

Training Materials for Dynamics NAV Software

1. "Getting Started with Dynamics NAV"

\$400

This is a one-day (1) "Self Study" Class for new End-Users on the basics of Dynamics NAV. Workbook and CD Topics Include: Screen Orientation, How to Add, Change, Delete (F3, F2, and F4), How to Search, Find, and View Information. (Filters, Sorts, and more), Adding Master Records, Vendor Activities such as Purchase Order Entry, and Customer Activities such as Sales Order Entry.

[Watch a sample learning segment on "Add, Change, and Delete."](#)

2. "Getting Started with Dynamics NAV-Setup"

\$800

This is 3-day class on how to "Setup" Dynamics NAV. **Topics Included:** Creating new Companies, Setup Checklist, Accounting Periods, Number Series, Chart of Accounts, Account Schedules, Dimensions, Analysis Views, Data Migration for Master Files and Transaction Files, Posting Groups, Tax Setup, Report Selections, Opening Entries, Security Setup, Backup and Restore, Importing Modified Objects, Year End Close setup.

[Watch a sample movie now. First part of "Posting Group Setup"](#)

3. "Getting Started with Dynamics NAV-Workflow"

\$800

This is 2-day class on how to "Use" Dynamics NAV. **Topics Included:** How to add Products, Services, Customer, and Vendors. PO Entry, Receiving Products, PO Close Out, Sales Quotes, Sales Orders, How to Ship Product, How to Bill, Billing for Services, How to update GL, Vendor Management, Customer Management, Financial Management, Resource Planning, Procurement Tips, Reporting Tips, Periodic Activities, Credit Memos, Locations, Statistics, Unit of Measures, Cross Reference, Dimensions, Blanket Sales Orders.

[Watch a sample movie now: "How to enter a Vendor Invoice"](#)

4. "Getting Started with Tables and Forms" \$800

This is 2-day class on the basics of Tables and Forms. Topics Include: Table creation, Form Creation, Numbering Methods, Keys, Tabular and Card Forms, Properties, Command and Menu Buttons, How to control Show/Hide, Creating Flow Fields, Exporting/Importing FOBS, Navigation Pane Designer.

[Watch a sample learning segment on creating a "Sum Flow Field".](#)

5. "Getting Started with Report Writer" \$400

This is a one (1) Day Class on CD for new Report Writer users. It covers: Mr. Wizard, Filters, Sorts, DataItems, Totals and Sub-Totals, Variables, Variable Totals, Tool Bar, Fonts, Nested Sorts, and many report building Exercises! (Recorded with V3.7, but concepts the same in V4.0+)

6. "Getting Started with Dynamics NAV Manufacturing" \$1,600

This is a 4-Day "Self-Study" CD Class on Dynamics NAV Manufacturing for new NM users. This class is not to be taken lightly. It is 4 days of intensive Lectures, Exercises, and Answer Keys covering all aspects of Dynamics NAV Manufacturing. (Version 4.0 only!)

Day 1 = Introduction, Setup, Product Design (Item Card, BOM, Routings, Link Codes)

Day 2 = Capacities (Setup, Machine Centers, Work Centers)

Day 3 = Planning (Sources of Demand, Production Orders, Subcontractors)

Day 4 = Execution (Released Production Orders, Consumption Journal, Output Journal, History)

There are over 25 hours of recordings: Lectures and Answer Keys. There are 15 hours of student exercises to strengthen their understanding of Dynamics NAV Manufacturing.

Objective: The student will complete this course with a through understanding of the basic setup and Workflow options within Dynamics NAV Manufacturing.

[Watch a sample learning segment on Production BOM.](#)

7. "Getting Started with Job Manager"**\$800**

This is 2-day class on the basics of "Job Manger" for Dynamics NAV. (Additional Granule for NAV Software) Topics Include: Granule Integration, Typical User Workflow, Job Cost Statistics Window and Reporting, Resource Card, Job Setup, Phases and Tasks, Item's Router, Item's BOM, Adding Jobs, Posting Labor to a Job, Posting Materials to a Job, Correcting Entries, Job Budget, Job Router, Purchase Order Management, Requisition Worksheet, Posting Production, Back Flushing, End of Month Processing, Advanced Setup Options, Estimating, Service Jobs, and Lot Number and Serial Number Tracking.

For questions on any of these classes please call us direct:

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“Getting Started with Dynamics NAV”

OBJECTIVES: This material is intended to familiarize you with some of the features available throughout DYNAMICS NAV software. This workbook and the accompanying CD Movies are designed to teach you the basics of Dynamics NAV. You will learn how to add, change, and delete information. You will also learn how to personalize Dynamics NAV for your company. This class should be taken before you take any of our other classes.

This class will cover the following topics in segments:

- 1 – Moving around in Dynamics NAV
- 2 – Card and List Windows (20/40 min)
- 3 – How to Add, Change, and Delete (20/25 min)
- 4 – Journals vs. Ledgers (15/15 min)
- 5 – Tips on Entering Data (20/20 min)
- 6 – (a & b) Searching, Finding, and Viewing Information (50/50 min)
- 7 – Short Cut Keys (5/10 min)
- 8 – Adding Master Records - Inventory Items, Vendors, Customers
- 9 – (a & b) Vendor Activities – Purchase Orders Processing (30/30 min)
- 10 – Customer Activities - Sales Order Processing (30/30 min)
- 11 – Object Designer Overview (10/20 min)
- 12 – Open Computer Test (10/30 min)
- 13 – What to do next (10 min)
- 14 – Advanced Topics and Tips (20/25 min)
- 15 – Where is the data? (10/15 min)
- 16 – Final Exam (15/15 min)

Getting Started with NAV – “Setup”

CD 1 of 2:

First Steps

- 0.0 - How to use this Training CD
- 1.0 - Using the Navigation Pane
- 2.0 – How to create a new Company
- 3.0 - The Setup Checklist

Setup

- 4.0 - Accounting Periods
- 5.0 - Number Series
- 6.0 - Chart of Account Numbers
- 7.0 – COA consideration if using Dimensions
- 8.0 - Account Schedules
- 9.0 - Dimensions
- 10.0 - Analysis Views

Static Data Entry

- 11.0 - Supporting Data entry
 - Primary Data entry
 - Defaults Setup & Quick Edit Forms

Data Migration – Importing Static Data

- 12.0 - Data Migration Considerations
- 13.0 - Import using the RIM Tool
- 14.0 - Import using Dataports

CD 2 of 2:

Transactional Data Entry

- 15.0 - Journal Type Transactions: (Enter then Post)
- 16.0 – Journal Setups
- 17.0 - Document Type Transactions: (Enter then Post)

Setup of Posting Groups, Taxes, and Reports

- 18.0 - Posting Groups
- 19.0 - Tax Setup
- 20.0 - Report Selections
- 21.0 - Check your setup

Opening Entries

- 22.0 – GL, Customer, and Vendor opening balances (Journal Entries)
- 23.0 - Opening Sales Quotes and Opening Sales Orders

Data Migration – Part II – Import Transactional Data

- 24.0 - Importing into Journals
- 25.0 - Importing into Documents

System Administration

26.0 - Security

27.0 - Backup and Restore

28.0 - Importing Modified Objects

Periodic Activities

29.0 – Posting Dates and Year End Close

"Getting Started with NAV - Workflow"

Topics Include:

How to add Products, Services, Customer, and Vendors.
PO Entry, Receiving Products, PO Close Out.
Sales Quotes, Sales Orders, How to Ship Product, How to Invoice for Products,
How to Invoice for Services,
How to update GL,
How to enter Vendor Invoices, How to print checks,
How to enter Cash Receipts,
Customer Deposits, Late Fees,
Inventory Requisitions, Purchase Advice Reports, Physical Inventory,
Financial Reports: Trial Balance, Income Statement and Balance Sheet,
Adjusting Journal Entries, Exception Reporting,
Resource Planning, Procurement Tips, Reporting Tips, Periodic Activities,
Credit Memos,
Locations, Statistics, Unit of Measures, Cross Reference,
Dimensions, Blanket Sales Orders, and Copy Document Function.

Getting Started with NAV – “Report Writer”

Dynamics NAV offers many customization features. These materials will take you through the many tools that you can use to customize the reports to suit your individual needs. The class will cover the following topics:

MOVIE SEGMENTS:

- 01 – Meet Mr. Wizard (Your first report)
- 02 – Enhancing your report
- 03 – Sorting
- 04 – Filtering
- 05 – Adding additional fields to an existing report
- 06 – Totals (Sub-Totals and Grand Totals)
- 07 – Table Relationships
- 08 – Formatting Tips
- 09 – Variables
- 10 – Variable Totals
- 11 – Request Filters
- 12 – Table Filters
- 13 – Copying and Renaming Reports
- 14 – Add Reports to a Menu
- 15 – Reinforcement Exercise – “Open Sales Order” Report
- 16 – “Shipped, but not Invoiced” Report
- 17 – “What is coming in?” Report
- 18 – How to Export / Import your reports
- 19 – The 4 Types of Reports
- 20 – Adding “Report Filters” and “Name” to Report Header

“Getting Started with Tables and Forms”

Topics Include:

Table Creation, Form Creation, Numbering Methods, Keys, Tabular and Card Forms, Properties, Command and Menu Buttons, How to control Show/Hide, Creating Flow Fields, Exporting/Importing FOBs, and the Navigation Pane Designer.



1 - Table and Form Introduction (Disk 1 of 3)

- Segment 1 – Application Diagram and Table Diagram
- Segment 2 - What is the Object Designer?
- Segment 3 – What is a Table? (Where is the data?)
- Segment 4 – What is a Form?
- Segment 5 – Adding existing fields to existing forms
- Segment 6 – Adding new fields

2 - Table Designer (Disk 1 of 3)

- Segment 7 – Numbering Methods
- Segment 8 – Adding a new Table
- Segment 9 – Documentation
- Segment 10 – Keys
- Segment 11 – Dual Keys

3 - Form Designer (Disk 2 of 3)

- Segment 12 – Tabular Forms
- Segment 13 – Card Forms
- Segment 14 – How to add a new form.
- Segment 15 – Form Properties
- Segment 16 – Field Properties
- Segment 17 - Spiff up your forms
- Segment 18 - How to add a command button
- Segment 19 – How to add a menu button
- Segment 20 – Button Properties
- Segment 21 – Show Hide column control
- Segment 22 – How to modify a form from the application

4 - Additional Designer Topics (Disk 3 of 3)

- Segment 23 – Sorting Table Data
- Segment 24 – Setting Table Properties
- Segment 25 – What is a Flow Field?
- Segment 26 – Flow Fields – Sum
- Segment 27 – Flow Fields – Sum a value.
- Segment 28 – Flow Fields – Count
- Segment 29 – Flow Fields – Lookup
- Segment 30 – Exporting your FOB
- Segment 31 – Importing your FOB
- Segment 32 – Navigation Pane Designer

“Getting Started with Dynamics NAV Manufacturing”

Day 1 - Foundation to Dynamics NAV Manufacturing

Introduction and Setup

- Segment 1 – Introduction and System Overview
- Segment 2 – Manufacturing Setup

Product Design

- Segment 3 – Items
- Segment 4 – Production BOM (Bill of Materials)
- Segment 5 – Routings
- Segment 6 – Put it all together
- Segment 7 – Routing Link Codes

Day 2 – Capacities

Capacities:

- Segment 8 - Capacity Setup
- Segment 9 – Machine Centers
- Segment 10 – Work Centers

Day 3 – Planning

Planning:

Sources of Demand:

- Segment 11 – Sales Orders and Blanket Sales Orders
- Segment 12 – Production Forecasts

Creating Production Orders to fulfill the demand:

- Segment 13 – Planning Worksheet (MPS/MRP) (a, b, c)
- Segment 14 – Order Planning (Manual MRP)
- Segment 14.5 – Production Schedule

Creating Purchase Orders to Subcontractors

- Segment 15 – Subcontracting Worksheet

Day 4 – Execution and History

Execution

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Getting Started with NAV 2009 – Workflow

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