

Installation and Configuration in Microsoft Dynamics NAV 2009

Module 1: Microsoft Dynamics NAV Architecture This chapter focuses on the architecture of Microsoft Dynamics NAV 2009. **Lessons**

- Review the Microsoft Dynamics NAV 5.0 Architecture
- Learn the Microsoft Dynamics NAV 2009 Architecture
- Understand the Developer Environment for Microsoft Dynamics NAV 2009
- Install Microsoft Dynamics NAV 2009 three-tier architecture on three computers

After completing this module, students will be able to:

- Know the Two-Tier architecture of Microsoft Dynamics NAV 5.0
- Understand the implications of the Three Tier architecture of Microsoft Dynamics NAV 2009

Module 2: Requirements Before you begin installing and configuring Microsoft Dynamics NAV, you need to consider the operating system, server requirements and any other software requirements. **Lessons**

- Understand the Operating System and software pre-requirements
- Select the correct Microsoft Windows server version
- Understand the SQL server versions

After completing this module, students will be able to:

- Choose the correct operating system and software prerequisites
- Choose the correct database

Module 3: RoleTailored Client Installation This module discusses the installation of the RoleTailored Client in a variety of configurations. **Lessons**

- Installing the Microsoft Dynamics NAV 2009 RoleTailored Client
- Navigate in the RoleTailored Client
- Keyboard Shortcuts

After completing this module, students will be able to:

- Install the Role Tailored Client
- Navigate in the Role Tailored Client
- Know the short-cut keys

Module 4: RoleTailored Client Personalization This chapter discusses personalization in the RoleTailored client. Learn how the Role Center is tailored to the user's role in the company. **Lessons**

- Customize the Navigation Pane
- Customize Pages

After completing this module, students will be able to:

- Understand how to personalize a users Navigation Pane
- Learn how to customize pages

Module 5: Database Server This chapter describes how to install Microsoft Dynamics NAV 2009 Database Server. You are also shown the Database Server Configuration Settings **Lessons**

- Setup the Microsoft Dynamics NAV 2009 Database server
- Configure the Database server during setup
- Configure the Database server after setup

After completing this module, students will be able to:

- Install the Database server
- Configure the Database Server
- Access the Database settings file

Module 6: Classic Client Option This module describes the Classic Client hardware and software recommendation. It walks you through the installation process of Classic Client installation. This chapter also presents the Microsoft Dynamics NAV 2009 developer environment. **Lessons**

- Recommended hardware and software
- Install the Classic Client

After completing this module, students will be able to:

- Know the recommended hardware and software configuration
- Install the Classic Client
- Discuss developer edition

Module 7: Deployment This module describes the process of deploying software in Microsoft Windows Server 2003. **Lessons**

- Understand software deployment using Group Policy
- Deploy Microsoft Dynamics NAV 2009 clients with Group Policy

After completing this module, students will be able to:

- Plan and Prepare to deploy Microsoft Dynamics NAV 2009 clients on a network
- Deploy the Microsoft Dynamics NAV 2009 clients

Module 8: Optimization and Troubleshooting This module presents the Microsoft Dynamics NAV 2009 operating environment. The focus is on Optimizing the Database, troubleshooting database and deployment performance issues. **Lessons**

- Troubleshoot and Optimize SQL Server 2005
- Troubleshoot and Optimize Deployment with Group Policy

After completing this module, students will be able to:

- Understand the troubleshooting methodology
- Know how to use the SQL troubleshooting tools
- Optimize and troubleshoot the Deployment process

Introduction to Microsoft Dynamics NAV 2009

Module 1: Use General Functions This module explains how to navigate in Microsoft Dynamics NAV 2009 using the Role Tailored client, as well as typical user tasks in common application areas, such as finance, inventory, purchases, and sales. An overview of ERP is also covered. **Lessons**

- The Role Center
- Use Keyboard Shortcuts
- Customizing Microsoft Dynamics NAV 2009
- The List Places
- Change how Windows Display
- Enter and Edit Information
- Extract Information
- Use MapPoint

After completing this module, students will be able to:

- Provide an overview of ERP and Microsoft Dynamics NAV 2009.
- Navigate in the Role Center.
- Use function keys and basic keyboard shortcuts.
- Able to Customize Microsoft Dynamics NAV 2009 UI (User Interface)
- Navigate and customize the List Places.
- Change the look of windows in the program.
- Enter and edit information.
- Get selected information out of the program.
- Look up a business partner's location on a map.

Module 2: Working with General Ledger Accounts This module explains how to work with G/L Accounts. **Lessons**

- Posting Groups
- G/L Account Cards
- Chart of Accounts Window

After completing this module, students will be able to:

- Identify different posting groups and outline their purpose.
- Explain the use of G/L account cards.

- Outline the purpose and functions of the Chart of Accounts window.

Module 3: Add and View Dimensions This module explains how to work with dimensions, add dimensions to a business document, and how to filter and view posted business transactions by dimensions. **Lessons**

- Dimensions Overview

After completing this module, students will be able to:

- Outline why and how to use dimensions.
- Add dimensions to a business document.
- Filter and view posted business transactions by dimensions.

Module 4: Manage Items This module explains how to create a new item and view item availability. **Lessons**

- The Item Card
- Use the Item Card
- View Item Availability
- Analyze Item Figures

After completing this module, students will be able to:

- Explain the purpose of all fields and functions on the item card.
- Identify and use the links and functions provided with the item card buttons.
- Create a new item.
- Examine an item's availability over time.
- Analyze item figures with statistics windows and reports.

Module 5: Process Purchases This module explains how to work with the purchase process flow. **Lessons**

- Introduction
- Overview

After completing this module, students will be able to:

- Outline a complete purchase process and how it connects to other application areas.
- Set up a new vendor by filling in a vendor card.
- Create, post, and review purchase orders.
- Process the receipt and invoicing of inventory items.
- Create, post, and review purchase invoices.
- Process the purchase of non-inventory goods or services with purchase invoices.
- Plan and make payments to creditors.

- Use the Suggest Vendor Payments function.
- Adjust general ledger entries with the general journal.
- Use general journal registers to follow the audit trail of all transaction types.

Module 6: Process Sales This module explains how to work with sales process flow. **Lessons**

- Introduction

After completing this module, students will be able to:

- Outline a complete sales process and how it connects to other application areas.
- Set up a new customer by filling in a customer card.
- Create a sales quote and convert it to a sales order.
- Create, post, and review sales orders.
- Process the shipment and invoicing of goods.
- Receive payments from customers.
- Use the Aged Accounts Receivable report.

Module 7: Approve Documents This module explains how to work with the approval process. **Lessons**

- Overview
- E-Mail Notifications
- Substitute Approvers

After completing this module, students will be able to:

- Outline the design concepts of the document approvals system.
- Request approval of a document.
- Receive an approval notification.
- Delegate approvals to substitute approvers.

Module 8: Technology Overview This module explains how objects work in the RoleTailored and Classic client, and what the elements in the Page Designer are used for. The architectural changes in Microsoft Dynamics NAV 2009 as well the basic concepts regarding C/SIDE development environment is covered.

Lessons

- Architectural Changes in Microsoft Dynamics NAV 2009
- Microsoft Dynamics NAV Server
- Web Services Support
- Web Services published by Microsoft Dynamics NAV
- Development Enhancements
- Page Designer
- Reports
- Multiple Client Support

- C/SIDE Development Environment
- Database Features
- Multilanguage Functionality

After completing this module, students will be able to:

- Present the architectural changes in Microsoft Dynamics NAV 2009.
- Review the Microsoft Dynamics NAV Server.
- Explain how Web Services Support the facilitation of data interchange.
- Describe the three types of Web services.
- Explain how objects work in the Classic client and the Role Tailored client.
- Review what the elements in the Page Designer are used for.
- Identify the features of new reports.
- Examine how multiple client support is handled in Microsoft Dynamics NAV 2009.
- Explain basic concepts of the C/SIDE development environment.
- List database server options and outline database features.
- Outline how to implement multiple languages.

Finance in Microsoft Dynamics NAV 2009

Module 1: Financial Management Setup

This module explain the fields on the General Ledger Setup window. It also explains how set up Accounting Periods, and how to set up Trail Codes, Source Codes, and Reason Codes

Lessons

- General Ledger Setup
- Accounting Periods
- Trail Codes

Lab : Create a Fiscal Year

After completing this module, students will be able to:

- Understand the General Ledger Setup card.
- Understand and work with accounting periods.
- Navigate the audit trail.

Module 2: General Ledger

This module explain the use of the Chart of Accounts and the elements of the Chart of Accounts and the G/L Account Card.

It also explain the Budgets feature and the G/L Budgets page. It describes the process of setting up budgets manually, the additional budget processes, such as deleting budget entries, the process of creating budgets by using the Copy Budget function and the process of creating budgets by using the Export Budget and Import Budget functions.

Lessons

- Chart of Accounts Overview
- G/L Account Card
- Chart of Accounts Page
- Budget
- Create Budgets Manually
- Copy Budgets
- Export and Import Budgets

After completing this module, students will be able to:

Understand and maintain the chart of accounts.

Understand the General Ledger Setup card.

Set up and work with budgets.

Copy and export budgets.

Module 3: General Journals

This module explain the General Journal entry and posting system. It describes how to create and post General Journal entries.

It also describe Recurring Journals, including the fields and allocations to recurring journals and it demonstrate how to use Recurring Journals with allocations and how to record accruals. It also explain the process of reversing and correcting journal entries.

Lessons

- Journal Overview
- Creating and Posting Journal Entries
- Recurring Journals Overview
- Processing Recurring Journals
- Reversals and Corrections

After completing this module, students will be able to:

- Understand the structure of journals, batches, and lines.
- Create a journal template.
- Create a journal batch.
- Create and post journal entries.
- Understand and use recurring journals.
- Use general journals to post corrections.

Module 4: Cash Management

This module describe the Bank Account Card. It demonstrate the process for entering and posting payments received from customers and the process for entering and posting payments to vendors.

This module explain and demonstrate the process of financially voiding a check.

It also describe the Bank Account Reconciliation window, the options for populating the bank reconciliation lines and demonstrate how to process a bank reconciliation.

Lessons

- Bank Account Overview
- Entering and Posting Receivables Payments
- Entering and Posting Payables Checks
- Financially Voiding Checks
- Bank Reconciliation

After completing this module, students will be able to:

- Set up new bank accounts.
- Enter and post payments.
- Suggest vendor payments.
- Reconcile a bank account.

Module 5: Receivables Management

This module describes the Payments FastTab on the Customer Card.

It explain the Cash Receipt Journal, which is used to post payments received, the process of applying cash receipt payments and the process of unapplying entries to customer ledger entries. It also explain the process of reversing customer ledger entries.

This module explains how to use payment discounts and describes the transactions for various situations that benefit from payment discounts.

It explains how to use payment tolerance and describes the transactions for various situations that benefit from using payment tolerance.

This module also explain why and when Reminders and Finance Charge Memos are used, it explain how to use reminders and the process of creating and issuing reminders.

It also explain how to use finance charge memos and the process of creating and issuing finance charge memos.

Finally it describes how to review the Customer Ledger Entries and Detailed Customer Ledger Entries.

Lessons

- Customer Card
- Cash Receipt Journals Overview
- Applying Cash Receipt Payments
- Unapply Customer Ledger Entries
- Reversal of Posted Journals
- Set Up Payment Discounts
- Process Payment Discounts
- Set Up Payment Tolerance
- Process Payment Tolerance
- Reminders and Finance Charge Memos

- Set Up and Assign Reminder Terms
- Create and Issue Reminders
- Set Up and Assign Finance Charge Terms
- Create and Issue Finance Charge Memos
- Analyzing Receivables

After completing this module, students will be able to:

- Understand detailed customer ledger entries.
- Analyze receivables accounts.
- Use the Cash Receipts journal to apply cash.
- Understand how to handle partial payments and foreign currencies.
- Make corrections by Unapplying customer ledger entries.
- Reverse journal postings.
- Understand and work with payment discounts.
- Understand and work with payment tolerances.
- Understand and work with reminders and finance charge memos.

Module 6: Payables Management

This module describe the Payments FastTab on the Vendor Card window. It explain the Payment Journal, which is used to process payments. It also explain the Apply Vendor Entries window, used to apply payments to vendor ledger entries.

This module explain the process of entering and posting manual checks. it describes the Suggest Vendor Payments batch job, which is used to generate open payables entries in the Payment Journal and how to create payments using the Suggest Vendor Payment batch job.

This module explain the process of printing and posting payments and explain the process of voiding printed but unposted payments.

It demonstrate how to apply payments to vendor ledger entries after posting, explain the process of unapplying vendor ledger entries and explain the process of reversing vendor ledger entries posted using journals.

It explains how to use payment discounts and describes the transactions for various situations that benefit from using payment discounts.

It explains how to use payment tolerance and the transactions for various situations that benefit from payment tolerance.

Finally it describes how to review Vendor Ledger Entries and Detailed Vendor Ledger Entries

Lessons

- Vendor Card
- Payment Journal Overview
- Apply Vendor Entries Window
- Post Manual Payables Checks
- Suggest Vendor Payments Overview
- Create Payments Using Suggest Vendor Payments
- Print and Post Payables Checks
- Void Unposted Checks
- Apply Payments after Posting
- Unapply Vendor Ledger Entries
- Reversal of Journal Postings
- Set up Payment Discounts
- Process Payment Discounts
- Set Up Payment Tolerance
- Process Payment Tolerance
- Analyze Payables

After completing this module, students will be able to:

- Use payment journals, both manually and with the Suggest Vendor Payments feature.
- Work with partial payments.
- Understand payment discounts.
- Understand how to void checks, posted and not posted.
- Unapply vendor ledger entries.
- Reverse journal postings.

Module 7: Prepayments

This module explain the requirements for setting up prepayments and how to set up and assign prepayment General Ledger accounts, for sales and purchases, and how to set up default prepayment percentages on customers and vendors and Customer-Item and Vendor-Item combinations.

It describes how to set up prepayment posting verification for sales and purchases and explain the prepayment processing flows for sales and purchase orders. It also describe the prepayment-specific fields

on sales and purchase orders and how to create sales and purchase orders with prepayment percents and amounts and prepayment invoices from sales and purchase orders.

This module explain the processes available to correct posted prepayment invoices.

Lessons

- Prepayments Setup Overview
- Set Up Prepayment General Ledger Accounts
- Set Up Number Series for Prepayment Documents
- Set Up Prepayment Percentages for Customers and Vendors
- Set Up Prepayment Percentages for Customer-Item and Vendor-Item Combinations
- Set Up Check Prepayment When Posting
- Prepayments Processing Flows
- Prepayment Sales and Purchase Orders Overview
- Process Prepayment Sales and Purchase Orders
- Process Prepayment Sales and Purchase Invoices
- Correct Prepayments

After completing this module, students will be able to:

- Set up prepayments in the General Ledger.
- Process prepayments, including the following:
 - Create an order requiring prepayment.
 - Create a prepayment invoice.
- Review the corrections that can be made to prepayments

Module 8: VAT and Intrastat

This module explain the VAT settings on sales and purchase documents. It also explain the process of adjusting calculated VAT amounts in sales and purchase documents and journals.

This module demonstrate the process of recording Import VAT.

This module describe how to correct a posted VAT entry and print a VAT Statement. It explain and run the Calc. and Post VAT Settlement batch job.

This module explain the requirements of reporting Intrastat, how to set up Intrastat and the process of running and submitting Intrastat reports.

Lessons

- Display VAT Amounts in Sales and Purchase Documents

- Adjust VAT Amounts in Sales and Purchase Documents and Journals
- Import VAT
- VAT Correction
- VAT Statements
- VAT Settlement
- Intrastat Reporting
- Set Up Intrastat
- Report Intrastat

After completing this module, students will be able to:

- Use VAT Posting Setup.
- Set up VAT posting groups.
- Do manual VAT calculations in journals.
- Show VAT calculations on sales and purchase documents.
- Record/Post import VAT.
- Demonstrate VAT corrections.
- Understand VAT reporting.
- Demonstrate VAT settlement.
- Process unrealized VAT.
- Adjust VAT for payment discounts.
- Understand Intrastat reporting.

Module 9: Multicurrency

This module explain the setup requirements for currencies and exchange rates when using multiple currencies.

It also explains the setup requirements using multiple currencies with Customers, Vendors, and/or Bank Accounts and the additional functionality for using Purchase and Sales documents that have foreign currency.

This module describe the additional functionality when posting multicurrency transactions in the Cash Receipts Journal or the Payments Journal.

It describes the process of running the Adjust Exchange Rates batch job for Customers, Vendors, and/or Bank Accounts.

And It also explain the set up, viewing amounts, daily processing, and periodic processes when using an Additional Reporting Currency.

Finally this module explain the process of consolidations with companies using different currencies.

Lessons

- Currency Card and Currency Exchange Rates
- Set Up Multicurrency for Customers, Vendors, and Bank Accounts
- Process Sales and Purchase Documents
- Process Cash Receipts
- Process Payments
- Use the Adjust Exchange Rates Batch Job
- Additional Reporting Currency
- Consolidations with Multiple Currencies

After completing this module, students will be able to:

- Understand and use currency exchange rates.
- Understand and use additional reporting currencies.

Module 10: Year End Closing Processes

This module explains how to close the accounting periods for the fiscal year, run the Close Income Statement batch job process and complete the closing process by posting the General Journal.

Lessons

- Closing a Fiscal Year
- Transferring Income Statement Account Balances
- Posting the Journal

After completing this module, students will be able to:

- Perform standard end of year financial closing operations

C/SIDE Introduction in Microsoft Dynamics NAV 2009

Course Outline
Module 1: Client/Server Integrated Development Environment (C/SIDE) This module explains basic objects in Microsoft Dynamics NAV and the Client/Server Integrated Development Environment (C/SIDE). It also describes physical and logical databases and several integration tools available in Microsoft Dynamics NAV 2009. **Lessons**

- Basic Objects in Microsoft Dynamics NAV
- C/SIDE Fundamentals
- The Physical and the Logical Database
- Integration Tools

After completing this module, students will be able to:

- Discuss objects in Microsoft Dynamics NAV 2009.
- Describe fundamental aspects of C/SIDE development, including UI, application objects, C/SIDE concepts and types of databases.
- Discuss database structure.
- Describe integration tools available in Microsoft Dynamics NAV 2009.

Module 2: Tables This module explains the fundamental concepts of table objects, describes the concepts of table relationships, special table fields and how to use them, and describes how to use the Table Designer to create and modify tables. It also describes table types and their characteristics. **Lessons**

- Table Fundamentals
- Primary and Secondary Keys
- Demonstration: Create a Simple Table
- Special Table Fields
- Demonstration: Special Table Fields
- Table Types and Characteristics

After completing this module, students will be able to:

- Describe table concepts, the structure and elements of tables.
- Demonstrate how to use the Table Designer to create simple tables and set field and table properties.
- Explain concepts behind primary and secondary keys for tables.
- Describe table relationships and how to set them.
- Explain the concepts of SumIndexFields, FlowFields, and FlowFilter fields, and how to use them.

- Review table types.

Module 3: Forms This module explains the fundamental concepts of form objects and describes how to use the Form Designer to create and modify forms. It also describes form types and their characteristics and standard navigation in forms. **Lessons**

- Form Fundamentals
- Demonstration: Create a Simple Form
- Form Types and Characteristics
- Demonstration: Create a Card Form
- Demonstration: Create a List Form
- Demonstration: Link the Card Form and the List Form
- Demonstration: Form and Subform
- Standard Navigation

After completing this module, students will be able to:

- Describe form concepts and elements of forms, including controls.
- Describe binding forms and controls to source tables.
- Create a blank form and attach a source table.
- Add simple controls to a form, such as a text box, a label, and a check box.
- Use tools from the Toolbox, including the Add Label tool and the Lock tool.
- Add a tab, frame, and TableBox controls to a form.
- Add option buttons, an indicator control, and a BLOB field, or picture, to a form.
- Use the Form Wizard to create a card form and a tabular form.
- Add fields and buttons to forms.
- Create a subform and add it to the main form.
- Discuss form types and the standard navigation in forms.

Module 4: Pages This module explains the fundamental concepts of page objects and describes how to use the Page Designer to create and modify pages. It also describes page types and their characteristics and discuss the best practices in creating pages. **Lessons**

- Page Fundamentals
- Page Designer
- Demonstration: Create a Simple Page
- Page Types and Characteristics
- Design Pages: Best Practices
- Demonstration: Create a Card Page
- Demonstration: Create a List Page
- Demonstration: Part and Part Page

After completing this module, students will be able to:

- Describe page concepts and elements of page, including actions.
- Use the Page Designer to create and modify pages and the Action Designer to add actions and position them.
- Add simple controls to a page, such as a field and a FastTab.
- Use the Field Menu to add multiple fields.
- Create a part page and add it to the main page.
- Discuss the best practices in creating pages.
- Discuss page types and their characteristics.

Module 5: Introduction to C/AL Programming This module introduces C/AL, the programming language in C/SIDE and its elements. It also describes data types available in C/AL, concepts of identifier, variable, syntax, variable scope and variable initialization. **Lessons**

- C/AL Programming
- Intrinsic Data Types
- Identifiers, Variables and Syntax
- The Syntax of Identifiers
- Variable Scope
- Variable Initialization
- Demonstration: Data Types and Variable Initialization

After completing this module, students will be able to:

- Understand the concepts and basic use of C/AL code elements.
- Describe data types in C/AL.
- Describe the concepts of identifier, variable, syntax, variable scope and initialization.

Module 6: Assignment Statements and Expressions This module explains assignment statements, expressions, terms and operators. It describes automatic type conversion between data types and different kinds of operators and operator precedence. It also describes numeric, relational and logical expressions. **Lessons**

- Assignment Statements
- The Syntax of Statements
- Automatic Type Conversions
- Demonstration: Use Assignment Statements and the Symbol Menu
- Expressions, Terms, and Operators
- The Syntax of an Expression
- The String Operator
- Demonstration: Use the String Operator
- Function Calls in Expressions

- Demonstration: Use the MAXSTRLEN and the COPYSTR Function
- Numeric Expressions
- Arithmetic Operators
- Demonstration: Use the Arithmetic Operators
- Relational and Logical Expressions
- Relational Expressions for Comparisons
- Relational Expressions for Set Inclusion
- Logical Expressions
- Demonstration: Use Logical and Relational Expressions in a Page

After completing this module, students will be able to:

- Describe the concepts of assignment statement, the syntax of statements and statement separator.
- Describe automatic type conversions for string, numeric and other data types.
- Use the C/AL Symbol Menu.
- Describe the concepts of expressions, terms and operators.
- Describe the string operator, the arithmetic operators and operator precedence.
- Describe relational and logical operators, and how to use them.

Module 7: C/AL Statements This module explains conditional statements, compound statements, comments and repetitive statements. It also describes the concepts of Arrays and how to use them.

Lessons

- Conditional Statements and Boolean Expressions
- The IF Statement
- The EXIT Statement
- The CASE Statement
- Compound Statements and Comments
- The Syntax of Compound Statements
- Compound Statement by Using Nested IF Statements
- The Syntax of Comments
- Demonstration: Use the IF, EXIT, CASE and Compound Statements in a Page
- Arrays
- The Syntax of Arrays
- The Power of Arrays
- Strings as Arrays of Characters
- Repetitive Statements
- Demonstration: Use Arrays and Repetitive Statements
- The WITH Statement

After completing this module, students will be able to:

- Describe the concepts of conditional statements and Boolean expressions.
- Use the IF, CASE and EXIT statements.
- Describe the concepts of compound statements and comments.
- Describe the concepts of Arrays and how to use them.
- Describe the concepts of repetitive statements and understand when to use different types of repetitive statements.

Module 8: C/AL Functions This module explains the concepts of functions and describes several built-in functions and how they are used. It also describes the concepts of parameters and how to create custom functions.

Lessons

- Functions and Parameters
- Review Built-in Functions
- Demonstration: Use the DATE2DMY Function
- Essential C/AL Functions
- User Communication Functions
- String Functions
- System Functions
- Date Functions
- Number Functions
- Array Functions
- Other Functions
- Create Custom Functions
- Formal and Actual Parameters
- Local Functions, Variables and the EXIT Statement
- Demonstration: Create Custom Functions

After completing this module, students will be able to:

- Describe the concepts of functions and parameters.
- Describe several built-in functions and how they are used.
- Create custom functions.

Module 9: Reports This module explains the fundamental concepts of report objects and describes the different stages in creating and designing reports. It also describes several types of printing reports and how to create grouping, totaling and add advanced features to a report, for the Classic and the RoleTailored Client.

Lessons

- Report Fundamentals
- Types of Printing Reports
- Report Design Process

- Design the Data Model
- Demonstration: Create a Data Model
- Design the Visual Element
- Demonstration: Design the Report Section
- Demonstration: Modify Report Properties
- Demonstration: Design the Report Layout
- The Request Options Designer
- Demonstration: Design the Request Options Form
- Demonstration: Design the Request Options Page
- Grouping Within a Classic Report
- Demonstration: Create Grouping For the Classic Report
- Totaling in a Report
- Demonstration: Create Totals for the Classic Report
- Demonstration: Create Grouping and Totals for the RoleTailored Report
- Demonstration: Add Some Advanced Features

After completing this module, students will be able to:

- Describe report concepts and the components of reports.
- Describe different types of printing reports and their characteristics.
- Describe the logical and visual design of reports.
- Create a data model in the Report Designer.
- Design report sections by using the Section Designer.
- Design report layout by using Microsoft Visual Studio Report Designer.
- Design Request Options Form and Request Options Page by using the Request Options Designer.
- Set several useful report properties.
- Create grouping and totaling in reports for the Classic and the RoleTailored Client.
- Add some advanced features to a report.

Module 10: Dataports and XMLports This module explains the fundamental concepts of dataport and XMLport objects and describes how to use the Dataport Designer and XMLport Designer to create dataports and XMLports for export and import external file. It also describes how XMLports replace Dataports in the RoleTailored Client.

Lessons

- Dataport Fundamentals
- Design Dataports

- Demonstration: Create Dataports for Export
- Demonstration: Create Dataports for Import
- XMLport Fundamentals
- Design XMLports
- Demonstration: Create XMLports for Use in the Classic Client
- Demonstration: Create XMLports for Use in the RoleTailored Client

After completing this module, students will be able to:

- Describe Dataport concepts and the components of Dataports.
- Create and design Dataports for export and import with fixed and variable format of the external file.
- Describe XMLport concepts and the components of XMLports.
- Create and design XMLports to be run in the Classic and the RoleTailored Client.

Module 11: Codeunits This module explains the fundamental concepts of codeunit objects and describes how to use the C/AL Editor to create codeunits. It also describes how to use the SMTP Mail Codeunit.

Lessons

- Codeunit Fundamentals
- Design Codeunits
- Use Codeunits
- Demonstration: Define Variables, Text Constants and Functions in a Codeunit
- SMTP

After completing this module, students will be able to:

- Describe codeunit concepts.
- Create and use codeunits.
- Define Variables, Text Constants and Functions in a codeunit.
- Use the SMTP Mail Codeunit.

Module 12: MenuSuites This module explains the fundamental concepts of MenuSuite objects and describes how to use the Navigation Pane Designer to create and design MenuSuites. It also describes how to create MenuSuite for the Classic and the RoleTailored Client.

Lessons

- MenuSuite Fundamentals
- Create and Design MenuSuites
- Upgrade MenuSuite
- Demonstration: Create a MenuSuite for the Classic Client
- Demonstration: Create a MenuSuite for the RoleTailored Client

After completing this module, students will be able to:

- Describe MenuSuite concepts and MenuSuite levels.
- Create and Design MenuSuites.
- Understand the concepts of upgrading MenuSuites.
- Create MenuSuites for the Classic and the RoleTailored Client.

Module 13: Integration Options This module explains several integration tools available in Microsoft Dynamics NAV. It also describes how to use them and their limitations.

Lessons

- Web Services
- Demonstration: Create, Expose and Consume Web Services
- ODBC
- Demonstration: Use Microsoft Dynamics NAV ODBC
- C/Front
- OCX
- Demonstration: Use OCX Controls
- Automation Server
- Demonstration: Create a Report with Automation

After completing this module, students will be able to:

- Describe the concepts of Microsoft Dynamics NAV Web Services.
- Create a codeunit Web service, expose a page and a codeunit Web service and consume them from an external application.
- Describe the concepts of Microsoft Dynamics NAV ODBC, its requirements, installation and limitations.
- Describe the concepts of C/Front, its requirements, installation and limitations.
- Describe the concepts of OCX, its installation, registration and limitations.
- Use OCX controls.
- Describe the concepts of Automation, its requirements, installation and limitations.
- Create a report with Automation.

NAV 2009 Trade & Inventory

Sales Order Management and Sales Prices

- Set up Sales Order Management
- Create sales quotes, blanket orders, and orders
- Ship and invoice orders
- Set up and use sales prices
- Set up and use line/invoice discounts

Purchase Order Management, Purchase Prices, and Requisitions

- Set up Purchase Order Management
- Create purchase quotes, blanket orders, and orders
- Receive and invoice orders
- Set up and use purchase prices
- Set up and use line/invoice discounts
- Set up Requisition Templates and planning parameters
- Calculate a Requisition Worksheet plan

Prepayments, Item Charges, Order Promising, Returns, and Drop Shipments

- Set up and use customer and vendor prepayments
- Set up and use item charges for sales and purchases
- Promise orders to customers
- Set up and manage customer returns
- Set up and manage returns to vendors
- Process drop shipments

Sales and Purchase Analysis and Reporting

- Set up sales and purchase analysis reports
- Create sales and purchase analysis reports (lines and columns)
- Analyze sales and purchases by dimensions

Item Management and Tracking

- Item reservations
- Serial/lot numbers
- Item tracing
- Print serial/lot numbers on documents and reports

Inventory/Warehousing

- Analyze item availability
- Adjust, count, and reclassify inventory
- Set up and use multiple locations, including SKUs
- Set up and use location transfers
- Set up for basic warehousing tasks (locations/bins)
- Use basic warehousing tasks (pick and ship / receive and put-away)