded. Details			~
separate line.	X The available inventory for item 1000 is lower than the entered quantity Details		Channa and Anna and A	~

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**

Notification	Ena	Conditions
Item availability is low.		(View filter details)
Customer exceeds credit limit.	 $\checkmark$	(View filter details)
Warn about unposted documents.	 $\checkmark$	
Confirm posting outside the fiscal	 $\checkmark$	
Customer has overdue balance.	 $\checkmark$	(View filter details)
Confirm after posting documents.	 $\checkmark$	
Items running low in inventory	 $\checkmark$	(View filter details)



## 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

CRONUS UK Lt	d.									
Items		+ new							i≡ 1⊈t 88	Q
										Cost
No.		Description	Туре	Inventory	Substi Exist	Assem BOM	Production BOM No.	Routing No.	Base Unit of Measure	is Adjust
1320		Chain Wheel Front	Inventory	100	No	No	DOWNVO.		PCS	i⊻ ^
1330		Chain Wheel Back	Inventory	100	No	No			PCS	$\leq$
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	$\leq$
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	233	110	No			PCS	
				Fetching more ro						
				-						~

• "Fetching more data" will appear briefly under last displayed list item, when more records are being retrieved

#### 5.1 Viewing the list

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

Microsoft Dynamics NAV

Edit View Delete Cash Rec

New

G HOME ∨

Sales Quote

Sales Invoices

Sales Return Or

Dynamics CRM Sales Or

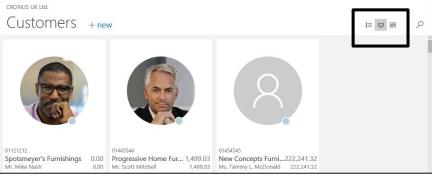
Blanket Sales Orders

A list page can be viewed as:

as a large tile grid,

a list,





Progressive Home Furn... 1,499.03

0.00

Elkhorn Airport

#### 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



New Ms. Ta

London Candoxy Storage C... 0.00

Dpen I

i≡ ¤ #

CRONUS UK Ltd.

Customers + new

Candoxy Canada Inc.

otsmeyer's Furnishings

#### 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.

OME ACTIONS NAVIGATE REPO	ORT										Ś
<	CRONUS UK L	.td.								>	
G HOME ~	Sales	Orders	+ new					(m) (s)	a 0	Customer Statistics	
	Jaies	Oldels	+ new					12	e 2	Customer No.	38128456
Chart of Accounts	No	Sell-to	Sell-to Customer Name	External Document Lo	cation Code	Status	Salesperson	Bill-to Name		Balance (LCV)	0.00
Bank Accounts		Customer No.		No			Code			Sales	
Customers	1001					Open			-	Outstanding Orders (LCV)	121,996.60
Vendors	1002	10000	The Cannon Group PLC	BU	JUE		PS	The Cannon Gr		Shipped Not Invel. (I.CY)	804.20
VAT Statements	101005	30000	John Haddock Insurance Co.				PS	John Haddock		Outstanding Invoices (LCIr)	0.00
Purchase Invoices	101009	··· 38128456	MEMA Ljubijana d.o.o.	RE			JR	MEMA Ljubljan		Service	
Purchase Orders	101011	43687129	Designstudio Gmunden	RE			JR	Designstudio G		Outstanding Serv. Orders (LCI)	0.01
Sales Invoices	101013	··· 46897889	Englunds Kontorsmöbler A8		ELLOW		JR .	Englunds Konte		Serv Shipped Not Invoiced(LCV)	0.01
Sales Orders	101015	··· 49633663	Autohaus Mielberg KG		REEN		JR	Autohaus Mielb		Outstanding ServJnvoices(LCY)	0.0
SOs Pending Approval	101016	10000	The Cannon Group PLC	BU			pS	The Cannon Gr		Total (LCY)	122,800.80
Approved Sales Orders	101017	20000	Selangorian Ltd.				PS	Selangorian Ltd		Credit Limit (LCV)	0.0
Approvals	101018	01454545	New Concepts Furriture				R	New Concepts		Overdue Amounts (I.CY) as of	0.0
Cash Receipt Journals	101019	··· 31987987 ··· 32789456	Candoxy Nederland BV				JR JR	Candoxy Neder		Total Sales (LCV)	0.0
Payment Journals			Lovaina Contractors			Open		Lovaina Contra		Invoiced Prepayment Amount	0.0
General Journals	101022	··· 38128456	MEMA Ljubijana d.o.o. John Haddock Insurance Co.	RE			JR PS	MEMA Ljubljan John Haddock I			
Recurring General Journals Intrastat Journals	101023	··· 30000 ··· 10000	John Haddock Insurance Co. The Cannon Group PLC	BU			PS	The Cannon Gr		Customer Details ~	3812845
Vendor Ledger Entries	104001	2000	Selangorian Ltd.	BD			PS	Selangorian Ltd		Customer No. Phone No.	3812845
	104002	20000	selangorian Ltd.				PS	John Haddock I			
Customer Ledger Entries	104004	40000	Deerfield Graphics Company		LOW		PS	John Haddock   Deerfield Graph		Email Fax No.	
	101004	40000	element trapmics company	YE		open On m		Deemeid Grape		Fax No. Credit Limit (LCV)	0.0
	<				_				>	Credit Limit (LCY)	0.01
dicrosoft Dynamics N	VAV										
vicrosoft Dynamics is	474.9										
DME ACTIONS NAVIGATE REP	FORT										
(	CRONUS UK	Ltd.								>	
ID HOME ✓	Sales	Orders	+ new					1 <b>=</b>	R 🔎	Customer Statistics	
Chart of Accounts										Customer No.	38128
Bank Accounts	No.	Sell-to Customer No.	Bill-to Name	Bill-to Contact		Currency Code	Document	Posting Date	Shipment	D Balance (LCY)	a
Customers	1001		-				31/10/2016	31/10/2016	31/10/2016	Sales	121,996
Vendors	1002	10000	The Cannon Group PLC	Mr. Andy Teal			25/01/2018	25/01/2018	25/01/2018	Outstanding Orders (LCY) Shipped Not Invd. (LCY)	121,996
VAT Statements	101005	30000	John Haddock Insurance Co.	Miss Patricia Doy	vle		11/01/2018	26/01/2018	11/01/2018		804
Purchase Invoices	101009	38128456	MEMA Ljubljana d.o.o.	g. Bostjan Lukan		EUR	19/01/2018	28/01/2018	19/01/2018	Outstanding Invoices (LCY)	(
Purchase Orders	101011	43687129	Designstudio Gmunden	Fr. Birgitte Vestp		EUR	12/01/2018	13/01/2018	12/01/2018	Service Outstanding Serv. Orders (LCY)	
Sales Invoices	101013	46897889	Englunds Kontorsmöbler AB	in organe resp		SEK	18/01/2018	21/01/2018	18/01/2018	Serv Shipped Not Invoiced(LCV)	
Sales Orders	101015	49633663	Autohaus Mielberg KG			EUR	21/01/2018	26/01/2018	21/01/2018		
SOs Pending Approval	101016	10000	The Cannon Group PLC	Mr. Andy Teal			25/01/2018	31/01/2018	25/01/2018	Outstanding Serv.Invoices(LCV)	
Approved Sales Orders	101017	20000	Selangorian Ltd.	Mr. Mark McArth	hur		26/01/2018	26/01/2018	26/01/2018	Total (LCY)	122,800
Approvals	101018	01454545	New Concepts Furniture	Ms. Tammy L. Mi		USD	26/01/2018	26/01/2018	26/01/2018	Credit Limit (LCY)	C
Cash Receipt Journals	101019	31987987	Candoxy Nederland BV	Rob Verhoff		EUR	22/01/2018	31/01/2018	22/01/2018	Overdue Amounts (LCY) as of	0
Payment Journals	101020	32789456	Lovaina Contractors	Hans Visser		EUR	26/01/2018	26/01/2018	26/01/2018	Total Sales (LCV)	C
General Journals	101022	38128456	MEMA Ljubljana d.o.o.	g. Bostjan Lukan		EUR	04/02/2018	04/02/2018	04/02/2018	Invoiced Prepayment Amount	0
Recurring General Journals	101023	30000	John Haddock Insurance Co.	Miss Patricia Doy			21/02/2018	21/02/2018	21/02/2018	Customer Details 🗸	
Intrastat Journals			The Cannon Group PLC	Mr. Andy Teal			17/01/2018	17/01/2018		Customer No.	38126
Vendor Ledger Entries	104001	10000							17/01/2018		
					hur					Phone No.	
	104002	20000	Selangorian Ltd.	Mr. Andy Teal Mr. Mark McArth	hur		17/01/2018	17/01/2018	17/01/2018	Phone No.	
	104002 104003	···· 20000 ···· 30000	Selangorian Ltd.	Mr. Mark McArth Miss Patricia Oby	yve		17/01/2018 17/01/2018	17/01/2018 17/01/2018	17/01/2018 17/01/2018	Email	
	104002	20000		Mr. Mark McArth Miss Patricia Doy	yve		17/01/2018	17/01/2018	17/01/2018	Email Fax No.	
	104002 104003	···· 20000 ···· 30000	Selangorian Ltd.	Mr. Mark McArth Miss Patricia Oby	yve		17/01/2018 17/01/2018	17/01/2018 17/01/2018	17/01/2018 17/01/2018	Email	
	104002 104003	···· 20000 ···· 30000	Selangorian Ltd.	Mr. Mark McArth Miss Patricia Oby	yve		17/01/2018 17/01/2018	17/01/2018 17/01/2018	17/01/2018 17/01/2018	Email Fax No.	
Customer Ledger Entries	104002 104003 104004	···· 20000 ···· 30000	Selangorian Ltd.	Mr. Mark McArth Miss Patricia Oby	yve		17/01/2018 17/01/2018	17/01/2018 17/01/2018	17/01/2018 17/01/2018	Email Fax No.	c
Customer Ledger Entries	104002 104003 104004	···· 20000 ···· 30000	Selangorian Ltd.	Mr. Mark McArth Miss Patricia Oby	yve		17/01/2018 17/01/2018	17/01/2018 17/01/2018	17/01/2018 17/01/2018	Email Fax No.	c
Customer Ledger Entries	104002 104003 104004 104004	···· 20000 ···· 30000	Selangorian Ltd.	Mr. Mark McArth Miss Patricia Oby	yve		17/01/2018 17/01/2018	17/01/2018 17/01/2018	17/01/2018 17/01/2018	Email Fax No.	c
Customer Ledger Entries	104002 104003 104004 	20000 30000 40000 #mmn	Selangorian Ltd.	Mr. Mark McArth Miss Patricia Oby	yve		17/01/2018 17/01/2018	17/01/2018 17/01/2018	17/01/2018 17/01/2018	Email Fax No. Credit Limit (LCV)	
Customer Ledger Entries <b>Aicrosoft Dynamics N</b> ME ACTIONS NAVIGATE REPC	194002 194003 194003 194004 ********	20000 30000 40000 	Selangorian Ltd.	Mr. Mark McArth Miss Patricia Oby	yve		17/01/2018 17/01/2018	17/01/2018 17/01/2018 17/01/2018	17/01/2018 17/01/2018 17/01/2018 17/01/2018	Email Fac No. , Credit Linit (LCY)	c
Customer Ledger Entries Aicrosoft Dynamics N ME ACTIONS NAVIGATE REPO	194002 194003 194003 194004 ********	20000 10000 40000 	Selangorian Ltd.	Mr. Mark McArth Miss Patricia Oby	yve		17/01/2018 17/01/2018	17/01/2018 17/01/2018	17/01/2018 17/01/2018 17/01/2018 17/01/2018	Email Fax No. Credit Limit (LCY)	?
Customer Ledger Entries Microsoft Dynamics N ME ACTIONS NAVABATE REPC C	IAV CRONUSUKE Sales	2000 3000 4000 	Selangorian ttd. - other instanciok Imparative con- Deerfield Graphics Company Maximum Vitif Plane + new	Mr. Mark McArth Miss Patricia Oby	yve		17/01/2018 17/01/2018 17/01/2018 17/01/2018	17/01/2018 17/01/2018 17/01/2018	17/01/2018 17/01/2018 17/01/2018 17/01/2018	Email Fax No. Credit Limit (LCY) Customer Statistics Customer No.	30123
Customer Ledger Entries	194002 194003 194003 194004 ********	20000 10000 40000 	Selangonian tid. Joan Haabuda Kinazamat daa Deented Graphics Company Manamatak Holf Plana	Mr. Mark McArth Miss Patricia Oby	yve	Department	17/01/2018 17/01/2018	17/01/2018 17/01/2018 17/01/2018	17/01/2018 17/01/2018 17/01/2018 17/01/2018	Email Facto. Credit Limit B.C?) Customer Statistics Customer Ho. Balance (C)	?
Cuitomer Ledger Entries	IAV CRONUSUKE Sales	2000 3000 4000 	Selangorian tid. John Habook Interation Colo Deeffeld Graphics Company Measured Hill Phan Heatmand Hill Phan Phan Separat Due Date Phan	Mr. Mark McArth Miss Patricia Oby	Payment Direct at %	Department	17/01/2018 17/01/2018 17/01/2018 17/01/2018	17,01/2018 17,01/2018 17,01/2018 17,01/2018 17,01/2018 17,01/2018	17/01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018	(mail Tar Ho. Control Limit (LCT) ) Customer Statistics Customer File. Railwore (LCT) Sales	? 30123
Cuttomer Ledger Entries	JAV CRONUS UKL Sales No.	2000 3000 4000 	Selangorian ttd. - other instanciok Imparative con- Deerfield Graphics Company Maximum Vitif Plane + new	Mr. Mark McArth Miss Patricia Doy	yve		17/01/2018 17/01/2018 17/01/2018 17/01/2018	17/01/2018 17/01/2018 17/01/2018	17/01/2018 17/01/2018 17/01/2018 17/01/2018	Imail rantes. Constituint S.Cr) Customer Statistics Customer Ho. Tablerer (LO) Sales Outstanting Content SLO)	<b>?</b> 30124 121,99
Cuttomer Ledger Entries	ID002 104003 104004 104004 104004 ID004 CRONUS UK L Sales No. 1501	2000 2000 4000 	Selangonan U.S. John Tasabook Insolance Col- Deeffeld Gaptiss Company Materials and Plane Parameter and Plane	Mr. Mark McArth Intes Patrice Ory Mr. Kevin Wright Fayment Temes Code	Payment Discount %	SALES	17/01/2018 17/01/2018 17/01/2018 17/01/2018	17,01/2018 17,01/2018	17/01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018	Email Tar Ho. Credit Limit (LCT) Customer Statistics Customer Ho. Balance (LCT) Sales Outsminking Orders (LCT)	<b>?</b> 30123 121,99 80
Costoner Ledger Onlies	INTERNAL STATES	20000 30000 40000 40000 40000 5cH-55 5cH-55 10000	Stellangonian ISS. Mini House Links and King Deemfeld Graphic Company Material Co	Mr. Mark McArth Mrss Hans Hans a Urg Mr. Kevin Whight Payment Terms Fork 1M(8D)	yw t Paymeet Diceaut % 0 2	SALES SALES	17/01/2018 17/01/2018 17/01/2018 17/01/2018	17,01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018	17/01/2018 17/01/2018 17/01/2018 17/01/2018 ****** Person Amount Amount 0.00 4,000.0	Imail Frances Count Limit 8:C17 Customer Statistics Customer No. Hadron (KC7) Salet Outstanding Contes (KC7) Salet No. Imail, 8:C17 Salet No.	<b>?</b> 30123 121,99 80
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Latence Ledge Entries           icrosoft Dynamics N           E         Action           Market N           C           D         House N           automatic         C           D         House N           automatic         C           Accounts         C           automatic         C           automatic         C           automatic         C           automatics         C           automatics         C           automatics         C	INTERNAL INT	2000 2000 2000 2000 	Ediagonia ILE     Compare International     Develoid Graphics Company     Process     Process     Develoid Complex Company     The Date     Sogname Theo Date     Sogname T	Korket Model     Market	Payment Biroust % 0 2 0 2 2 0 0 0 0 0 0 0 0 0 0 0 0 0 0	SALES SALES SALES SALES SALES SALES SALES	17/01/2018 17/01/2018 17/01/2018 17/01/2018	Complete Science No No No No No No No	17/01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018 17/01/2018 4/0002 4/0002 1.5/972 2.887.1 6.982.4 1.5/972 2.887.1 1.9/972	Imail Fra Ho. Create Limit (LCP) Customer Statistics Customer Ho. Ruiners (LCP) Sales Outstanding Cortem (LCP) Software (LCP) Software (LCP) Software (LCP) Software (LCP) Software (LCP) Customering Innoisen (LCP) Software (LCP) Customering Software (LCP) Software (LCP) Customering Software	2 30120 121,99 80 122,80
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#### 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.

CRONUS UK Lt	d.			
Custo	mer	List + new		
No. 1	Name	~	Responsibility Centre	Location Code
01121212	··· Spr A	Ascending		YELLOW
01445544	··· Prc			YELLOW
01454545	··· Ne 🏾	↓ Descending		YELLOW
01905893	··· Cai	Filter		YELLOW
01905899	··· Elk	Clear Filter		YELLOW
01905902	··· Lor	Clear Filter		YELLOW
10000	••• The	Hide Column	BIRMINGHAM	BLUE
20000	··· Sel	Choose Columns		
20309920	• • Me			YELLOW
20312912	· · Hig	What's this?		GREEN
		T		

CRONUS UK Ltd. <u>Cus</u>tomer List + new Name Location Code er List Responsibilit Centre Open Menu ··· Spr AJ Ascending YELLOW YELLOW ••• Pro Name ✓ Resp ··· Ne <sup>Z</sup>↓ Descending YELLOW ··· Cai 🍸 Filter... YELLOW Spotsmeyer's Furnishings ··· Elk YELLOW 📡 Clear Filter Progressive Home Furnishin... YELLOW •••• Lo New Concepts Furniture Hide Column ... Th INGHAM BLUE Candoxy Canada Inc. Sel Choose Columns YELLOW Me ... Hig 🕜 What's this? 20312912 GREEN

Choose Columns	k	.7
Visible	Caption	Â
	No.	
$\checkmark$	Name	(
$\checkmark$	Responsibility Centre	
$\checkmark$	Location Code	
	Phone No.	
$\checkmark$	Contact	
	Search Name	
$\checkmark$	Blocked	
$\checkmark$	Credit Limit (LCY)	
$\checkmark$	Currency Code	
$\checkmark$	Customer Disc. Group	- 10
$\checkmark$	Customer Posting Group	- 84
$\checkmark$	Customer Price Group	- 84
$\checkmark$	Salesperson Code	- 84
$\checkmark$	Shipping Advice	- 84
$\checkmark$	Shipping Agent Code	- 84
$\checkmark$	Combine Shipments	- 84
$\checkmark$	Last Date Modified	- 84
	Post Code	~
	OK Cancel	

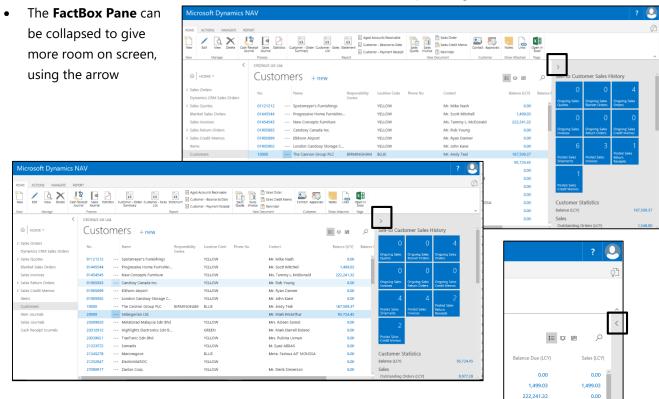
Choosing the "**What's This?**" option will show the user the extended tooltip help that explains the use of that field/column. There is also an option to "**Learn More**" and go to the online help pages.

Microsoft Dynamics	NAV					
HOME ACTIONS NAVIGATE	REPORT					
ŵ │ Home ~	CRONUS UK Ltd CUSTO				Specifies the name of regularly contact when business with this cust Learn more	n you do
Chart of Accounts Bank Accounts	No.	Name	Responsibility Centre	Location Code	Contact	Blocked
<ul> <li>Customers</li> </ul>	01121212	··· Spotsmeyer's F	urnishings	YELLOW	Mr. Mike Nash	
Balance	01445544	··· Progressive Ho	me Furnishin	YELLOW	Mr. Scott Mitchell	
▷ Vendors	01454545	··· New Concepts	Furniture	YELLOW	Ms. Tammy L. McDonal	d
VAT Statements	01905893	··· Candoxy Canad	da Inc.	YELLOW	Mr. Rob Young	



#### 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







#### 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

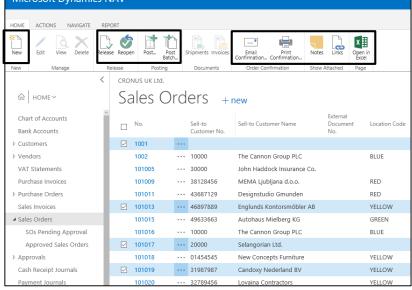
										pped Not III
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Microsoft Dynamic	s N	IAV								proved
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HOME ACTIONS NAVIGATE	REP	ORT								idy To Ship
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								Extern	▷ Sales (	
<ul> <li>Sales Orders</li> </ul>	^		No.			Sell-to	Sell-to Customer Name	Docur	Blanke	et Sales Orde
Shipped Not Invoiced						Customer No.		No.	Sales I	nvoices
Completely Shipped			1001		•••	10000	The Cannon Group PLC		▷ Sales F	Return Orde
Pending Approval		•	1002		••••	10000	The Cannon Group PLC		·	
Approved			1003			10000	The Cannon Group PLC			BLUE
Sales Orders - Open		•	1006			10000	The Cannon Group PLC			BLUE
Ready To Ship			1009			10000	The Cannon Group PLC			BLUE
Partially Shipped			101005		••••	30000	John Haddock Insurance Co.			
Delayed			101009		••••	38128456	MEMA Ljubljana d.o.o.			RED
Dynamics CRM Sales Ord			101011		•••	43687129	Designstudio Gmunden			RED
Sales Quotes			101013		•••	46897889	Englunds Kontorsmöbler AB			YELLOW
Blanket Sales Orders			101015			49633663	Autohaus Mielberg KG			GREEN
Sales Invoices			101016		•••	10000	The Cannon Group PLC			BLUE

• Or tick the top box to select all the records

	Microsoft Dynamic	s NA	V					
	HOME ACTIONS NAVIGATE	REPORT	r					
		<	Cronus - Train	er				
			Sales	0	rders	+ new		
	<ul> <li>Sales Orders</li> <li>Shipped Not Invoiced</li> </ul>	^	No.		Sell-to Customer No.	Sell-to Customer Name	External Document No.	Location C
	Completely Shipped		1001		10000	The Cannon Group PLC		BLUE
	Pending Approval		1000		10000	The Cannon Group PLC		
	Approved		1003		100 0	The Cannon Group PLC		BLUE
	Sales Orders - Open		1006		100 0	The Cannon Group PLC		BLUE
	Ready To Ship		C View		100 0	The Cannon Group PLC		BLUE
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	Delayed		🖍 Edit		381 8456	MEMA Ljubljana d.o.o.		RED
	Dynamics CRM Sales Ord		🗙 Delete		436 7129	Designstudio Gmunden		RED
err	▷ Sales Quotes		Select More		468 7889	Englunds Kontorsmöbler AB		YELLOW
ur	Blanket Sales Orders		Select Mol	e	496 3663	Autohaus Mielberg KG		GREEN
	Sales Invoices		101016		10000	The Cannon Group PLC		BLUE
	Sales Return Orders		101017		20000	Selangorian Ltd.		

Microsoft Dynamic	s N/	٩V				
HOME ACTIONS NAVIGATE	REPO	RT				
	<	Cro	onus - Traine	r		
☆ HOME ∨		S	ales	Orc	ders	+ new
<ul> <li>Sales Orders</li> <li>Shipped Not Invoiced</li> </ul>	^	7	No.		Sell-to Customer No	Sell-to
Completely Shipped		•	1001		10000	The Ca
Pending Approval		✓	1002		10000	The Ca
Approved		✓	1003		10000	The Ca
Sales Orders - Open		✓	1006		10000	The Ca
Ready To Ship		✓	1009		10000	The Ca
Partially Shipped		✓	101005		30000	John F
Delayed		✓	101009		38128456	MEMA
Dynamics CRM Sales Ord		✓	101011		43687129	Desigr
▷ Sales Quotes		✓	101013		46897889	Englur
Blanket Sales Orders		✓	101015		49633663	Autoh
Sales Invoices		✓	101016		10000	The Ca

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). Microsoft Dynamics NAV

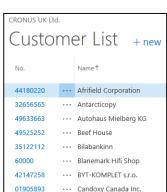




### 5.6 Sorting a List page

- 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 Lt	d.					
Custo	me	er	L	ist + new		
No. 1		Nar	ne	~	Responsibility Centre	Location Code
01121212		Spe	Ą١	Ascending		YELLOW
01445544		Prc				YELLOW
01454545		Ne	Â↓	Descending		YELLOW
01905893		Cai	Ŧ	Filter		YELLOW
01905899		Elk	_	Class Filter		YELLOW
01905902		Lor	×	Clear Filter		YELLOW
10000		The		Hide Column	BIRMINGHAM	BLUE
		Sel		Choose Columns		
20		Me				YELLOW
2		Hig	0	What's this?		GREEN
Menu						
- Respon						
Centre						



Date Picker

The **Date Picker** can be used on date fields in editable lists, such as the **Planned** 

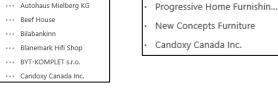
Delivery Date on the lines of a sales

This works well on touch screens.

EDIT - SALES ORDER - 101017 · SELANGORIAN LTD

57

order.



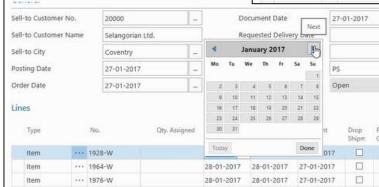
er List

Spotsmeyer's Furnishings

Name

Open

Sell-to Custome	r No.	20000			D		27-01-2017		
Sell-to Custome	r Name	Selangoria	in Ltd.		R	ry Date			
Sell-to City		Coventry		-	Ð	ternal Documer	it No.	1	
Posting Date		27-01-201	7	-	Sa	alesperson Code		PS	
Order Date		27-01-201	27-01-2017			atus		Open	
Lines		No.	0.1.1		Planned	Planned		Deer	0
Туре		NO.	Qty. Assig	jneo	DateSelect i	a date ment	Shipment Date	Drop Shipm	Pur
		1928-W			-01-2017	28-01-2017	27-01-20	17	
Item	tem ••• 19				28-01-2017	28-01-2017	27-01-20	17	
Item Item	***	1964-W							
	•••	1964-W 1976-W			28-01-2017	28-01-2017	27-01-20	17 🗌	





#### Searching (filtering) on a List Page 5.8

- Search across all columns means users can without specifying which column it should be in 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

enter text to be searched n. The system will	for
	٩

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 Dynamic	cs N	IAV										
HOME ACTIONS NAVIGATE	REPO	ORT										
	<	Cro	nus - Train	er								
		S	ales	Or	ders 4	- new				100	00	$\times$
<ul> <li>Sales Orders</li> <li>Shipped Not Invoiced</li> </ul>	^		No.		Sell-to Customer No.	Sell-to Customer Name	External Document No.	Location Code	Assigned User ID	Status	Salesperson Code	Campaign
Completely Shipped			1001		• 10000	The Cannon Group PLC		BLUE		Open	PS	
Pending Approval		-	1002		• 10000	The Cannon Group PLC				Open	PS	
Approved			1003		• 10000	The Cannon Group PLC		BLUE		Open	PS	
Sales Orders - Open			1006		• 10000	The Cannon Group PLC		BLUE		Open	PS	
Ready To Ship			1009		• 10000	The Cannon Group PLC		BLUE		Open	PS	
Partially Shipped			101016		• 10000	The Cannon Group PLC		BLUE		Released	PS	
Delayed			104001		• 10000	The Cannon Group PLC		BLUE		Open	PS	
Dynamics CRM Sales Ord			104006		• 10000	The Cannon Group PLC		BLUE		Open	PS	
▷ Sales Quotes			104011		• 10000	The Cannon Group PLC		BLUE		Released	PS	
Blanket Sales Orders												
Sales Invoices												

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, Yellow as in the warehouse location) will produce a result that

CRONUS UK Lt	d							
-								
Custo	m	ers					ell	$\times$
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. Gudmundso	lottir	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

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

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



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:

Micr	rosoft	Dyna	mio	cs NA	٩V									
HOME	HOME	ACTIONS	N	AVIGATE	REPORT									
	New	/	Q	Delete	Item Item Reclassificati	n Inventory - Reorders	Inventory - Sales Back Orders	Cross Reference	Approvais	Send Approval Cano Request	cel Approval Request	e Filter by Cle	ar Attributes Note	s Links Open in Excel
New	New	Mar	nage		Process		Report	H	em	Request Appr	roval Invent	ory Attrib	utes Show	Attached Page
	VIEW -	ITEM LIST	+	- new								13 10 18	chai	$\times$
යි Cha	No.			Descrip	ation	Туре	Inventor	y Subs Exist	ti Asse BON		Routing N	o. Base Unit Measure		Unit Cost
Ban	1300	)		Chain	Assy	Inventory	15	2 No	No	1300		PCS		13.1565
▷ Cus	1310	)	•••	Chain		Inventory	10	0 No	No			PCS	$\checkmark$	1.99
⊳ Ven	1320	)	•••	Chain	Wheel Front	Inventory	10	0 No	No			PCS	$\sim$	4.66
VAT	1330			Chain	Wheel Back	Inventory	10	0 No	No			PCS	×	5.88
Pure	1900	I-S	•••	PARIS	Guest Chair, black	Inventory	29	9 No	No			PCS		97.50
⊳ Pure	1908	I-S	•••	LOND	ON Swivel Chair, blue	Inventory	30	5 No	No			PCS		96.10
Sale	1936	i-S	•••	BERLIN	N Guest Chair, yellow	Inventory	13	6 No	No			PCS		97.50
⊿ Sale	1960	I-S		ROME	Guest Chair, green	Inventory	17	7 No	No			PCS		97.50
S	1964	I-S	•••	TOKYC	0 Guest Chair, blue	Inventory	11	3 No	No			PCS		97.50
A	1968	I-S	•••	MEXIC	O Swivel Chair, black	Inventory	26	5 Yes	No			PCS		96.10
▷ App	1972	!-S		MUNI	CH Swivel Chair, yellow	Inventory	12	2 No	No			PCS		96.10
Casi	1980	I-S	•••	MOSC	OW Swivel Chair, red	Inventory	10	0 Yes	No			PCS		96.10
Pay	1988	I-S	•••	SEOUL	. Guest Chair, red	Inventory	16	7 Yes	No			PCS	$\checkmark$	97.50
Gen	2000	I-S		SYDNE	EY Swivel Chair, green	Inventory	16	3 No	No			PCS		96.10

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

VIE																
	HOME	ACTION		AVIGATE	REPORT		_						_		_	
]	New	Edit	View	Delete	Item Item Reclassificati	on Inventory Reorders	- Inventory - Sales Back Orders	Cross References	Approvals	Send Approval Request	Cancel Approval Request	Price	Filter by Cl Attributes	ear Attributes Filter	Notes	Links Ope
v	New		Manage		Process		Report	Iter	n	Request	Approval	Inventory	Attrit	outes	Show Att	tached Pag
	VIEW -	- ITEM L	IST +	new								:=	101 58	chair		×
ධ Cha	No.			Descripti	on	Туре	Inventor	y Substi. Exist	. Asse BOM			uting No.	Base Un Measure		ist ljust	Unit Co
Ban	1900	0-S		PARIS G	iuest Chair, black	Inventory	29	9 No	No				PCS			97.5
Cus	1908	B-S		LONDO	N Swivel Chair, blue	Inventory	30	5 No	No				PCS			96.1
/en	1936	5-S		BERLIN	Guest Chair, yellow	Inventory	13	6 No	No				PCS			97.5
	1960	0-S		ROME	Guest Chair, green	Inventory	17	7 No	No				PCS			97.5
Pun	1964	4-S		токуо	Guest Chair, blue	Inventory	11	3 No	No				PCS			97.5
Pun	1968	B-S		MEXICO	Swivel Chair, black	Inventory	26	5 Yes	No				PCS			96.1
sale	1972	2-S		MUNICI	H Swivel Chair, yellow	Inventory	12	2 No	No				PCS			96.1
ale	1980	0-S		MOSCO	W Swivel Chair, red	Inventory	10	0 Yes	No				PCS			96.1
C	1988	8-S		SEOUL	Guest Chair, red	Inventory	16	7 Yes	No				PCS		$\checkmark$	97.5
	2000	0-S		SYDNEY	Swivel Chair, green	Inventory	16	3 No	No				PCS		$\checkmark$	96.1

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).

IE	HOME	ACTIONS	N	AVIGATE	REPORT										
,	X New	Edit	Q	Delete	Item Item Reclassificat Journal Journal	ion Inventory - Reorders	Inventory - Sales Back Orders		pprovals		Approval List	Filter by Clear A Attributes Fi	ttributes Notes	Links Open in Excel	
	New	М	anage		Process		Report	Item		Request Approva	Inventory	Attributes	Show A	Attached Page	
à	VIEW	- ITEM LIS	т +	- new							:=		lon* par*	×	
ha	No.	~		Descript	tion	Туре	Inventory	/ Substi Exist	Asse BON		Routing No.	Base Unit of Measure	is Adjust	Unit Cost	
an	190	0-S		PARIS	Guest Chair, black	Inventory	29	9 No	No			PCS		97.50	
		8-S			ON Swivel Chair, blue	Inventory	30	5 No	No			PCS	_	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

	RED	Sr. Ramon Garcia No	oblejas	
	Only show lines where "Lo	ocation Code" is		
			OK Cancel	
d				
a	YELLOW	Mirs. Azieen Samat		

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

CRONUS UK Lt	-		
Custo	mers		
No.	Name	Responsibility Location Code V Centre	′ Contact↓
47563218	··· Klubben	Ascending	Thomas Andersen
34010199	··· Corporación Beta	2.4	Srta. Vanessa Garcia Garcia
34010602	··· Helguera industrial	Z↓ Descending	Sr. Ramon Garcia Noblejas
34010100	··· Libros S.A.	<b>Filter</b>	Sr. Oscar Alfonso Caceres
31987987	··· Candoxy Nederland BV	Clear Filter	Rob Verhoff
35451236	••• Gagn & Gaman	Clear Filter	Ragnheidur K. Gudmundsdottir
42258258	•••• J & V v.o.s.	Hide Column	Petr Karasek
01454545	··· New Concepts Furniture	Choose Columns	Ms. Tammy L. McDonald
20339921	··· TraxTonic Sdn Bhd		Mrs. Rubina Usman
20309920	··· Metatorad Malaysia Sdn Bhd	What's this?	Mrs. Azleen Samat
44180220	· · · Afrifield Corporation	BLUE	Mrs. Ariane Peeters
01445544	··· Progressive Home Furnishin	YELLOW	Mr. Scott Mitchell
01905899	··· Elkhorn Airport	YELLOW	Mr. Ryan Danner
01905893	··· Candoxy Canada Inc.	YELLOW	Mr. Rob Young
27321782	··· Karoo Supermarkets	YELLOW	Mr. Pieter Wycoff

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

			Microsoft Dynamics	NAV							
Code Name			HOME ACTIONS NAVIGATE RE	PORT							
oode	- Hanne	Cancel	<	< CRONUS UK Ltd.							
BLUE	Blue Warehouse		ы номе∽	Custo	mers					10	88 /
GREEN	Green Warehouse		Chart of Accounts	No. Y	Name	Responsibility	Location Code	Contact 4	Blocked	Credit Limit	Currency Co
RED	Red Warehouse		Bank Accounts	34010199	··· Corporación Beta	Centre	▼ BLUE	Srta. Vanessa Garcia Garcia		(LCY)	
SILVER	Silver Warehouse		Balance	34010199	Libros S.A.		BLUE	Sr. Oscar Alfonso Caceres			
WHITE	White Warehouse		▷ Vendors	44180220	··· Afrifield Corporation		BLUE	Mrs. Ariane Peeters		0.00	
YELLOW	Yellow Warehouse		VAT Statements	44756404	··· London Light Company		BLUE	Mr. Mathew Charles		0.00	
YELLOW	fellow wateriouse		Purchase Invoices	44171511 10000	Zuni Home Crafts Ltd.     The Cannon Group PLC	BIRMINGHAN	BLUE	Mr. James R. Hamilton Mr. Andy Teal		0.00	
+ new	Select from full list		Sales Invoices	21245278	Maronegoce	BIRMINGHAN	BLUE	Mr. Andy Teal Mme. Fadoua AIT MOUSSA			MAD
VELLON	Mr. Miko Nach	1	Sales Orders	41597832	··· Möbel Scherrer AG		BLUE	Herrn Stefan Delmarco			CHF
			Approvals	41497647	· · · Pilatus AG		BLUE	Fr. Gabriele Dickmann			
			Cash Receipt Journals								

Formulae can be added to Microsoft Dynamics NAV filter the results, for example HOME ACTIONS NAVIGATE REPORT CRONUS UK Ltd. to see orders above a certain ഹ Sales Orders + new **:**≡ 88 ρ value, Due Date ount Payment Terms Code Depar Code Compl... t Including Payment Discount % 25/02/2018 1M(8D) 2 SALES 4,000.00 4,800.00 No Only show lines where "Amount" is 19/02/2018 1M(8D) 2 SALES No 2,887.11 2,887.11 No 6,983.44 6,983.44 12/02/2018 1M(8D) 2 SALES >2000 31/01/2018 СМ SALES No 12,253.79 12,253.79 0 04/02/2018 14 DAYS 0 SALES No 19,395.95 19,395.95 31/01/2018 CM SALES No 5,179.48 5,179.48 0 OK Cancel 31/01/2018 CM SALES No 5.132.11 5.132.11 0 04/03/2018 1M(8D) No 2,998.30 2,998.30 2 SALES

Microsoft Dynamics NAV or between certain values, OME ACTIONS NAVIGATE REPORT CRONUS UK Ltd. Sales Orders + new := 88 Q Sell-to Custon Payment Terms Code Depa Code uding VAT er No 1,917.02 ... 30000 CM 0 SALES Yes 1,597.5 Only show lines where "Amount" is 14 DAYS SALES 1,109.0 ... 20000 1,330.88 No 0 ... 01454545 СМ 0 SALES No 1,083.2 1.083.21 >1000&<2000 ... 30000 СМ 0 SALES No 1.032.0 1 238.40 1,770.0 ... 40000 1M(8D) 2 SALES No 2,124.00 ... 40000 1M(8D) No 1,740.0 SALES 2,088.00 2 Cancel ОК ... 60000 1M(8D) No 1,180.0 1,416.00 ... 10000 1M(8D) 2 SALES No 1,290.0 1.548.00 ... 20000 14 DAYS 0 SALES No 1,242.0 1,490.40 1,318.0 1,581.60 104019 ... 61000 1M(8D) N Approvals

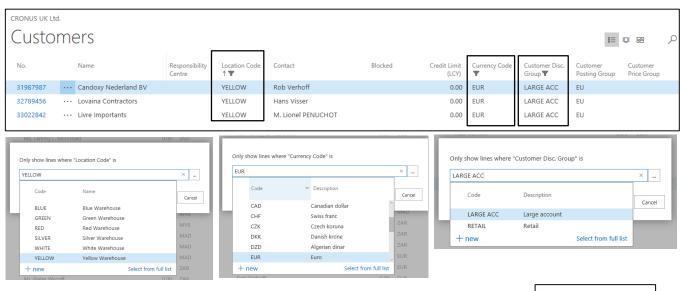


Or a specific date range, for example orders shipped in January.

								0101183101	8			×		
Mic	rosoft Dyna	ami	cs NAV								ОК	Cancel		
HOME	ACTIONS NAVI	IGATE	REPORT						U SALES	_	NO	880.0		
	CRONUS UK Lt	d.												
ŵ	Sales	0	rders	+ new										Q
≡	No.		Sell-to Customer No.	Shipment Date↑ <b>▼</b>	Due Date	Payment Terms Code	Payment Discount %	Department Code	Project Code	Compl Shipped	Amount	Amount Inclue	ding VAT	
	101005		30000	11/01/2018	31/01/2018	CM	0	SALES		Yes	1,597.52	1,91	7.02	
	101011		43687129	12/01/2018	12/02/2018	1M(8D)	2	SALES		No	6,983.44	6,98	3.44	
	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	2,99	7.60	
	104003		30000	17/01/2018	31/01/2018	CM	0	SALES		No	1,032.00	1,23	8.40	
	104004		40000	17/01/2018	17/02/2018	1M(8D)	2	SALES		No	1,770.00	2,12	4.00	
	104005		60000	17/01/2018	17/02/2018	1M(8D)	2			No	4,902.00	5,88	2.40	
	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	3,15	8.40	
	104008		30000	17/01/2018	31/01/2018	CM	0	SALES		No	880.00	1,05	6.00	
	104009		40000	17/01/2018	17/02/2018	1M(8D)	2	SALES		No	1,740.00	2,08	8.00	
	104010		60000	17/01/2018	17/02/2018	1M(8D)	2			No	1,180.00	1,41	6.00	
	104011		10000	17/01/2018	17/02/2018	1M(8D)	2	SALES		No	1,290.00	1,54	8.00	
	104012		20000	17/01/2018	31/01/2018	14 DAYS	0	SALES		No	1,242.00	1,49	0.40	
	104013		30000	17/01/2018	31/01/2018	СМ	0	SALES		No	948.00	1,13	7.60	

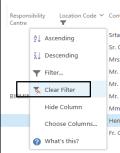
Only show lines where "Shipment Date" is

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



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

See Appendix B for more detail on filter criteria.





# 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)

icrosoft Dynamics NAV							?
	EPORT						
		Sales Invoice			Contact		
Sales Credit Finance Charge Edit ×		Sales Credit Memo	Approval Cancel Approval Approvals	Contact Bank Accounts Mandates Addresses A	Bank Dimensions Ledger St	atistics Entry Statistics Notes Links	Previous Next
Memo Memo New Manag		New Document R	Request Request Request Request Approval	Accounts Mandates Addresses A Customer		Statistics istory Show Attached	Page
EDIT - CUSTOMER CARD					5 ×	>	
10000 · The Can	non Group PI C					Custo 7 ure ~	
General				Γ	- [		
en	10000		Credit Limit (LCY)		3 Show more		
<u></u>			Blocked		1,000.00	136	B
Balance (LCY)	The Cannon Group PLC	167,509.37	Total Sales		17,100.96		
Balance Due (LCY)		167,509.37	Costs (LCY)		11,762.70		
ale		107,309-57	CU3G (LC1)		11,702.70		
Address & Contact				B27 4	KT Mr. Andy Teal	Sell-to Customer Sales H	istory
as Invoicing				<b>2</b> DOM	ESTIC DOMESTIC	0 0	5
en Payments					1M(8D)	Ongoing Sales Ongoing Sales	Ongoing Sales
ec				Г		Ongoing Sales Quotes Dianket Orders	Ongoing Sales Orders
Shipping					4	0 0	0
en Location Code	BLUE		Shipping Time	1D	-	Ongoing Sales Invoices Return Orders	Ongoing Sales Credit Memos
combine snipments			Base Calendar Code			Invoices Return Orders	Credit Memos
Reserve	Optional	~	Customised Calendar	No		6 3	1
Shipping Advice	Partial	~	Delivery Area Code			Posted Sales Posted Sales	Posted Sales Return
crosoft Dynamics NAV							2
HOME ACTIONS NAVIGATE R	EPORT						
	New a iii	Sales Invoice	🔍 📉 🐺	😐 📑 🚵 🔛	Contact	2 🛃 🤜 🗋	
Sales Credit Finance Charge Edit	Sales Customer Detailed S	les Credit Memo les Reminder R	Approval Cancel Approval Approvals equest Request	Contact Bank Direct Debit Ship-to Accounts Mandates Addresses A	Bank Ledner St	atistics Entry Statistics	Previous Next
New Manag	e Process Report	New Document	Request Approval	Customer		istory Show Attached	Page
EDIT - CUSTOMER CARD							7
□ 10000 · The Can	non Group PLC						
General							Show more
an No.	10000			edit Limit (LCY)			1,000.00
	The Cannon Gr			ocked			
in Name							

- 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 <u>only</u>. 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



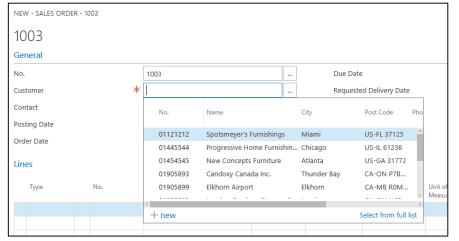
**Tooltips** operate on card pages to guide the user, all fields underline when the user hovers over them, if clicked then a brief description of the field is given to help the user, along with a link ("**Learn More**") which will load the relevant page in the online help system or if there is no specific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

Microsoft Dynamics	NAV	Microsoft Dynamics NAV							
HOME       HOME       ACTIONS       NAVIG         Image       Image       Image       Image       Image         Image       Image       Image       Image       Image       Image         Image	ATE  Item Reclassification Journal Process  RS  RS  Velcome to Dy warmics NAV is a business management apple data, but you can create your of the Business Owner role center; you Assisted Setup Set Up Company C Migrate Business Data L Set Up Sales Tax C Set Up Sales Tax C Set Up Demail G Set Up Office Add-Ins Set Up Approval Workflow S Set Up Approval Workflow S	HOME ACTIONS NAVIGATE     Image Image      Process   Item History   Set Special Special Special Special Prices &   Image Process   Item   History Set Special Special Special Special Prices & Special Prices &   Image Process   Item   History Set Special Special Special Special Special Prices &   Special Prices &   Image Process   Item   History Set Special Special Special Special Special Prices &   Special Prices &   Image Image   Image   Image Process   Item   History Set Special Special Special Special Prices & Special Prices & Special Prices & Image <p< th=""></p<>							
	Set Up Email Logging Set								
	Connection	it is marked as <b>Completed</b> . To run the assisted setup, you choose the three dots also called the context menu, and then you select <b>Start Setup</b> .							

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.





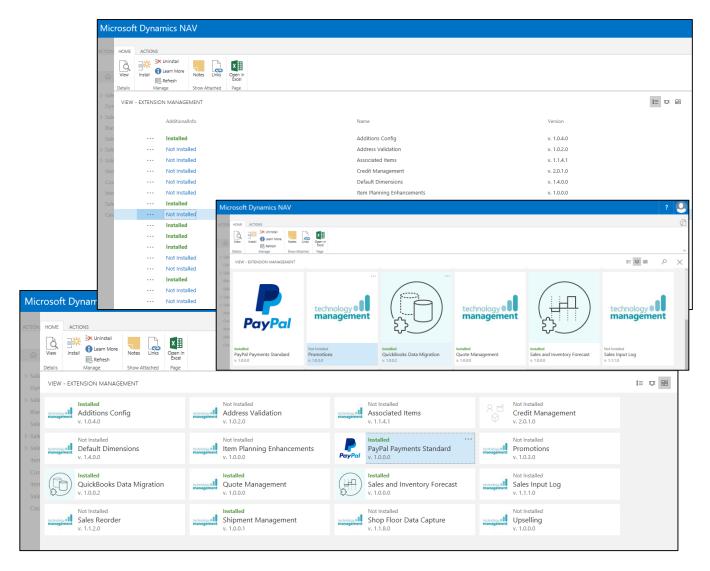
## 7 Extension Management

**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**.

Search for Page or Report		2	$\times$
Type page or report name to start search:	ed man		×
1 search results: All Administration			
Name	Department		
8 <sup>9</sup> Extension Management	Administration/IT Administration/Extensions		

- 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 appsource.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.

#### }<sup>#</sup> Install Not Installed al Promotions 🔆 Uninstall **Microsoft Dynamics NAV** v. 1.0.3.0 Learn More Not Installed ACTIONS HOME Manage Uninstall Sales Input Log à х v. 1.1.1.0 👌 View 1 Learn More View Install Notes Refresh Not Installed Details Manage Show Attached Page Upselling v. 1.0.0.0 VIEW - EXTENSION MANAGEMENT Installed Not Installed Additions Config Address Validation Associated Items v. 1.0.4.0 v. 1.0.2.0 v. 1.1.4.1

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

Install Extension	
Extensions add new capabilitie	es that extend and enhance functionality.
Name	Associated Items
Description	Associated Items from Technology Management Ltd
Version	1.1.4.1
Publisher	Technology Management Ltd
Website	
Help	

Review Extension Information before installation					
Name	Associated Items				
Publisher	Technology Management Ltd				
Language	English (United Kingdom)				
Terms and Conditions Privacy Statement					
I accept the terms and conditions					

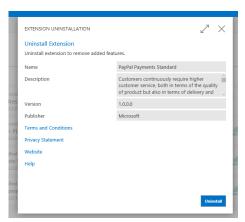
Not Installed

v. 2.0.1.0

Credit Managen

Manage

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.

Mic	rosoft Dynamics NAV							
ACTION	HOME ACTIONS							
Sales Quote	Let Default Apping Notes Links							
	EDIT - CREDIT MANAGEMENT SETUP							
ŵ	Credit Management Setup							
▶ Sale								
Dyn I• Sale	Credit Hold Quotes		Credit Hold Blanket Orders					
Blar	Credit Hold Orders		Credit Hold Return Orders					
Sale	Credit Hold Invoices		Release Doc. on Credit Release					
▷ Sale	Credit Hold Credit Memos							
> Sale Iten	CreditSafe							
Cus	CONNECTION		REPORT					
Iten	API URL		Report Type	Full				
Sale	User Name		Language					
Cas	Password							



## 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 Mozilla Firefox 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) 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 Users and Credential Types.
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 Requi<u>rements (minimum)</u>

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	5		
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-LINmnV0DWUgFo9ZTIzddqHLXli (Introducing NAV 2016) https://www.youtube.com/playlist?list=PLoS7gV-LINmmqE6R7tFLliQmbISraQRFg (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 capabilities all be found playlists the of NAV. They can as 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

**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	11002100	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	2223	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.		
0	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 81008490	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> <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 0015 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 0010 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					
С	Current	Note: In date formulas one day is				
D	Day(s)	automatically included to cover today, so 1W will actually be 8 days including today.				
w	Week(s)	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.				
Μ	Month(s)					
Q	Quarter(s)					
Y	Year(s)	4 ways to construct a date formula				
cw	Current week	Current + a time unit				
СМ	Current month					
10D	10 days from today	Number + a time unit Time unit + a number				
2W	2 weeks from today					
D10	The next 10 <sup>th</sup> day of a month					
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				
5:30	05:30:00	Notes:			
0530	05:30:00	<ul> <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 BM</li> </ul>			
5:30:5	05:30:05				
053005	05:30:05	<ul> <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>			
5:30:5,50	05:30:05.5				
053005050	05:30:05.05				
	E	Intering Datetimes			
131202 132455	13-12-02 13:24:55		Note: When entering datetimes a space		
1-12-02 10	01-12-02 10:00:00		must be entered between the date and the time.		
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		
6.5h	6 hours 30 mins	of measure for the duration field			
90m	1 hour 30 min				
2d 6h 30m 56s 600ms	2 days 6 hours 30 mins 56 seconds 600 milliseconds				

