



MobileNAV
ERP anywhere

MobileNAV User Guide



Table of content

Working with the MobileNAV client.....	5
Logging in to MobileNAV.....	6
Additional login options	7
Getting around in MobileNAV	8
About the MobileNAV main menu.....	9
Navigating in MobileNAV	17
How to use your Favorites.....	18
How to get help	19
Working with Lists.....	20
About the list context menu	20
How to use barcodes with lists	20
How to use the toolbar	21
Working with Cards.....	25
About the card context menu.....	25
How to edit card fields	25
How to use barcodes with cards.....	26
How to look up an address: Map integration	27
How to dial a contact: Phone integration	28
How to email a contact: Email integration.....	28
How to look up a web link of your contact: Browser integration.....	28
How to open a related card from a card	28
How to use the card toolbar	29
How to generate reports	33
Online configuration	34
Sales	34
Concept	34
Contact	35
Companies.....	36
To-Dos	38
CRM workflow example	40
Customers.....	46
Sales quotes.....	51
Sales orders	55
Return orders.....	58





Approval Entries.....	61
Customer – Top 10 List.....	62
Sales workflow example.....	62
Inventory	73
Concept	73
Items.....	73
Phys. Journals	76
Vendors	78
Warehouse Receipts	80
Warehouse Put-aways	81
Warehouse Picks.....	84
Inventory Put-aways	85
Inventory Picks.....	87
Warehouse Shipments	89
Warehouse Movements.....	91
Transfer Orders.....	93
Item Reclass. Journals	96
Inventory workflow example.....	98
Finance	101
Concept	101
Posted Sales Shipments.....	101
Posted Sales Invoices	102
Posted Sales Cr. Memos	103
Posted Return Receipts	104
Reports	105
Finance workflow example.....	109
Service.....	112
Concept	112
Service Orders.....	113
Service Tasks.....	114
My Service Tasks	119
Service workflow example.....	119
Manufacturing	131
Concept	131
Released Production Orders.....	132
Consumption Journals.....	136





Output Journals	140
Manufacturing workflow example.....	143
Job.....	149
Concept	149
Jobs	149
Job Journal Batch	152
Job workflow example	155
Offline configuration.....	159
Sales	159
Concept	159
Contact	160
Company.....	161
CRM workflow example	162
Customer	168
Sales quote	170
Sales order.....	173
Return order	176
Sales workflow example.....	178
Inventory	186
Concept	186
Items.....	186
Service	188
Concept	188
Service Task	188
My Service Task	192
Service workflow example.....	192

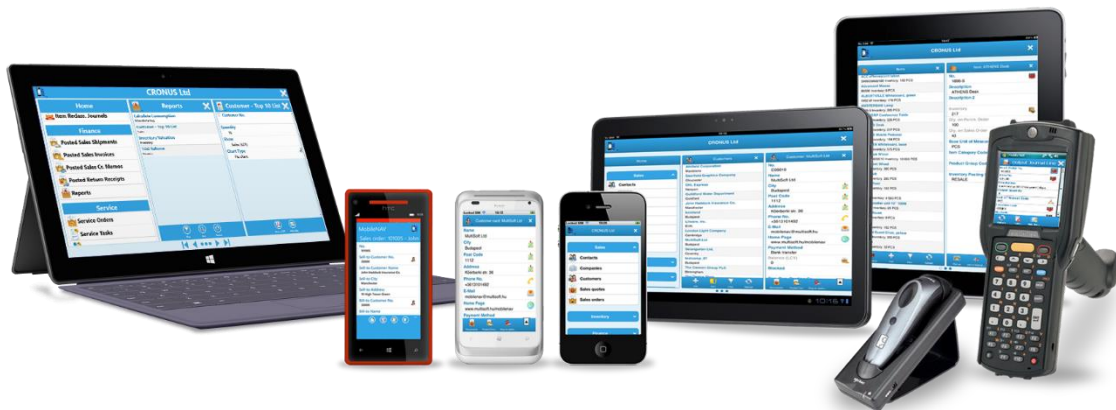




Working with the MobileNAV client

MobileNAV provides Microsoft Dynamics NAV functionality on mobile devices, which is an ideal solution for field agents on the road, for warehouse agents managing the inventory of your company, and for anyone who works in an environment without access to a desktop computer. With Internet access, they can take orders anywhere, anytime by retrieving the most current data from their company's system. Order forms that agents fill out are instantaneously available in a central system. Clients and partners also enjoy the advantages of this modern service, since they receive a confirmation message about their orders in a few minutes and products are also delivered to the client the following day.

Try **MobileNAV** on



The Microsoft Dynamics NAV system can be used on iOS, Android, Windows 8, Windows Phone and Windows CE/Windows Mobile platforms. MobileNAV offers native application support on every popular platform making user experience superior to browser-based or cross-platform solutions. It offers the same functionality on all platforms due to its customizable server-side configuration.





Logging in to MobileNAV

After you have installed the MobileNAV app and your system administrator has granted you access to the MobileNAV server, start the app.

When you start the MobileNAV app on your mobile device, the login page is displayed as shown below:

The image shows the MobileNAV Login screen. At the top, there is a blue header with the MobileNAV logo on the left and the text "MobileNAV Login" in the center. Below the header, the login form is displayed on a light blue background. The form contains the following fields and controls:

- User name:** A text input field containing "demo_en".
- Password:** A password input field with masked characters (dots).
- Domain:** A text input field containing "mobilenav".
- Use SSL:** A checkbox that is currently unchecked.
- Server:** A text input field containing "mobilenav.multisoft.hu".
- Instance:** A text input field containing "MobileNAV42".
- Tenant:** An empty text input field.
- Company:** A text input field containing "CRONUS Ltd".
- Login:** A blue button.
- Login offline:** A blue button.
- Save password:** A checkbox with a green checkmark icon, labeled "Save password".

To log in, you need an existing login configuration. Open **Login configurations** with the "lefele nyilacska" (kellene ide a kep) icon. You can either select an already saved login configuration from the list or create a new one with the **New** button or import it from a .mnlc file.

To create a new login configuration, you must provide the following details:

User name: Depending on your system administrator's settings, this is your Windows or your Dynamics NAV user name.

Password: Your Windows or Dynamics NAV password.

Domain: The name of the domain that you connect to. Leave this field empty if you use your Dynamics NAV password.

Use SSL: SSL provides enhanced security for your connection between your mobile device and your MobileNAV server. If SSL is enabled on your MobileNAV server, you must select this option. Otherwise, leave it unselected.

Server: The name or IP address and port number of your MobileNAV server, like 195.56.87.39:7047

Instance: The name of the MobileNAV instance on your server that you want to connect to. By default the instance name can be DynamicsNAV, DynamicsNAV70 or DynamicsNAV71 depending on the NAV version.

Tenant: The name of your tenant in the server instance. A tenant is an additional layer for users of the same server instance. Only available in NAV server version 2013 R2.

Company: The name of your company.





Save password: Select this option to save your password on your mobile device. MobileNAV saves all your login details – other than your password – even if you do not select the **Save password** option.

Note: If you are not sure about the details of the MobileNAV server that you want to connect to or you cannot log in, contact your system administrator.

You can also create Office 365 authentication. **More info needed??**
Use **Copy** to copy data when creating several similar login configurations.
To delete a saved configuration, press **Delete**.

Important: You can log in to the MobileNAV app only with a valid saved configuration.

Note: Data of a saved login configuration cannot be edited on the login screen. You must open **Login configurations** for any modification. Additional login options

MobileNAV provides additional options to help you log in to the app. To see these options in the login menu, tap the MobileNAV icon in the top-left corner.



You have the following options:

Reset to demo server: Resets the login settings so that you can connect to the demo server, with which you can access a fully working demo version of the MobileNAV app.

Login configurations: Displays your saved login configurations. In case you need access to multiple companies or multiple database instances of the same company, you can save your credentials and fill in the login details by selecting your previously defined login settings. For information about saving login configurations, see [Save / Remove login configuration](#).

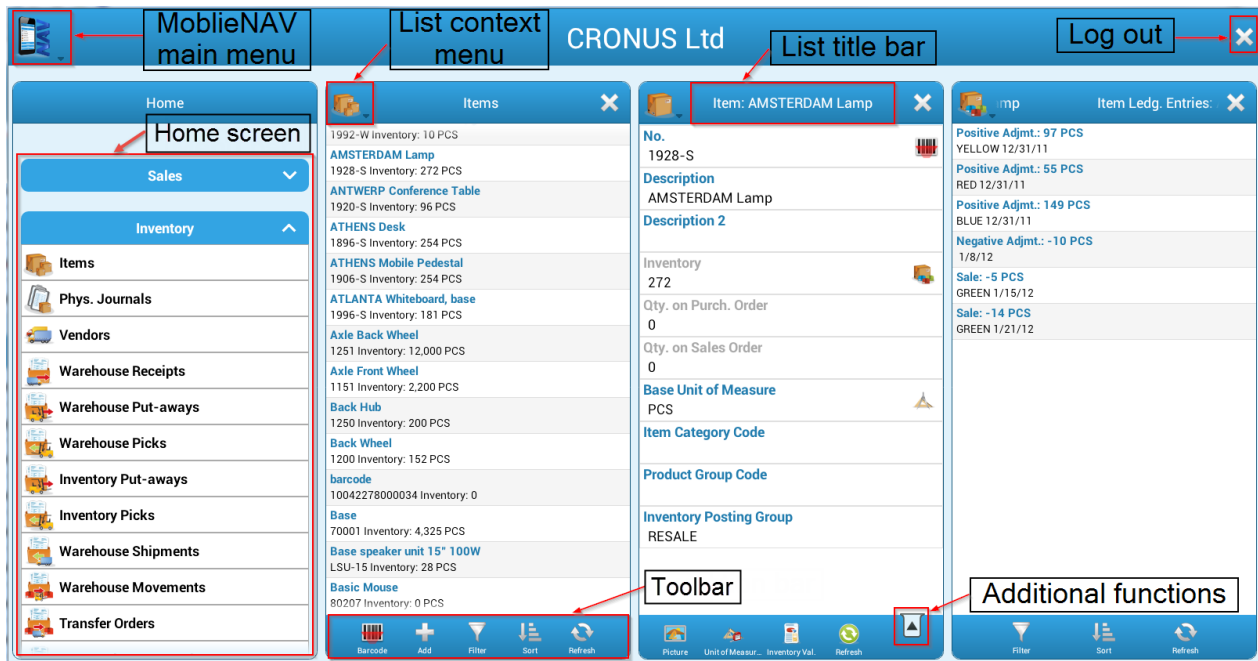
About: Displays basic software information, such as the version of your application and the database schema that you are connected to, which may be useful for troubleshooting your device.



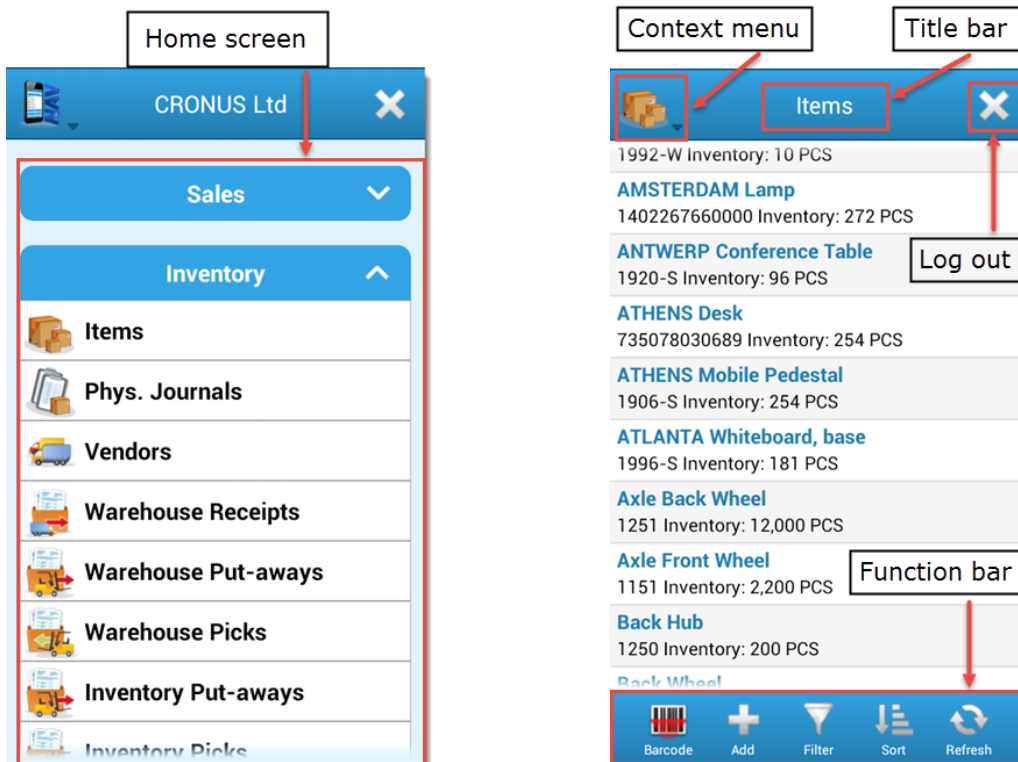


Getting around in MobileNAV

After successful login, you see the MobileNAV workboard, which is shown below on a tablet:



Mobile phone and smartphone users see only one page at a time:





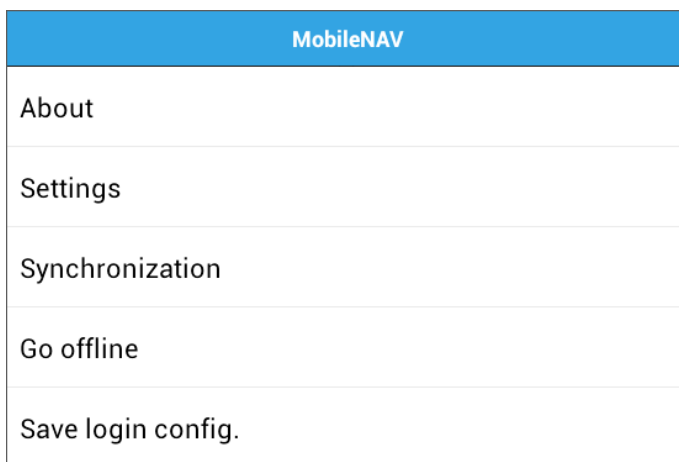
The workboard is the home page of MobileNAV from where you can access the MobileNAV main menu and start navigating on the home screen.

About the MobileNAV main menu

The main menu, allows you to do the following:

- View basic information about the application
- Change the settings of the MobileNAV app. For example, you can setup your barcode reader.
- Use the app in offline mode and synch your changes after reconnecting
- Save your login configuration

To open the main menu, tap the MobileNAV icon in the top-left corner.



About

In the **About** menu, you can view basic software information, such as the version of your application and the database schema that you are connected to, which may be useful for troubleshooting your device.





Since MobileNAV licensing is device-based, the **device identifier** is associated with your MobileNAV installation and identifies your device.

Settings

General settings

Here you can set the following options:

Delete stored answers: With this option you can delete all your stored answers for warning messages, such as the confirmation of deleting a sales order. You can store answers by selecting the **Don't ask again** or **Remember the answer** option in the warning dialogs.

Note: You cannot remove a single stored answer.

Delete cacheable files: With this option you can delete the cacheable files.

Delete flow filters: With this option you can delete the flow filters.

Export app data: With this option you can export application data as a ZIP file to your device.

Printer configuration: With this option you can configure printer settings or add a new printer. For label printing (ZPL templates) define the following settings:

1. Depending on the platform used, define the type of connection to the printer: Serial Port, USB, Bluetooth or Network.
2. Define the necessary data: IP Address, port, etc
3. Print a test label with the **Test** button to test the connection to the printer.
4. If test printing was successful, click **Save**.

You can now print labels with the **Print Label** icon on the toolbar.

Play sound on modification: With this option you can enable audible sound notification after successful or unsuccessful modification. On particular platforms it is possible to change the sound file.

Close window on Enter/Esc: With this option you can set closing the window when pressing Enter or Esc.

Use Keyboard shortcuts: With this option you can enable the usage of keyboard shortcuts. If enabled, the **Shortcuts** option is displayed in the MobileNAV menu, where you can define shortcut keys for the different options. From the menu of the list and card pages you can also assign shortcuts to function buttons or to actions.

Note: Always use unique shortcut keys for each option, action or function button in order to avoid interference. Pay attention to the keyboard events sent when scanning barcodes as well (**Keyboard emulation (HID mode)**).

Background synchronization: With this option you can enable background synchronization and set the time interval of the synchronization. It is recommended to enable this option in case you do not have continuous internet connection. For more information, see [Background synchronization](#).

Change log clean-up interval (day): Here you can set the time interval in days of the log clean-up.

Connection monitoring interval: Here you can set the time interval in seconds of monitoring Internet connection.





Auto online/offline: With this option you can enable switching automatically between online and offline modes depending on whether you have active connection to the server or not.

Define the time interval for checking the connection to the server.

For more information, see [Auto online/offline mode](#).

Note: If an option is inactive in MobileNAV, it has been set by your administrator on the server and cannot be changed on your device.

Barcode settings

Here you can set up your barcode reader and delete your stored answers for the confirmation and warning messages of MobileNAV.

The screenshot shows the 'Settings' screen of the MobileNAV application. At the top, there is a blue header bar with the word 'Settings' in white. Below this, the 'Barcode mode:' section is highlighted in light blue. It contains two radio button options: 'Camera' (which is selected) and 'SocketMobile'. Below these options is a text input field labeled 'Next field after scan' with a small square icon to its right. The 'Connected device:' section is also highlighted in light blue and contains an empty text input field. Below that, the 'Scanned barcode:' section is highlighted in light blue and contains an empty text input field. At the bottom of the screen, there is a blue button with the text 'Delete stored answers' in white.

You have the following options:

Barcode scanner mode:

Off: Barcode reading is turned off. On Windows CE devices this is the default setting. **Camera:** MobileNAV uses the camera of your mobile device to scan barcodes. When there are multiple barcodes on a card, for example, on a **New Consumption Journal Line**, you must select fields one by one that you want to fill in by scanning a barcode.

Keyboard emulation (HID mode): Sends keyboard events when scanning barcodes similarly to typing the barcode in. Barcode reading on Windows CE devices is based on character emulation. You must configure the barcode reader by first scanning a barcode and then removing the prefix and postfix characters of the barcode. This allows MobileNAV to separate the barcode from the start and end characters and hence identify the prefix and postfix.

After selecting the desired option, click **Configure** to save the settings.

SocketMobile: MobileNAV uses a Bluetooth device connected to your Android, iOS, or Windows CE mobile device or a built-in barcode reader. Currently SocketMobile is not supported for devices running Windows 8 or Windows Phone. For more information about SocketMobile devices, see www.socketmobile.com.

Connected device: Select your SocketMobile device from the list.





Scanned barcode: Displays a scanned barcode. This field essentially verifies that the barcode reader works. **LineaPro:** The iOS app supports [Linea Pro and Infinea devices](#) of Datecs. So besides [SocketMobile](#) you can also choose Datecs external barcode scanners for your iPhone or iPad.

Device specific: Barcode reading uses the SDK of the Windows CE device; therefore, you do not have to make additional configurations. The following devices support this option:

- CipherLab
- Intermec
- M3 (Sky and Green)
- Motorola/Symbol
- Ingenico
- Psion

NFC: MobileNAV can read NFC tags and use them similarly to the barcode scanner to filter lists or enter data onto cards. All functions available for barcode, for eg. focus handling or smart scanning, are available for NFC as well.

Scanning focus behavior:

Off: Select this option to turn off scanning focus.

Next field after scan: Select this option to allow barcode reader to move to the next field when there are multiple barcode fields.

Smart scanning: Select this option to allow smart scanning. With smart scanning you do not need to handle the scanning focus inside a list or card anymore, because the system will find out what has been scanned and insert the value into the proper field. You can scan a Cross Reference Number, a Bin Code or a Serial Number, the system will find out which field should be filled.

Synchronization

Any work you do in offline mode, that is, without Internet connection, must be synchronized when you go online again.





Pending only: Displays only pending changes that have not been synchronized yet. By deselecting this option, you will also see all your synchronized items, whether those were successful or failed.

Synchronization: Starts synchronizing your offline changes.

Refresh state: Refreshes the state of the records.

This option is available only if Offline Administration has been enabled by the administrator.

Upload: Uploads offline changes to the Offline Cockpit, from where the administrator can store them into the Dynamics 365 Business Central database.

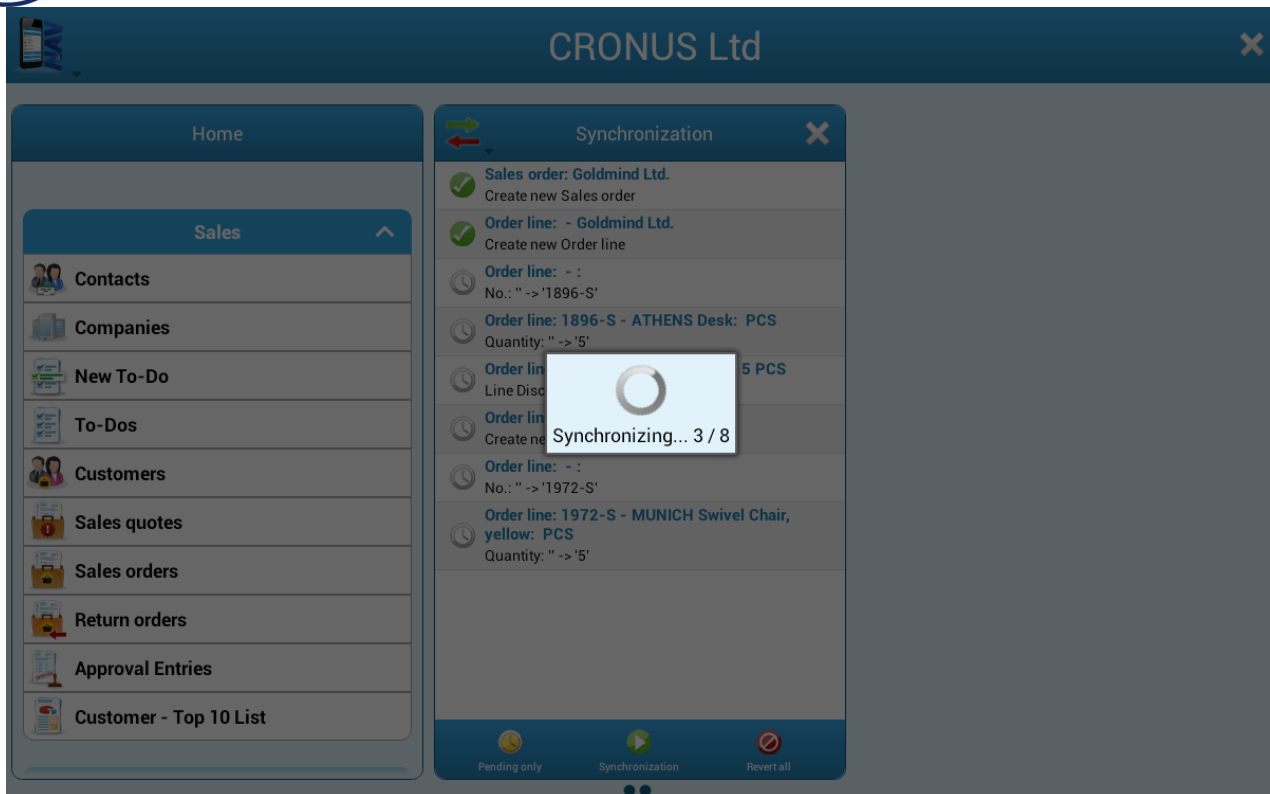
Revert all: Discards all your synchronized and pending offline changes.

To revert a single change, tap on it.

When you tap the **Synchronization** button, the client will start uploading all offline modifications to the NAV server. At this point, all NAV validation and business logic will be executed, which may lead to synchronization issues. After successful synchronization MobileNAV offers refreshing offline data by downloading changes from the server.

In case of error, if Offline Administration has been enabled by the administrator, you can upload the pending changes to the Offline Cockpit, where the administrator can handle the error and store the changes into the Dynamics 365 Business Central database.





Background synchronization

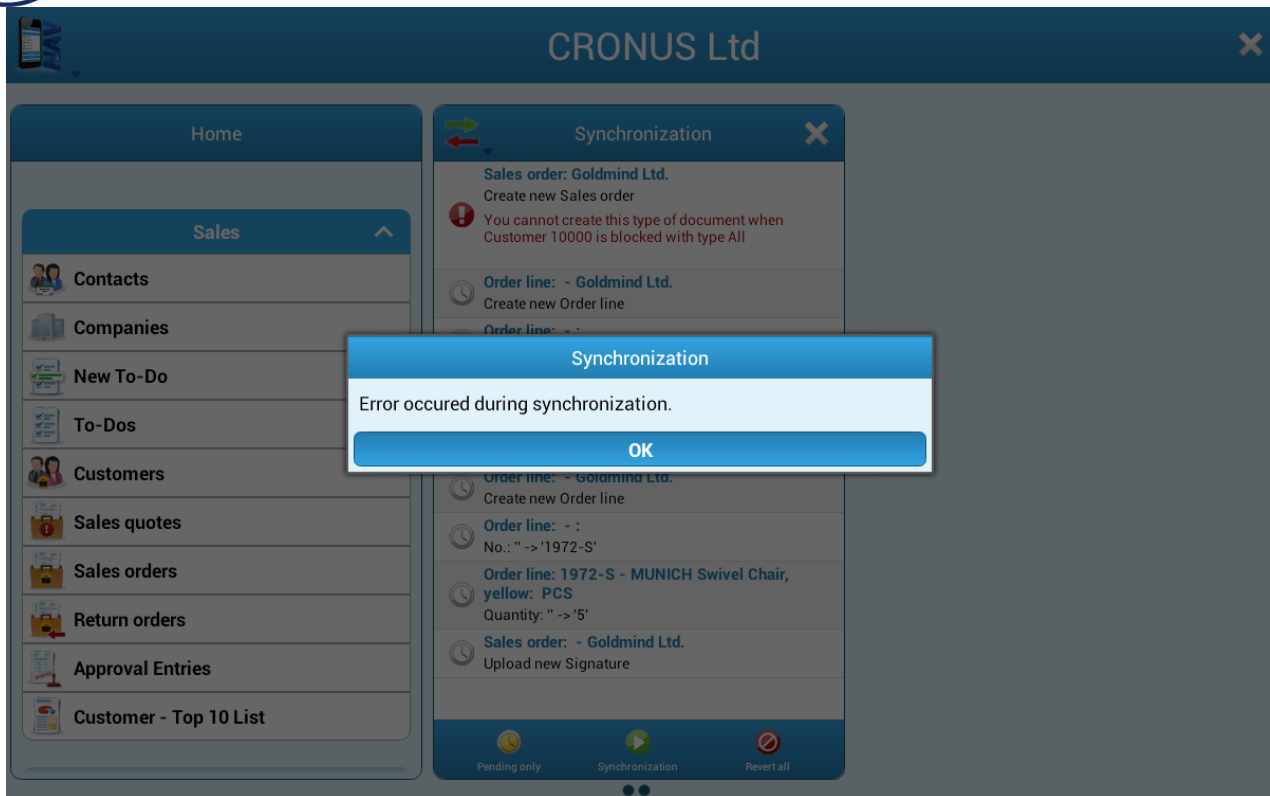
During background synchronization uploading your offline changes to the Dynamics 365 Business Central database is made automatically in the background while you can continue your offline work. At the same time, offline data on your mobile device is automatically refreshed by downloading changes from the database. Background synchronization is initiated periodically at the specified time interval and is performed in case of successful connection to the database (Internet connection is necessary).

You can enable background synchronization under the **General** tab of the **Settings** menu of MobileNAV.

Troubleshooting synchronization issues

During the synchronization process, errors may occur. The MobileNAV client will stop the synchronization process and you cannot continue uploading your remaining modifications until you resolve the issue. However, if Offline Administration has been enabled by the administrator on the server, the pending changes are uploaded to the Offline Cockpit, where the administrator can handle the error and store the changes into the Dynamics 365 Business Central database.





There are 2 types of synchronization issues:

- Error: synchronization error occurs if the creation / modification / deletion operation could not be uploaded to the Dynamics 365 Business Central database for some reason. The error message will





be displayed on the erroneous line. By selecting the modification, the details will open, where you can review the current state of the record. Tap the **Synchronization** button again, to retry uploading your modification.

- Warning: synchronization warning occurs if the record that you modified in offline mode has been updated while you were in offline mode. By selecting the modification, the details will open, where you can review the current state of the record. Tap the **Synchronization** button again, to confirm that you want to upload your modification.

Login mode

Login mode determines what you can do after logging in to the MobileNAV application. If login mode has not been defined on the server side, you can choose from the following options:

- online mode
- offline mode
- auto online/offline mode

Online mode

In online mode, MobileNAV can be used only with active connection to the server, that is, you must have Internet connection while working with the application. If the connection is active, you can reach all pages from the server and use all features.

For more information, see [Online configuration](#).

Enable online mode with the **Go online** option from the main menu.

Offline mode

In offline mode, MobileNAV can be used also without Internet connection. MobileNAV is fully functional in offline mode since your work is saved in an offline database on your device.

For more information, see [Offline configuration](#).

Important: Before you go offline for the first time, MobileNAV will prompt you to download offline data to your mobile device. Subsequently, you will only need to refresh your existing offline data. Downloading and refreshing offline data requires Internet access.

Notice that the MobileNAV menu icon in the top-left corner changes to the following: 

Remember: When you go online you should synchronize your changes. MobileNAV will prompt you to do so after going online, but you can also do it manually with the **Synchronization** MobileNAV menu option. However, you can also enable background synchronization under the **Settings** menu of MobileNAV. In this case, the synchronization is made automatically at a specified time interval. For more information, see [Background synchronization](#).

Enable online mode with the **Go offline** option from the main menu.

Auto online/offline mode

In auto online/offline mode, MobileNAV switches automatically between online and offline modes depending on your Internet connection. While the connection is active, MobileNAV is online, using online pages with all online features available, downloading data from the server and storing it in the offline database, and uploading the modifications to the server immediately. When the connection goes off,





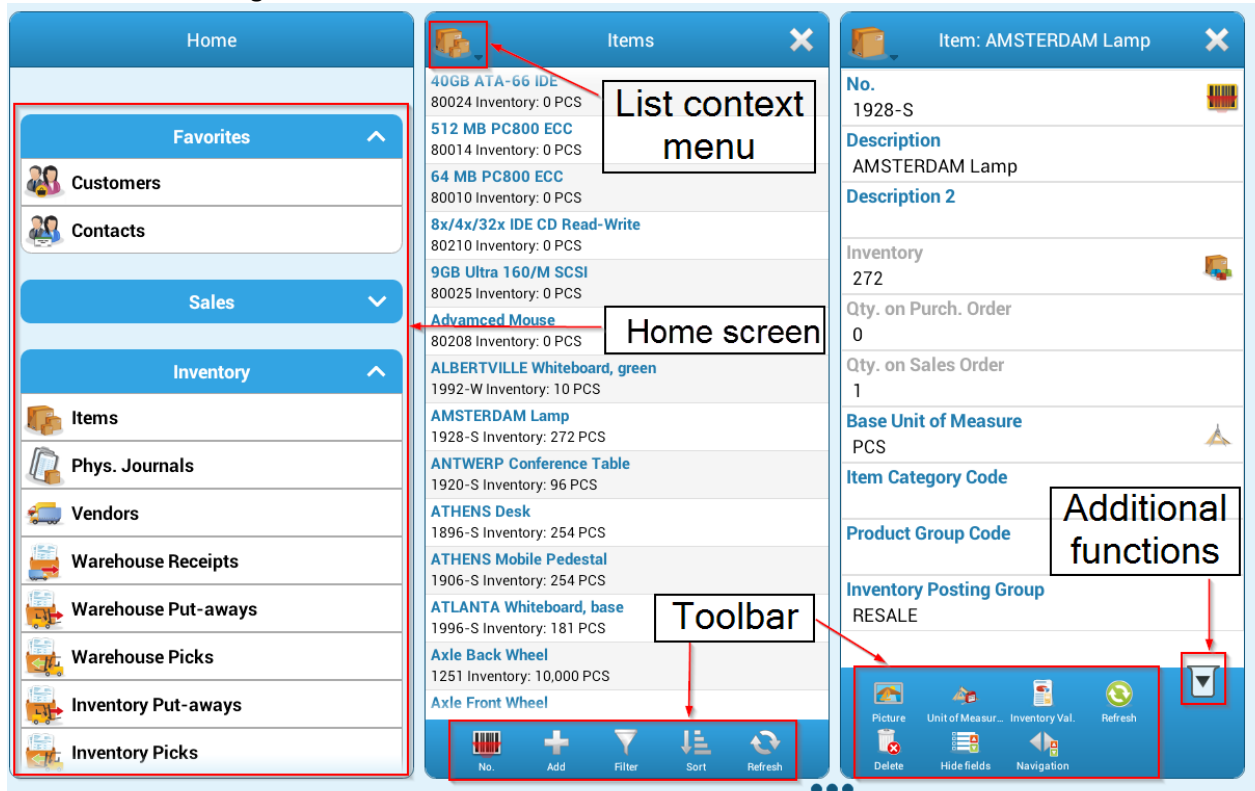
MobileNAV goes offline, online options will not be available, data is taken from the offline database and synchronization is done automatically when the connection is restored.

Enable **Auto online/offline mode** and set the time interval for checking the connection to the server under [Settings](#).

→ ez vizsont meg ott van a telomon a menuben Navigating in MobileNAV

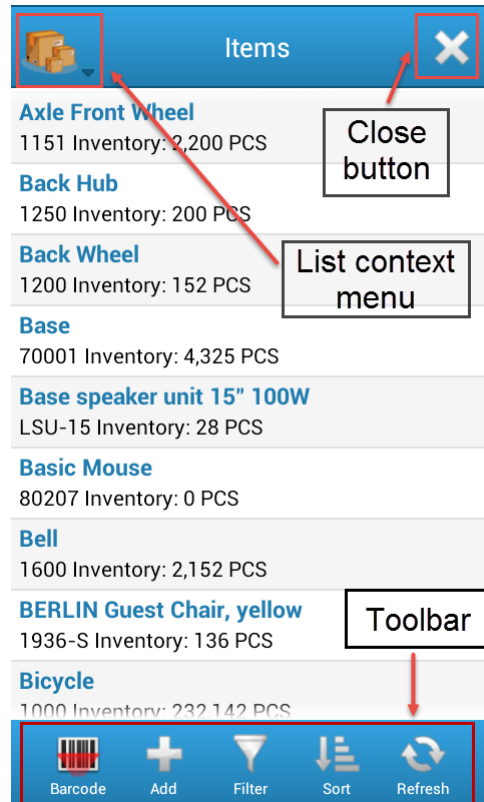
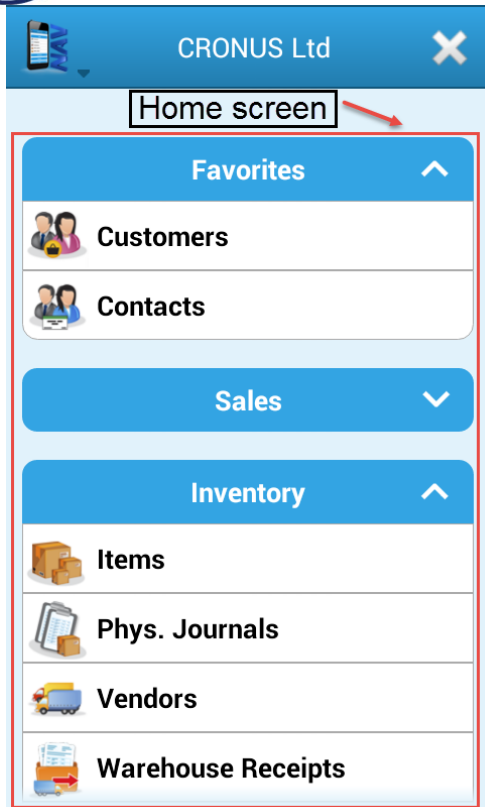
Navigation in MobileNAV is similar to navigating in Dynamics 365 Business Central. You can open lists from the Home screen and then drill down to the list and card that you want to view. You can navigate with single taps that open menus, lists, and cards.

You can see the navigation tools available on tablets in the screen below:



You can see the navigation tools available on mobile phones and smartphones in the screens below:





To open a list or card,

1. Tap a category in the Home screen.
2. Tap the name of a list.
3. Tap **Refresh** in the toolbar if there are no results in the list. Optionally, select filter conditions by tapping **Filter**.
4. Tap an item in the list to open a card.

For information about filtering, see [Filtering lists](#).

How to use your Favorites

Your favorites list provides easy access to your most commonly used lists and cards.

To add a shortcut to your Favorites list, do the following:

1. Open a list or card.
2. Sort and filter your results as necessary.
3. Tap the icon in the top-left corner of the list or card. The context menu is displayed.
4. Tap **Add to favorites**.
5. Type the name of your favorite item and tap **OK**.

Note: Your sorting and filtering conditions will be applied to your Favorite item. For information about sorting and filtering, see [Sorting list items](#) and [Filtering lists](#).

Removing a Favorite item

To remove a Favorite item,

1. Tap the **Favorites** menu on your Home screen and tap an item to open it.
2. Open the context menu by tapping the list or card icon in the top-left corner.





3. Tap **Remove from favorites**.

How to get help

Every list and card has its own context menu from where you can view help that describes the basic list and filter options that are available in MobileNAV. In the context menu of a page, tap **Help** to open the help page.

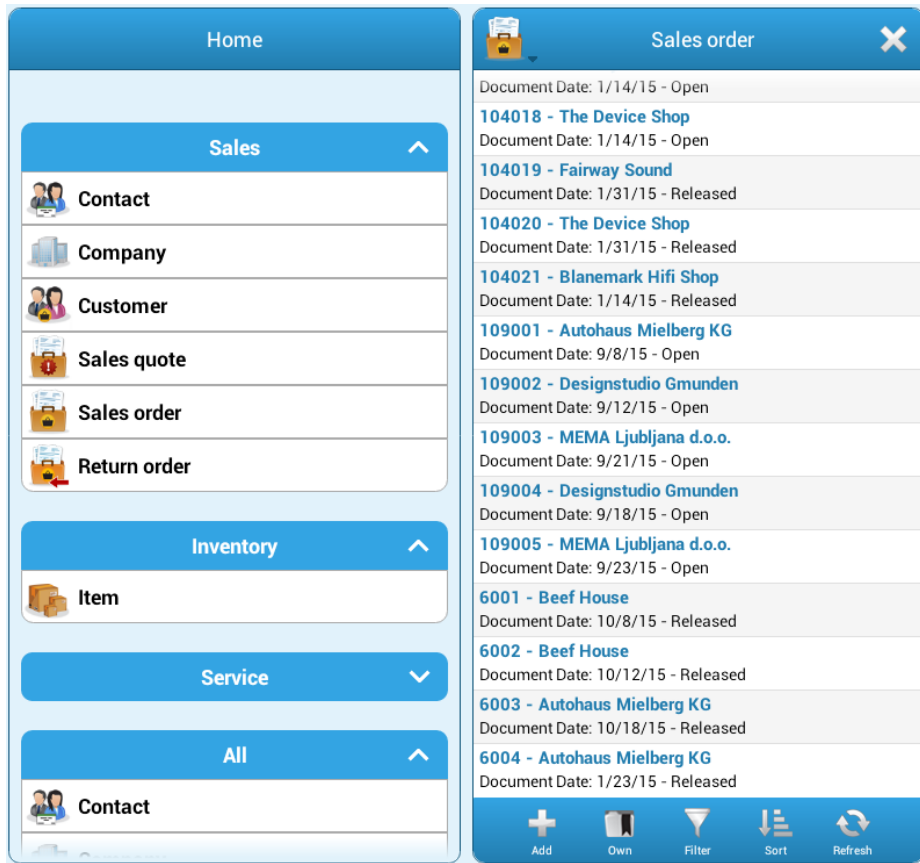
Note: Not every listed option is available on every page.





Working with Lists

Every menu in the MobileNAV menu bar opens its relevant list. The header of the list contains the context menu, the title, and an X button to close the list. The Toolbar at the bottom of the page contains tools to manage your list.



About the list context menu

As in every context menu, you can add the list to your [Favorites](#) list and view [Help](#).

Note: The context menu on mobile devices other than tablets contains the [MobileNAV main menu items](#) as well.

About this page

Displays useful information about the page for the configurators.

How to use barcodes with lists

Barcode readers make it easier to quickly enter correct data, whether that is a product identifier or any other information that you want to use as a filter.

You have two options to scan barcodes: Camera mode and SocketMobile/CE mode.






Camera mode

In Camera mode, you use your device's camera to scan a barcode. There are multiple cases for reading barcodes:

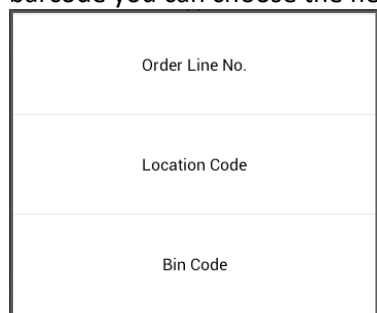
A list with a single barcode filter field

The simplest case is when there is only one field in a filter where you can scan a barcode, for instance when you search for an inventory item.

In this case, tap the barcode icon  on the toolbar of the list and start scanning a barcode. When your device's camera recognizes the barcode, it is automatically entered into the filter field.

A list with multiple barcode filter fields

There are lists, such as the **Consumption Journal Line**, that have multiple fields where you can scan a barcode. In this case, tap the barcode icon and scan a code. When your device's camera recognizes the barcode you can choose the field from a list where you can enter the scanned code.




Order Line No.
Location Code
Bin Code

SocketMobile/CE mode

The main difference between Camera and SocketMobile modes is that the latter supports barcode focus which has an effect on lists and cards as well. In this mode, you only set the focus of the barcode reader on a card or list. When you start scanning a barcode, MobileNAV will automatically enter the code to the field which has focus.

A list with a single barcode filter field

When a list only has one barcode filter field, there is no difference between Camera and SocketMobile modes. When you open the card, the only barcode field already has focus, marked by the  icon, therefore, you can start scanning a code. The code will be entered into the field.

A list with multiple barcode filter fields

When there are multiple filter fields on a list where you can read barcodes, you first have to scan a code and then select the filter field where you want to enter the barcode. If you selected the [Next field after scan](#) option, barcode focus moves to the next barcode filter field, where you can scan the next barcode.

How to use the toolbar

The toolbar of lists provides the following functions:

- **Add** a new item to the list
- List your **Own** items in a list
- **Filter** a list
- **Sort** a list
- Scan a **Barcode** to fill in a field or search for an item
- **Refresh** a list






In certain lists you can search for an item by scanning a barcode with your device's camera or Bluetooth barcode reader. For instance, when you have hundreds or thousands of items in your inventory, you can simply read a barcode to open the card of the related item. If the item is not yet in your inventory then a notification is displayed.

Adding items

You can add items to all those lists where creation is enabled. This is managed in the MobileNAV configuration and the permissions of the mobile user.


To add a new item,


1. Tap a menu and open a list. For instance, tap **Inventory** and open the **Items** list.
2. Tap **Add** on the toolbar.
3. Fill in the fields as necessary. You can either manually enter the Identifier (**No.**) of the item, or scan its barcode. For scanning a barcode, tap the barcode icon in the **No.** field: 
4. Close the item's card when you are done. Your changes are saved automatically.

Selecting your own items

As a special type of filter, you can select your own items in a list, for example, when you want to list only your own contacts. Your Own list contains items based on a pre-defined set of properties that only your system administrator can change. This can be Salesperson Code, Resource ID or Location Code by default, but the solution is extendable with additional properties as well.

To select your own list items,

1. Tap a menu and open a list. For instance, tap **Sales** and open the **Contacts** list.
2. Unless already selected, tap **Own** on the toolbar. 

The **Own** filter is enabled by default ; therefore, when you open a list where this filter is available, you only see your own items. In some cases you may have to tap the filter to disable it and see any results.

Note: The application saves your setting. Filtering lists

Filtering is especially useful if a list has dozens or hundreds of elements. In MobileNAV, every list can have its own set of filters, depending on the fields of the cards in that list.

To filter a list,

1. Tap a menu and open a list. For instance, tap **Sales** and open the **Sales quotes** list.
2. Tap **Filter** on the toolbar.
3. Enter your filtering conditions. When you tap a filter field, it is automatically selected and is marked by a checkbox. For information about filter field types, see [How to edit card fields](#).

Note: Text fields are case sensitive.





Filter

No. A+ ☒

Sell-to Customer Name A+ ☒

L

Document Date ☒

3/4/14

Status ☒

Open

Sell-to Customer No. A+ ☒

Apply Save Cancel

4. Tap **Apply** to apply your filters or tap **Cancel** to return to your list.

Notes:

- If a filter is selected but empty, it will be disregarded automatically. You do not have to clear its checkbox.
- You can set a default filter for all your lists. See [Saving your filters](#) for details.
- If you already have saved filters you can apply those as described in [Using your saved filters](#).

Selecting a filter match for text fields

For text fields, you can select which part of the field should be considered for filtering:



Beginning of Field: MobileNAV will search for the specified text at the beginning of the field names. For example, if you type *Jo* in the **Name** filter field your results will return *John* Smith and *Johanna* Doe, but not *Steve Johnson*. In Dynamics 365 Business Central, you can type *Jo** to view the same results.



Whole Field: Your result will return the exact match for your search term. This is only useful if you know the exact detail of a card. For example, when you look for the address of a customer, called *John Smith*, you can type *John Smith* in the **Name** filter field and select the **Whole Field** filter match option to find the customer's card. In Dynamics 365 Business Central, searching for an exact match works the same way.



Any Part of Field: MobileNAV will search for the specified text anywhere in the selected field names. For example, if you type *Jo* in the **Name** filter field your results will return *John* Smith, *Johanna* Doe, and *Steve Johnson*. Dynamics 365 Business Central, you can type **Jo** to view the same results.





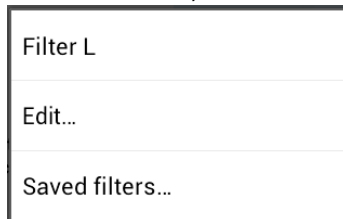
The application saves your last used filtering setting.

Saving your filters

You can also save your filtering conditions if you plan to use them later on. To do so, tap **Save** on the **Filter** page and name your filter. Optionally, select the **Default filter** option to make it default for your selected list. When you open this list again, the default filter will be applied.

Using your saved filters


In MobileNAV, you can reuse your saved filters to quickly select items from a list. When you have at least one saved filter, MobileNAV displays a list from where you can run a saved filter:



To apply a saved filter, tap its name. The list will be automatically refreshed with the filter conditions.

When you have existing filters but want to create a new filter, tap **Edit**. You can create a filter as described in [Filtering lists](#).

To manage your saved filters, tap **Saved filters**.

To edit a filter, tap its name. To remove a filter, tap **Remove** .

Field types

Card fields and filter fields have the same types. The only exception is **Quantity**, which is a card-only field type. For more information about filter field types, see [How to edit card fields](#).

Sorting list items

A long list can be sorted to get a better view of its elements. Sorting conditions always depend on the list that you want to sort. The only common condition is that you can choose ascending or descending order for your selected sorting condition.

To sort a list,

1. Tap a menu and open a list. For instance, tap **Inventory** and open the **Items** list.
2. Tap **Sort** on the toolbar.
3. Select a sorting condition and whether it should be listed in **Ascending** or **Descending** order. Notice that you can only select one sorting condition.
4. Tap **Apply**. The list will be refreshed based on your sorting condition.

Refreshing lists

When you change your filtering or sorting conditions, you have to refresh your list before your changes take effect. To do so,

1. Tap a menu and open a list. For instance, tap **Sales** and open the **Contacts** list.
2. Tap **Filter** or **Sort** to change your filtering or sorting conditions on the toolbar.
3. Tap **Refresh** on the toolbar.





Working with Cards

About the card context menu

As in every context menu, you can add the card to your [Favorites](#) list and view [Help](#).

Note: The context menu on mobile devices other than tablets contains the [MobileNAV main menu items](#) as well.

About this page

Displays useful information about the page for the configurators. How to edit card fields

Cards have the following field types:

Text: Type any character into a text field.

Integer: Type any number or character into the field.

Decimal: Type a decimal number, like 123.45 into the field, such as **Amount (LCY)** or **Unit Price Excl. VAT**. The format of a decimal number depends on the regional settings of your device.

Date: Select the date from a calendar. Date format depends on the regional settings of your device.

Document Date

Mar 05 2014

OK Cancel

Date and time: Select the date and time from the calendar. These fields generally include **Date Time** in their names, such as **Date Time Sent for Approval** or **Last Date Time Modified**. Date and time format depends on the regional settings of your device.

Date-Time Sent for Approval

Mar 05 2014

11 31

OK Cancel





Options: Tap the arrow next to the field and select an option from the list and tap **OK**.

Options dialog for Status:

- Open (selected)
- Released
- Pending Approval
- Pending Prepayment

Buttons: OK, Cancel

Boolean: Check or uncheck the checkbox to set to desired value, then tap **OK**.

Boolean dialog for Comment:

☒ Comment

Buttons: OK, Cancel

Code: Type the abbreviation or code of the field. These fields generally have **Code** in their names, such as **Location Code** or **Currency Code**.

List: Lists are similar to options in that they contain several items to choose from. The difference is that rather than selecting from a pre-defined set of options, you can select an item from a list and MobileNAV automatically picks the relevant detail of that item. For ease of use, the field will be filled in for you with that detail.

For instance, when you select the **Sell-to Customer No.** field, you can search for a customer from a list by name and MobileNAV enters the relevant customer number to the card field.

To select a list element, tap the arrow next to the field, select your filter and sorting conditions and tap **Refresh**. Select an item from the list and tap **OK**.

Quantity: Where you can type the number of items that you want to work with. Optionally, you can tap **+** **-** to increase or decrease the number of items.

If the **Play sound on modification** setting is enabled in the **Settings** menu, you will receive audible sound notification after successful or unsuccessful modifications.

How to use barcodes with cards

Barcode readers make it easier to quickly enter correct data, whether that is a product identifier or any other detail that you want to use as a filter. You can scan a barcode as a filter field or a product identifier. You have two options to scan barcodes: Camera mode and SocketMobile/CE mode.






Camera mode

In Camera mode, you use your device's camera to scan a barcode. There are multiple ways of reading barcodes:

A card with a single barcode field

The simplest case is when there is only one field in a card where you can scan a barcode, for instance when you add a new inventory item.

In this case, tap the barcode icon  next to the field where you want to start scanning a barcode. When your device's camera recognizes the barcode, it is automatically entered into the field.


A card with multiple barcode fields

There are cards that have multiple fields where you can scan a barcode. In this case, tap the barcode icons on that field that you would like to modify and scan a code. When your device's camera recognizes the barcode it will enter the scanned value into the field where you have tapped the barcode icon.

Next Field after scan

The main difference between Camera and SocketMobile/CE modes is that the latter supports barcode focus which has an effect on lists and cards as well. In this mode, you only set the focus of the barcode reader on a card or list. When you start scanning a barcode, MobileNAV will automatically enter the code to the field which has focus.

A card with a single barcode field

When there is only one barcode field on a card, there is no difference between Camera and SocketMobile modes. When you open the card, the only barcode field already has focus, marked by the  icon, therefore, you can start scanning a code. The code will be entered into the field.

A card with multiple barcode fields

When there are multiple fields on a card where you can read barcodes, first you have to make sure that the desired field has the focus of your barcode reader and then scan a code. If you selected the [Next field after scan](#) option, barcode focus moves to the next barcode field, where you can scan the next barcode. If you change the initial focus from the first barcode field to another one and select the **Next field after scan** option, then you only change the order of the fields where barcodes are scanned. When the last barcode field is reached, the focus will move to the first barcode field on the card.

Smart Scanning

When there are multiple fields on a card, all the fields are in focus and the application recognizes the barcodes and assigns them to the relevant field automatically.

How to look up an address: Map integration

MobileNAV enables you to view the location of your contacts and customers provided that your mobile device has a map application installed. MobileNAV creates a link from an address by conjoining the country, city, post code and street address details, and tries to display that in the device's default map application. If at least one of the details is incorrect, the map will not display the correct location and you should verify the address of your contact.


The default map application is Google Maps on Android and Maps on iOS devices.

To locate your contact,

1. Tap the **Sales** menu and tap **Contacts, Companies, or Customers**.
2. Open the card of a person or company.






3. Tap any of the map icons  to open your default map application and locate your contact.

MobileNAV locates your contacts based on their complete addresses, regardless of which map icon you tap.

How to dial a contact: Phone integration


With a single tap you can call your NAV contacts:

1. Tap the **Sales** menu and tap **Contacts, Companies, or Customers**.
2. Open the card of a person or company.
3. Tap the phone icon  to initiate a call. Your device's phone will dial the number.

If you have an instant message application installed on your mobile device that can initiate calls, such as Skype or Viber, then you are prompted to select which app to use for calling your contact.


How to email a contact: Email integration

You can send an email to your contacts from MobileNAV. To do so,

1. Tap the **Sales** menu and tap **Contacts, Companies, or Customers**.
2. Open the card of a person or company.
3. Tap the email icon  to view your options to send an email. You may go to your default email client, or send an email with a device-specific feature, such as Bluetooth or Wi-Fi Direct connection.

How to look up a web link of your contact: Browser integration

From MobileNAV, you can easily navigate to the website of your contact or open a linked document. To do so,

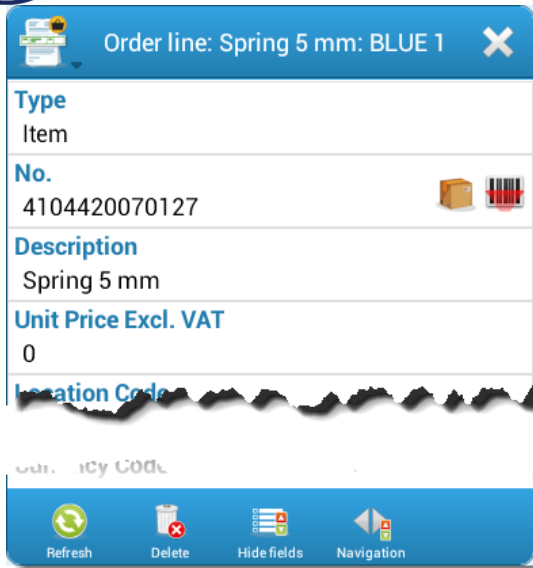
1. Tap the **Sales** menu and tap **Contacts, Companies, or Customers**.
2. Open the card of a person or company.
3. Tap the web link icon  to open your contact's website or document link in the default web browser of your mobile device.


This feature can be used for linking external documentation to certain records. For example attach a detailed product specification PDF to a service item. These are the so-called document links in Dynamics 365 Business Central.

How to open a related card from a card

A related card contains the details of an item that is only marginally mentioned on another card. For instance, the No. field in a **Sales Order Line** only contains the identifier of an item that does not necessarily tell you much about the underlying product.





You can, however, tap the  icon to open the card of the related item that provides the details of that item.

How to use the card toolbar

The card toolbar is similar to the [list toolbar](#), but in some cases it contains more tools. If there are several tools available on a card, you can show all tools by tapping the arrow on the right:



The number of tools displayed on the toolbar depends on the resolution and screen size of your device. This displays all the available functions that you can perform on a specific card.



To collapse the toolbar, tap the arrow again or tap on a field of the card.

The toolbar has standard tools that are available for all cards and additional functions that are relevant for specific cards only.





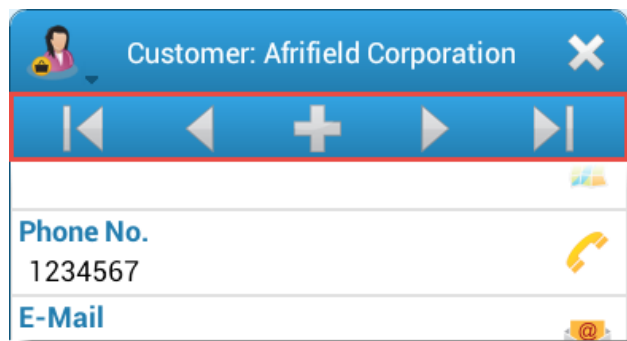
Standard tools

Refresh: Refreshes the details of a card.

Delete: Deletes the record.

Hide fields: Allows you to hide fields of the card. To hide a card field, tap **Hide fields** and tap the checkbox next to the name of a field to clear the checkbox. Only those fields on the card will be visible that are selected. By default, all fields are selected.

Navigation: Provides an additional navigation bar at the top of the card. You can navigate in the list of cards with the arrows or add a new card with the **Add +** button.



Additional functions

How to Import/Export card details

You can copy your contacts between the contact list of your mobile device and MobileNAV.

To import a contact from your mobile device,

1. Open a contact card in MobileNAV.
2. Tap **Import/Export** on the toolbar.
3. Tap **Import**.
4. Select a contact from the contact list of your device.

MobileNAV will update the selected card with the imported contact.

To save a contact to your mobile device,

1. Open a contact card in MobileNAV.
2. Tap **Import/Export** on the toolbar.
3. Tap **Export**.
4. Ensure that the details of your contact are correct. Optionally, tap **Add another field** to include additional details.
5. Tap **Done** in the top-left corner to save the contact to your mobile device.

How to display related items from a Card

From the card that you are viewing you can access other lists, cards, reports, and other functions. The number of related items and functions accessible depends on the configuration of MobileNAV.

Lists

From a card, you can drill-down to other lists to see related items. For example, you may open a customer card and check the sales orders of that customer. To do so,

1. Tap the **Sales** menu and then **Customers**.





2. Tap a card to view the details of that customer.
3. Tap **Documents** and choose **Orders**.

As a result, the Sales Order list will open filtered for the actual customer.

Cards

From a card, you can drill-down to other cards to see more details. For example, you may open the statistics of a certain customer, which contains statistical details of that customer. To do so,

1. Tap the **Sales** menu and then **Customers**.
2. Tap a card to view the details of that customer.
3. Tap **Statistics** on the toolbar to drill-down to another card.

As a result, the Customer Statistics card will open with the statistical information about the current customer.

Reports

From a card, you can execute reports as well. Certain report parameters can be filled out from the actual card. For example, you can display the inventory valuation of an item as described in [Inventory Valuation](#). To do so,

1. Tap the **Inventory** menu and then **Items**.
2. Tap a card to view the details of that item.
3. Tap **Inventory Val.** on the toolbar to execute a report.

As a result, the Inventory Valuation report will open, then the Item No. filter will be filled with the actual item's number.

Additional functions

With other functions on the toolbar, you typically tap the function and confirm your selection. If you select the **Don't ask again** option in the confirmation dialog, then you do not even have to confirm your selection for subsequent times.

For example when your customer accepts the sales quote you can easily turn this quote into an order. To do so,

1. Tap the **Sales** menu and then **Sales quotes**.
2. Tap a sales quote to open its card.
3. Tap **Make Order** and confirm your choice.
4. Optionally, select the **Don't ask again** option if you do not want to confirm your selection in the future.

As a result, the sales quote will disappear from the **Sales quotes** list and will be displayed on the **Sales orders** list.

Managing pictures

For easier identification, you can assign a picture to an inventory item either by uploading a picture from your device or by taking a picture with your device's camera.

To do so,

1. Tap the **Inventory** menu and then tap **Items** to open the list of your inventory items.
2. Depending on whether you want to create a new item or update an existing one with a new picture, tap **Add** or tap an item to open its card.





3. Tap **Picture** on the toolbar.
4. Do one of the following:
 - Tap **Download** to download the picture assigned to the selected card, if available.
 - Tap **Upload** to assign a picture to the selected item from your mobile device.
 - Tap **Take a picture and upload** to take a picture with the camera of your mobile device and assign that to the selected item.
 - Tap **Delete** to remove the picture assigned to the item. Tap **Yes** to confirm deletion.

When you upload a picture, you can select the size of the image, which can be the following:

- **Small** (240x320 pixel)
- **Medium** (480x640 pixel)
- **Large** (960x1280 pixel)
- **Original**

Unless you select the original size of the image, the uploaded picture will be resized to the given dimension.

Note: Not all options are available for all images. For example, you cannot select *Large* for an image with only 480x640 pixel size.

Signing documents

You can add your digital signature to the sales order. You can define the documents that can be signed in the MobileNAV configuration. To sign a document,

1. Find the list of documents that you want to sign. For example, tap the **Sales** menu and then **Sales orders**.
2. Tap a document to open it.
3. Tap **Signature** on the toolbar.
4. Tap **Upload** to add your signature.
5. Use the screen of your mobile device to draw your signature.
6. Tap the menu button of your device.
7. Tap **Save**.

Once you created your digital signature, you can download it to your mobile device and reuse it later:

1. Open the card of the sales order from where you want to download your signature.
2. Tap **Signature**.
3. Tap **Download**.
4. Select where to store your digital signature.

If you want to correct your digital signature, delete it and upload it again. To remove your signature:

1. Open the card of the sales order from where you want to download your signature.
2. Tap **Signature**.
3. Tap **Delete**.

Printing documents

In online mode, you can generate PDF and Excel files, which you can print and send in email.



Tap this icon to create PDF file from the current document. You can print or send the PDF file in email.





Tap this icon to create Excel file from the current document. You can print or send the Excel file in email.

In offline mode, you can open documents in HTML templates for printing.

Preview icon – Tap this icon, to open the HTML template for preview in the browser, from where printing is available.

Print Label icon – Tap this icon, to print labels. Label printing uses ZPL templates.

Note: For label printing, configure your printer as described under **Printer configuration** in [Settings](#).

How to generate reports

You can generate reports to view information about your manufacturing and sales activity as well as your inventory. Any Dynamics Dynamics 365 Business Central reports can be published to the MobileNAV application, because the available reports are described in the MobileNAV configuration. There are four reports available in MobileNAV by default. Should you need additional reports, contact your system administrator.

You can filter and sort your reports just like any other lists.

Filtering reports works the same way as with any other [list](#). By default, **Name** and **Category** are available for filtering.

You can add report parameters just as you fill in the fields of any other [cards](#).

For more information about the usage of available reports, see [Reports](#).

Report toolbar

The toolbar only contains buttons for running your report and hiding report filter fields. You can do the following:



view a PDF report



view an Excel report



execute a process-only report. For example, calculate and generate the consumption journal lines

Important: You must have a PDF reader and an Excel sheet viewer installed to display these reports. Otherwise, MobileNAV displays an error message.

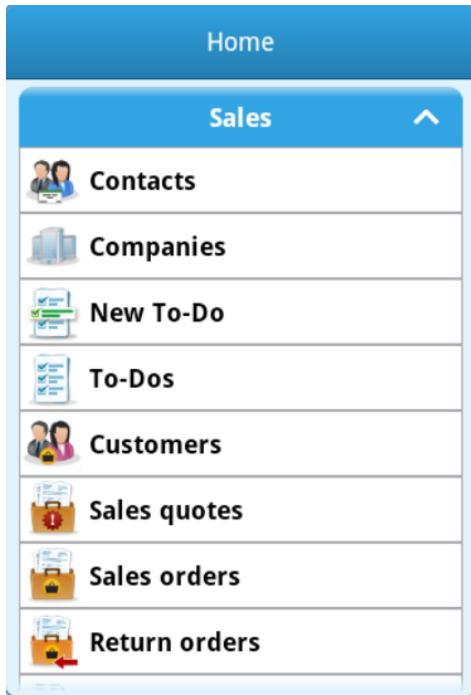




Online configuration

Sales

Concept



The Sales module is designed for sales representatives who work with clients and would like to reach the Dynamics 365 Business Central database.

Via MobileNAV, a sales person can check the information about the contacts and customers, and can add new information as well.

They can manage the To-Dos even when they are on the road.

They can create sales quotes, sales orders and return orders while they are out of office. The related reports can be printed if needed.

Back office employees have updated information, do not have to wait for phone calls or e-mails.

The sales manager handles the approval entries from his device and can analyze the customers.





Contact

Contacts list



In this menu, you find the list of the Contacts with Type Person. By tapping the Refresh button, you will see your Contacts. If you disable the **Own** filter, you will see all Contacts. The following information appears: Name, Name2 and Company Name. You can sort and filter the list by No, Name, Name2, Company Name and Salesperson Code.

Tap a line to open the [Contact Card](#).

By tapping the Add button, you can create a new contact with the type "Person".

Contact card

If you select a Contact, the card opens and you can view the following details: No, Name, Name2, City, Post Code, Address, Phone No, Mobile Phone No, E-Mail, Home Page, Type, Company No., Company Name, Job Title and Salesperson.

All fields are editable, except of the Company Name.

Extra functions:



Tap the map icon on the City, Post Code, Address fields to display the address on the map.



Tap the phone icon on the Phone No or Mobile Phone field to dial the phone number.



To send an e-mail to your client, tap the e-mail icon on the E-Mail No field.





Tap the icon on the Home Page field to open the homepage of the client.



Tap this icon on Company No. field to open the [Company card](#) of the contact.

Toolbar functions:



Tap the Comments toolbar button to see the [Contact Comment List](#) with the registered comments of the current contact.



Tap the Import/Export toolbar button to import or export your contact data between your device and the Dynamics 365 Business Central database.

Contact Comment list

If you tap on the Comments toolbar button the Contact Comment list opens. You can see the related comments and the datum of the comment.

You can create new comments via tapping the Add button, the [Contact Comment card](#) will be opened.

Contact Comment card

On the Contact Comment card you can see and modify the related comments. The available fields are Date and Comment. Both fields are editable.

Companies

If you tap Companies you will see all of your contacts with Company type.





Companies list



The Companies list opens with the following data: Name, Name2 and Salesperson Code. You can sort the list and filter the list according to No, Name and Name2.

Tap one Company to open the [Company card](#).

Tap the Add button to create a new company.

Company card

If you select a Company, the card opens and you can check the following details: No, Name, Name2, City, Post Code, Address, E-Mail, Phone No, Mobile Phone No, Homepage and Salesperson.

All fields are editable.

Extra functions:



Tap the map icon on the City, Post Code, Address fields to display the address on the map.



Tap the phone icon on the Phone No or Mobile Phone field to dial the phone number.



To send an e-mail to your client, tap the e-mail icon on the E-Mail No field.



Tap the icon on the Home Page field to open the homepage of the client.

Toolbar functions:





Tap the Employees toolbar button to see the [Employees List](#). You can check, modify the persons related to the current company.



Tap the Comments toolbar button to see the [Contact Comment List](#) with the registered comments of the current contact.



Tap the Make Customer toolbar button to create a Customer from the Contact (company type) if it does not exist yet.



Tap the Import/Export toolbar button to import or export your contact data between your device and the Dynamics 365 Business Central database.

Employees list

From the Company card you can reach the related Contacts with Person type.

The screenshot displays the MobileNAV interface for 'CRONUS International Ltd.'. It features three main panels:

- Company: The Cannon Group PLC**: Fields include No. (CT000007), Name (The Cannon Group PLC), Name 2, City (Birmingham), Post Code (B27 4KT), Address (192 Market Square), and E-Mail (group.plc@cronuscorp.net). The toolbar includes 'Employees', 'Comments', 'Make Customer', and a trash icon.
- Employees: Group PLC**: Lists three employees: David Hodgson, John Emory, and Mindy Martin. The toolbar includes 'Add', 'Filter', 'Sort', and 'Refresh'.
- Contact: David Hodgson**: Fields include No. (CT100140), Name (David Hodgson), Name 2, City (Birmingham), Post Code (B27 4KT), Address (192 Market Square), and Phone No. The toolbar includes 'Comments', 'Refresh', 'Delete', and a trash icon.

The related employees are listed, you can see the Name, Name2 and Job Title. You can sort and filter the list by No, Name, Name2 and Job Title.

If you select a contact, the [Contact card](#) will open.

Tap the Add button to create a new contact related to this company.

To-Dos

In this menu, you can handle your To-Dos.

To-Dos list

Tap on the To-Dos to display the To-Dos list.





In the To-Dos list you can see the following data: No, Description, Type, Date and Location. You can sort and filter the list.

By selecting one item the [To-Do card](#) opens up.

Tap the Add button on the To-Dos list or go into the New To-Dos menu to add new To-Dos. The value of the Type field (Meeting or Phone call) determine the fields of the [To-Do card](#).

To-Do card

On the To-Do card you see the No and Type fields, and depending on the Type, additional fields are displayed.

If the Type is Meeting, then following fields appear: Salesperson Code, Description, Location, Subject, All Day Event, Starting Date, Starting Time, Ending Date, Ending Time, Status, Priority, Canceled, Team Name, Organizer To-do No and No. of Attendees.

Non-editable fields are: Starting Time, Ending Time, Team Name, Organizer To-do No, No. of Attendees. The other fields can be modified.

If the Type is Phone call, then following fields appear: Salesperson Code, Contact No, Contact Name, Contact Company name, Starting Date, Ending Date, Status, Priority, Canceled, Team Name, Organizer To-do No.

Non-editable fields are: Contact Name, Contact Company name Team Name, Organizer To-do No.

Extra functions:



If the Type is Phone Call you can tap the Contact No icon and the [Contacts List](#) opens.





If the Type is Meeting you can tap the No. of Attendees icon and the [Attendee list](#) opens with the assigned Attendees.

Attendees list

The screenshot shows the MobileNAV interface for CRONUS International Ltd. It features three main cards:

- To-Do Card:** Displays details for 'To-Do: TD100053 - Prese'. Fields include Ending time (12:00 AM), Status (Not Started), Priority (Normal), Canceled (No), Team Name, Organizer To-do No. (TD100051), and No. of Attendees (3). A small icon of three people is next to the number of attendees.
- Organizational strategy Card:** Displays details for 'Organizational strategy'. Fields include To-do Organizer (Salesperson - Peter Sadow), Required (Contact - David Hodgson), and Required (Contact - John Emory).
- Attendee Card:** Displays details for 'Attendee: TD100051'. Fields include Attendance Type (Required), Attendee Type (Contact), Attendee No. (CT100156), Attendee Name (John Emory), Send Invitation (No), Invitation Response Type (None), and Invitation Sent (No).

Each card has a bottom bar with icons for Refresh, Delete, Hide fields, and Navigation. The Attendee card also has an icon for the number of attendees.

On the To-Do Card, the No. of Attendees field shows the number of the assigned Attendees. By tapping the Attendee icon, the Attendee list opens up with the Attendance Type, Attendee Type and Attendee Name.

You can add new attendees or you can check the details of one existing Attendee on the [Attendee Card](#).

Attendee card

The Attendee card contains the Attendance Type, Attendee Type, Attendee No, Attendee Name, Send Invitation, Invitation Response Type and Invitation Sent fields. All of them are editable except of Attendee Name.

You have to fill out the Attendance Type, Attendee Type and Attendee No to create an attendee.

CRM workflow example

Let's see a typical example for the Sales/CRM module. Linda, the sales representative has a new contact in her smartphone. The contact is an employee of the DHL Express company. She would like to organize a meeting with this contact. In MobileNAV she imports the contacts data into the Dynamics 365 Business Central database and creates a new To Do.

Let's see the procedure:

1. Open the MobileNAV client.





2. Go to Sales/Companies, switch off the Own filter and tap Refresh. All of your Companies appear, select the DHL Express company. The Company card opens, and tap the Employees button on the toolbar.

CRONUS Ltd.

Companies

Salesperson Code: RL

Custom Metals Incorporated

Salesperson Code: RL

DanMöbler

Salesperson Code: RL

Deerfield Graphics Company

Salesperson Code: PS

Designstudio Gmunden

Salesperson Code: JR

DHL Express

Salesperson Code: PS

Durbandit Fruit Exporters

Salesperson Code: JR

eAmericonda

Salesperson Code: DC

Eco Office Inc.

Salesperson Code: AH

ElectroMAROC

Salesperson Code: JR

Electronics Ltd.

Salesperson Code: RL

Elkhorn Airport

Add

Own

Filter

Sort

Refresh

Company: DHL Express

No.

CT100009

Name

DHL Express

Name 2

City

Newport

Post Code

NP5 6GH

Address

810 South Newport Drive

E-Mail

dhl.express@cronuscorp.net

Phone No.

Mobile Phone No.

Home Page

Employees

Comments

Make Customer

Refresh

Employees: DHL Express

Allan Vinther-Wahl

David Campbell

Matthew Hink

Patricia Doyle

Tammy L. McDonald

Terry Adams

Add

Filter

Sort

Refresh





3. Tap the Add button to create a new contact for this company. Some fields will be automatically inherited from the company, like address and e-mail.

CRONUS Ltd.

Company: DHL Express

No. CT100009

Name DHL Express

Name 2

City Newport

Post Code NP5 6GH

Address 810 South Newport Drive

E-Mail dhl.express@cronuscorp.net

Phone No.

Mobile Phone No.

Home Page

Employees: DHL Express

Allan Vinther-Wahl

David Campbell

Matthew Hink

Patricia Doyle

Tammy L. McDonald

Terry Adams

Contact:

No. CT000165

Name

Name 2

City Newport

Post Code NP5 6GH

Address 810 South Newport Drive

Phone No.

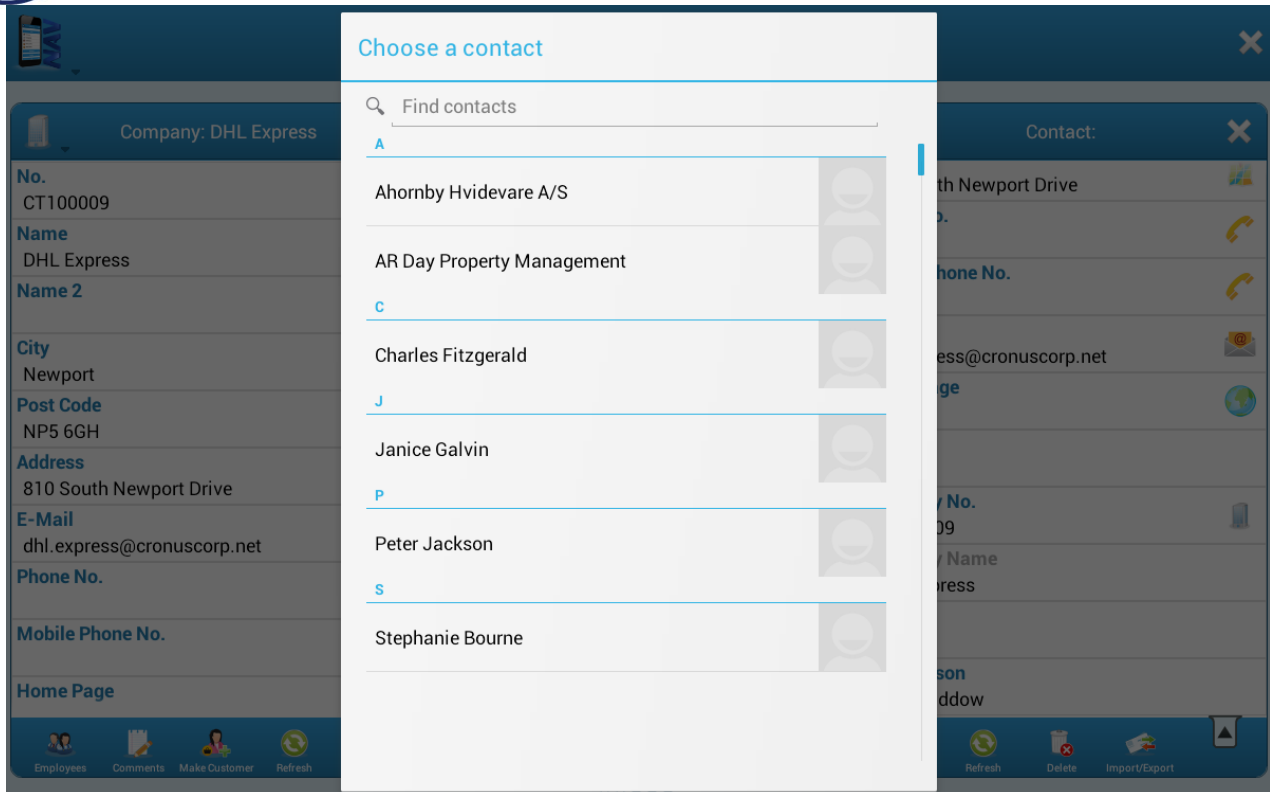
Mobile Phone No.

E-Mail dhl.express@cronuscorp.net

Home Page

4. On the toolbar card, tap the Import/Export button, then choose Import. You can define the new contact from your phone.





5. Note that Name, Phone No. and E-mail have been imported from the phonebook.



6. After this, you can organize a new meeting for this contact.
7. Go to Sales/New To-Do. Choose **Meeting** at the Type Field, and fill out the details of the meeting.





CRONUS Ltd.

Home

Sales

Contacts

Companies

New To-Do

To-Dos

Customers

Sales quotes

Sales orders

No. TD000053

Type Meeting

Salesperson Code Linda Martin

Description the new system possibilities

Location DHL office

Subject Presentation

All Day Event No

Refresh Delete Hide fields

8. Scroll to the No of Attendees field and tap the Attendee icon, then tap the Add button to assign new attendees.

CRONUS Ltd.

To-Do: TD000056 -

Attendees: TD000056 -

Attendee:

Attendance Type

Attendee Type

Attendee No.

Attendee Name

Send Invitation

Invitation Response Type

Invitation Sent

Refresh Delete Hide fields

Add Filter Sort Refresh

9. Choose **Required** for Attendance Type, **Contact** for Attendee Type and select your new Contact in the Attendee No field.





The screenshot shows the MobileNAV app interface for 'CRONUS Ltd.'. It features three main cards:

- em possibilities** (To):
 - Ending time: 12:00 AM
 - Status: Not Started
 - Priority: Normal
 - Canceled: No
 - Team Name:
 - Organizer To-do No.: TD000053
 - No. of Attendees: 0
- system possibilities** (X):
 - Required: Contact - Peter Jackson
- Attendee: TD000053** (X):
 - Attendance Type: Required
 - Attendee Type: Contact
 - Attendee No.: CT000163
 - Attendee Name: Peter Jackson
 - Send Invitation: Yes
 - Invitation Response Type: None
 - Invitation Sent: No

Each card has a bottom bar with icons for Refresh, Delete, Hide fields, and Navigation. The 'system possibilities' card also includes an 'Add' button. The 'Attendee' card includes a 'Refresh' button.

10. Fill out the other details on the attendee card if necessary.

Note that the No of Attendees on the To Do card changes to 1 (you can see it after tapping the Refresh button).





Customers

Customers list



In this menu you find the list of customers. Because this is a large master table, you will see an empty screen at first. Via tapping the Refresh button you will see the customers.

The following information appears in the list: Name, Name 2 and City. You can filter by No., Name, Name 2, City, Post code and Salesperson code.

Tap a line to open the [Customer card](#).

Tap the Add button on the toolbar to create a new customer.

Customer card

When you tap on a customer name in the customers list, the program will open the corresponding customer's card, and you can view the following details of the Customer: No., Name, Name 2, City, Post Code, Address, Address 2, Phone No., E-Mail, Home Page, Payment Method, Balance (LCY), Prepayment %, Blocked, Gen. Bus. Posting Group, VAT Bus. Posting group, Customer Posting Group and Salesperson. Editable fields: all fields are editable except Balance (LCY).

Extra functions:



Tap the map icon on the City, Postcode, Address or Address2 fields to show the address on the map.



Tap the phone icon on the Phone No field to dial the phone number.





If you want to send an e-mail to your customer, tap the e-mail icon on the E-Mail field.



Tap the icon on the Home Page field to open the home page in a browser application.



Tap the icon on the Balance (LCY) field to open the [Customer Ledger Entries list](#), which contains the open entries of the customer.

Toolbar functions:



When you tap the Documents icon you have to choose from three options: Quotes, Orders, or Return Orders. According to your selection, the [Sales Quotes list](#), the [Sales Orders list](#) or the [Return Orders list](#) will open, showing the documents of the current customer.



When you tap the Posted Documents icon you have to choose from four options: Shipments, Invoices, Credit Memos, Return Receipts. According to your selection the [Posted Sales Shipments list](#) or the [Posted Sales Invoices list](#) or the [Posted Sales Credit Memos list](#) or the [Posted Return Receipts list](#) will open, showing the posted documents of the current customer.



Tap the Statistics button to display the [Customer Statistics card](#).



Tap the Ship-to address button to open the [Ship-to addresses list](#) showing the ship-to addresses of the customer.



Tap the Comments button to open the [Customer Comments list](#).



Tap the Import/Export toolbar button you can import or export your customer data between your device and the Dynamics 365 Business Central database.

Cust. Ledg. Entries list

CRONUS Ltd.

Customer: The Cannon Group PLC

Phone No.

E-Mail
the.cannon.group.plc@cronuscorp.net

Home Page

Payment Method

Balance (LCY)
168,364.41

Prepayment %
0

Blocked

Gen. Bus. Posting Group
Domestic customers and vendors

VAT Bus. Posting Group
Domestic customers and vendors

Customer Posting Group
DOMESTIC

Cust. Ledg. Entries: The Cannon Group PLC

Invoice 00-11
12/31/14; 1/31/15 Original Amt. (LCY): 63,473.13 Remaining Amount: 63,473.13

Invoice 00-16
12/31/14; 1/31/15 Original Amt. (LCY): 33,852.35 Remaining Amount: 33,852.35

Invoice 00-9
12/31/14; 1/31/15 Original Amt. (LCY): 50,778.5 Remaining Amount: 50,778.5

Invoice 103005
1/4/15; 2/1/15 Original Amt. (LCY): 8,269.04 Remaining Amount: 8,269.04

Credit Memo 104001
1/11/15; 1/11/15 Original Amt. (LCY): -292.84 Remaining Amount: -292.84

Invoice 103001
1/19/15; 2/19/15 Original Amt. (LCY): 8,182.35 Remaining Amount: 8,182.35

Invoice 103018
1/14/15; 2/14/15 Original Amt. (LCY): 4,101.88 Remaining Amount: 4,101.88

Cust. Ledg. Entry: Invoice 103018

Document Type
Invoice

Document No.
103018

Posting Date
1/14/15

Description
Order 6005

Remaining Amt. (LCY)
4,101.88

Original Amt. (LCY)
4,101.88

Due Date
2/14/15

Documents

Posted Doc.

Statistics

Ship-to address...

Filter

Sort

Refresh

Refresh

Hide fields

Navigation





When you tap the icon on the Balance (LCY) field, the Customer ledger entries list will open showing the open entries of the current customer.

In the list you can see the Document Type, Document No., Posting Date, Due Date, Original Amount (LCY), Remaining Amount and Currency Code fields.

You can filter by Entry No., Document Type, Document No., Posting Date, Due Date, Description, Remaining Amount, Original Amount (LCY) and Currency Code.

Tap a line to open the [Customer Ledger Entry card](#).

Cust. Ledg. Entry card

Select an entry in the list, to open its card. You can view the following details of the customer ledger entry: Document Type, Document No., Posting Date, Description, Remaining Amount (LCY), Original Amount (LCY) and Due Date fields. These fields are not editable.

Customer Statistics card

CRONUS Ltd.	
Customers Selangorian Ltd. Coventry Sjøbøden Sandvika Slubrevik Senger AS Asker Somadis AGDAL-RABAT Sonnmatt Design Glattbrugg Spotsmeyer's Furnishings Miami The Cannon Group PLC Birmingham The Device Shop London TraxTonic Sdn Bhd KUCHING, Sarawak Woonboulevard Kuitenbrouwer Zulphen Zanlan Corp. Carletonville Zuni Home Crafts Ltd.	Customer: The Cannon Group PLC Phone No. E-Mail the.cannon.group.plc@cronuscorp.net Home Page Payment Method Balance (LCY) 168,364.41 Prepayment % 0 Blocked Gen. Bus. Posting Group Domestic customers and vendors VAT Bus. Posting Group Domestic customers and vendors Customer Posting Group DOMESTIC
	cs: The Cannon Group PLC Name The Cannon Group PLC Balance (LCY) 168,364.41 Outstanding Orders (LCY) 2,496.63 Shipped Not Invoiced (LCY) 525.5 Outstanding Serv. Orders (LCY) 6.63 Serv Shipped Not Invoiced (LCY) 0 Outstanding Invoices (LCY) 0 Total (LCY) 171,386.54 Credit Limit (LCY) 0 Balance Due (LCY)

The Customer Ledger entry shows an overview of the sales to your customer. It shows the status of the customer as of the current date. The amounts are shown in LCY.

The fields are Name, Balance, Outstanding Orders, Shipped Not Invoiced, Outstanding Serv. Orders, Serv. Shipped Not Invoiced, Outstanding Invoices, Total, Credit Limit and Balance Due. These fields are not editable.

Extra functions:



Tap the icon on the Outstanding Orders (LCY) field to show the [Sales Order Lines list](#) of the customer.





Tap the icon on the Shipped Not Invoiced (LCY) field to show the [Sales Order Lines list](#) of the customer.



Tap the icon on the Outstanding Serv. Orders (LCY) field to see service order lines which is basically the [Service Task list](#).



Tap the icon on the Serv Shipped Not Invoiced (LCY) field to see service order lines which is basically the [Service Task list](#).

Ship-to addresses list

Tap the Ship-to address button on the [Customer card](#) to open this list and display the ship-to addresses of the customer.

In the list you can see the Code, Location Code, City, Address and Name fields. You can filter by Code, Location Code, Name, Address, City and Post Code.

Tap a line to open the [Ship-to address card](#).

Tap the Add button on the toolbar to enter a new ship-to address for this customer.

Ship-to address card

When you tap on a ship-to address in the list, the program will open the corresponding ship-to address card, and you can view the following details of the ship-to address: Code, Location Code, Name, Address, City, Post Code and Shipment Method. All fields are editable.

Extra functions:



Tap the map icon on the City, Postcode or Address fields to show the address on the map.





Customer Comments list

Customer: The Cannon Group PLC	Comments: The Cannon Group PLC	Comments: Important customer
Phone No.	Important customer	Date
E-Mail the.cannon.group.plc@cronuscorp.net	3/7/14	3/7/14
Home Page	No late payments	Comment
Payment Method	2/6/13	Important customer
Balance (LCY) 168,364.41		
Prepayment % 0		
Blocked		
Gen. Bus. Posting Group Domestic customers and vendors		
VAT Bus. Posting Group Domestic customers and vendors		
Customer Posting Group DOMESTIC		

Tapping the Comments button on the [Customer card](#) will open up this list, showing the comments of the customer.

In the list you can see the Comment and the Date fields, and you can also filter by them.

Tap a line to open the [Customer Comments card](#) .

Tap the Add button on the toolbar to enter a new comment.

Customer Comment card

When you tap on a customer comment in the list, the program will open the corresponding customer comment card, and you can check the details of the comment, such as Date and Comment. All fields are editable.





Sales quotes

Sales quotes list



In this menu you find the list of sales quotes. The following information appears in the list: No, Sell to Customer Name, Document Date and Status. You can filter by No., Sell-to Customer Name, Document Date, Status and Sell-to Customer No.

Tap a line to open the [Sales quote card](#).

Tap the Add button on the toolbar to create a new quote.

Sales quote card

When you tap on a quote in the quotes list, the program will open the corresponding quote's card and you can view the following details of the quote: No., Sell-to Customer No., Sell-to Customer Name, Sell-to City, Sell-to Address, Bill-to Customer No., Bill-to Name, Bill-to City, Bill-to Address, Ship-to Code, Ship-to Name, Ship-to City, Ship-to Address, Document Date, Currency Code, Salesperson and Status.

Editable fields: all fields are editable except Status.

Extra functions:



Tap the icon on the Sell-to Customer No. field to open the [Customer card](#) of the selected customer.



Tap the icon on the Bill-to Customer No. field to open the [Customer card](#) of the selected customer.





Tap on the icon on the Ship-to Code field to open the [Ship-to Address card](#).



Tap on the icon on the Barcode field to scan an Item No.: a new quote line will be created with this Item No., the quantity will be 1. If there is already an existing order line with this Item No., the quantity on the line will be increased by 1.

Toolbar functions:



Tap the Lines icon to open the [Quote Lines list](#), showing the lines of the sales quote.



Tap the Preview icon to generate the Sales Quote report in PDF. The report will automatically open in the default PDF reader app.



Tap the Make order button to create a sales order from the quote.



Tap the Comments button to open the [Sales Comments list](#) showing the comments of this quote.

Sales quote lines list

When you tap the Lines icon the on the [Quote card](#), the quote lines list will show up. You can see the existing lines. The following information appears in the list: No, Description, Quantity, Unit of Measure Code, Unit price, Line Amount and Currency Code.

You can filter by the following fields: Line No., No., Description, Quantity, Type, Unit of Measure Code, Line Amount, Currency Code and Unit Price.

If you select a line, the [Sales Quote Line card](#) will open.





Tapping the Add button, you can create a new line.

Sales quote line card

CRONUS Ltd.

Sales quote: The Cannon Group PLC

No. 1010

Sell-to Customer No. 10000

Sell-to Customer Name The Cannon Group PLC

Sell-to City Birmingham

Sell-to Address 288 Windsor St

Bill-to Customer No. 10000

Bill-to Name The Cannon Group PLC

Bill-to City Birmingham

Bill-to Address 288 Windsor St

Ship-to Code

Quote lines: The Cannon Group PLC

1896-S - ATHENS Desk: 1 PCS
Unit Price Excl. VAT: 649.4 Line Amount Excl. VAT: 649.4

1972-S - MUNICH Swivel Chair, yellow: 1 PCS
Unit Price Excl. VAT: 123.3 Line Amount Excl. VAT: 123.3

Quote line: ATHENS Desk: BLUE 1

Type Item

No. 1896-S

Description ATHENS Desk

Unit Price Excl. VAT 649.4

Location Code BLUE

Quantity 1

Unit of Measure Code PCS

Line Discount % 0

Line Amount Excl. VAT 649.4

Currency Code

When you tap on a line on the [Quote Lines list](#) or tap Add button, the quote lines card will be displayed and you can check/modify the following details of the line: Type, No., Description, Unit Price, Location Code, Quantity, Unit of Measure Code, Line Discount %, Line Amount and Currency Code. All fields are editable except Currency Code.

If you enter a new item, the program automatically retrieves the price from the Unit Price field in the Item table. If a sales price is set for this item and this customer, the unit price will be retrieved from the Sales Price table.

Extra functions:



Tap the icon on the No. field to open the card of the selected item. The icon is available only if the Type is Item.



Tap the icon on the No. field you can scan a barcode with a proper No. (it is available on all line types).



Tap on the icon on the Unit of Measure Code field to open the [Item Unit of Measure card](#). The icon is only available if the Type is Item.





Sales Comments list

CRONUS Ltd.

Sales quote: The Cannon Group PLC

No. 1010

Sell-to Customer No. 10000

Sell-to Customer Name The Cannon Group PLC

Sell-to City Birmingham

Sell-to Address 288 Windsor St

Bill-to Customer No. 10000

Bill-to Name The Cannon Group PLC

Bill-to City Birmingham

Bill-to Address 288 Windsor St

Ship-to Code

Comments: The Cannon Group PLC

This is the best price

3/27/14

Comments: This is the best price

Date 3/27/14

Comment This is the best price

Lines Preview Make Order Comments Add Filter Sort Refresh Refresh Delete Hide fields Navigation

Tap the Comments button on the [Sales Quote card](#), the Sales Comments list will show up, showing the comments of the quote. You can see the existing comments or add a new one with the Add button. The following information appears in the list: Comment and Date. You can filter by both.

Tap a line to open the [Sales Comments card](#).

Sales Comments card

When you tap on a comment in the list, the corresponding sales comment card will open, and you can check the following details of the comment: Date and Comment. All fields are editable.





Sales orders

Sales order list



In this menu, you find the list of sales orders. The following information appears in the list: No, Sell to Customer Name, Document Date and Status. You can filter by No., Sell-to Customer Name, Document Date, Status and Sell-to Customer No.

Tap a line to open the [Sales order card](#).

Tap the Add button on the toolbar to create a new order.

Sales order card

When you tap on an order in the orders list, the program will open the corresponding order's card and you can check the following details of the order: No., Sell-to Customer No., Sell-to Customer Name, Sell-to City, Sell-to Address, Bill-to Customer No., Bill-to Name, Bill-to City, Bill-to Address, Ship-to Code, Ship-to Name, Ship-to City, Ship-to Address, Order Date, Document Date, Shipment Date, Prepayment %, Currency Code, Salesperson and Status.

Editable fields: all fields are editable except Status.

Extra functions:



Tap the icon on the Sell-to Customer No. field to display the [Customer card](#) of the selected customer.



Tap the icon on the Bill-to Customer No. field to display the [Customer card](#) of the selected customer.



Tap on the icon on the Ship-to Code field to open the [Ship-to Address card](#).





Tap on the icon on the Barcode field to scan an Item No.: a new order line will be created with this Item No., the quantity will be 1. If there is already an existing order line with this Item No., the quantity on the line will be increased by 1.

Toolbar functions:



Tap the Lines icon to open the [Order Lines list](#), showing the lines of the sales order.



Tap the Preview icon to generate the Order Confirmation report in PDF, and will automatically open in the default PDF reader app.



You can send the request for approval.



Tap the Comments button to open the [Sales Comments list](#) showing the comments of this order.

Sales order lines list

The screenshot shows the MobileNAV app interface for CRONUS Ltd. The top bar is blue with the company name. Below it, there are three main panels. The left panel, titled 'Sales orders', lists various orders with their document dates and statuses. The center panel, titled 'order: 1007 - The Cannon Group PLC', shows details for a specific order, including 'No.', 'Sell-to Customer No.', 'Sell-to Customer Name', 'Sell-to City', 'Sell-to Address', 'Bill-to Customer No.', 'Bill-to Name', 'Bill-to City', 'Bill-to Address', and 'Ship-to Code'. The right panel, titled 'Order lines: 1007 - The Cannon Group PLC', lists the individual lines of the order, including line numbers, descriptions, quantities, unit prices, and line amounts. The bottom of the screen features a blue toolbar with icons for 'Add', 'Own', 'Filter', 'Sort', and 'Refresh'.

When you tap the Lines icon on the [Order card](#), the order lines list will be displayed. You can see the existing lines or add a new one with the Add button. The following information appears in the list: No., Description, Quantity, Unit of Measure Code, Unit price, Line Amount, Currency Code. You can filter by the following fields: Line No., No., Description, Quantity, Type, Unit of Measure Code, Line Amount, Currency Code and Unit Price.

Tap a line to open the [Sales order line card](#).

Tap the Add button on the toolbar to create a new line.





Sales order line card

When you tap on a line on the [lines list](#) or tap Add button, the order line card will be displayed and you can check/modify the following details of the line: Type, No., Description, Unit Price, Location Code, Quantity, Outstanding Quantity, Quantity Shipped, Unit of Measure Code, Line Discount %, Line Amount, Currency Code and Shipment Date. All fields are editable except Outstanding Quantity, Quantity Shipped and Currency Code.

If you enter a new item, the program automatically retrieves the price from the Unit Price field in the Item table. If a sales price is set up for this item and this customer, the unit price will be retrieved from the Sales Price table.

Extra functions:



Tap the icon on the No. field to open the card of the selected item. The icon is only available if the Type is Item.



Tap the icon on the No. field to scan a barcode with a proper No. (it is available on all line types).



Tap the icon on the Unit of Measure Code field to open the [Item Unit of Measure card](#). The icon is only available if the Type is Item.





Return orders

Return order list



In this menu you find the list of return orders. The following information appears in the list: No, Sell to Customer Name, Document Date and Status. You can sort the list according to the following fields: Document Type, No.; No, Document Type; Document Type, Sell-to Customer No.; Document Type and Bill-to Customer No.

Tap a line to open the [Return order card](#).

Tap the Add button on the toolbar to create a new return order.

Return order card

When you tap on a return order in the return orders list, the program will open the corresponding return order's card and you can check the following details of the return order: No., Sell-to Customer No., Sell-to Customer Name, Sell-to City, Sell-to Address, Bill-to Customer No., Bill-to Name, Bill-to City, Bill-to Address, Ship-to Code, Ship-to Name, Ship-to City, Ship-to Address, Order Date, Document Date, Shipment Date, Prepayment %, Currency Code, Salesperson and Status.

Editable fields: all fields are editable except Status.

Extra functions:



Tap the icon on the Sell-to Customer No. field to open the [Customer card](#) of the selected customer.



Tap the icon on the Bill-to Customer No. field to open the [Customer card](#) of the selected customer.





Tap the icon on the Ship-to Code field to open the [Ship-to Address card](#).

Toolbar functions:



Tap the Lines icon to open the [Return Order Lines list](#), showing the lines of the return order.



Tap the Preview icon to generate the Return Order Confirmation report in PDF format, and will automatically opened in the default PDF reader app.



Tap the Comments button to open the [Sales Comments list](#) showing the comments of this return order.

Return order lines list

CRONUS Ltd.

Return orders

1001 - Selangorian Ltd.
Document Date: 3/5/14 - Open

Return order: 1001 - Selangorian Ltd.

No. 1001

Sell-to Customer No. 20000

Sell-to Customer Name Selangorian Ltd.

Sell-to City Coventry

Sell-to Address 153 Thomas Drive

Bill-to Customer No. 20000

Bill-to Name Selangorian Ltd.

Bill-to City Coventry

Bill-to Address 153 Thomas Drive

Ship-to Code

1 - Selangorian Ltd.

4104420070127 - Spring 5 mm: 1 PCS
Unit Price Excl. VAT: 100 Line Amount Excl. VAT: 100

Add Own Filter Sort Refresh Lines Preview Comments Refresh

When you tap the Lines icon the on the [Return Order card](#), the return order lines list will show up. The following information appears in the list: No, Description, Quantity, Unit of Measure Code, Unit price, Line Amount, Currency Code. You can filter by the following fields: Line No., No., Description, Quantity, Type, Unit of Measure Code, Line Amount, Currency Code and Unit Price.

Tap a line to open the [Sales Return Order line card](#).

Tap the Add button on the toolbar to create a new line.





Return order line card

CRONUS Ltd.

Return order: 1001 - Selangorian Ltd.

No. 1001

Sell-to Customer No. 20000

Sell-to Customer Name Selangorian Ltd.

Sell-to City Coventry

Sell-to Address 153 Thomas Drive

Bill-to Customer No. 20000

Bill-to Name Selangorian Ltd.

Bill-to City Coventry

Bill-to Address 153 Thomas Drive

Ship-to Code

Return order lines: 1

4104420070127 - Spring 5 mm: 1 PCS
Unit Price Excl. VAT: 100 Line Amount Excl. VAT: 100

Return order line: Spring 5 mm: BLUE 1

Type Item

No. 4104420070127

Description Spring 5 mm

Unit Price Excl. VAT 100

Return Reason Code DAMAGED

Location Code BLUE

Quantity 1

Unit of Measure Code PCS

Line Discount % 0

Line Amount Excl. VAT 100

When you tap on a line on the [lines list](#) or tap Add button, the order line card will show up and you can check/modify the following details of the line: Type, No., Description, Unit Price, Return Reason Code, Location Code, Quantity, Unit of Measure Code, Line Discount %, Line Amount and Currency Code. All fields are editable except Currency Code.

If you enter a new item, the program automatically retrieves the price from the Unit Price field in the Item table. If a sales price is set for this item and this customer, the unit price will be retrieved from the Sales Price table.

Extra functions:



Tap the icon on the No. field to open the card of the selected item. The icon is only available if the Type is Item.



Tap the icon on the No. field to scan a barcode with a proper No. (it is available on all line types).



Tap the icon on the Unit of Measure Code field to open the [Item Unit of Measure card](#). The icon is only available if the Type is Item.





Approval Entries

Approval Entries list



In the Approval Entries list you can see your approval entries. The following information appears in the list: Document Type, Document No., Approval Code, Amount (LCY) and Due Date.

You can filter by the following fields: Overdue, Table ID, Limit Type, Approval Type, Document Type, Document No., Sequence No., Approval Code, Status, Sender ID, Salespers./Purch. Code, Approver ID, Currency Code, Amount (LCY), Available Credit Limit (LCY), Date-Time Sent for Approval, Last Date-Time Modified, Last Modified by ID, Comment and Due Date.

Tap an Approval entry to open the [Approval Entry card](#).

Approval Entry card

When you tap on a line on the Approval Entries lines, the Approval Entry card will be displayed, and you can view the following details: Overdue, Table ID, Limit Type, Approval Type, Document Type, Document No., Sequence No., Approval Code, Status, Sender ID, Salespers./Purch. Code, Approver ID, Currency Code, Amount (LCY), Available Credit Limit (LCY), Date-Time Sent for Approval, Last Date-Time Modified, Last Modified by ID, Comment and Due Date.

These fields are not editable.

Extra functions:



Tap the icon on the Document No. field to open the card of the selected document (e.g.: sales order).

Toolbar functions:





Tap the Approve icon to approve the document.



Tap the Reject icon to reject the document.



Tap the Delegate button to delegate the approval.

Customer – Top 10 List



By selecting this menu you run the Customer – Top 10 list report which is a standard report in the Dynamics 365 Business Central database. First, you get the request page of the report. You can filter the Customers by editing the Customer No. filter. The parameters are Quantity, Show (Sales or Balance) and Chart Type (Bar or Pie). After filling the request page, tap on the Show as PDF button to generate a report in PDF format, and the report will automatically open in the default PDF reader app.

Sales workflow example

Let's see a typical example for the sales module. Brad, the sales manager visits a customer, who wants to buy a new item. As a first step Brad launches MobileNAV application on his tablet and goes to the card of the customer. He uses the map integration to navigate to the customer. On the customer's site he creates a new quote. Because Brad offered good price, the customer accepts the quote, and Brad creates an order from the quote. As a last step, he sends a request to his boss for approval.

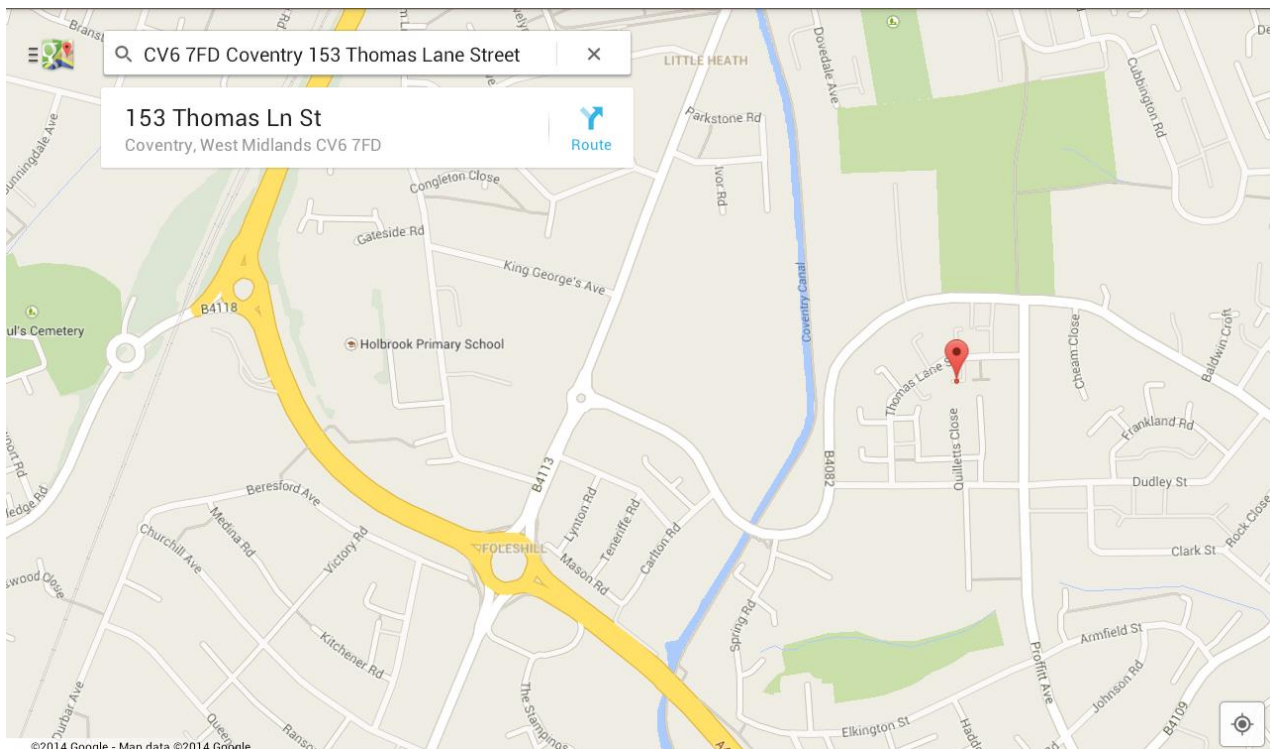
Let's see the procedure.

1. Open the MobileNAV application and log in.
2. Go to Sales-Customers, and open the card of the customer you want to visit.





3. Tap the map icon on the City line to open the Customer's address in Google Maps.



4. From here you can also start GPS navigation to plan a route to the address.
5. Tap Back to go back to MobileNAV application.
6. Tap the Documents icon on the toolbar of the customer card and select Quotes.





7. Tap on the Add button on the toolbar to create a new sales quote. Note that the Sell-to, Bill-to and Ship-to addresses, the document dates, and so on are prefilled with data, so normally the salesperson does not need to modify it.

The screenshot displays the MobileNAV app interface for 'CRONUS Ltd'. It features three main panels:

- Customer: Selangorian Ltd.**
 - No. 20000
 - Name Selangorian Ltd.
 - Name 2
 - City Coventry
 - Post Code CV6 1GY
 - Address 153 Thomas Drive
 - Address 2
 - Phone No.
 - E-Mail selangorian.ltd@cronuscorp.net
 - Home Page
- Sales quotes: Selangorian Ltd.**
 - 1051 - Selangorian Ltd.
 - Document Date: 4/2/14 - Open
- Sales quote: Selangorian Ltd.**
 - No. 1051
 - Sell-to Customer No. 20000
 - Sell-to Customer Name Selangorian Ltd.
 - Sell-to City Coventry
 - Sell-to Address 153 Thomas Drive
 - Bill-to Customer No. 20000
 - Bill-to Name Selangorian Ltd.
 - Bill-to City Coventry
 - Bill-to Address 153 Thomas Drive
 - Ship-to Code

The bottom toolbar includes icons for Documents, Posted Doc., Statistics, Ship-to addre..., Add, Own, Filter, Sort, Refresh, Lines, Preview, Make Order, and Comments.

8. Tap the Lines button and then the Add button, to create a new line.





CRONUS Ltd

Sales quote: Selangorian Ltd.

No.
1051

Sell-to Customer No.
20000

Sell-to Customer Name
Selangorian Ltd.

Sell-to City
Coventry

Sell-to Address
153 Thomas Drive

Bill-to Customer No.
20000

Bill-to Name
Selangorian Ltd.

Bill-to City
Coventry

Bill-to Address
153 Thomas Drive

Ship-to Code

Quote lines: Selangorian Ltd.

- : 0
Unit Price Excl. VAT: 0 Line Amount Excl. VAT: 0

Quote line: : 0

Type
Item

No.

Description

Unit Price Excl. VAT
0

Location Code

Quantity
0

Unit of Measure Code

Line Discount %
0

Line Amount Excl. VAT
0

Currency Code

Lines Preview Make Order Comments

Add Filter Sort Refresh

Refresh Delete Hide fields Navigation

9. Select an Item like ATHENS Desk, modify the Quantity to 5, and add some Line Discount %, let's say 10%.

CRONUS Ltd

Sales quote: Selangorian Ltd.

No.
1051

Sell-to Customer No.
20000

Sell-to Customer Name
Selangorian Ltd.

Sell-to City
Coventry

Sell-to Address
153 Thomas Drive

Bill-to Customer No.
20000

Bill-to Name
Selangorian Ltd.

Bill-to City
Coventry

Bill-to Address
153 Thomas Drive

Ship-to Code

Quote lines: Selangorian Ltd.

1896-S - ATHENS Desk: 5 PCS
Unit Price Excl. VAT: 649.4 Line Amount Excl. VAT: 2,922.3

Quote line: ATHENS Desk: 5

Type
Item

No.
1896-S

Description
ATHENS Desk

Unit Price Excl. VAT
649.4

Location Code

Quantity
5

Unit of Measure Code
PCS

Line Discount %
10

Line Amount Excl. VAT
2,922.3

Currency Code

Lines Preview Make Order Comments

Add Filter Sort Refresh

Refresh Delete Hide fields Navigation





10. Tap on the box icon next to the item no. to see the item card.

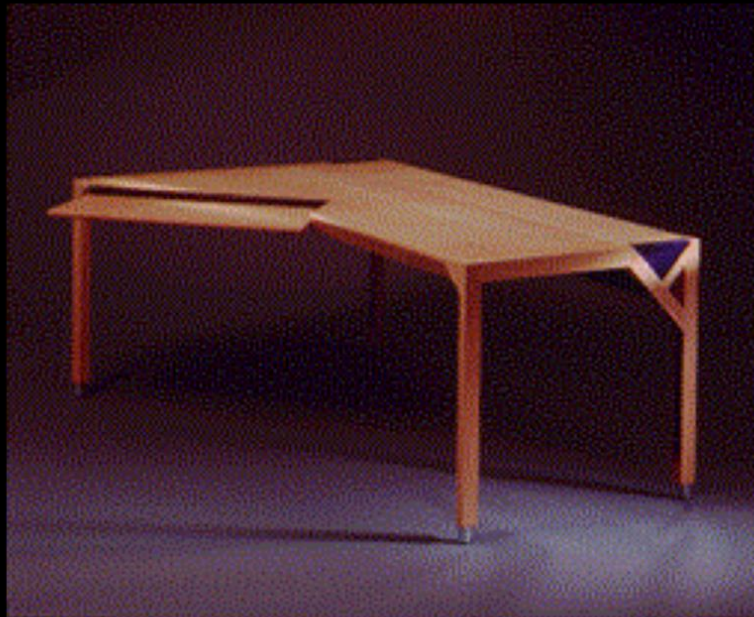
The screenshot shows the MobileNAV interface for 'CRONUS Ltd.'. It displays three panels: 'Quote lines: Selangorian Ltd.', 'Quote line: ATHENS Desk: 5', and 'Item: ATHENS Desk'. The 'Item: ATHENS Desk' panel shows details for item 1896-S, including description, unit price, location code, quantity, unit of measure, and line discount. The bottom navigation bar includes buttons for Add, Filter, Sort, Refresh, Picture, Unit of Measures, Inventory Val., and Refresh.

11. Tap the Picture button and then tap Download.


The screenshot shows the MobileNAV interface with the 'Picture' dialog box open. The dialog box has a title bar 'Picture' and four options: 'Download', 'Upload', 'Take a picture and upload', and 'Delete'. The background shows the same item card as in the previous screenshot.

12. Show the picture of the item to the customer and the tap Back.





13. Create a second line by tapping the Add button on the line list again. Select a new item, using your printed item catalogue which also contains barcodes of the items. Tap on the barcode icon next to the No. field and scan the barcode with the device's camera. Enter 5 as Quantity.



CRONUS Ltd

Sales quote: Selangorian Ltd.

No.
1051

Sell-to Customer No.
20000

Sell-to Customer Name
Selangorian Ltd.

Sell-to City
Coventry

Sell-to Address
153 Thomas Drive

Bill-to Customer No.
20000

Bill-to Name
Selangorian Ltd.

Bill-to City
Coventry

Bill-to Address
153 Thomas Drive

Ship-to Code

Quote lines: Selangorian Ltd.

1896-S - ATHENS Desk: 5 PCS
Unit Price Excl. VAT: 649.4 Line Amount Excl. VAT: 2,922.3

1972-S - MUNICH Swivel Chair, yellow: 5 PCS
Unit Price Excl. VAT: 123.3 Line Amount Excl. VAT: 616.5

Quote line: MUNICH Swivel Chair, y

Type
Item

No.
1972-S

Description
MUNICH Swivel Chair, yellow

Unit Price Excl. VAT
123.3

Location Code

Quantity
5

Unit of Measure Code
PCS

Line Discount %
0

Line Amount Excl. VAT
616.5

Currency Code

Lines Preview Make Order Comments

Add Filter Sort Refresh

Refresh Delete Hide fields Navigation





14. On the sales quote card, tap the Preview button on the toolbar to generate the quote in PDF format. The PDF viewer app opens, and you can send or print the document.

Selangorian Ltd.
Mr. Mark McArthur
153 Thomas Drive
Coventry, CV6 1GY
Great Britain

Sales - Quote
Page 1

CRONUS International Ltd.
5 The Ring
Westminster
W2 8HG London

Bill-to Customer No. 20000
VAT Registration No. 254687456
Document Date April 2, 2014
Shipment Date 04/02/14
Quote No. 1051
Prices Including VAT No

Payment Terms Net 14 days
Shipment Method Ex Warehouse

Phone No. 0666-666-6666
Home Page
E-Mail
VAT Registration GB777777777
Giro No. 888-9999
Bank World Wide Bank
Account No. 99-99-888
Salesperson Peter Saddow

No.	Description	Quantity	Unit of Measure	Unit Price	Discount %	Allow Invoice Discount	VAT Identifier	Amount
1896-S	ATHENS Desk	5	Piece	649,40	10	Yes	VAT25	2 922,30
1972-S	MUNICH Swivel Chair, yellow	5	Piece	123,30		Yes	VAT25	616,50
Total GBP Excl. VAT								3 538,80
25% VAT								884,70
Payment Discount on VAT								0,00



15. Tap Back to go back to MobileNAV application.
16. On the sales quote card tap the Make Order button on the toolbar to create the sales order.





17. Tap Yes.

18. On the customer card tap Documents button on the toolbar and select Orders to see the orders of this customer, and select the newly created Sales Order.



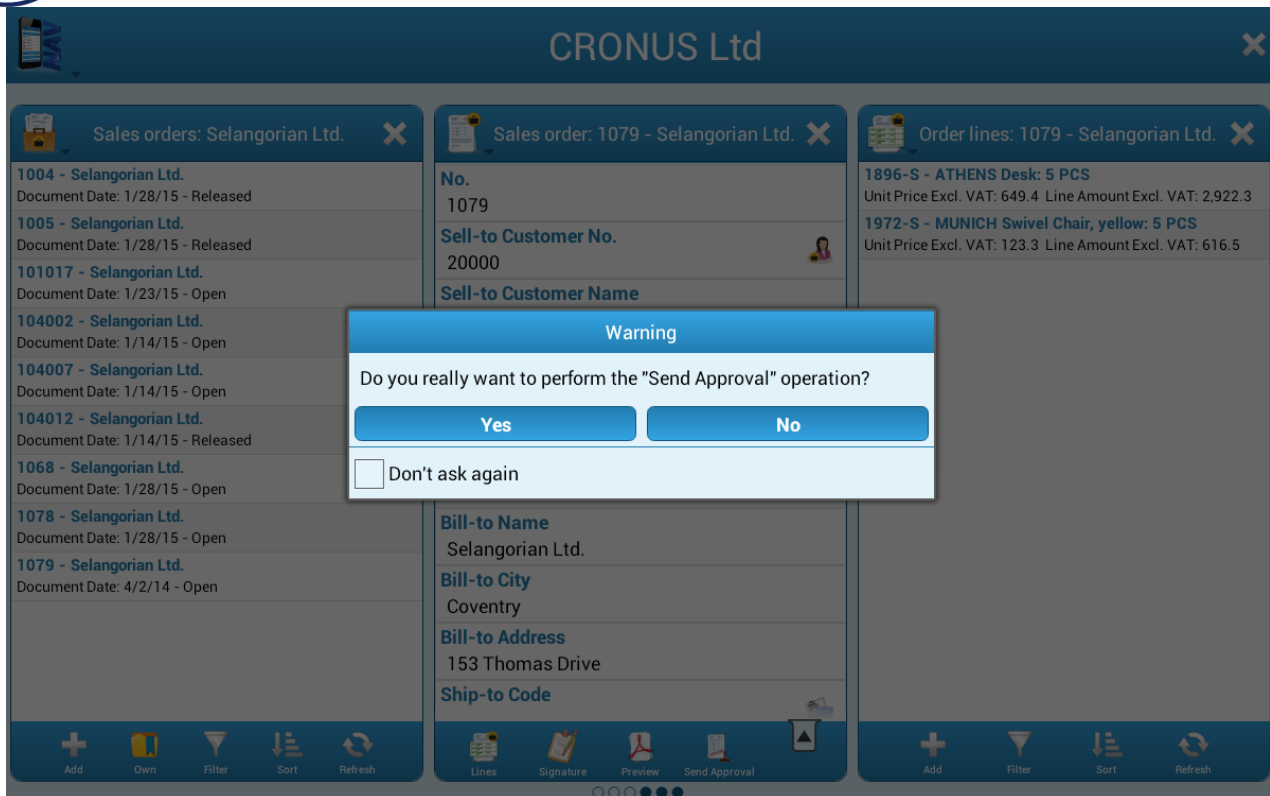


19. The customer confirms his order with his signature. Tap on the Signature icon, tap on Upload, and then the customer signs the touchscreen.



20. Tap Save, and the signature will be uploaded to the Dynamics 365 Business Central database.
21. Tap the Send Approval button on the toolbar to request approval for this order.





22. Tap Yes.

23. Note that the Status changed to Pending Approval





24. Open Dynamics 365 Business Central client, and check whether the new Sales Order has been properly entered into the database.

Edit - Sales Order - 1079 - Selangorian Ltd.

CRONUS Ltd.

HOME ACTIONS NAVIGATE

View New Release Reopen Post... Post and Print... Copy Document... Order Promising Statistics Assembly Orders Archive Document Shipments Invoices Order Confirmation... Email as Attachment Send To OneNote Notes Links Refresh Clear Filter Go to Previous Next

1079 - Selangorian Ltd.

General

No.: 1079 Document Date: 2014.04.02.

Sell-to Customer No.: 20000 Requested Delivery Date:

Sell-to Customer Name: Selangorian Ltd. External Document No.:

Sell-to City: Coventry Salesperson Code: PS

Posting Date: 2014.04.02. Status: Pending Approval

Order Date: 2014.04.02.

Show more fields

Lines

Type	No.	Description	Location ...	Quantity	Unit of Mea...	Unit Price Excl. ...	Line Amount Ex...	Line Discount %
Item	1896-S	ATHENS Desk		5	PCS	649,40	2 922,30	10
Item	1972-S	MUNICH Swivel Chair, yellow		5	PCS	123,30	616,50	

Invoicing 20000 14 DAYS 2014.04.16.

Shipping CV6 1GY 2014.04.02. Partial

Foreign Trade

Prepayment 0 2014.04.16.

Sales Line Details

Item No.: 1896-S

Availability: -5

Substitutions: 0

Sales Prices: 0

Sales Line Discou... 0

Notes

Click here to create a new note.

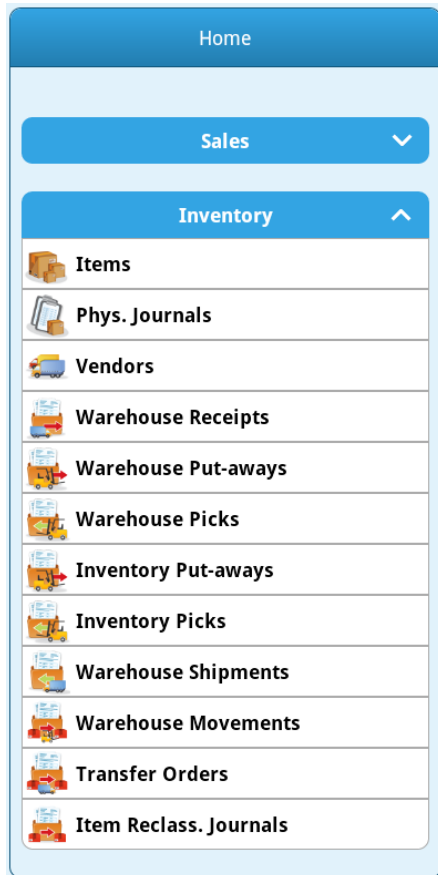
OK





Inventory

Concept



The inventory module is designed for warehouse employees who are responsible for inventory movements and would like to book (register) them with a mobile device.

Once the inbound and outbound orders have been released, the appropriate warehouse documents will be accessible in MobileNAV.

The warehouse employees can choose the appropriate document, carry out the prescribed movement and finally register their outcome. Barcode usage can make their work easier.

These functions are available in online mode. The item master is available in offline mode as well.

Items

Item master is the most important master table in logistics. By tapping on the Items menu item you will reach the item list screen.





Item list



In this menu you find the list of the items. Because the item master is one of the biggest master table, you will see an empty screen at first. By tapping the Refresh button you will see all items. The list provides the following details of items: Description, Description2, Item no., Inventory and Base Unit of Measure.

Tapping the barcode icon will activate the barcode reader. The barcode will act as a filter.

When you tap on an item in the item list, the program will open the selected [Item card](#).

Item card

If you select an Item in the Item list, the Item card opens where you can check the following details: No., Description, Description2, Inventory, Qty. on Purchase Order, Qty. on Sales Order, Base Unit of Measure, Item Category Code, Product Group Code and Inventory Posting Group.

Editable fields: No., Description, Description2, Base Unit of Measure, Item Category Code, Product Group Code and Inventory Posting Group.

Extra functions:



Entering Item No. is assisted by barcode reading.



Tap the icon on the inventory fields to drill down into an item ledger entry.



Tap the icon to download, upload, take a picture and upload or delete the picture of the item.





Toolbar functions:



Tap the icon to download, upload, take a picture and upload or delete the picture of the item.



Tap the icon to view the item unit of measures list showing the item's measures.



Tap to run the inventory valuation report. After setting the report parameters the system will generate the report and show it in PDF or Excel format.

Item Ledg. Entries list

CRONUS Ltd		
Item: ATHENS Desk	Item Ledg. Entries: ATHENS Desk	Item Ledger Entry: Sale: 1 PCS
No. 1896-S	Positive Adjmt.: 160 PCS YELLOW 12/31/14	Entry No. 174
Description ATHENS Desk	Positive Adjmt.: 19 PCS RED 12/31/14	Entry Type Sale
Description 2	Positive Adjmt.: 48 PCS GREEN 12/31/14	Posting Date 1/13/15
Inventory 1,254	Sale: 1 PCS GREEN 1/13/15	Item No. 1896-S
Qty. on Purch. Order 100	Sale: 1 PCS RED 1/16/15	Description
Qty. on Sales Order 11	Transfer: 25 PCS OUT. LOG. 1/22/15	Location Code GREEN
Base Unit of Measure PCS	Purchase: 999 PCS BLUE 1/28/15	Document No. 107002
Item Category Code	Transfer: 1 PCS RED 3/18/14	Document Date 1/13/15
Product Group Code		Quantity 1
Inventory Posting Group DESK		Remaining Quantity -

The Item Ledger Entry list contains the ledger entries of the selected item. Fields are as follows: Entry Type, Quantity, Unit of Measure Code, Location Code and the Posting Date.

The details can be shown via tapping on a line.

Item Ledg. Entry card

An Item Ledger Entry card contains the following details of the selected item ledger entry: Entry No., Entry Type, Posting Date, Item No, Description, Location Code, Document No., Document Date, Quantity, Remaining Quantity and Unit of Measure Code. The card is not editable.





Item Unit of Measure list

The screenshot shows the MobileNAV interface for 'CRONUS Ltd'. It displays three panels for the item 'ATHENS Desk'.

- Item: ATHENS Desk** (Left panel):
 - No. 1896-S
 - Description: ATHENS Desk
 - Description 2
 - Inventory: 1,254
 - Qty. on Purch. Order: 100
 - Qty. on Sales Order: 11
 - Base Unit of Measure: PCS
 - Item Category Code
 - Product Group Code
 - Inventory Posting Group
- Item Units of Measure: ATHENS Desk** (Middle panel):
 - PCS
- Item Unit of Measure: PCS** (Right panel):
 - Code: PCS
 - Qty. of Base Unit of Measure per Unit: 1

The bottom toolbar includes icons for Picture, Unit of Measure, Inventory Val., Refresh, Add, Filter, Sort, Refresh, Refresh, Delete, Hide fields, and Navigation.

The list contains the Item Unit of Measures for an Item. This list can be accessed from [Item card](#), but it also appears when you try to modify the Unit of Measure for an Item, for example on [Sales Order Line card](#).

Tap a line to open the [Item Unit of Measure card](#).

Tap the Add button on the toolbar to create new Item Unit of Measure.

Item Unit of Measure card

The Item Unit of Measure card contains the following details of the selected Item Unit of Measure: Code or Qty. of Base Unit of Measure per Unit. Both fields are editable.

Phys. Journals

Physical counts of inventory must be performed on a regular basis to keep an accurate record of inventory in the warehouse. Physical inventory counting is performed:

- either in the Phys. Inventory Journal (no warehousing functions are used)
- or in the Whse. Phys. Invt. Journal window (warehousing functions are used).

The base configuration contains the first option.

Tap the Phys. Journals menu item to open the Phys. Journal Batches list.





Phys. Journal Batches list



The Phys. Journal Batches list contains the list of batches with the following fields: Batch Name, Batch Description.

Tap on a batch to open the [Phys. Journal Batch card](#).

Phys. Journal Batch card

The page contains the name and the description of the selected batch. The following fields are available: Name and Description. The card is not editable.

Toolbar functions:



Tap on the lines icon to open the list of the lines of this batch.





Physical Inventory Journal Line list

The page contains the list of the lines of the selected batch. The journal lines have to be prepared in Windows client by the Calculate inventory function. Fields are as follows: Item No., Description, Location Code and Qty. (Calculated).

Reading the Item No.'s barcode can help you quickly select a row.

By tapping on a row, you will see the details of the selected row and be able to register the actual quantity.

Phys. Inv. Journal Line card

The page contains the fields of the selected phys. inventory batch line. Fields are as follows: Item No., Description, Location Code, Bin Code, Qty. (Calculated), Qty. (Phys. Inventory) and Unit of Measure Code. Only the Qty. (Phys. Inventory) field is editable.

After registering the actual quantities, the batch can be posted in Windows client.

Vendors

You can find vendor data in Inventory section for lack of Purchase section.
Tap the Vendors menu item to open the vendor list.





Vendors list



In this menu, you find the list of the vendors. The list contains vendor's Name, Name 2 and City.

You can create a new vendor via tapping the Add button.

Tap the name of a vendor in the list to open the [Vendor card](#).

Vendor card

When you tap on a vendor name in vendors list, the selected vendor's card will open. The following fields are available: Name, Name2, Post Code, City, Address, Address 2, Phone No., E-Mail, Payment Method, Balance and Blocked

Extra functions:



Tap the map icon on the City, Postcode, Address, Address2 fields you can show the address on the map.



Tap the phone icon on the Phone No or Mobile Phone No field to dial the phone number.



If you want to send an e-mail to your client tap the e-mail icon on the E-Mail field.

Toolbar functions:



With the Import/export button on the toolbar you can synchronize vendor's data with the contacts in your phone.





Warehouse Receipts

If you have set up your warehouse to use warehouse receipt documents like in the GREEN location of the demo Cronus company, then you have to prepare these documents – on a Windows client – from released inbound orders and register receiving of items on these documents.

Tap the Warehouse Receipts menu item to open the list of warehouse receipts.

Warehouse Receipts list

The screenshot displays the 'Warehouse Receipts' screen in the MobileNAV application. The header shows 'CRONUS Ltd.' with a close button. The left sidebar contains a menu with 'Home', 'Sales', 'Inventory' (expanded), and 'Warehouse Receipts'. The 'Inventory' section lists 'Items', 'Phys. Journals', 'Vendors', 'Warehouse Receipts', 'Warehouse Put-aways', and 'Warehouse Picks'. The main area shows a list of warehouse receipts for 'RE000002 - GREEN - MULTISOFT\KARPATIZ'. The right panel displays details for this receipt: 'No. RE000002', 'Location Code GREEN', 'Document Status', 'Vendor Shipment No.', and 'Assigned User ID MULTISOFT\KARPATIZ'. The bottom toolbar includes buttons for 'Barcode', 'Own', 'Filter', 'Sort', 'Refresh', 'Lines', 'Post', and 'Refresh'.

The Warehouse Receipt list contains the list of warehouse receipts. The list contains No., Location Code, Document Status, Vendor Shipment No. and Assigned User ID fields.

Tapping the Barcode button you can use barcode reading (No).

Tap on a document to open the [Warehouse Receipts card](#).

Warehouse Receipt card

The Warehouse Receipt card contains the following fields: No, Location Code, Document Status, Vendor Shipment No, Assigned User ID. You can edit the Vendor Shipment No. and Assigned user ID fields.

Toolbar functions:



Tap the Lines button to open the related [Warehouse Receipt Lines list](#).



Tap the Post button to post the related Lines.





Warehouse Receipt Lines list

Line No.	Item No.	Description	Location Code	Zone Code	Bin Code
10,000	1964-S	TOKYO Gæstestol, blå	GREEN		
20,000	1996-S	ATLANTA Whiteboard, basis	GREEN		
30,000	80100	Printerpapir	GREEN		
40,000	1964-S	TOKYO Guest Chair, blue	GREEN		
50,000	1968-S	MEXICO Swivel Chair, black	GREEN		
60,000	80100	Printing Paper	GREEN		
70,000	80100	Printing Paper	GREEN		

Source Document	Source No.	Item No.	Description	Quantity	Qty. to Receive	Unit of Measure Code	Location Code	Zone Code	Bin Code
Purchase Order	6002	1996-S	ATLANTA Whiteboard, basis	110	110	PCS	GREEN		

The list contains the selected warehouse receipt lines. Fields are: Line no., Item no., Description, Location code, Zone Code, Bin Code.

Tap on a line to open the [Warehouse Receipt Lines card](#).

Warehouse Receipt Line card

The card contains the selected warehouse receipt line with the following details: Source Document, Source No, Item No, Description, Quantity, Qty. to Receive, Unit of Measure Code, Location Code, Zone Code and Bin Code. You can edit the Qty. to Receive, Zone code and Bin code fields.

Extra functions:



Tap the icon on the Item No. field to open the [Item card](#).

Warehouse Put-aways

If you have set up your warehouse to use put-away documents in combination with warehouse receipts like in the GREEN location of the demo Cronus company, then you use the warehouse put-away documents function to control the putting away of items.

Tap the Warehouse Put-aways menu item to open the list of warehouse put-aways.





Warehouse Put-aways list

CRONUS Ltd.

Warehouse Put-aways	Warehouse Put-aways	Warehouse Put-aways
PU000002 No. of Lines: 2	No. PU000002	70001 - Base Qty. to Handle: 15 PCS - Qty. Outstanding: 15 PCS
PU000003 No. of Lines: 1	Location Code YELLOW	70002 - Top Panel Qty. to Handle: 0 PCS - Qty. Outstanding: 3 PCS
PU000005 No. of Lines: 1	Assigned User ID	
	No. of Lines 2	

Barcode Own Filter Sort Refresh Lines Register Refresh Barcode Filter Sort Refresh

The Warehouse Put-aways list contains the No. and No. of Lines fields. Select one to open the card.

Tap the Barcode button to find your Warehouse Put-away, if the document is identified with the barcode.

Warehouse Put-away card

The page contains the selected Warehouse Put-away header. The following fields are available: No., Location Code, Assigned User ID and No. of Lines. Only the Assigned User ID is editable.

Extra functions:



Tap the Lines button to open the [Warehouse Put-aways Lines list](#).



Tap the Register button to register all lines of the current Warehouse put-away document.





Warehouse Put-away Lines list

The list contains the lines of the selected warehouse put-away document, with the following fields: Item No., Description, Qty. to Handle, Qty. Outstanding and Unit of Measure Code.

Tap the Barcode toolbar button to find your current Warehouse Put-away line if you use a barcode on your Document.

If you select one line, the [Warehouse Put-away Line card](#) opens.

Warehouse Put-away Line card

On your screen you will see the selected Warehouse Put-away line with the following details: Item No, Description, Unit of measure Code, Qty to Handle, Qty Outstanding, Location Code and Bin code. You can edit the Qty. to handle and Bin code fields.

Extra functions:



Tap the Barcode icon on the Bin code field to enter your Bin Code with you barcode reader.

Toolbar functions:



Tap the Register button to register this line of the document.





Warehouse Picks

If you have set up your warehouse to use pick documents in combination with warehouse shipments like in the Green location of the demo Cronus company, then you use the warehouse pick documents function to control the picking of items. Pick documents can be created in Windows client.

Tap Warehouse Picks menu item to open the list of warehouse picks.

Warehouse Picks list



The list contains the Warehouse Picks with the following information: No. and No. of lines.

Tap the Barcode button to find your Warehouse Pick if barcode is used on the document.

Tap on a document to open the document's card.

Warehouse Pick card

The page contains the selected Warehouse Pick header. The following fields are available: No., Location Code, Assigned User ID and No. of Lines. Only the Assigned User ID is editable.

Extra functions:



Tap the Lines button to open the [Warehouse Pick Lines list](#).



Tap the Register button to register all lines of the current Warehouse Pick document.





Warehouse Pick Lines list

The lines of the selected warehouse pick document contain the following information: Item no., Description, Qty. to Handle, UOM, Qty. Outstanding and Unit of Measure Code.

Tap the Barcode button to find your Warehouse Pick Line if barcode is used on the document.

Warehouse Pick Line card

On the screen you can see the selected warehouse pick line with the following details: Item No, Description, Unit of Measure Code, Qty. to Handle, Qty. Outstanding, Location Code and Bin Code. You can edit the Qty. to handle and Bin code fields.

Extra functions:



Tap the Barcode icon on the Bin code field to enter your Bin Code via barcode.

Toolbar functions:



Tap the Register button to register this line of the document.

Inventory Put-aways

If your location is set up to require put-away processing but does not receive processing, you use the **Inventory Put-away** window to record and post put-away and receipt information for your released inbound source documents.





Inventory Put-aways list

CRONUS Ltd.

Home

Vendors

Warehouse Receipts

Warehouse Put-aways

Warehouse Picks

Inventory Put-aways

Inventory Picks

Warehouse Shipments

Warehouse Movements

Transfer Orders

Inventory Put-aways

IPU000002

Purchase Order - 106030 - No. of Lines: 1

Inventory Put-aways:

No. IPU000002

Source Document Purchase Order

Source No. 106030

No. of Lines 1

Barcode Filter Sort Refresh

Lines Post Refresh

In the Inventory Put-aways list, all of the created Inventory Put-aways are listed with the following details: No., Source Document, Source No. and No. of Lines.

Tap on one item to open the [Inventory Put-aways card](#).

Tap the barcode icon to scan the barcode of your Inventory Put-away document and find it in the list.

Inventory Put-away card

The Inventory Put-aways card has the following details: No, Source Document, Source No. and No. of Lines. These are non-editable fields.

Toolbar functions:



Tap the Lines icon to open the [Inventory Put-aways Line list](#) where you can check or update the lines.



Tap the Post button to post the lines of the selected Inventory Put-away document.





Inventory Put-away Lines list

Here you will find all lines of the selected Inventory Put-away document. The following fields are available: Item No, Description, Unit of Measure Code, Qty. to Handle, Qty. Outstanding.

Tap the Barcode icon to filter the lines by the Item with barcode scanner.

Tap a line to open the Inventory Put-away Lines card.

Inventory Put-away Lines card

Inventory Put-away lines contain the following details: Item No., Description, Unit of Measure Code, Qty. to Handle, Qty. Outstanding, Lot No., Location Code and Bin code.

The editable fields are the following: Qty. to Handle, Lot. No.

Extra functions:



Tap the Barcode icon on the Lot No field to enter your Lot No via barcode.

Toolbar functions:



If you want to post the selected document line, tap the Post icon.

Inventory Picks

If your location is set up to require pick processing but not shipment processing, you use the **Inventory Picks** window to record and post pick and shipment information for your released outbound source documents.





Inventory Picks list



In the Inventory Picks list are all of the created Inventory Picks with the following details: No., Source Document, Source No. and No. of Lines.

Tap the barcode icon to scan the barcode of your Inventory Pick document and you find it in the list.

Tap on an item to open the [Inventory Picks card](#) opens.

Inventory Pick card

The Inventory Picks card contains the following details: No, Source Document, Source No. and No. of Lines. These are non-editable fields.

Toolbar functions:



Tap the Lines icon to open the [Inventory Pick Lines list](#) where you can check or update the lines.



Tap the Post button to post the lines of the selected Inventory Pick document.





Inventory Pick Lines list

CRONUS Ltd.

Inventory Picks: IPI000001

No. IPI000001

Source Document Sales Order

Source No. 1003

No. of Lines 1

Inventory Pick Line: 1000 - Bicycle

Qty. to Handle: 0 PCS - Qty. Outstanding: 2 PCS

1000 - Bicycle

Item No. 1000

Description Bicycle

Unit of Measure Code PCS

Qty. to Handle 0

Qty. Outstanding 2

Lot No.

Location Code BLUE

Lines Post Refresh Barcode Filter Sort Refresh Post Refresh Hide fields Navigation

Here you will find all lines of the selected Inventory Pick document. The following fields are available: Item No, Description, Unit of Measure., Qty. to Handle and Qty. Outstanding.

Tap the Barcode icon to filter the lines by the Item with a barcode scanner.

Tap a line to open the Inventory Pick Lines card.

Inventory Pick Line card

Your Inventory Pick line contains the following details: Item No., Description, Unit of Measure Code, Qty. to Handle, Qty. Outstanding, Lot. No, Location Code and Bin code.

The editable fields are the following: Qty. to Handle, Lot. No.

Extra functions:



Tap the Barcode icon on the Lot No field to enter your Lot No via barcode.

Toolbar functions:



If you want to post the selected document line, tap the Post icon.

Warehouse Shipments

If you have set up your warehouse to use warehouse shipments documents like in the GREEN location of the demo Cronus company, then you have to prepare these documents – on Windows client – from released outbound orders and have to post shipment of items on these documents.





Tap the Warehouse Shipments menu item to open the list of warehouse shipments.

Warehouse Shipments list

The Warehouse Shipment list contains the list of warehouse shipments. The list contains No., Location Code, Status and Assigned User ID.

Tap the Barcode button to use barcode reading (No).

Tap on a document to open the [Warehouse Shipment Card](#).

Warehouse Shipment card

The Warehouse Shipment card contains the following fields: No, Location Code, Document Status, Status and Assigned user ID fields.

Toolbar functions:



Tap the Lines button to open the related Lines.



Tap the Post button to post the related Lines.





Warehouse Shipment Lines list

Warehouse Shipments: SH0		Warehouse Shipment Lines		es: 20,000 - 1996-S - ATLAN	
No.	SH000002	10,000 - 1964-S - TOKYO Gastestuhl, Blau	GREEN - -	Source Document	Sales Order
Location Code	GREEN	20,000 - 1996-S - ATLANTA Whiteboard, base	GREEN - -	Source No.	6002
Document Status		30,000 - 80100 - Printing Paper	GREEN - -	Item No.	1996-S
Status	Open	40,000 - 1964-S - TOKYO Gastestuhl, Blau	GREEN - -	Description	ATLANTA Whiteboard, base
Assigned User ID		50,000 - 1968-S - MEXICO Swivel Chair, black	GREEN - -	Quantity	11
		60,000 - 80100 - Printing Paper	GREEN - -	Qty. to Ship	0
		70,000 - 80100 - Printing Paper	GREEN - -	Unit of Measure Code	PCS

The list contains the selected warehouse shipment lines. It contains the following details: Line no., Item no., Description, Location code, Zone Code and Bin Code.

Tap on a line to open the [Warehouse Shipment Lines card](#).

Warehouse Shipment Line card

The card contains the selected warehouse shipment line with the following details: Source Document, Source No, Item No, Description, Quantity, Qty. to Ship, Unit of Measure Code, Location Code, Phone Code and Bin Code.

You can edit the Qty. to Ship, Zone code, Bin code fields.

Warehouse Movements

Warehouse movements can be used for internal movements within WMS-controlled locations (i.e. where directed pick and put-away is set like in the WHITE warehouse in the demo CRONUS company) from one bin to another. Movement documents can be created on a Windows client by using the movement worksheet.

Tap the Warehouse Movements menu item to open the list of warehouse movements.





Warehouse Movements list

No.	Location Code	Assigned User ID	Sorting Method	No. of Lines
WM000001	WHITE			4

The Warehouse Movements list contains the following details: No., Location Code, Assigned User ID and Number of Lines.

Tap on a document to open the document's card.

Warehouse Movement card

Tap on an item in the Warehouse Movements List to open the selected warehouse movement card with the following details: No., Location Code, Assigned User ID, Sorting Method and Number of Lines. You can edit the Sorting Method field.

Toolbar functions:



The Lines icon shows the lines of the selected document: [Warehouse Movement Lines list](#).



Tap the Post button to post the lines of the selected document.





Warehouse Movement Lines list

The Warehouse Movement Lines list contains the following details: Action Type, Item No, Bin Code, Quantity and Quantity Outstanding.

Tap the Barcode icon to filter the lines by the Item with barcode scanner.

Tap a line to open the document's card.

Warehouse Movement Line card

The page contains the selected warehouse movement line with the following details: Action Type, Item No, Description, Bin Code, Quantity, Quantity to Handle, Quantity Outstanding, Unit of Measure Code. You can edit the Qty. to Handle and Bin code fields.

Extra functions:



Tap the icon on the Item No. field to open the [Item card](#).

Transfer Orders

In this menu you can handle your transfer orders.





Transfer Orders list



If you choose the Transfer Orders menu and tap the Refresh button the Transfer Orders List opens. The following information is displayed: No., Transfer-from Code, Transfer-To Code, In-Transit Code and Status.

Tap the Add button to create a new Transfer Order.

Tap a line to open the [Transfer Orders card](#).

Transfer Order card

If you select a Transfer Order the card opens and you can view the following details of the Order header: No., Transfer-from Code, Transfer-To Code, In-Transit Code, Posting Date and Status.

The following fields are editable: Transfer-from Code, Transfer-To Code, In-Transit Code, Posting Date, Status. These fields are supported with drill-down, you can choose for example from the Location List.

Toolbar functions:



Tap the Lines icon to open the [Transfer Order Lines](#) where you can register the item for the actual Transfer Order.



Tap the Ship button to book the Lines of the actual Transfer orders (if it already has) as a shipment.



Tap the Receive button to book the Lines of the actual Transfer orders (if it already has) as a receipt.





Transfer Order Lines list

Tap the Lines icon on the Transfer Order Card to open the Transfer Order Lines List. The following information is displayed per line: Item No., Description, Quantity, Unit of Measure Code, Qty. to Ship and Qty. to Receive.

Tap the Barcode icon to filter the lines by the Item with barcode scanner.

If you do not have any Line you can create a new one by tapping the Add button. You can only create new lines if the status of the current Transfer Order is “Open” (otherwise an error message appears).

Tap one Line to open the [Transfer Order Line Card](#).

Transfer Order Line card

On the Transfer Order Line Card you can see the following details: Item No., Description, Quantity, Unit of Measure Code, Qty. to Ship, Quantity Shipped, Qty. to Receive and Quantity Received.

If the Lines are correct, all Lines can be posted from the [Transfer Orders Card](#). You can manage first the shipment and then the receipt.

Extra functions:



Tap the box icon on the No field to open the [Item Card](#), which contains the details about the Item.



Tap the barcode icon on the No field to scan the barcode. In the base configuration the barcode should be the item No.





Tap the measure icon on the Unit of Measure Code field to change the available unit of measure.

Item Reclass. Journals

In the Item Reclass. Journal you reach the Item Reclassification Journal.

Item Reclass. Journal list



If you choose the Item Reclass. Journals menu and tap the Refresh button the Item Reclass. Journals list opens. The following information appears: Name and Description.

Tap a line to open the [Item Reclass. Journal card](#).

Item Reclass. Journal card

After selecting the journal you will see the journal batches of the selected journal. The following information is available: Name and Description. The card is not editable.

After selecting the journal batch by tapping the Lines button the Item [Reclass.Journal Line List](#) appears.

Toolbar functions:



Tap the Lines icon to open the [Reclass.Journal Line List](#) where you can register journal lines.



Tap the Post button to post the lines of the selected journal batch.





Item Reclass. Journal Line list

Tap the Lines button on the [Item Reclass. Journals Card](#) to open the Lines. The following information appears in each line: Item No., Description, Location Code, New Location Code, Quantity and Unit of Measure Code.

Tap the Barcode icon to filter the lines by the Item with barcode scanner.

Tap the Add button to enter new lines.

Item Reclass. Journal Line card

On the Item Reclass. Journal Line Card you can edit your line with the following details: Posting Date, Document No., Item No., Description, Location Code, Bin Code, New Location Code, New Bin Code, Quantity and Unit of Measure Code.

If you want to post the Lines of the current journal batch, go to the [Item Reclass. Journal Card](#) and tap the Post button.

Extra functions:



Tap the box icon on the No field to open the [Item Card](#), which contains the details about the Item.



Tap the barcode icon on the No field to scan the barcode. In the base configuration, the barcode should be the item No.



Tap the measure icon on the Unit of Measure Code field to change the available unit of measure.





Inventory workflow example

Let's see a typical example for the Inventory module. The purchaser creates a purchase order in Dynamics 365 Business Central. When the items are received the warehouse back office employee creates a receipt for this purchase order in Dynamics 365 Business Central. The Receipt can be posted in the MobileNAV client. When the items are put in the warehouse the warehouse employee can register the put-away with his device on the MobileNAV.

Let's see the procedure.

1. Open the Dynamics 365 Business Central client.
2. Go to Departments/Purchase/Order Processing/Purchase Orders and create a new PO.

3. Tap Release for releasing the purchase order.
4. Go to Departments/ Warehouse/Planning & Execution/Warehouse receipts. Create a new receipt, fill in the Location Code and start the Get Source Document Function. You can select the new released purchase order and the Lines are filled in with the PO lines.





RE000013

General

No.: RE000013 Vendor Shipment No.: Assigned User ID: Assignment Date: Assignment Time: Sorting Method:

Location Code: GREEN Zone Code: Bin Code: Document Status: Posting Date: 2015.01.22.

Item Details - Wareho...

Item No.: 1920-S Identifier Code: Base Unit of Meas.: PCS Put-away Unit of ... Purch. Unit of Mea.: PCS Item Tracking Cod... Special Equipmen... Last Phys. Invt. Dat... 2014.12.31. Net Weight: 0,00 Warehouse Class ...

Notes

Click here to create a new note.

Line	Source Doc...	Source No.	Item No.	Description	Quantity	Qty. to Receive	Qty. to Cross-Dock	Qty. Received	Qty. Outstanding	Due Dat
	Purchase Ord...	106034	1920-S	ANTWERP Conference Table	30	30	0	0	30	
	Purchase Ord...	106034	1964-S	TOKYO Guest Chair, blue	120	120	0	0	120	

5. Go into your MobileNAV client to the Inventory/Warehouse receipt. Your new warehouse receipt will be listed there.

CRONUS Ltd.

13 - GREEN - War

No. RE000013 Location Code GREEN Document Status Vendor Shipment No. Assigned User ID

000013 - GREEN -

10,000 - 1920-S - ANTWERP Conference Table GREEN - - 20,000 - 1964-S - TOKYO Guest Chair, blue GREEN - -

es: 20,000 - 1964-S - TOKYO

Source Document Purchase Order Source No. 106034 Item No. 1964-S Description TOKYO Guest Chair, blue Quantity 120 Qty. to Receive 120 Unit of Measure Code PCS

Lines Post Refresh Filter Sort Refresh Refresh Hide fields Navigation

6. Post the Lines via tapping the Post button on the toolbar of the Warehouse receipt card. The system creates a warehouse Put-away from the posted lines.
7. Go to Inventory/Warehouse Put-aways. Select the first line and check the details. If your Location is setup with bins you can fill the bin code. Tap Register on the toolbar.





The screenshot displays the MobileNAV application interface for 'CRONUS Ltd.'. It features three main panels:

- Warehouse Put-aways: PU000008**: Shows fields for No. (PU000008), Location Code (GREEN), Assigned User ID, and No. of Lines (2). Buttons at the bottom include Lines, Register, Refresh, and a barcode icon.
- Warehouse Put-away: 1920-S - ANTWERP Conference Table**: Shows Qty. to Handle: 30 PCS - Qty. Outstanding: 30 PCS. Below it, **1964-S - TOKYO Guest Chair, blue** shows Qty. to Handle: 120 PCS - Qty. Outstanding: 120 PCS. Buttons at the bottom include Barcode, Filter, Sort, and Refresh.
- Conference Table: 1920-S**: Shows Item No. (1920-S), Description (ANTWERP Conference Table), Unit of Measure Code (PCS), Qty. to Handle (30), Qty. Outstanding (30), Location Code (GREEN), and Bin Code. Buttons at the bottom include Register, Refresh, Hide fields, and Navigation.

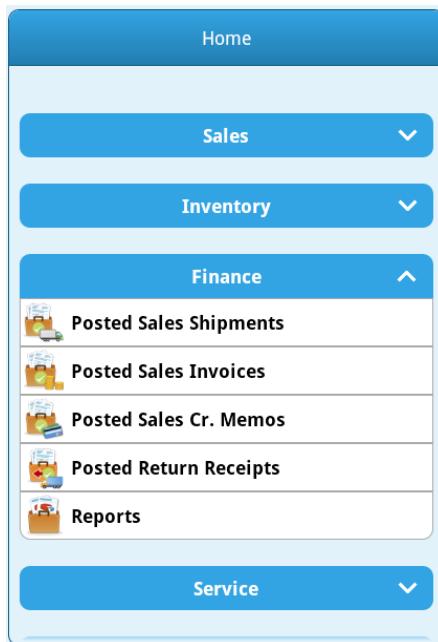
8. The Warehouse Put-away line is registered and disappears from this screen. If you want to register another Line you have to fill the Qty. to Handle field with the handled quantity. If all Lines are correct, tap the Register button on the Warehouse Put-away Line card and all Lines of the Warehouse Put-away will be registered.
9. Go to Dynamics 365 Business Central, find your purchase order and check the receipt items.





Finance

Concept



The finance module is designed mainly for Financial Managers.

They are able to reach posted sales documents and check out reports that can help them making decision and be updated even if they are not in the office.

These posted document lists are also available (as filtered list) from the Customer card in the Posted Document toolbar button.

Posted Sales Shipments

Posted Sales Shipments list





In this menu you can find the list of the Posted Sales Shipments. By default you will be filtered by your own Posted Sales Shipments. You can remove this filter by tapping on the Own icon. After tapping the Refresh button you will see all Posted Service Shipments. The following information appears: No., Sell-to Customer Name and Posting Date. You can narrow the list by filtering these fields.

Tap on a line to open the [Posted Sales Shipment card](#).

Posted Sales Shipment card

If you select a specific Posted Sales Shipment the card opens and you can see the details of the Posted Sales Shipment header: No., Sell-to Customer No., Sell-to Customer Name, Sell-to City, Sell-to Address, Bill-to Customer No., Bill-to Name, Bill-to City, Bill-to Address, Ship-to Code, Ship-to Name, Ship-to City, Ship-to Address, Posting Date, Document Date, Currency Date, Currency Code, Salesperson. The card is not editable.

Toolbar functions:



Tap this icon to display the Posted Sales Shipment print-out in PDF format.

Posted Sales Invoices

Posted Sales Invoices list

CRONUS Ltd.

Home

Sales

Inventory

Finance

Posted Sales Shipments

Posted Sales Invoices

Posted Sales Cr. Memos

Posted Return Receipts

Reports

Posted Sales Invoices

103001 - The Cannon Group PLC
Posting Date: 1/19/15

103002 - Selangorian Ltd.
Posting Date: 1/19/15

103003 - John Haddock Insurance Co.
Posting Date: 1/19/15

103005 - The Cannon Group PLC
Posting Date: 1/4/15

103006 - BYT-KOMPLET s.r.o.
Posting Date: 1/10/15

103007 - Designstudio Gmunden
Posting Date: 1/10/15

103008 - Selangorian Ltd.
Posting Date: 1/11/15

103009 - Selangorian Ltd.
Posting Date: 1/13/15

Cannon Group PLC

No.
103005

Sell-to Customer No.
10000

Sell-to Customer Name
The Cannon Group PLC

Sell-to City
Birmingham

Sell-to Address
192 Market Square

Bill-to Customer No.
10000

Bill-to Name
The Cannon Group PLC

Own Filter Sort Refresh

Preview Refresh Hide fields Navigation

You can find the list of Posted Sales Invoices in this menu. By default, you will be filtered by your own posted documents. If you want to see the whole list, you have to simply tap the Own icon and tapping on the Refresh button. You will see the following information: No., Sell-to Customer Name and Posting Date. You can also filter by these fields.





Tap on a line to open the [Posted Sales Invoice card](#).

Posted Sales Invoice card

If you select Posted Sales Invoice on the list by tapping it, you will see the Posted Sales invoice card and all of its information: No., Customer No., Customer Name, City, Address, Bill-to Customer No., Bill-to Customer Name, Bill-to City, Bill-to Address, Ship-to Code, Ship-to Name, Ship-to City, Ship-to Address, Posting Date, Document Date, Currency Code and Salesperson Code.

Toolbar functions:



Tap this icon to display the Posted Sales Invoice print-out in PDF format.

Posted Sales Cr. Memos

Posted Sales Cr. Memos list

The screenshot shows the MobileNAV app interface for 'CRONUS Ltd.'. The left sidebar menu includes 'Home', 'Sales', 'Inventory', and 'Finance'. Under 'Finance', there are options for 'Posted Sales Shipments', 'Posted Sales Invoices', 'Posted Sales Cr. Memos' (which is selected), 'Posted Return Receipts', and 'Reports'. The central panel displays a list of 'Posted Sales Cr. Memos' with the following entries:

No.	Customer Name	Posting Date
104005	Autohaus Mielberg KG	1/16/15
104003	Selangorian Ltd.	1/16/15
104002	Selangorian Ltd.	1/13/15
104001	The Cannon Group PLC	1/11/15

The right-hand panel shows the details for the selected memo (No. 104001):

No.	104001
Sell-to Customer No.	10000
Sell-to Customer Name	The Cannon Group PLC
Sell-to City	Birmingham
Sell-to Address	192 Market Square
Bill-to Customer No.	10000
Bill-to Name	The Cannon Group PLC

At the bottom of the app, there is a toolbar with icons for 'Own', 'Filter', 'Sort', 'Refresh', 'Preview', 'Refresh', 'Hide fields', and 'Navigation'.

In this menu you can find the list of the Posted Sales Credit Memos. By default you will be filtered by your own Posted Sales Credit Memos. You can remove this filter by tapping the Own icon. After tapping the Refresh button you will see all Posted Sales Credit Memos. The following information will be available: No., Sell-to Customer Name and Posting Date. You can narrow the list by filtering any of these fields.

Tapping a line to open the [Posted Sales Cr. Memos card](#).

Posted Sales Cr. Memo card

If you select a specific Posted Sales Cr. Memo on the list, the card opens and you can see the details of the Posted Sales Cr. Memo header with the following fields: No., Customer No., Customer Name, City,





Address, Bill-to Customer No., Bill-to Customer Name, Bill-to City, Bill-to Address, Ship-to Code, Ship-to Name, Ship-to City, Ship-to Address, Posting Date, Document Date, Currency Code and Salesperson Code.

Toolbar functions:



Tap this icon to open the Posted Sales Cr. Memo print-out in PDF format.

Posted Return Receipts

Posted Return Receipts list

No.	Sell-to Customer No.	Sell-to Customer Name	Sell-to City	Sell-to Address	Bill-to Customer No.	Bill-to Name
107004 - Autohaus Mielberg KG						
107003 - Selangorian Ltd.						
107002 - Selangorian Ltd.						
107001 - The Cannon Group PLC						

In this section, you can find the list of Posted Return Receipts. By default you will be filtered by your own Posted Return Receipts. You can remove this filter by tapping the Own icon. After tapping the Refresh button you will see all Posted Return Receipts. You will see the following information: No., Sell-to Customer Name and Posting Date. You can narrow the list by filtering any of these fields.

Tap on a line to open the [Posted Return Receipts card](#).

Posted Return Receipt card

If you select a specific Posted Return Receipt on the list, the card opens and you can see the details of the Posted Return Receipt header with the following fields: No., Customer No., Customer Name, City, Address, Bill-to Customer No., Bill-to Customer Name, Bill-to City, Bill-to Address, Ship-to Code, Ship-to Name, Ship-to City, Ship-to Address, Posting Date, Document Date, Currency Code and Salesperson Code.

Toolbar functions:



Tap this icon to open the Posted Return Receipt print-out in PDF format.





Reports

Calculate Consumption

This process-only report is available from the [Consumption Journal card](#), where you can generate the Consumption Journal Lines by opening the [Calculate Consumption report](#), specifying certain filter criteria on the report request form, and then execute the process-only report.

Customer – Top 10 List

You can access Microsoft Dynamics NAV's standard Customer – Top 10 List report via MobileNAV. You can specify the following parameters for the report: Customer No. (filter), Quantity, Show (Sales(LCY) or Balance (LCY)) and Chart Type.

Toolbar functions:

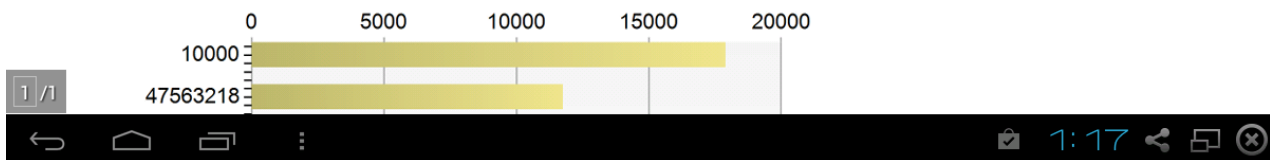


Tap this icon, to open the Customer – Top 10 print- in PDF format.





No.	Name	Sales (LCY)	Balance (LCY)
10000	Goldmind Ltd.	17 901,96	169 365,68
47563218	Klubben	11 772,20	11 772,20
20000	Selangorian Ltd.	6 510,64	96 049,99
30000	John Haddock Insurance Co.	6 142,90	349 615,40
32656565	Antarcticopy	2 582,81	2 582,81
43687129	Designstudio Gmunden	2 498,10	2 498,10
35963852	Heimilisprydi	2 024,21	2 024,21
42147258	BYT-KOMPLET s.r.o.	1 602,90	1 602,90
01445544	Progressive Home Furnishings	1 499,02	1 499,02
40000	Deerfield Graphics Company	1 063,10	1 328,88
Total		53 597,84	638 339,19
Total Sales		55 963,67	873 283,25
% of Total Sales		95,80	73,10



Inventory Valuation

Home

Sales

Inventory

Finance

Posted Sales Shipments

Posted Sales Invoices

Posted Sales Cr. Memos

Posted Return Receipts

Reports

Service

Manufacturing

CRONUS Ltd

Reports

Calculate Consumption

Manufacturing

Customer - Top 10 List

Sales

Inventory Valuation

Inventory

Trial Balance

Finance

Filter

Sort

Refresh

Inventory Valuation

Item No.

1000..2000

Starting Date

Ending Date

4/3/14

Include Expected Cost

No

Show as PDF

Show as Excel

Hide fields





You can use the standard Inventory Valuation report via MobileNAV. You can specify the following parameters for the report: Item No. (filter), Starting Date, Ending Date, Include Expected Cost.

Toolbar functions:



Tap this icon to open the Inventory Valuation print-out in PDF format.



Tap this icon to open the Inventory Valuation print-out in Excel format.

Home pdf_temp.pdf									
Inventory Valuation									
CRONUS Ltd.									
Item: No.: 1000..2000									
		As of		Increases (LCY)		Decreases (LCY)			
No.	Description	Assembly BOM	Base Unit of Measure	Quantity	Value	Quantity	Value	Quantity	Value
Inventory Posting Group: FINISHED									
1000	Bicycle	No	PCS	0	0,00				
1100	Front Wheel	No	PCS	0	0,00			20	2 593,42
1200	Back Wheel	No	PCS	0	0,00			20	2 593,64
1300	Chain Assy	No	PCS	0	0,00			20	263,14
1700	Brake	No	PCS	0	0,00			20	195,30
Inventory Posting Group Total: FINISHED					0,00		0,00		5 645,50
Inventory Posting Group: RAW MAT									
1400	Mudguard front	No	PCS	0	0,00			20	78,00
1450	Mudguard back	No	PCS	0	0,00			20	78,00
1500	Lamp	No	PCS	0	0,00			20	104,00
1600	Bell	No	PCS	0	0,00			20	54,00
1800	Handlebars	No	PCS	0	0,00			20	42,40
1850	Saddle	No	PCS	0	0,00			20	144,00





Trial Balance



You can access NAV's standard Trial Balance report via MobileNAV. You can also add a G/L Account filter for the report.

Toolbar functions:



Tap this icon to open the Trial Balance print-out in PDF format.



Tap this icon to open the Trial Balance print-out in Excel format.





Home pdf_temp.pdf

2014.04.03. 13:32

Page 1

MAJORTIDEMO_EN

Trial Balance

Period:
CRONUS Ltd.

No.	Name	Net Change	Balance		
		Debit	Credit	Debit	Credit
1000 BALANCE SHEET					
1002 ASSETS					
1003 Fixed Assets					
1005 Tangible Fixed Assets					
1100 Land and Buildings					
1110	Land and Buildings	1 479 480,60		1 479 480,60	
1120	Increases during the Year	147,73		147,73	
1130	Decreases during the Year				
1140	Accum. Depreciation, Buildings		526 620,38		526 620,38
1190	Land and Buildings, Total	953 007,95		953 007,95	
1200 Operating Equipment					
1210	Operating Equipment	582 872,18		582 872,18	
1220	Increases during the Year	25 116,00		25 116,00	
1230	Decreases during the Year				
1240	Accum. Depr., Oper. Equip.		508 176,74		508 176,74
1290	Operating Equipment, Total	638 811,44		638 811,44	
1300	Vehicles				

1 / 7

1:32

Finance workflow example

Let's see a typical example for the finance module. As a financial manager, Jack has to go to a meeting where he has to demonstrate the company's top buying customers. As a manager, Jack has no time to go to the office and print-out the list of their top 15 customers. He can easily get this information by using his smartphone only.

Let's see the procedure.

1. Login to the MobileNAV application.
2. Go to Finance/Reports/Customer Top 10 List.





The screenshot shows the MobileNAV interface for 'CRONUS Ltd'. The left sidebar contains navigation options: Home, Sales, Inventory, Finance, Service, and Manufacturing. The 'Finance' section is expanded, showing 'Posted Sales Shipments', 'Posted Sales Invoices', 'Posted Sales Cr. Memos', 'Posted Return Receipts', and 'Reports'. The 'Reports' section is selected, displaying a list of reports: 'Calculate Consumption', 'Manufacturing', 'Customer - Top 10 List', 'Sales', 'Inventory Valuation', 'Inventory', 'Trial Balance', and 'Finance'. The 'Customer - Top 10 List' report is open, showing a table with columns: 'Customer No.', 'Quantity' (10), 'Show' (Sales (LCY)), and 'Chart Type' (Bar chart). The bottom bar contains icons for Filter, Sort, Refresh, Show as PDF, and Hide fields.

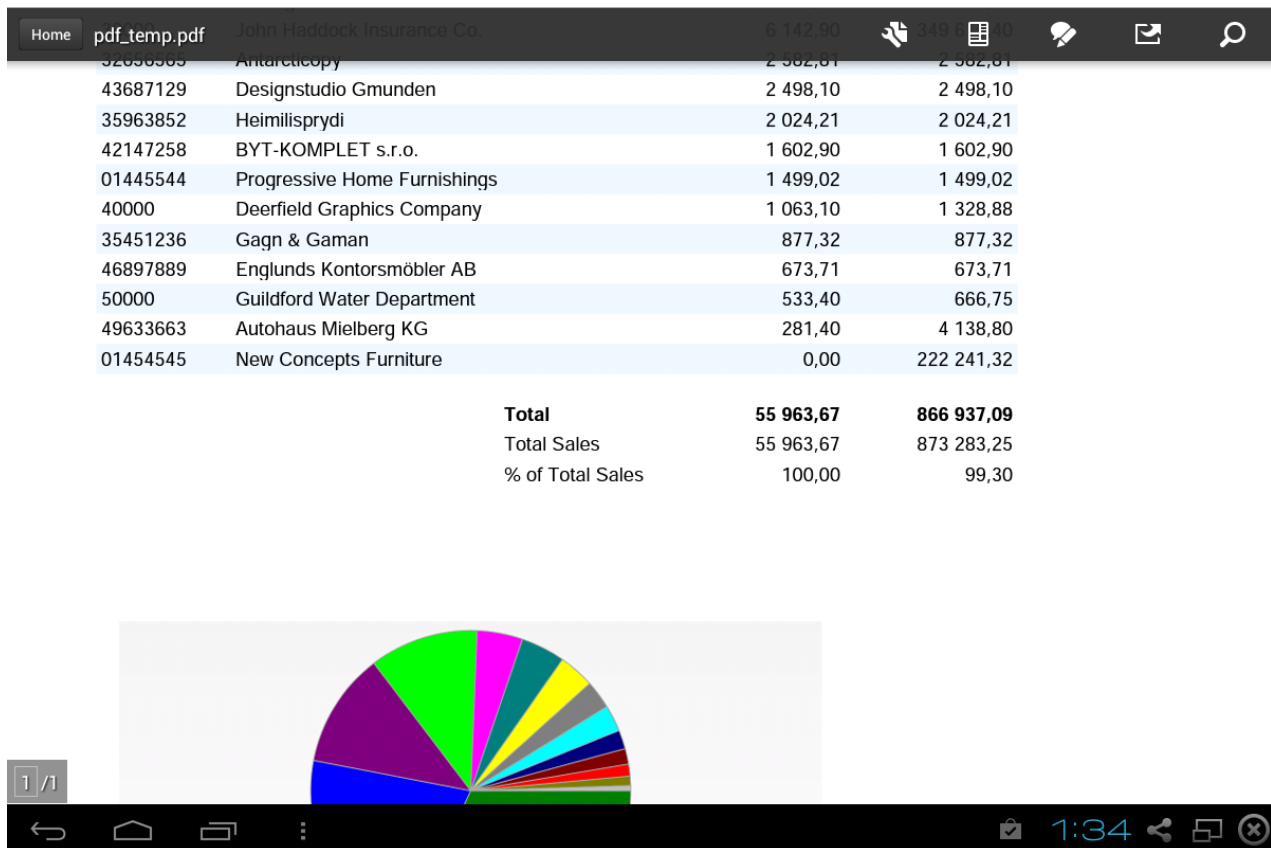
3. Modify Quantity from 10 to 15.
4. Modify the Chart Type from Bar chart to Pie chart.

The screenshot shows the MobileNAV interface for 'CRONUS Ltd' after modifications. The left sidebar and 'Reports' section are the same as in the previous screenshot. The 'Customer - Top 10 List' report is open, showing a table with columns: 'Customer No.', 'Quantity' (15), 'Show' (Sales (LCY)), and 'Chart Type' (Pie chart). The bottom bar contains icons for Filter, Sort, Refresh, Show as PDF, and Hide fields.





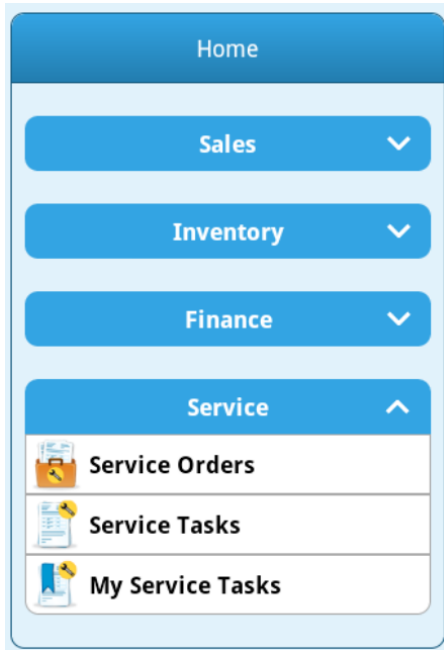
5. Tap on the Show as PDF button.





Service

Concept



The service module is designed for service technicians who work out of office and would like to have a paperless work environment with a smartphone or tablet.

The back-office employee registers the Service orders in Dynamics 365 Business Central. The service tasks will be assigned to the available resources with the proper skills. Once the service order has been properly registered and assigned, the service technicians can access them in MobileNAV.

The service technicians can fill out the Service item worksheet via entering the symptom codes and registering the item and resource usages. He can print out the Service item worksheet in PDF format and he can also report the status back by tapping Start of Finish button.

These functions are available in online and offline mode.





Service Orders

Service Order list

CRONUS International Ltd.

Home

- Sales
- Inventory
- Finance
- Service
 - Service Orders
 - Service Tasks
 - My Service Tasks

Service Orders

- SO000001 - The Cannon Group PLC
Finished - 1/2/15
- SO000002 - Guildford Water Department
In Process - 1/5/15
- SO000003 - Deerfield Graphics Company
In Process - 1/31/15
- SO000004 - Guildford Water Department
In Process - 1/31/15
- SO000005 - Deerfield Graphics Company
In Process - 1/31/15
- SO000006 - John Haddock Insurance Co.
In Process - 1/31/15
- SO000007 - Deerfield Graphics Company
In Process - 1/31/15
- SO000008 - Guildford Water Department
In Process - 1/31/15

Service Order: SO000001

No. SO000001

Customer No. 10000

Name The Cannon Group PLC

City Birmingham

Post Code B27 4KT

Address 192 Market Square

Address 2

Filter Sort Refresh

Lines Refresh Hide fields Navigation

In this menu you find the list of the Service orders. Tap the Refresh button to view all Service orders. The following information appears: No., Name of the Customer, Status and Starting date. You can filter and sort the list according to these data.

Tap a line to open the [Service Order card](#).

Service Order card

If you select a Service Order the card opens and you can view the following details: No, Customer No, Name, City, Postcode, Address, Address2, Phone No, E-Mail, Contact No, Contact Name, Salesperson, Status, Priority, Starting Date and Starting Time.

Extra functions:



Tap the map icon on the City, Postcode, Address, Address2 fields to view the address on the map.



Tap the phone icon on the Phone No field to dial the phone number.



If you want to send an e-mail to your client tap the e-mail icon on the E-Mail field.

Toolbar functions:



Tap the Lines toolbar button to open the [Service Order Line list](#) which contains the created service tasks for this Service order.







CRONUS International Ltd.

Service Orders

SO000001 - The Cannon Group PLC

Finished - 1/2/15

SO000002 - Guildford Water Department

In Process - 1/5/15

SO000003 - Deerfield Graphics Company

In Process - 1/31/15

SO000004 - Guildford Water Department

In Process - 1/31/15

SO000005 - Deerfield Graphics Company

In Process - 1/31/15

SO000006 - John Haddock Insurance Co.

In Process - 1/31/15

SO000007 - Deerfield Graphics Company

In Process - 1/31/15

SO000008 - Guildford Water Department

In Process - 1/31/15

Filter

Sort

Refresh

3 - Deerfield Graphics Com

No.

SO000003

Customer No.

40000

Name

Deerfield Graphics Company

City

Gloucester

Post Code

GL1 9HM

Address

10 Deerfield Road

Address 2

Lines

Refresh

Hide fields

Navigation

00003 - Deerfield Graphics

30 - 8908-W - Computer - Highline Package

Low - Special functions

31 - 8908-W - Computer - Highline Package

Low - Special functions

32 - 8908-W - Computer - Highline Package

Low - Special functions

Filter

Sort

Refresh

Service Tasks

Service Task list



CRONUS International Ltd.

Home

Sales

Inventory

Finance

Service

Service Orders

Service Tasks

My Service Tasks

Service Tasks

7 - 80007 - Enterprise Computer 667 MHz

High - Unstable

- 80005 - Computer III 866 MHz

Low -

30 - 8908-W - Computer - Highline Package

Low - Special functions

31 - 8908-W - Computer - Highline Package

Low - Special functions

32 - 8908-W - Computer - Highline Package

Low - Special functions

36 - 8916-W - Computer - TURBO Package

Low - Other conditions

33 - 8916-W - Computer - TURBO Package

Low - No function

41 - 8924-W - Server - Enterprise Package

Low -

Filter

Sort

Refresh

ghline Package

Document No.

SO000003

Service Item No.

30

Item No.

8908-W

Description

Computer - Highline Package

Priority

Low

Symptom Code

Special functions

Fault Area Code

Data processing

Lines

Start

Finish





In the Service Task list you find all of the Service Tasks (Service item lines). The following information appears: Service Item No, Item No, Description, Priority and Symptom code. You can filter and sort the list based on these details.

Tap a line to open the Service Task card.

Service Task card

If you select a Service Task the card opens and you can view the following details: Document No, Service Item No, Item No, Description, Priority, Symptom Code, Fault Area Code, Fault Code, Resolution Code, Repair Status Code, Starting Date, Starting Time, Finishing Date and Finishing Time.

Editable fields: Symptom Code, Fault Area Code, Fault Code, Resolution Code, Repair Status Code, Starting Date, Starting Time, Finishing Date and Finishing Time.

Extra functions:



Tap the icon on the Document No field to open the [Service Order card](#) of the actual Service Order.



Tap the box icon on the Service Item No field to open the [Service Item card](#), which contains the details about the Service Item.



Tap the box icon on the Item No field to open the [Item card](#), which contains the details about the Item.

Toolbar functions:



Tap the Lines icon to open the [Service Lines](#) where you can register the item and resource usage for the actual Service Task.



Tap the Start button to set the Status of the Service Task to "In Process". The Starting Date and Starting Time are automatically filled in with the actual date and time.



Tap the Finish button to set the Status of the Service Task to "Finished". The Finishing Date and Finishing Time are automatically filled with the actual date and time.



Tap this button to check the allocated resources. The [Resource Allocation list](#) will open.



Tap the Service Task PDF button to preview the Service Task document, which contains all of your service tasks (filtered by the Resource No.).



Tap the Service Item Worksheet PDF button to preview the Service Item Worksheet document, which contains the Service Task details and the registered item and resource usages.





Service Line list

CRONUS International Ltd.

Service Task: 41 - 8924-W

Document No.
SO000006

Service Item No.
41

Item No.
8924-W

Description
Server - Enterprise Package

Priority
Low

Symptom Code
Unstable

Fault Area Code
Mechanics

Service Lines: 41 - 8924-V

Resource - TIMOTHY - 10,000
Timothy Sneath - 1.5 HOUR

Item - 80206 - 20,000
Webcam - 1 PCS

Service Line: TIMOTHY -

Type
Resource

No.
TIMOTHY

Description
Timothy Sneath

Service Item Serial No.

Unit of Measure Code
HOUR

Location Code

Quantity
1.5

Lines Start Finish Add Filter Sort Refresh Refresh Delete Hide fields Navigation

Tap the Lines button on the toolbar to open the Service Line list from the [Service Task card](#). This list contains the registered item or resource usages and costs. In the list you can see the following details: Type, No, Line No, Description, Quantity and Unit of Measure Code.

Tap a line to open the [Service Line card](#).

Tap the Add button on the toolbar to create new Service Line.

Service Line card

If you select a Service Line, this card opens and you can view the following details of the Service Line: Type, No, Spare Part Action (in case of Item type), Replaced Item No (in case of Item type), Description, Service Item serial No, UOM Code, Location Code, Quantity, Unit Price Excl. VAT, Line Discount %, Line Amount Excl. VAT, Currency Code, Symptom Code, Fault Area Code, Fault Code and Resolution Code.

Editable fields: all fields are editable except the Currency Code.

Tap the Delete button on the toolbar to delete the actual Service Line.

Extra functions:



Tap the box icon on the No field to open up the [Item Card](#), which contains the details about the Item.



Tap the barcode icon on the No field to scan the barcode. In the base configuration the barcode should be the item No.





Resource Allocation list

CRONUS Ltd		
Service Task: 18 - 80001 - Computer III 533 MHz	Resource Allocations: 18 - 80001	Resource Allocation: Computer III 533 MHz
Document No. SO000016	MARK - Computer III 533 MHz - Active	Status Active
Service Item No. 18		Resource No. MARK
Item No. 80001		Description
Description Computer III 533 MHz		Service Item Description Computer III 533 MHz
Priority Low		Allocated Hours 2
Symptom Code		Reason Code
Fault Area Code		Starting Time 12:00 AM
Fault Code		Finishing Time 12:00 AM
Resolution Code		
Repair Status Code		

Tap the Resource Allocations button on the toolbar to open the Resource Allocation list from the [Service Task card](#). This list contains the allocated resources to the actual Service Task. In the list you can see the Resource No, Service Item Description, Description and Status.

Tap a line to open the [Resource Allocation card](#).

Resource Allocation card

If you select a Resource Allocation, this card opens and you can view the following details: Status, Resource No, Description, Service Item Description, Allocated Hours, Reason Code, Starting Time and Finishing Time.





Service Item card

CRONUS Ltd

My Service Tasks

SO000014 - Low - INITIAL

50000 - Computer III 533 MHz

SO000016 - Low - INITIAL

50000 - Computer III 533 MHz

Filter

Sort

Refresh

Computer III 533 MHz

Service Task

Document No.

SO000016

Service Item No.

18

Item No.

80001

Description

Computer III 533 MHz

Priority

Low

Symptom Code

Fault Area Code

Fault Code

Resolution Code

Repair Status Code

Lines

Start

Finish

Resource Alloc...

Computer III 533 MHz

Service Item

No.

18

Item No.

80001

Description

Computer III 533 MHz

Serial No.

121003

Customer No.

50000

Warranty Ending Date (Labor)

1/12/16

Warranty Ending Date (Parts)

1/12/16

Refresh

Hide fields

Tap the extra icon on the Service Item No. field of the [Service Task card](#) to open this card, where you can view the following details: No, Item No, Description, Serial No, Customer No, Warranty Ending Date (Labor) and Warranty Ending Date (Parts).





My Service Tasks

My Service Tasks list

This list contains the Service Tasks which are assigned to the currently logged in user depending on his Resource No configured in MobileNAV User Setup. Let's say you have MARK configured as Resource No, then you will see only those Service Tasks in the list which has an Active allocation for MARK. In the list you can see the Document No, Priority, Repair Status Code, Customer No and Description fields.

Tap a line to open the [Service Task card](#).

Service workflow example

Let's see a typical example for the service module. As a first step the back office will create a new Service Order and allocate Mark, as service technician. After that Mark launches MobileNAV application on his Tablet and goes to the My Service Tasks and checks the details. He uses the map integration to navigate to the customer. On the customer's site, he fills out the Service Item Worksheet. After finishing the job the back office employee sees the finished task and can post the Service Order.

Let's see the procedure.

1. Open the Dynamics 365 Business Central client.
2. Go to Departments/Service/Order Processing/Service Orders and create a new Service Order. Fill out the Customer No. and create a new Line. Check the Document No.





New - Service Order - SO000017 - Guildford Water Department

HOME ACTIONS NAVIGATE

View Demand Overview Order Promising Statistics E-Mail Queue Dimensions Comments Post... Test Report... Post and Print... Shipments Invoices Service Document Log Print... Email as Attachment Send To Show Attached Page

SO000017 - Guildford Water Department

General

No.: SO000017 Description: Customer No.: 50000 Contact No.: CT000063 Name: Guildford Water Department Address: 25 Water Way Post Code: GU7 5GT Contact Name: Mr. Jim Stewart Phone No.: E-Mail: guildford.water.department@cronuscorp.... City: Guildford Service Order Type: Contract No.: Response Date: 2015.01.30. Response Time: 12:41:19,417 Priority: Low Status: Pending Release Status: Open

Customer Service Hi... Customer No.: 50000 Quotes: 0 Orders: 6 Invoices: 1 Credit Memos: 0 Pstd. Shipments: 0 Pstd. Invoices: 0 Pstd. Credit Mem...: 0

Service Item Line De... Service Item No.: 18 Component List: 6 Troubleshooting: 1 Skilled Resources: 1

Notes Click here to create a new note.

Lines

Line	Service It...	Item No.	Service It...	Serial No.	Description	Repair Stat...	War...	Contract No.	Se
18	80001	DESKTOP	121003	Computer III 533 MHz	INITIAL	<input checked="" type="checkbox"/>	SC00006		

Invoicing 50000 14 DAYS 2015.02.11. Shipping GU7 5GT Mr. Jim Stewart Details

OK

3. Select the created line, and go to Functions/Resource Allocations, select the existing Non-active line and allocate MARK as Resource No., enter the Allocation Date and Allocated Hours.

Edit - Resource Allocations - SO

HOME

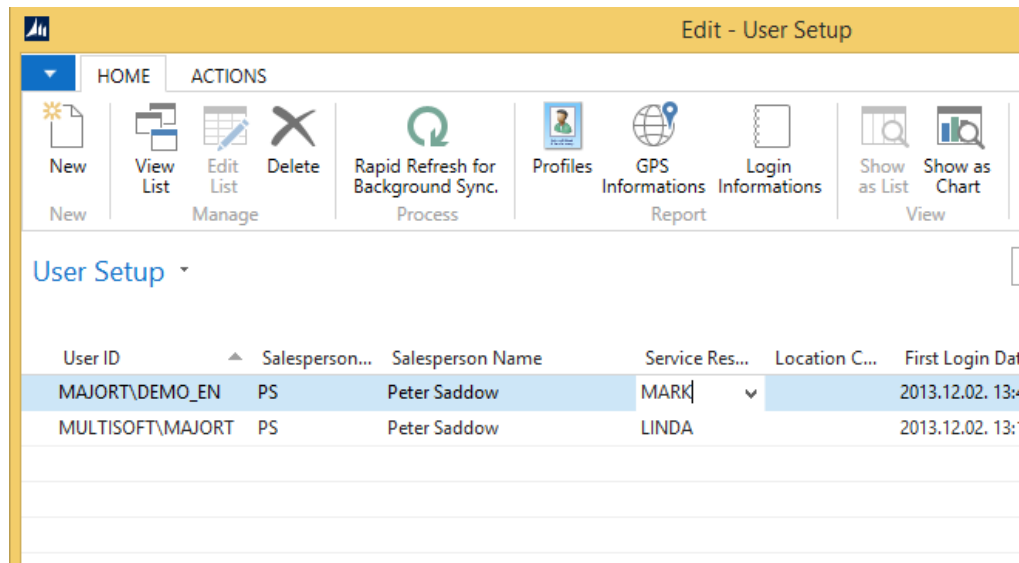
New View List Edit List Delete Cancel Allocation Allocate to all Service Items Resource Availability Res. Group Availability Canceled Allocation Entries Show as List Show as Chart On

Resource Allocations

Status	Service It...	Service Item Description	Resource No.	Allocat...	Allocated Hours
Active	18	Computer III 533 MHz	MARK	2014.02.12.	2,0

4. Check the assigned Resource No. for your MobileNAV user in Departments/MobileNAV/Users. It should be MARK.





5. Login with MobileNAV application, and open the Service category, and choose [My service task list](#).
6. Find and open the new Service Task with the Document No. created in step 2.



Note that the Symptom Code, Fault Codes are empty, and there is no registered lines for the Service Item Worksheet.

7. Tap the extra icon on the Document No. field. This opens the [Service Order card](#) with the details of the Service Order.





CRONUS Ltd

My Service Tasks

SO000014 - Low - INITIAL

50000 - Computer III 533 MHz

SO000016 - Low - INITIAL

50000 - Computer III 533 MHz

SO000017 - Low - IN PROCESS

50000 - Computer III 533 MHz

Filter

Sort

Refresh

Computer III 533 MHz

Document No.

SO000017

Service Item No.

18

Item No.

80001

Description

Computer III 533 MHz

Priority

Low

Symptom Code

No function

Fault Area Code

General

Fault Code

Not operating

Resolution Code

Product exchange (repair too expensive)

Repair Status Code

Lines

Start

Finish

Resource Alloc...

Service Order: SO000017 - Guildford W

No.

SO000017

Customer No.

50000

Name

Guildford Water Department

City

Guildford

Post Code

GU7 5GT

Address

25 Water Way

Address 2

Phone No.

E-Mail

corp.net

guildford.water.dep

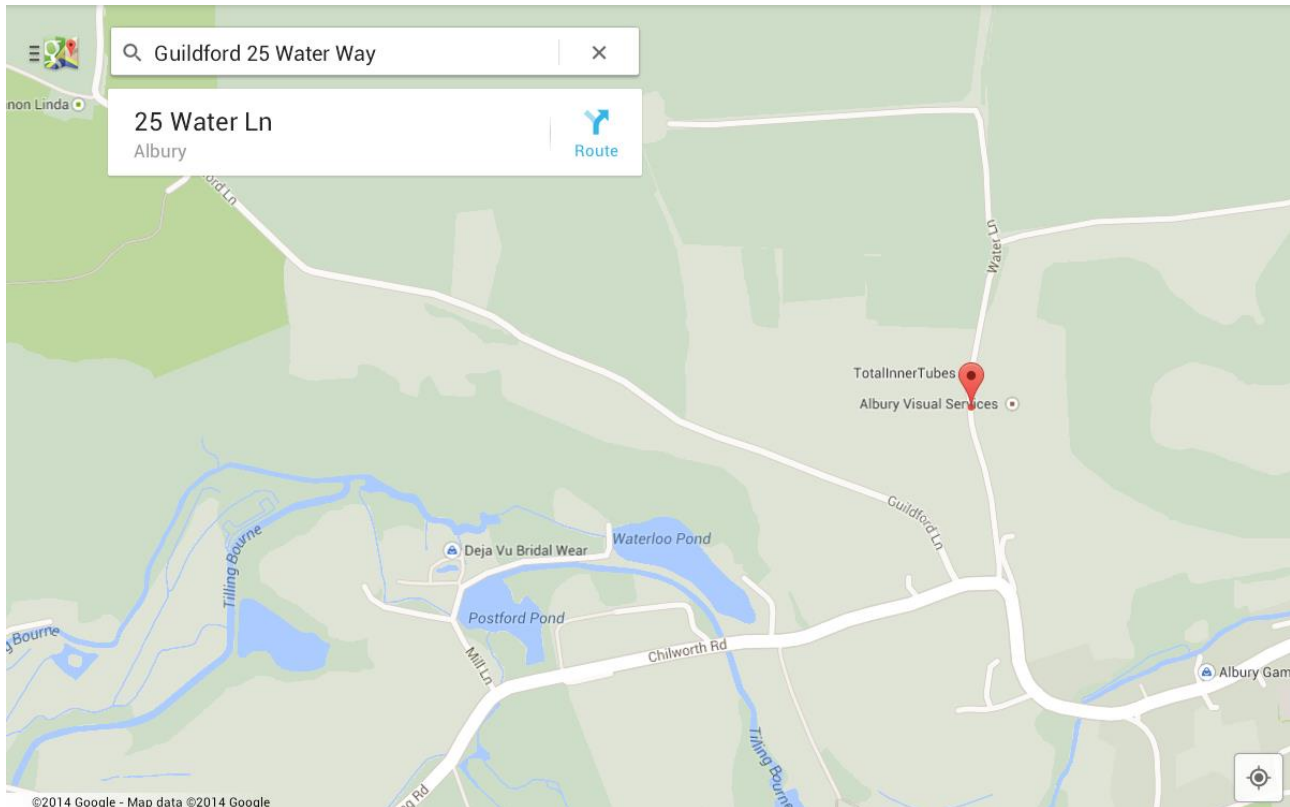
Contact No.

Lines

Refresh

Hide fields

8. Tap the map icon on the City line to open the Customer's address in Google Maps.



9. From here you can also start GPS navigation to plan a route to the address.





10. Tap Back to go back to MobileNAV application.
11. Tap the Start button, and note that the Repair Service Status changed to Service in progress, and the Starting Date and Time has been filled with the actual date and time.

The screenshot displays the MobileNAV application interface for 'CRONUS Ltd'. It consists of three main panels:

- My Service Tasks:** A list of tasks with details like 'SO000014 - Low - INITIAL' and '50000 - Computer III 533 MHz'. It includes a 'Filter' button at the bottom.
- Service Task: 18 - 8:** A detailed view of a specific task. It shows fields for 'Symptom Code', 'Fault Area Code', 'Fault Code', 'Resolution Code', 'Repair Status Code' (Service in process), 'Starting Date' (1/28/15), 'Starting Time' (02:41 PM), 'Finishing Date', and 'Finishing Time' (12:00 AM). It includes a 'Start' button at the bottom.
- Service Lines: 18 - 80001 - Con:** A panel showing 'No results found.' It includes an 'Add' button at the bottom.

The bottom navigation bar contains icons for 'Lines', 'Start', 'Finish', 'Resource Alloc...', and a 'Back' arrow.

12. Fill out the Symptom Code, Fault Area Code, Fault Code and Resolution Code.





The screenshot shows the MobileNAV interface for 'CRONUS Ltd'. It features three main panels:

- My Service Tasks:** A list of tasks with status indicators. The selected task is 'SO000017 - Low - IN PROCESS' for '50000 - Computer III 533 MHz'.
- Service Task: 18:** A detailed view of the selected task, showing fields like Document No. (SO000017), Service Item No. (18), Item No. (80001), Description (Computer III 533 MHz), Priority (Low), Symptom Code (No function), Fault Area Code (General), Fault Code (Not operating), Resolution Code (Product exchange (repair too expensive)), and Repair Status Code.
- Computer III 533 MHz:** A panel showing 'No results found.'

Each panel has a toolbar at the bottom with icons for Filter, Sort, and Refresh. The bottom-most toolbar includes icons for Lines, Start, Finish, and Resource Alloc...

13. Tap the Lines toolbar button to open the [Service Line list](#) of this Service Task.

14. Tap the Add toolbar button to create a new line.

The screenshot shows the MobileNAV interface for 'CRONUS Ltd' after navigating to the 'Service Lines' section. It features three main panels:

- Task: 18 - 80001 - Computer III 533 MHz:** A detailed view of the task, showing fields like Document No. (SO000017), Service Item No. (18), Item No. (80001), Description (Computer III 533 MHz), Priority (Low), Symptom Code (No function), Fault Area Code (General), Fault Code (Not operating), Resolution Code (Product exchange (repair too expensive)), and Repair Status Code.
- Service Lines: 18 - 80001 - Computer III 533 MHz:** A panel showing a list of service lines. The first line is 'Resource - 10,000' with a quantity of '- 0'.
- Service Line: -:** A panel for editing a service line, showing fields like Type (Resource), No., Description, Service Item Serial No. (121003), Unit of Measure Code, Location Code, Quantity (0), Unit Price Excl. VAT (0), Line Discount % (0), and Line Amount Excl. VAT.

Each panel has a toolbar at the bottom. The bottom-most toolbar includes icons for Add, Filter, Sort, and Refresh. The rightmost panel also includes icons for Refresh, Delete, Hide fields, and Navigation.





15. Tap the No. field to select your Resource No., and select MARK from the list.
16. Modify the Quantity field to 2.

The screenshot shows the MobileNAV application interface for 'CRONUS Ltd'. It consists of three main panels:

- Left Panel (Document No. 18 - 80001 - Computer III 533 MHz):** Contains fields for Document No. (SO000017), Service Item No. (18), Item No. (80001), Description (Computer III 533 MHz), Priority (Low), Symptom Code (No function), Fault Area Code (General), Fault Code (Not operating), Resolution Code (Product exchange (repair too expensive)), and Repair Status Code.
- Middle Panel (Service Lines: 18 - 80001 - Computer):** Shows a list of service lines. The first line is 'Resource - MARK - 10,000' with 'Mark Hanson - 2 HOUR'.
- Right Panel (Service Line: MARK -):** Contains fields for Type (Resource), No. (MARK), Description (Mark Hanson), Service Item Serial No. (121003), Unit of Measure Code (HOUR), Location Code, Quantity (2), Unit Price Excl. VAT (54), Line Discount % (0), and Line Amount Excl. VAT.

The bottom navigation bar includes icons for Lines, Start, Finish, Resource Alloc..., Add, Filter, Sort, Refresh, Refresh, Delete, Hide fields, and Navigation.

17. Tap the Add button on the [Service Line list](#) again to create an additional new line.
18. Modify the Type to Item.
Note that you have extra icons on the No. field, and Spare Part Action and Replaced Item No. fields appeared.





CRONUS Ltd

Service Task: 18 - 80001 - Computer III

Document No.
SO000017

Service Item No.
18

Item No.
80001

Description
Computer III 533 MHz

Priority
Low

Symptom Code
No function

Fault Area Code
General

Fault Code
Not operating

Resolution Code
Product exchange (repair too expensive)

Repair Status Code

Service Lines: 18 - 80001 - Computer III

Resource - MARK - 10,000
Mark Hanson - 2 HOUR

Item - - 20,000
- 0

Service Line: -

Type
Item

No.

Spare Part Action

Replaced Item No.

Description

Service Item Serial No.
121003

Unit of Measure Code

Location Code

Quantity
0

Unit Price Excl. VAT

Lines

Start

Finish

Resource Alloc...

Add

Filter

Sort

Refresh

Refresh

Delete

Hide fields

Navigation

19. Tap the No. field to select an Item, or you can also scan a barcode with a proper Item No.
20. Set Quantity to 1.

CRONUS Ltd

Service Task: 18 - 80001 - Computer III

Document No.
SO000017

Service Item No.
18

Item No.
80001

Description
Computer III 533 MHz

Priority
Low

Symptom Code
No function

Fault Area Code
General

Fault Code
Not operating

Resolution Code
Product exchange (repair too expensive)

Repair Status Code

Lines: 18 - 80001 - Computer III 533

Resource - MARK - 10,000
Mark Hanson - 2 HOUR

Item - 80103-T - 20,000
19" M009 Monitor - 1

Service Line: 80103-T -

Type
Item

No.
80103-T

Spare Part Action

Replaced Item No.

Description
19" M009 Monitor

Service Item Serial No.
121003

Unit of Measure Code

Location Code

Quantity
1

Unit Price Excl. VAT

Lines

Start

Finish

Resource Alloc...

Add

Filter

Sort

Refresh

Refresh

Delete

Hide fields

Navigation





21. Go back to the [Service Task card](#), and tap the Stop button. Note that the Repair Service Status changed to Service is finished, and the Finishing Date and Time has been filled with the actual date and time.

CRONUS Ltd

- 80001 - Computer III 533 MHz

Low

Symptom Code
No function

Fault Area Code
General

Fault Code
Not operating

Resolution Code
Product exchange (repair too expensive)

Repair Status Code
Service is finished

Starting Date
1/28/15

Starting Time
02:41 PM

Finishing Date
1/28/15

Finishing Time
02:41 PM

Service Lines: 18 - 80001 - C

Resource - MARK - 10,000
Mark Hanson - 2 HOUR

Item - 80103-T - 20,000
19" M009 Monitor - 1

Service Line: 80103-T -

Type
Item

No.
80103-T

Spare Part Action

Replaced Item No.

Description
19" M009 Monitor

Service Item Serial No.
121003

Unit of Measure Code

Location Code

Quantity
1

Unit Price Excl. VAT

22. Tap the Service Item Worksheet PDF icon on the Service Task card toolbar to generate the worksheet document in PDF format.





Home

pdf_temp.pdf

Service Item Worksheet

Page 1

Customer Address

Guildford Water Department
Mr. Jim Stewart
25 Water Way

Great Britain

CRONUS, London RC.

Document Type

Order

Document No.

SO000017

Order Date

01/28/15

Order Time

14:41:19

Contract No.

SC00006

Service Item No.	Service Item Group Code	Item No.	Serial No.	Description	Warranty	Repair Status Code	Service Shelf No.
18	DESKTOP	80001	121003	Computer III 533 MHz	Yes	FINISHED	

Service Lines

Service Item Serial No.	Type	No.	Variant Code	Description	Quantity	Fault Area Code	Symptom Code	Fault Code	Resolution Code
121003	Item	80103-T		19" M009 Monitor	1	1	1	11F	Z1
121003	Resource	MARK		Mark Hanson	2	1	1	11F	Z1

1 / 1

←

🏠

📄

⋮

📧

3:35

🔗

🖨

✕

23. If you have a mobile printer you can also print it out, or you can also send this as an email attachment.
24. Close the [Service Task card](#), and tap the Refresh button on the [My Service Task list](#).





- Note that the processed Service Task disappeared from the list.
25. Open the Dynamics 365 Business Central client again.
 26. Go to Departments/Service/Order Processing/Service Orders and find the processed Service Order, and note that the Status is now Finished.
 27. Select the existing line, and tap Functions/Service Item Worksheet, and note that the Service Item Worksheet has been filled out successfully from the mobile device.





Edit - Service Item Worksheet - 18 Computer III 533 MHz

CRONUS Ltd. ?

HOME

View Edit Demand Overview Adjust Service Price Comments Service Item Fault/Resol. Codes Relationships Troubleshooting OneNote Notes Links Refresh Go to Previous Next

Manage Planning Functions Worksheet Show Attached Page

18 Computer III 533 MHz

General

Document No.: SO000017

Service Item No.: 18

Item No.: 80001

Service Item Group Code: DESKTOP

Serial No.: 121003

Fault Reason Code:

Document Type: Order

Loaner No.:

Service Shelf No.:

Service Price Group Code:

Fault Area Code: 1

Symptom Code: 1

Fault Code: 11F

Resolution Code: Z1

Repair Status Code: FINISHED

Lines

Functions Line Find Filter Clear Filter

Type	No.	Description	Location C...	Unit of Mea...	Quantity	Fault Reaso...	Fault Area ...	Sym
Resource	MARK	Mark Hanson		HOUR	2	1		1
Item	80103-T	19" M009 Monitor			1	1		1

Customer

Shipping

Details

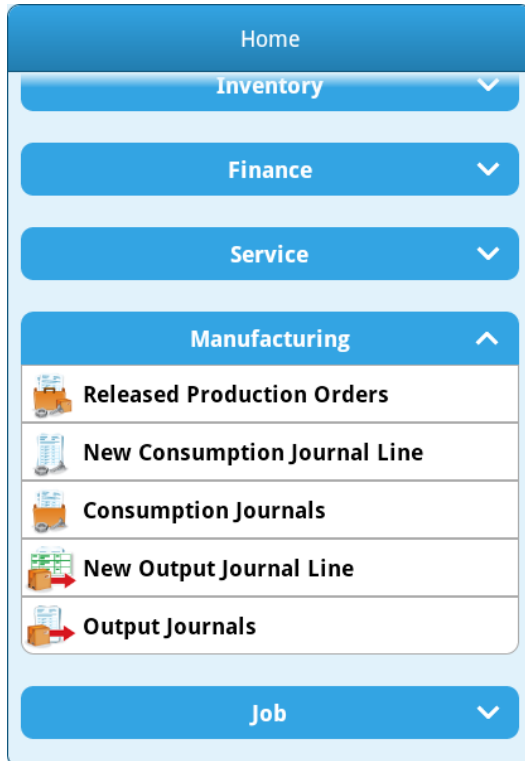
OK





Manufacturing

Concept



The manufacturing module covers the most commonly used functions of the execution part of manufacturing, starting with released production order.





Released Production Orders

Released Production Orders list

No.	Description	Quantity	Starting Date Time	Ending Date Time
101001	Loudspeaker 100W OakwoodDeluxe	15	12/31/13 08:00 AM	12/31/13 11:00 PM
101002	Loudspeaker 100W OakwoodDeluxe	12	12/31/13 08:00 AM	12/31/13 11:00 PM
101003	Loudspeaker 100W OakwoodDeluxe	10	12/31/13 08:00 AM	12/31/13 11:00 PM
1011002	Bicycle	27	1/30/15 08:00 AM	1/30/15 11:00 PM
1011003	Bicycle	16	1/30/15 08:00 AM	1/30/15 11:00 PM
1011004	Bicycle	10	1/28/15 04:43 PM	1/30/15 05:00 PM

In this menu you find the released production orders. The following information is displayed: No., Description, Quantity, Starting Date Time and Ending Date Time. You can filter by all of them.

Tap a line to open the Released Production Order card. Line(s) belonging to the production order will also open.

You can use barcode scanner to filter and open the proper Released Production Order.

Released Production Order card





CRONUS Ltd

Released Production Orders

101001 Loudspeaker 100W OakwoodDeluxe

Quantity: 15 - 12/31/13 08:00 AM - 12/31/13 11:00 PM

101002 Loudspeaker 100W OakwoodDeluxe

Quantity: 12 - 12/31/13 08:00 AM - 12/31/13 11:00 PM

101003 Loudspeaker 100W OakwoodDeluxe

Quantity: 10 - 12/31/13 08:00 AM - 12/31/13 11:00 PM

1011002 Bicycle

Quantity: 27 - 1/30/15 08:00 AM - 1/30/15 11:00 PM

1011003 Bicycle

Quantity: 16 - 1/30/15 08:00 AM - 1/30/15 11:00 PM

1011004 Bicycle

Quantity: 10 - 1/28/15 04:43 PM - 1/30/15 05:00 PM

Released Production Orders: 101002 L

No.

101002

Description

Loudspeaker 100W OakwoodDeluxe

Quantity

12

Starting Date-Time

12/31/13 08:00 AM

Ending Date-Time

12/31/13 11:00 PM

Released Production Order Line: 1

LS-100 Loudspeaker 100W OakwoodDeluxe

12 PCS

Barcode

Filter

Sort

Refresh

Lines

Job Card

Refresh

Hide fields

Navigation

Filter

Sort

Refresh

The following data can be seen on the Released Production Order card: No., Description, Quantity, Starting Date-Time and Ending Date-Time. These fields are not editable.

Toolbar functions:



Tap the Lines toolbar button to open the [Released Production Order Line list](#) which generally contains one line.



Tap the Job Card function to generate a report containing time and material need per Operation No.





Released Production Order Line list

The screenshot displays the MobileNAV application interface for 'CRONUS Ltd'. It features three side-by-side panels, each with a title bar and a close button (X).

- Released Production Orders: 101002 L**
 - No.: 101002
 - Description: Loudspeaker 100W OakwoodDeluxe
 - Quantity: 12
 - Starting Date-Time: 12/31/13 08:00 AM
 - Ending Date-Time: 12/31/13 11:00 PM
- Released Production Order Line: 10**
 - LS-100 Loudspeaker 100W OakwoodDeluxe
 - 12 PCS
- Released Production Order Line:**
 - Item No.: LS-100
 - Description: Loudspeaker 100W OakwoodDeluxe
 - Location Code
 - Quantity: 12 (with + and - buttons)
 - Finished Quantity: 0
 - Remaining Quantity: 12
 - Unit of Measure Code: PCS

Each panel has a bottom toolbar with icons for 'Lines', 'Job Card', 'Refresh', 'Hide fields', and 'Navigation' (left panel); 'Filter', 'Sort', and 'Refresh' (middle panel); and 'Prepare Produc...', 'Show Product...', 'Post', and 'Refresh' (right panel).

When the Released Production Order card is selected, its lines are also opened automatically. A production order usually contains one single line. The following information appears per line: Item No., Description, Location Code, Quantity and Unit of Measure Code. You can filter by Item No., Description, Location Code, Quantity, Finished Quantity, Remaining Quantity and Unit of Measure Code.

Released Production Order Line card

Selecting the line in the Released Production Order Line List, the detailed line Released Production Order Line Card opens with the following details: Item No., Description, Location Code, Quantity, Finished Quantity, Remaining Quantity and Unit of Measure Code.

Toolbar functions:



Tap Prepare Production Journal to automatically fill the production journal with the relevant consumption and output journal lines based on the actual content of the released production order line.



Tap this icon to view and adjust the previously prepared Production Journal Lines. After tapping the button the [Production Journal Lines list](#) will open.



Tap this icon to post the prepared and adjusted Production Journal Lines.





Production Journal Lines list

The Production Journal Lines list can be opened from the Released Production Order Line card. It contains journal lines previously generated by function Prepare Production Journal. The following information appears per line: Order No., Line No, Entry Type, Item No., Quantity and Output Quantity. You can filter by Posting Date, Entry Type (Consumption or Output), Item No., Location Code, Type, No., Description, Consumption Quantity, Output Quantity, Unit of Measure Code and Run Time.

Tap a journal line in the Production Journal Lines list to open the detailed Production Journal Lines Card.

Production Journal Line card

The Production Journal Lines Card contains detailed journal line information – see the picture above. The following fields are displayed: Posting Date, Entry Type (Consumption or Output), Item No., Location Code, Type, No., Description, Consumption Quantity (if the Entry Type is Consumption), Output Quantity (if the Entry Type is Output), Unit of Measure Code and Run Time. All fields are editable except Item No., Type, No. and Description.

Users can adjust quantities in journal lines and finally post the Released Production Order – use the toolbar function Post on the Released Production Order Line card.





Consumption Journals

Consumption Journals list



The Consumption Journals list contains the consumption journal batches. The user has to choose the appropriate one to continue. By choosing the desired journal batch its card opens and the journal lines belonging to the journal batch also open in a new window. The following information appears per line: Name and Description. You can also filter by both.

If you select an item, the detailed Consumption Journal card will open.





Consumption Journal card

CRONUS Ltd

Consumption Journals

DEFAULT
Default Journal

Consumption Journals: DEFAULT

Name
DEFAULT

Description
Default Journal

Consumption Journal Line: DEFAULT

1011004 - 10000
Item No.: 1100 - Quantity: 12

1011004 - 10000
Item No.: 1200 - Quantity: 12

1011004 - 10000
Item No.: 1300 - Quantity: 12

1011004 - 10000
Item No.: 1400 - Quantity: 12

1011004 - 10000
Item No.: 1450 - Quantity: 12

1011004 - 10000
Item No.: 1500 - Quantity: 12

1011004 - 10000
Item No.: 1600 - Quantity: 12

1011004 - 10000
Item No.: 1700 - Quantity: 12

1011004 - 10000
Item No.: 1800 - Quantity: 12

1011004 - 10000
Item No.: 1850 - Quantity: 12

1011004 - 10000
Item No.: 1900 - Quantity: 12

Filter Sort Refresh

Lines Calc. Consumpt. Post Refresh

Barcode Add Filter Sort Refresh

After the user selects a journal batch from the list, the Consumption Journal card opens and the belonging journal lines also open in a new window. The following fields appear: Name and Description. These fields are not editable.

Toolbar functions:



Tap the Lines button to open the [Consumption Journal Lines list](#) with the lines belonging to the actual journal batch.



Tap the Function Calculate Consumption button to generate consumption journal lines for a certain Released Production Order and Item No.



Tap the Post button to post the lines in the Consumption Journal.

Calculate Consumption report





Calculate Consumption

Template Name

CONSUMP

Batch Name

DEFAULT

Prod. Order No.

Item No.

Posting Date

3/26/14

Calc. Based on

Expected Output

Picking Location

Calculate

Hide fields

On the Consumption Journals card, the Calculate Consumption toolbar function is available, which can calculate the consumption for a selected Released Production Order and Item No.

Both Prod. Order No. and Item No. can be read in using the barcode scanner.

Calculation can be based on Actual Output or Expected Output – the desired option can be set in the request window.

The Posting Date and the Picking Location can also be specified before starting the calculation.

After the settings are entered, tap Calculate on the toolbar to start the consumption calculation.

Consumption Journal Line list

CRONUS Ltd

Consumption Journals: DEFAULT

Consumption Journal Line: DEFAULT

Consumption Journal Line: 1011004 -

Name

DEFAULT

Description

Default Journal

1011004 - 10000

Item No.: 1100 - Quantity: 12

1011004 - 10000

Item No.: 1200 - Quantity: 12

1011004 - 10000

Item No.: 1300 - Quantity: 12

1011004 - 10000

Item No.: 1400 - Quantity: 12

1011004 - 10000

Item No.: 1450 - Quantity: 12

1011004 - 10000

Item No.: 1500 - Quantity: 12

1011004 - 10000

Item No.: 1600 - Quantity: 12

1011004 - 10000

Item No.: 1700 - Quantity: 12

1011004 - 10000

Item No.: 1800 - Quantity: 12

1011004 - 10000

Item No.: 1850 - Quantity: 12

1011004 - 10000

Item No.: 1900 - Quantity: 12

Order No.

1011004

Order Line No.

10000

Item No.

1200

Description

Back Wheel

Quantity

12

Unit of Measure Code

PCS

Location Code

Bin Code

Posting Date

1/22/15

Refresh

Delete

Hide fields

Navigation





This window gives you an overview of the generated or manually entered journal lines. Tap a line in the list to open the detailed Consumption Journal Line card.

To add a new journal line manually, tap Add on the toolbar of the Consumption Journal Line list.

Tap the barcode icon to scan the barcode. In the base configuration the barcode can be the Order Line No. or Location Code or Bin Code – the relevant field has to be selected before the scan operation.

Consumption Journal Line card

Tap on the Add toolbar button in the Consumption Journal Line list to open a detailed card. It also serves for checking or modifying the previously entered or generated journal lines.

Fields Order No., Order Line No., Item No., Location Code, and Bin Code can be read in using the bar code scanner.

Extra functions:



Fields Order No., Order Line No., Item No., Location Code, and Bin Code can be read in using the barcode scanner.



Tap this icon in the Order No. field to open the related [Released Production Order card](#).



Tap this icon in the Order Line No. field to open the related [Released Production Order Line card](#).



Tap this icon in the Item No. field to open the [Item card](#).



Tap this icon in the Unit of Measure Code field to open the [Item Unit of Measure card](#).

New Consumption Journal Line

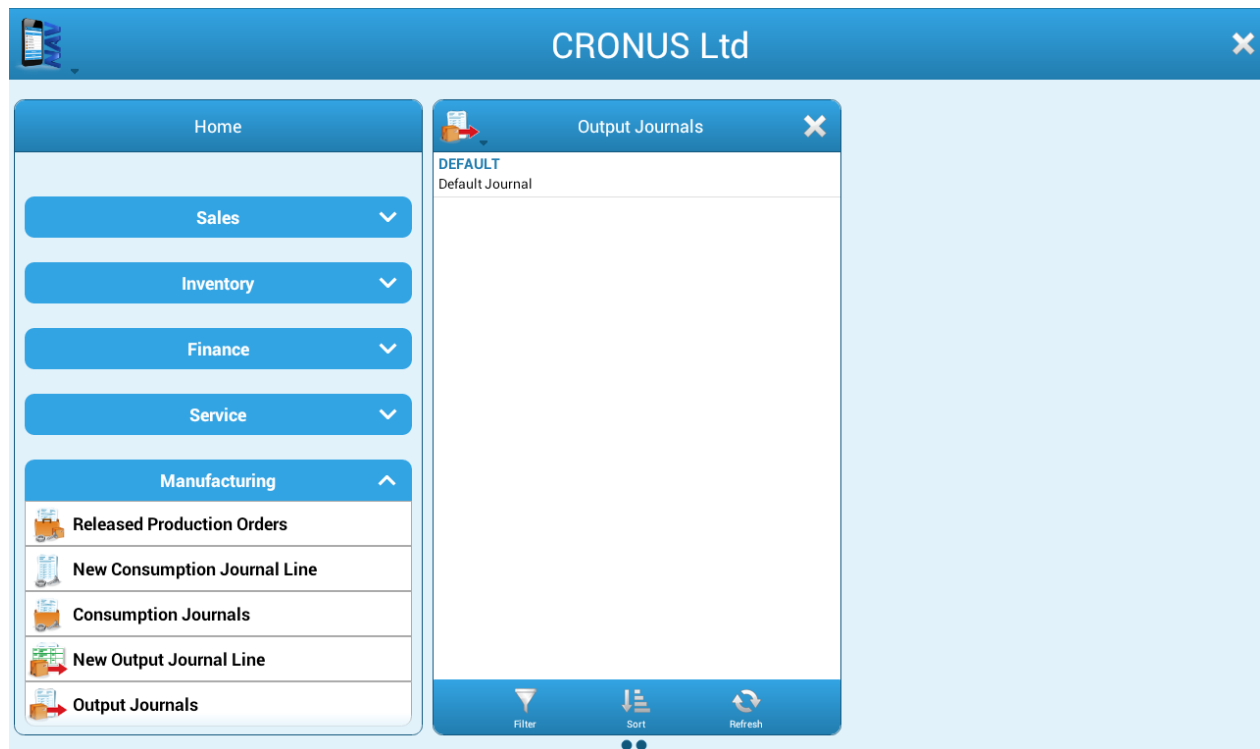
This menu item is just a short-cut for the [Consumption Journal Line card](#). Selecting the menu item the card opens with a new empty line. Here you can register a new line by specifying all necessary fields.





Output Journals

Output Journals list



The Output Journals list contains the output journal batches. The user has to choose the appropriate one to continue. By choosing the desired journal batch its card opens and the journal lines belonging to the journal batch also open in a new window. The following information appears per line: Name and Description. You can also filter by both.





Output Journal card

After the user selects a journal batch from the list, the Output Journals card opens and the respective journal lines also open in a new window. The following fields are available: Name and Description. These fields are not editable.

Toolbar functions:



Tap on the Lines icon to open the [Output Journal Line list](#).



Tap the Post icon to post the lines in the Output Journal.





Output Journals Line list

This window gives you an overview of the Output Journal Lines. Tap a line to open the detailed Output Journal Line card. The following information appears per line: Order No., Order Line No. and Item No. You can filter by Order No., Item No., Operation No., Description, Output Quantity, Unit of Measure Code, Location Code, Bin Code and Posting Date.

Tap a line to open the [Output Journal Line card](#).

To add a new journal line manually, tap the Add button on the toolbar of the Output Journal Line list.

Tap the barcode icon to scan the barcode. In the base configuration the barcode can be the Item No., Operation No. or Location Code or Bin Code – the relevant field has to be selected before the scan operation.

Output Journal Line card

Tap the Add toolbar icon in the Output Journal Line list to open this detailed card. It also serves for checking or modifying the previously entered or generated journal lines. The following information appears: Order No., Item No., Operation No., Description, Output Quantity, Unit of Measure Code, Location Code, Bin Code and Posting Date. All fields are editable.

Extra functions:



Fields Order No., Item No., Operation No., Location Code, and Bin Code can be read by using the barcode scanner.



Tap this icon in the Order No. field to open the related Released Production Order.





Tap this icon in the Item No. field to open the Released Production Order Line.



Tap this icon in the Unit of Measure Code field to open the Item Unit of Measure card.

Manufacturing workflow example

Let's see an example of the Released Production Journal usage. The back office prepares the Released Production Journal for 10 pieces of LS-100 loudspeaker.

Timothy Sneath, the production assistant at Cronus Ltd uses his smartphone to continue the manufacturing process in the workshop. He first finds and opens the Released Production Order in MobileNAV. Then he generates and opens the Production Journal lines for the found Released Production Order. Finally, he adjusts the consumption by changing the related Production Journal Lines and posts the Released Production Order.

Let's see the process.

1. The new Released Production Order 101006 is created in the back office with the Item No. LS-100 and Quantity of 10 pieces. The Refresh Production Order action is used which generates the order line.

101006 · Loudspeaker 100W OakwoodDeluxe

General

No.: 101006
Description: Loudspeaker 100W OakwoodDeluxe
Description 2:
Source Type: Item
Source No.: LS-100

Search Description: LOUDSPEAKER 100W OAKWOODDELUXE
Quantity: 10
Due Date: 1/22/2015
Assigned User ID:
Blocked:
Last Date Modified: 3/26/2014

Lines

Item No.	Due Date	Description	Starting Date-Time	Ending Date-Time	Quantity	Unit of Measure Code
LS-100	1/22/2015	Loudspeaker 100W OakwoodDeluxe	1/21/2015 8:00 AM	1/21/2015 11:00 PM	10	PCS

Schedule
8:00:00 AM | 1/21/2015 | 11:00:00 PM | 1/21/2015
Posting
RESALE

2. Open the Released Production Order number 101006 in MobileNAV. The Released Production Order Line list window opens automatically with the only line of the order.





CRONUS Ltd

Released Production Orders

- 101001 Loudspeaker 100W OakwoodDeluxe
Quantity: 15 - 12/31/13 08:00 AM - 12/31/13 11:00 PM
- 101002 Loudspeaker 100W OakwoodDeluxe
Quantity: 12 - 12/31/13 08:00 AM - 12/31/13 11:00 PM
- 101003 Loudspeaker 100W OakwoodDeluxe
Quantity: 10 - 12/31/13 08:00 AM - 12/31/13 11:00 PM
- 101004 Bicycle
Quantity: 5 - 1/21/15 08:00 AM - 1/21/15 11:00 PM
- 101005 Loudspeaker and bicycle
Quantity: 8 - 1/21/15 08:00 AM - 1/21/15 11:00 PM
- 101006 Loudspeaker 100W OakwoodDeluxe
Quantity: 10 - 1/21/15 08:00 AM - 1/21/15 11:00 PM
- 1011002 Bicycle
Quantity: 27 - 1/30/15 08:00 AM - 1/30/15 11:00 PM
- 1011003 Bicycle
Quantity: 16 - 1/30/15 08:00 AM - 1/30/15 11:00 PM

Released Production Orders: 101006 Lc

No. 101006

Description Loudspeaker 100W OakwoodDeluxe

Quantity 10

Starting Date-Time 1/21/15 08:00 AM

Ending Date-Time 1/21/15 11:00 PM

Released Production Order Line: 101006

LS-100 Loudspeaker 100W OakwoodDeluxe
10 PCS

3. Tap on the order line. The detailed Released Production Order Line card opens. Use the toolbar functions Prepare Production Journal (1) and Show Production Journal (2).

CRONUS Ltd

OakwoodDeluxe Release

No. 101006

Description Loudspeaker 100W OakwoodDeluxe

Quantity 10

Starting Date-Time 1/21/15 08:00 AM

Ending Date-Time 1/21/15 11:00 PM

101006 Loudspeaker 100W OakwoodDeluxe

LS-100 Loudspeaker 100W OakwoodDeluxe
10 PCS

Released Production Order Line: LS-100

Item No. LS-100

Description Loudspeaker 100W OakwoodDeluxe

Location Code

Quantity 10

Finished Quantity 0

Remaining Quantity 10

Unit of Measure Code PCS

1 2

Prepare Product Show Product Post Refresh

4. The generated Production Journal Lines appear.





The screenshot shows the MobileNAV interface for CRONUS Ltd. It consists of three main panels:

- Released Production Order Line: 101001**
 - LS-100 Loudspeaker 100W OakwoodDeluxe
 - 10 PCS
- Item Details: kwoodDeluxe**
 - Item No. LS-100
 - Description Loudspeaker 100W OakwoodDeluxe
 - Location Code
 - Quantity 10 (+ -)
 - Finished Quantity 0
 - Remaining Quantity 10
 - Unit of Measure Code PCS
- Production Journal Lines: LS-100 Loudspeaker**
 - 101006 - 320,000 Consumption - LSU-15 - 10 - 0
 - 101006 - 330,000 Consumption - LSU-8 - 10 - 0
 - 101006 - 340,000 Consumption - LSU-4 - 10 - 0
 - 101006 - 350,000 Consumption - FF-100 - 10 - 0
 - 101006 - 360,000 Consumption - C-100 - 10 - 0
 - 101006 - 370,000 Consumption - HS-100 - 10 - 0
 - 101006 - 380,000 Consumption - SPK-100 - 40 - 0
 - 101006 - 390,000 Output - LS-100 - 10 - 10

At the bottom, there are navigation icons: Filter, Sort, Refresh, Prepare Product, Show Product, Post, and Refresh.

5. Tap on the Consumption type journal line with Item No. = SPK-100. The detailed Production Journal Line card opens. Adjusts the spike consumption quantity to 42 (planned consumption quantity was 40).

The screenshot shows the detailed Production Journal Line card for SPK-100. It consists of three main panels:

- Production Order Line: LS-100 Loudspeaker**
 - Item No. LS-100
 - Description Loudspeaker 100W OakwoodDeluxe
 - Location Code
 - Quantity 10 (+ -)
 - Finished Quantity 0
 - Remaining Quantity 10
 - Unit of Measure Code PCS
- Production Journal Lines: LS-100 Loudspeaker**
 - 101006 - 320,000 Consumption - LSU-15 - 10 - 0
 - 101006 - 330,000 Consumption - LSU-8 - 10 - 0
 - 101006 - 340,000 Consumption - LSU-4 - 10 - 0
 - 101006 - 350,000 Consumption - FF-100 - 10 - 0
 - 101006 - 360,000 Consumption - C-100 - 10 - 0
 - 101006 - 370,000 Consumption - HS-100 - 10 - 0
 - 101006 - 380,000 Consumption - SPK-100 - 42 - 0
 - 101006 - 390,000 Output - LS-100 - 10 - 10
- Production Journal Lines: 101006 - 380,000**
 - Posting Date 3/26/14
 - Entry Type Consumption
 - Item No. SPK-100
 - Location Code
 - Type
 - No.
 - Description Spike for LS-100
 - Consumption Quantity 42** (+ -)
 - Unit of Measure Code PCS
 - Run Time 0

At the bottom, there are navigation icons: Filter, Sort, Refresh, Prepare Product, Show Product, Post, Refresh, Hide fields, and Navigation.

6. Tap the Post toolbar icon to post the Released Production Order.





Released Production Order Line: LS-100 ✕

Item No.	LS-100
Description	Loudspeaker 100W OakwoodDeluxe
Location Code	
Quantity	10 + -
Finished Quantity	0
Remaining Quantity	10
Unit of Measure Code	PCS

Prepare Produc... Show Producti... Post Refresh

7. After the successful post operation, the Finished Quantity on the Released Production Order changes from 0 to 10.

Released Production Order Line: LS-100 ✕

Item No.	LS-100
Description	Loudspeaker 100W OakwoodDeluxe
Location Code	
Quantity	10 + -
Finished Quantity	10
Remaining Quantity	0
Unit of Measure Code	PCS

Prepare Produc... Show Producti... Post Refresh





8. Colleagues in the back office check the Released Production Order 101006. They check the Finished Quantity and the Remaining Quantity. They see that the production has finished.

Edit - Released Production Order - 101006 - Loudspeaker 100W OakwoodDeluxe

HOME ACTIONS NAVIGATE REPORT

Put-away/Pick Lines/Movement Lines
Registered Pick Lines
Registered Invt. Movement Lines

Order

101006 · Loudspeaker 100W OakwoodDeluxe

General

No.: 101006 Search Description: LOUDSPEAKER 100W OAKWOODDELUXE
Description: Loudspeaker 100W OakwoodDeluxe Quantity: 10
Description 2: Due Date: 1/22/2015
Source Type: Item Assigned User ID:
Source No.: LS-100 Blocked:
Last Date Modified: 3/26/2014

Lines

Item No.	Description	Starting Date-Time	Ending Date-Time	Quantity	Unit of Measure Code	Finished Quantity	Remaining Quantity	Unit Cost
LS-100	Loudspeaker 100W OakwoodDeluxe	1/21/2015 8:00 AM	1/21/2015 11:00 PM	10	PCS	10	0	15.00

Schedule: 8:00:00 AM | 1/21/2015 | 11:00:00 PM | 1/21/2015
Posting: RESALE

OK

9. They also check the Statistics of the Released Production Order using the toolbar function Statistics. They realize the slight deviation in the material cost.

Edit - Production Order Statistics - 101006 - Loudspeaker 100W OakwoodDeluxe

HOME

View Edit Refresh Clear Filter Go to Previous Next

Manage Page

101006 · Loudspeaker 100W OakwoodDeluxe

General

	Standard Cost	Expected Cost	Actual Cost	Dev. %	Variance
Material Cost:	1,500.00	1,500.00	1,530.00	2	30.00
Capacity Cost:	0.00	0.00	0.00	0	0.00
Subcontracted Cost:	0.00	0.00	0.00	0	0.00
Capacity Overhead:	0.00	0.00	0.00	0	0.00
Manufacturing Overhead:	0.00	0.00	0.00	0	0.00
Total Cost:	1,500.00	1,500.00	1,530.00	2	30.00
Capacity Need:	MINUTES	0	0	0	

OK

10. Finally they check the Item Ledger Entries of the Released Production Order using toolbar function Entries/Item Ledger Entries. They can see what caused the deviation of the material cost.





View - Item Ledger Entries - Released Production Order 101006 Loudspeaker 100W OakwoodDeluxe

HOME

CRONUS Ltd. - MobileNAVDocumentationExamples - szj-n2.multi...

Item Ledger Entries

Type to filter (F3) | Posting Date

Filter: Production • 101006

Posting Date	Entry Type	Document Type	Document No.	Item No.	Descripti...	Location Code	Quantity	Invoiced Quantity	Remaining Quantity	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non-Invtbl.)	Open	Order Type	Entry No.
3/26/2014	Consumption		101006	LSU-15			-10	-10	0	0.00	-150.00	0.00	<input type="checkbox"/>	Production	350
3/26/2014	Consumption		101006	LSU-8			-10	-10	0	0.00	-150.00	0.00	<input type="checkbox"/>	Production	351
3/26/2014	Consumption		101006	LSU-4			-10	-10	0	0.00	-150.00	0.00	<input type="checkbox"/>	Production	352
3/26/2014	Consumption		101006	FF-100			-10	-10	0	0.00	-150.00	0.00	<input type="checkbox"/>	Production	353
3/26/2014	Consumption		101006	C-100			-10	-10	0	0.00	-150.00	0.00	<input type="checkbox"/>	Production	354
3/26/2014	Consumption		101006	HS-100			-10	-10	0	0.00	-150.00	0.00	<input type="checkbox"/>	Production	355
3/26/2014	Consumption		101006	SPK-100			-40	-40	0	0.00	-600.00	0.00	<input type="checkbox"/>	Production	356
3/26/2014	Consumption		101006	SPK-100			-2	-2	0	0.00	-30.00	0.00	<input type="checkbox"/>	Production	357
3/26/2014	Output		101006	LS-100			10	0	10	0.00	0.00	0.00	<input checked="" type="checkbox"/>	Production	358

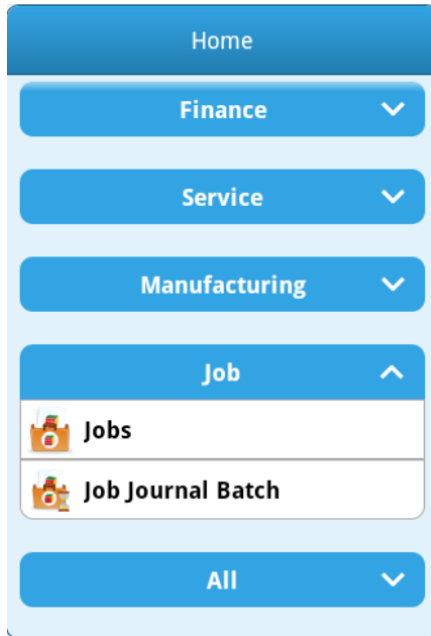
Close





Job

Concept



The Job module is designed for project managers who would like to have up-to-date information about the project tasks in and out of office and would like to reach the planned and actual project information. The project members can register the work per projects.

The project manager registers the Jobs in Dynamics 365 Business Central. He registers the tasks for the project and plans the job per resources, items. The planning lines can be modified in MobileNAV too.

The project member registers his work in the Job Journal. He can choose the Job and Job Task. He can also post the Lines.

The project manager can browse the jobs, control the amounts and can let run the reports as Items/Job, to show the used items, the planned and actual work.

These functions are available in online mode.

Jobs

In this Menu you can list your Jobs, Job tasks and you can manage your Job Planning lines.





Jobs list



In this menu you find the list of the Jobs with the following information: No, Status, Description, Bill-to Name, Ending Date and Person Responsible.

Tap on a line to open the [Job Card](#).

Job card

If you select a Job the card opens and you can view the following details: No, Description, Status, Bill-to Customer No, Bill-to Name, Bill-to Postcode, Bill-to City, Bill-to Address, Bill-to Address2, Starting Date, Ending Date, Person Responsible, Blocked, Recog. Sales Amount, Recog. Costs Amount, Total WIP Sales Amount and Next Invoice Date.

These fields are not editable.

Extra functions:



Tap the map icon on the City, Postcode, Address, Address2 fields to view the address on the map.

Toolbar functions:



Tap the Tasks toolbar button to open the [Job tasks List](#) which are basically the created job tasks for this Job.



Tap Items/Job, Planning Lines, Sugg. Billing toolbar button to display the actual report in PDF format.





Job Tasks list

CRONUS Ltd.

Job: GUILDFORD, 10 CR

Order

Bill-to Customer No.
50000

Bill-to Name
Guildford Water Department

Bill-to Post Code
GU7 5GT

Bill-to City
Guildford

Bill-to Address
25 Water Way

Bill-to Address 2

Tasks Items/Job Planning Lines

GUILDFORD, 10 CR

1000 - Begin-Total - Setting up Ten Conference Rooms
0 - 0 - 0

1100 - Begin-Total - Preliminary Services
0 - 0 - 0

1110 - Posting - Determining Specifications
215.6 - 0 - 0

1120 - Posting - Selecting Furnishings
539 - 0 - 0

1130 - Posting - Obtaining Customer Approval
161.7 - 916.3 - 0

1190 - End-Total - Total Preliminary Services
916.3 - 916.3 - 0

1200 - Begin-Total - Assembling the Furniture etc.
0 - 0 - 0

Filter Sort Refresh

Preliminary Services

Job No.
GUILDFORD, 10 CR

Job Task No.
1190

Description
Total Preliminary Services

Job Task Type
End-Total

Job Posting Group

Schedule (Total Cost)
916.3

Schedule (Total Price)
1.700

Planning Lines Refresh Hide fields Navigation

In this menu you find the list of the Job tasks related to the selected Job. The following information appears on the screen: Job Task No, Job Task Type, Description, End Total Amounts of Schedule Total Cost, Contract Total Cost and Contract Invoiced Price.

Tap on a line to open the [Job Task Card](#).

Job Task card

If you select a Job task, the card opens and you can view the following details: Job No, Job Task No, Description, Job Task Type, Job Posting Group, Schedule (Total Cost), Schedule (Total Price), Contract (Total Cost) and Contract (Invoiced Price).

These fields are not editable.

Toolbar functions:



Tap the Planning Lines toolbar button to open the [Job Planning Lines List](#) which are created to the actual Job Task.





Job Planning Lines list

In this menu you find the list of the Job Planning Lines. The following information is displayed: Job Task No, Line No, Line Type, Type, No, Description and Total Cost .

Tap on a line to open the [Job Planning Line Card](#).

Tap Add to create new Lines.

Job Planning Line card

If you select a Job Planning Line, the card opens and you can view the following details: Line Type, Type, No, Description, Work Type Code, Unit of Measure Code, Quantity, Unit Cost, Unit Price, Line Discount%, Line Amount (LCY), Total Cost (LCY) and Total Price (LCY).

The fields are editable.

Extra functions:



Tap the icon on the No. field in case of Type = Item to open the [Item card](#).



Tap the barcode icon on the No. field in case of Type = Item to select the Item with barcode scanning (by default the Item No. is used).

Job Journal Batch

In this menu you can register and post the journal lines to the selected Job and Job Task.





Job Journal Batch list



In this menu you find the list of the Job Journal Batches. The following information is displayed: Batch Name and Description.

Tap on a line to open the [Job Journal Batch card](#).

Job Journal Batch card

If you select a Job Journal Batch card, the card opens with Journal Template Name, Name and Description. These fields are not editable.

Toolbar functions:



Tap the Lines toolbar button to open the [Job Journal Line List](#) where you can register the Job Journal Lines.



Tap the Post button to post the Job journal Lines.





Job Journal Line list

If you select the Job journal batch the Job Journal Lines appear with the following details: Doc No, Job No, Job Task No, Description, Quantity and Unit of measure. You can filter and you can sort the list.

Tap on a line to open the [Job Journal Line card](#).

Tap Add to create new Lines.

Job Journal Line card

If you select a Job Journal Line, the card opens and you can view the following details: Line Type, Doc No, Job No, Job Task No, Type, No, Description, Quantity, Unit of measure code, Unit Cost, Unit Price, Line Amount and Posting Date.

These fields are editable.

Extra functions:



Tap the Jobs icon on the Job No field to open the [Job Card](#).



Tap the Job Tasks icon on the Job Task No field to open the [Job Task Card](#).



Tap the icon on the No. field in case of Type = Item to open the [Item card](#).



Tap the barcode icon on the No. field in case of Type = Item to select the Item with barcode scanning (by default the Item No. is used).





Job workflow example

Let's see a typical example for the job module. As a first step Timothy, the project manager will create a new Job in Dynamics 365 Business Central and define the job tasks, because his client Deerfield Graphics Company ordered items for setting up two new training rooms.

On the job starting date he is on the client side and together with the client they plan the details of the tasks on his tablet. He assigns Linda and Mark to the tasks and plan also some item usage. They check the planned data with the client.

Linda as a project member registers and post her work on her iPhone.

Timothy, the project manager checks the planned and actual usage in the Dynamics 365 Business Central.

Let's see the procedure.

1. Open the Dynamics 365 Business Central client.
2. Go to Departments/Jobs/Job list and create a new Job.

The screenshot shows the 'New Job Card' form in Dynamics 365 Business Central. The form is titled 'J00010 - Setting up twoTraining Rooms'. It has a top navigation bar with tabs for HOME, ACTIONS, NAVIGATE, and REPORT. Below the navigation bar is a ribbon with various action buttons like View, Edit, New, Delete, Copy Job Tasks, Job Task Lines, Job Planning Lines, Statistics, G/L Account, Resource, Item, WIP Entries, Ledger Entries, Email as Attachment, OneNote, Notes, Links, Refresh, Clear Filter, and Page. The main form area is divided into sections: General, Posting, and Duration. The General section contains fields for No. (J00010), Description (Setting up twoTraining Rooms), Bill-to Customer No. (40000), Bill-to Contact No. (CT000037), Bill-to Name (Deerfield Graphics Company), Bill-to Address (10 Deerfield Road), Bill-to Address 2, Bill-to Post Code (GL1 9HM), Bill-to City (Gloucester), Bill-to Country/Region Code (GB), Bill-to Contact (Mr. Kevin Wright), Search Description (SETTING UP TWOTRAINING ROOMS), Person Responsible (TIMOTHY), and Last Date Modified (2014.04.02). The Posting section contains fields for Status (Order), Job Posting Group (SETTING UP), WIP Method, WIP Posting Method (Per Job), Allow Schedule/Contract Lines, and Apply Usage Link. The Duration section contains fields for Starting Date and Creation Date (2014.04.02). On the right side of the form, there is a 'Job Details' panel showing Job No. (J00010), Resource (0), Item (0), and G/L Account (0). Below the Job Details panel is a 'Notes' section with a link 'Click here to create a new n...'. An 'OK' button is located at the bottom right of the form.

3. Go to the Job Task Lines and create new Job tasks to the new Job.





Job Task Ty...	Totalling	Job Posting ...	WIP-Total	WIP Method	Start Date	End Date	Schedule
Begin-Total							
Begin-Total		SETTING UP					
Posting		SETTING UP					
Posting		SETTING UP					
End-Total	1100.1199						
Begin-Total							
Posting		SETTING UP					
Posting		SETTING UP					
End-Total	1200.1299						
End-Total	1000.1999						

4. Open the MobileNAV client.
5. Go to the Jobs and select the new Job which is already in the list. The Job card opens up. Tap the Tasks button to check the tasks. Choose the first task with Posting type and tap the Planning Lines, then tap Add. Type in the planned data. For resource select the Type "Resource" and for item usage select the Type "Item" on the Job Planning Line card.





6. When finished, go back to the new Job card and tap the Planning Lines button. The report is displayed in PDF format.

Job Planning Lines
CRONUS Ltd.

April 2, 2014
Page 1
MULTISOFTTRITA

Line Type	Planning Date	Type	Document No.	No.	Description	Quantity	Unit of Measure Code	Total Cost (GBP)	Line Discount Amount (G)	Line Amount (GBP)
Job No. J00010 Setting up two Training Rooms										
Job Task No. 1110 Selecting furnishing										
Schedule	04/02/14	Resour	LINDA		Linda Martin	12	HOUR	75.60	0.00	150.00
Schedule	04/02/14	Item	1896-S		ATHENS Desk	1	PCS	506.60	0.00	649.40
Schedule	04/02/14	Text			Linda should check the	0		0.00	0.00	0.00
Schedule								582.20	0.00	799.40
Contract								0.00	0.00	0.00
Job Task No. 1120 Selecting hardwer										
Schedule	04/02/14	Resour	MARK		Mark Hanson	2	HOUR	63.80	0.00	108.00
Schedule	04/02/14	Item	80103		19" M009 Monitor	2	PCS	42.00	0.00	83.20
Schedule								105.80	0.00	191.20
Contract								0.00	0.00	0.00
Total Schedule								688.00	0.00	990.60
Total Contract								0.00	0.00	0.00

7. For registering, go to Jobs in your MobileNAV client, then tap Job journal Batch and choose the default journal. Tap Add to create a new line. Select the Type, Doc No, Job No and Job task No, the Resource and Quantity.




CRONUS Ltd.
✕


Job Journal Batch: DEFAULT
✕

Journal Template Name
JOB

Name
DEFAULT

Description
Default Journal

Lines
Post
Refresh



Job Journal Line: DEFAULT
✕

W4-01 - GUILDFORD, 10 CR - 1210
Delivering and Assembling the Furniture - 8 HOUR

W5-01 - GUILDFORD, 10 CR - 1210
Delivering and Assembling the Furniture - 4 HOUR

W5-01 - GUILDFORD, 10 CR - 1210
Delivering and Assembling the Furniture - 3 HOUR

J001 - J00010 - 1110
Linda Martin - 11 HOUR

+
Filter
Sort
Refresh


Journal Line: J001 - J00010 -
✕

Line Type
Schedule

Document No.
J001

Job No.
J00010

Job Task No.
1110

Type
Resource

No.
LINDA

Description
Linda Martin

Refresh
Delete
Hide fields
Navigation

- Go back to the Journal Batch card and tap the Post button. The registered lines will be posted.
- Go to Dynamics 365 Business Central find the Jobs, select the new Job at the Job list and run the Job Actual to Budget report on the Report Tab. You can check the planned and actual data.

Job Actual To Budget

CRONUS Ltd.

2014 April
Page
MULTISOFT.VRT

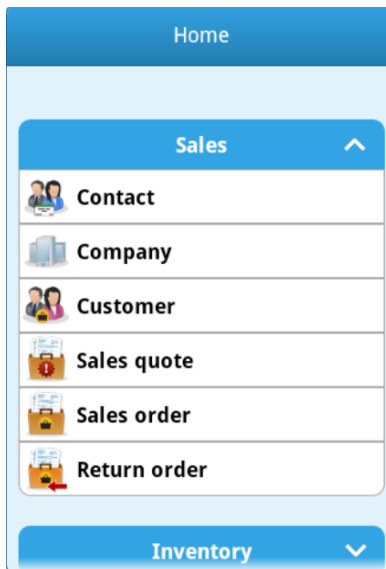
Quantity			Total Cost (GBP)			Line Amount (GBP)		
Schedule	Usage	Difference	Schedule	Usage	Difference	Schedule	Usage	Difference
J00010 Setting up two Training Rooms								
Job Task No. 1110 Selecting furnishing								
Resource LINDA HOUR	11	12	144.90	69.30	75.60	287.50	137.50	150.00
Item 1896-S PCS	1	1	506.60		506.60	649.40		649.40
Total for Job Task 1110			651.50	69.30	582.20	936.90	137.50	799.40
Job Task No. 1120 Selecting hardware								
Resource MARK HOUR	2	2	63.80		63.80	108.00		108.00
Item 80103 PCS	2	2	42.00		42.00	83.20		83.20
Total for Job Task 1120			105.80		105.80	191.20		191.20
			Total for Job J00010			1 128.10	137.50	990.60



Offline configuration

Sales

Concept



The Sales module is designed for sales representatives who work on the client side and would like to access the Dynamics 365 Business Central database.

If they do not have Internet connection they can work with MobileNAV in offline mode as well.

With MobileNAV, sales people can check the information about the contacts and customers and can add new customers as well.

They can create sales quotes, sales orders and return orders while out of office.





Contact

Contact list



In this menu you find the list of the Contacts with Type Person. By tapping the Refresh button you will see your Contacts. If you disable the Own filter, you will see all of the Contacts. The following information appears: Name, Name2 and Company Name.

Tap a line to open the [Contact Card](#).

Contact card

If you select a Contact, the card opens and you can view the following details: No, Name, Name2, City, Post Code, Address, Phone No, Mobile Phone No, E-Mail, Home Page, Type, Company No., Company Name, Job Title and Salesperson.

Extra functions:



Tap the map icon on the City, Post Code, Address fields to view the address on the map.



Tap the e-mail icon on the E-Mail No field to send an e-mail to your client.



Tap the phone icon on the Phone No or Mobile Phone field to dial the phone number.



Tap the icon on the Home Page field to open the homepage of the client.



Tap this icon on the Company No. field to open the [Company card](#) of the contact.





Toolbar functions:



Tap the Import/Export toolbar button to import or export your contact data between your device and the Dynamics 365 Business Central database.

Company

Company list



The Companies list opens with the following data: Name, Name2 and Salesperson Code.

Tap a Company to open the [Company card](#).

Company card

If you select a Company, the card opens and you can view the following details: No, Name, Name2, City, Post Code, Address, E-Mail, Phone No, Mobile Phone No, Homepage and Salesperson.

Extra functions:



Tap the map icon on the City, Post Code or Address fields to view the address on the map.



Tap the e-mail icon on the E-Mail No field to send an e-mail to your client.



Tap the phone icon on the Phone No or Mobile Phone No field to dial the phone number.





Tap the icon on the Home Page field to open the homepage of the client.

Toolbar functions:



Tap the Employees toolbar button to see the [Employees List](#). You can check the persons related to the current company.



Tap the Make Customer toolbar button to create a Customer from the Contact (company type) if it does not exist.



Tap the Import/Export toolbar button to import or export your contact data between your device and the Dynamics 365 Business Central database.

CRM workflow example

Let's see a typical example for the CRM part. Linda, the sales representative has no Internet connection but she would like to check the company data and create a customer from the companies: Big 5 Video and Spotsmeyer's Furnishings. She would like to have the data in the Dynamics 365 Business Central database when she has Internet connection again.

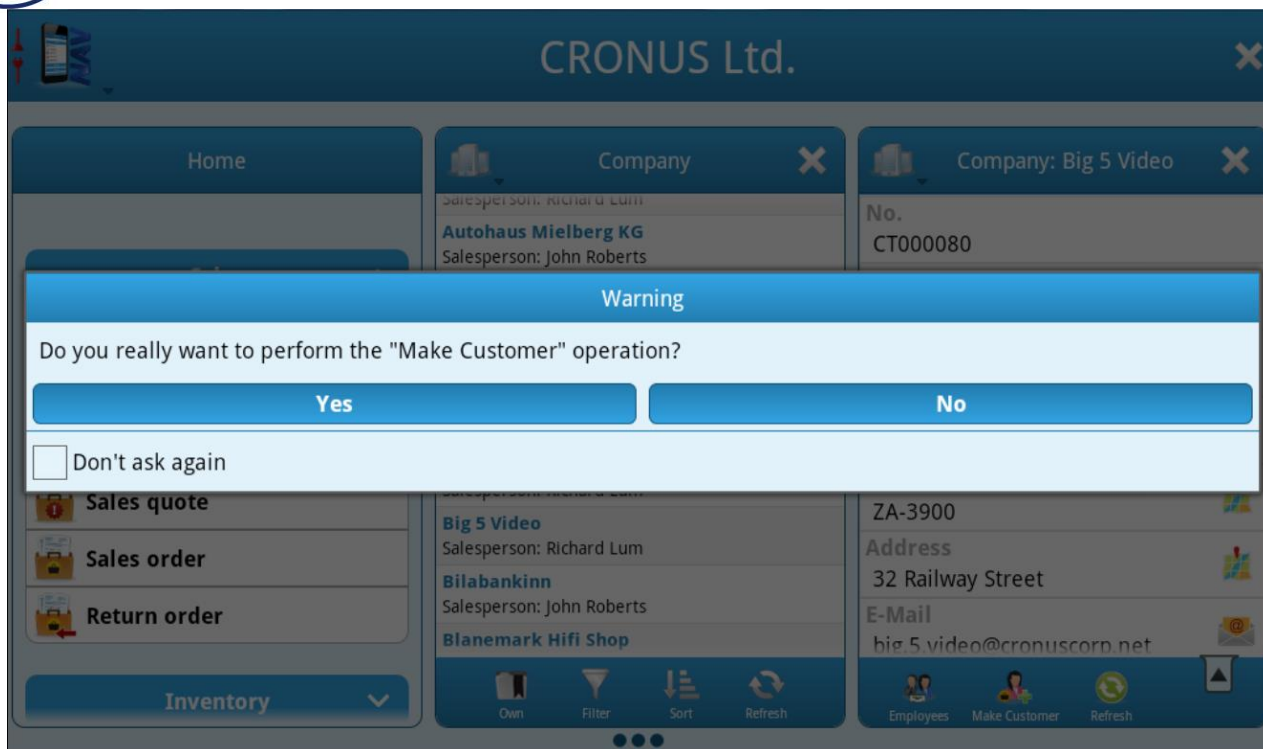
Let's see the procedure.

1. Open the MobileNAV application and log in offline mode. Tap Yes to refresh offline data.
2. Go to the Sales/Company and find the Big 5 Video in the Company list.



3. Click on the Big 5 Video in the list. When the company card opens, check the data and tap the Make Customer button.



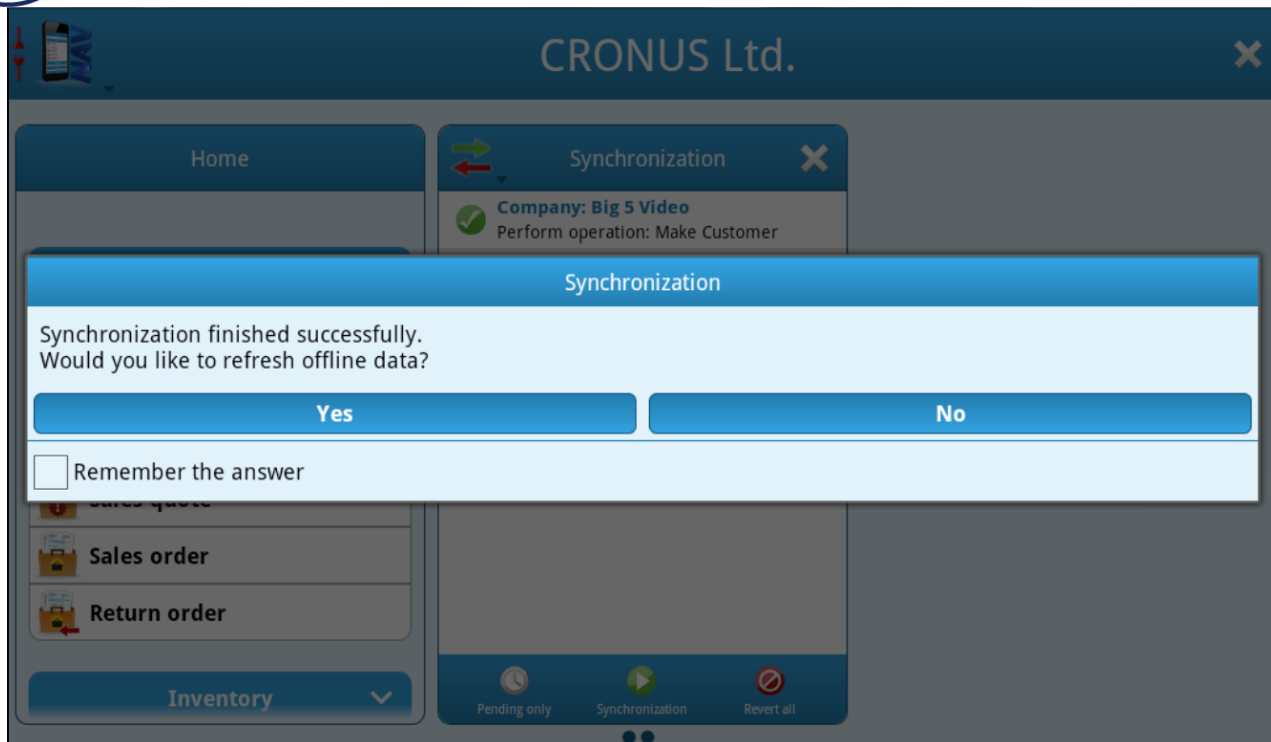


4. Tap “Yes” and select the **Don't ask again** option. The program will remember your selection and displays the following message: “Execution saved: Make customer”.
5. If you have Internet connection, tap the MobileNAV icon and choose Synchronization. Tap the Synchronization button.



6. Tap “Yes”. The offline database will be refreshed.





7. Verify that the customer list now contains Big 5 Video.

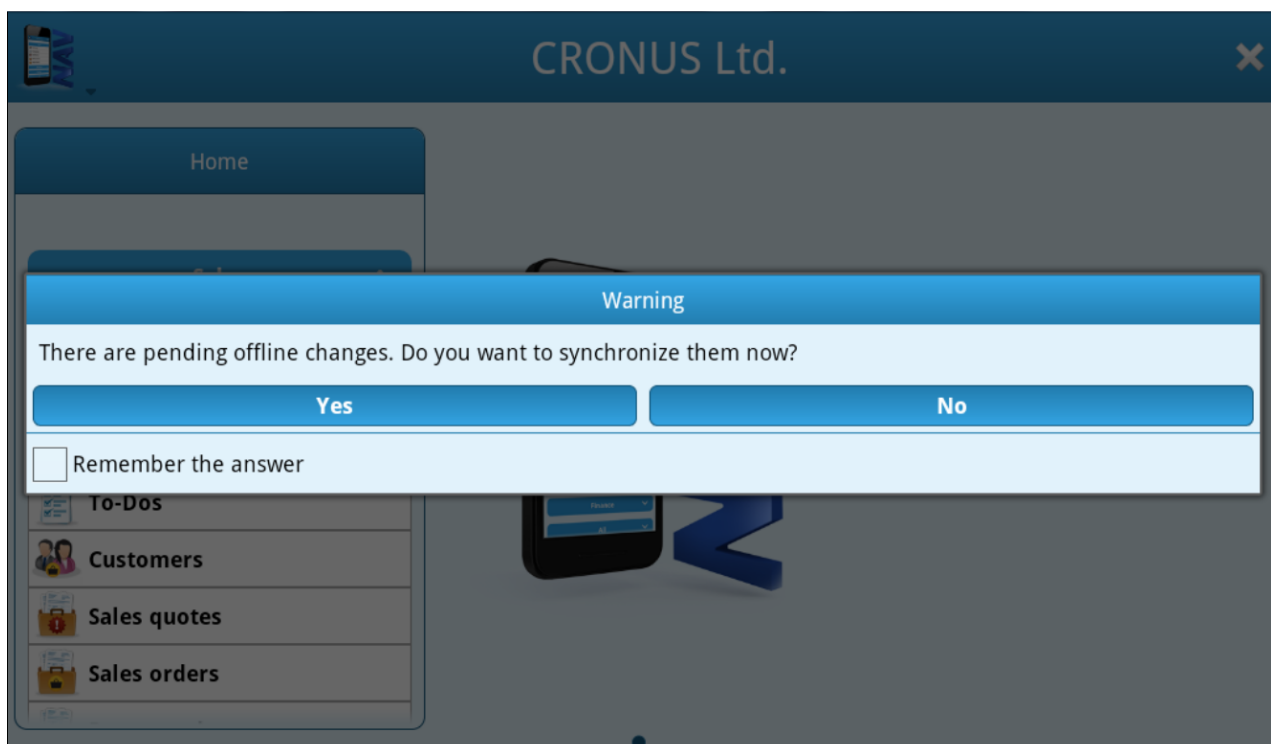


8. Try to make a customer on the same way from the Spotsmeyer's Furnishings Company. Go to the Sales/Company and find the Spotsmeyer's Furnishings in the Company list.





9. Tap the Make Customer button on the Spotsmeyer's Furnishings Company card. If you have Internet connection, find the MobileNAV icon and now tap the Go online function.

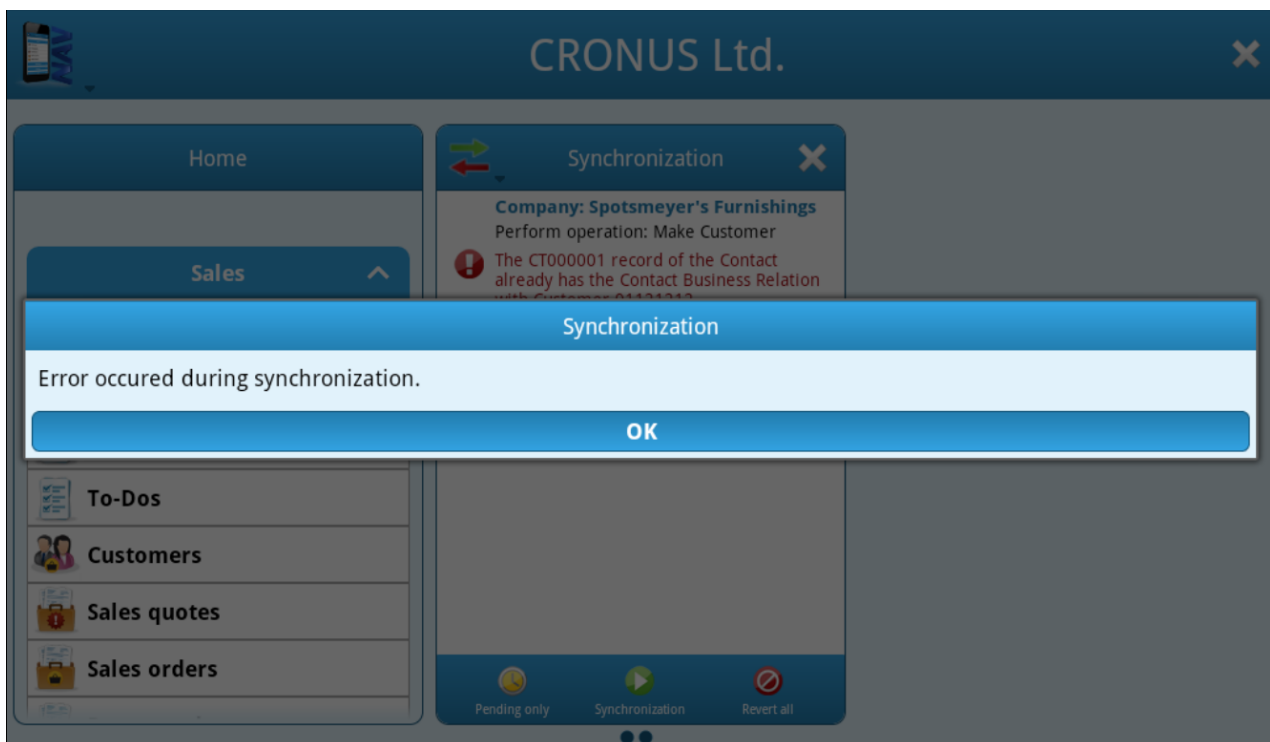


10. Tap "Yes". The system recognizes the changes in offline mode.





11. Tap the Synchronization button. The system starts the synchronization process, which will fail due to an error.

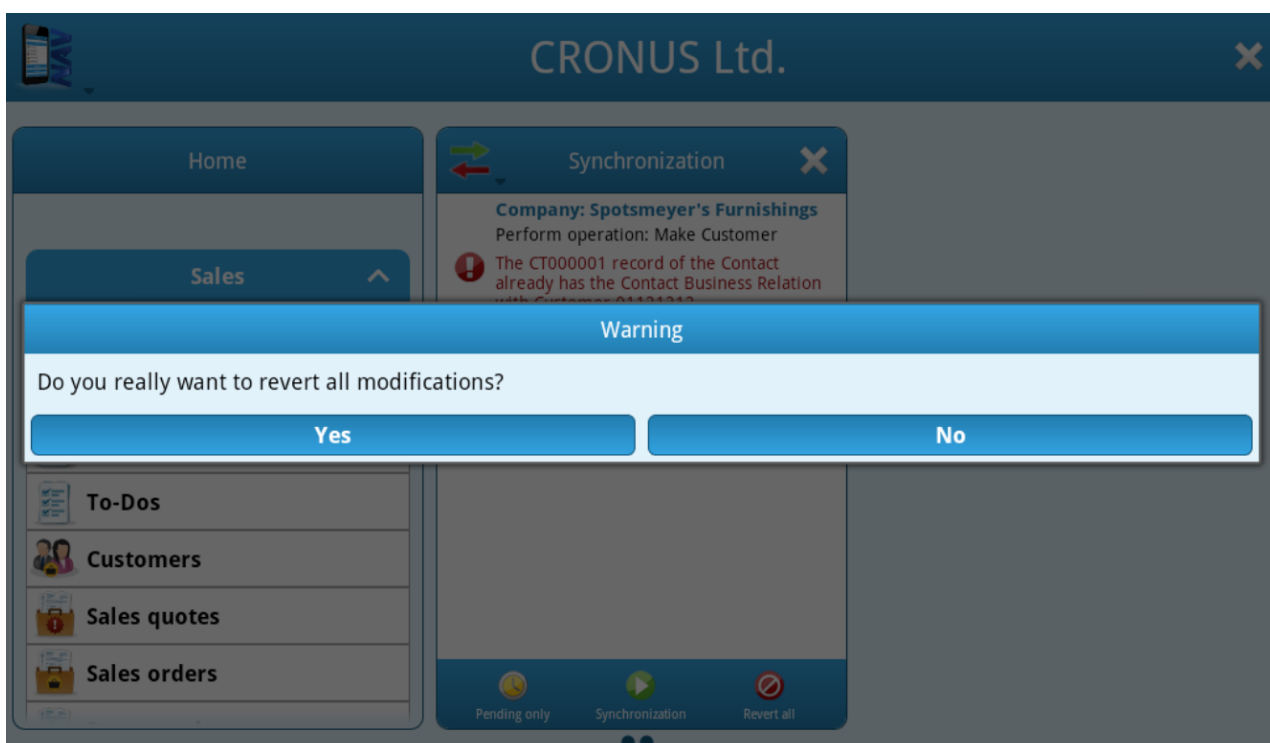


12. Tap OK and check the synchronization problem. The problem is, that Spotsmeyer's Furnishings Company has already been made a customer.





13. Tap Revert all, to revert your modifications. Remember that you can revert the records one by one if you tap on each the record individually.



14. You can go ahead and work in online or offline mode.





Customer

Customer list



In this menu you find the list of customers. The following information appears in the list: Name, Name2 and City. You can filter by No., Name, Name 2, City, Post code, Address, Address 2, Phone No., E-Mail, Home Page, Payment Method, Balance (LCY), Prepayment %, Bill-to Customer No., Currency Code, Blocked, Gen. Bus. Posting Group, VAT Bus. Posting Group, Customer Posting Group, Customer Price Group and Customer Disc. Group.

Tap a line to open the [Customer card](#).

Tap the Add button on the toolbar to create a new customer.

Customer card

When you tap on a customer name in the customers list, the program will open the corresponding customer's card, and you can view the following details: No., Name, Name 2, City, Post code, Address, Address 2, Phone No., E-Mail, Home page, Payment method, Balance (LCY), Prepayment %, Bill-to Customer No., Currency Code, Blocked, Gen. Bus. Posting Group, VAT bus. Posting group, Customer Posting Group, Customer Price Group and Customer Disc. Group, Salesperson.

Editable fields: all fields are editable except Balance (LCY).

Extra functions:



Tap the map icon on the City, Postcode, Address or Address2 fields to show the address on the map.



Tap the phone icon on the Phone No field to dial the phone number.





Tap the e-mail icon on the E-Mail field to send an e-mail to your customer.



Tap on the icon on the Home Page field to open the home page in a browser application.



Tap on the icon on the Bill-to Customer No. to open the Customer card of the Bill-to Customer.

Toolbar functions:



When you tap the Documents icon you have to choose from three options: Quotes, Orders, or Return Orders. According to your selection, the [Sales quotes list](#), the [Sales orders list](#) or the [Return orders list](#) will open, showing the documents of the current customer.



Tap the Import/Export toolbar button to import or export your contact data between your device and the Dynamics 365 Business Central database.

Ship-to address card

CRONUS Ltd.

Sales quote: Selangorian Ltd.

Order Date: -

Bill-to information:

- Coventry
- Sell-to Address**
153 Thomas Lane Street
- Bill-to Customer No.**
20000
- Bill-to Name**
Selangorian Ltd.
- Bill-to City**
Coventry
- Bill-to Address**
153 Thomas Lane Street
- Ship-to Code**
EAST ACTON
- Ship-to Name**
Selangorian Ltd.
- Ship-to City**
Coventry
- Ship-to Address**
53 East Acton Road

Ship-to addresses: EAST A

Customer No.
20000

Code
EAST ACTON

Location Code
BLUE

Name
Selangorian Ltd.

Address
53 East Acton Road

City
Coventry

Post Code
CV6 1GY

When you tap on the icon in the ship-to address field on a quote/order/return order card, the MobileNAV will open the corresponding ship-to address card, and you can view the following details of the ship-to address: Customer No., Code, Location Code, Name, Address, City and Post Code.

Extra functions:



Tap the map icon on the City, Postcode or Address fields to view the address on the map.





Sales quote

Sales quote list

In this menu you find the list of sales quotes. The following information appears in the list: No, Sell to Customer Name, Order Date, Salesperson Code. You can filter by No., Sell-to Customer Name, Sell-to City, Sell-to Address, Bill-to Customer No., Bill-to Name, Bill-to City, Bill-to Address, Ship-to Code, Ship-to Name, Ship-to City, Ship-to Address, Order Date, Document Date, Currency Code and Status.

Tap a line to open the [Sales quote card](#).

Tap the Add button on the toolbar to create a new quote.

Sales quote card

When you tap on a quote in the quotes list, the program will open the corresponding quote's card and you can view the following details of the quote: No., Sell-to Customer No., Sell-to Customer Name, Sell-to City, Sell-to Address, Bill-to Customer No., Bill-to Name, Bill-to City, Bill-to Address, Ship-to Code, Ship-to Name, Ship-to City, Ship-to Address, Order Date, Document Date, Currency Code, Salesperson and Status. Editable fields: all fields are editable except Status.

Extra functions:



Tap the icon on the Sell-to Customer No. field to open the card of the selected customer.



Tap the icon on the Bill-to Customer No. field to open the card of the selected customer.



Tap on the icon on the Ship-to Code field to open the [Ship-to Address card](#).





Toolbar functions:



Tap the Lines icon to open the [Quote Lines list](#), showing the lines of the sales quote.



Tap the Make order button to create a sales order from the quote.

Sales quote line list

When you tap the Lines icon the on the [Quote card](#), the quote lines list will show up. The following information appears in the list: No, Description, Quantity, Unit of Measure Code, Unit price, Line Amount, Currency Code. You can filter by the following fields: Type, No., Description, Unit Price, Location Code, Quantity, Unit of Measure Code, Line Discount %, Line Amount and Currency Code.

Tap a line to open the [Sales quote line card](#).

Tap the Add button on the toolbar to create a new line.





Sales quote line card

CRONUS Ltd.

Sales quote: - Selangorian Ltd.

No.

Sell-to Customer No.
20000

Sell-to Customer Name
Selangorian Ltd.

Sell-to City
Coventry

Sell-to Address
153 Thomas Lane Street

Bill-to Customer No.
20000

Bill-to Name
Selangorian Ltd.

Bill-to City
Coventry

Bill-to Address
153 Thomas Lane Street

Ship-to Code

Quote line: - Selangorian Ltd.

1250 - Back Hub: 1 PCS
Unit Price Excl. VAT: 1,100 Line Amount Excl. VAT: 1,100

Quote line: 1250 - Back Hub: 1 PCS

Type
Item

No.
1250

Description
Back Hub

Unit Price Excl. VAT
1,100

Location Code

Quantity
1

Unit of Measure Code
PCS

Line Discount %
0

Line Amount Excl. VAT
1,100

Currency Code

Lines

Make Order

Refresh

Delete

Add

Filter

Sort

Refresh

Refresh

Delete

Hide fields

Navigation

When you tap on a line on the [lines list](#) or tap Add button, the quote lines card will be displayed and you can check/modify the following details of the line: Type, No., Description, Unit Price, Location Code, Quantity, Unit of Measure Code, Line Discount %, Line Amount and Currency Code. All fields are editable except Currency Code.

If you enter a new item, the program automatically retrieves the price from the Unit Price field in the Item table. If a sales price is set for this item and this customer, the unit price will be retrieved from the Sales Price table.

Extra functions:



Tap the icon on the No. field to open the card of the selected item. The icon is available only if the Type is Item.



Tap the icon on the No. field to scan a barcode with a proper No. (it is available on all line types).





Sales order

Sales order list



In this menu you find the list of sales orders. The following information appears in the list: No, Sell to Customer Name, Document Date and Status. You can filter by No., Sell-to Customer Name, Sell-to City, Sell-to Address, Bill-to Customer No., Bill-to Name, Bill-to City, Bill-to Address, Ship-to Code, Ship-to Name, Ship-to City, Ship-to Address, Order Date, Document Date, Shipment Date, Prepayment %, Currency Code and Status.

Tap a line to open the [Sales order card](#).

Tap the Add button on the toolbar to create a new order.

Sales order card

When you tap on an order in the orders list, the program will open the corresponding order's card and you can view the following details: No., Sell-to Customer No., Sell-to Customer Name, Sell-to City, Sell-to Address, Bill-to Customer No., Bill-to Name, Bill-to City, Bill-to Address, Ship-to Code, Ship-to Name, Ship-to City, Ship-to Address, Order Date, Document Date, Shipment Date, Prepayment %, Currency Code, Salesperson and Status.

Editable fields: all fields are editable except Status.

Extra functions:



Tap the icon on the Sell-to Customer No. field to open the card of the selected customer.



Tap the icon on the Bill-to Customer No. field to open the card of the selected customer.





Tap on the icon on the Ship-to Code field to open the [Ship-to Address card](#).

Toolbar functions:



Tap the Lines icon to open the [Order Lines list](#), showing the lines of the sales order.



Tap this icon to send a request for approval.

Sales order line list

When you tap the Lines icon the on the [Order card](#), the order lines list will be displayed. The following information appears in the list: No, Description, Quantity, Unit of Measure Code, Unit price, Line Amount, Currency Code. You can filter by the following fields: Type, No., Description, Unit Price, Location Code, Outstanding Quantity, Quantity Shipped, Unit of Measure Code, Line Discount %, Line Amount, Currency Code and Shipment Date.

Tap a line to open the [Sales order line card](#).

Tap the Add button on the toolbar to create a new line.





Sales order line card

CRONUS Ltd.		
Sales order: 1003 - Selangorian Ltd.	Order line: 1003 - Selangorian Ltd.	Order line: 1000 - Bicycle: 2 PCS
No. 1003	1000 - Bicycle: 2 PCS Unit Price Excl. VAT: 4,000 Line Amount Excl. VAT: 8,000	Type Item
Sell-to Customer No. 20000		No. 1000
Sell-to Customer Name Selangorian Ltd.		Description Bicycle
Sell-to City Coventry		Unit Price Excl. VAT 4,000
Sell-to Address 153 Thomas Drive		Location Code BLUE
Bill-to Customer No. 20000		Quantity 2
Bill-to Name Selangorian Ltd.		Outstanding Quantity 2
Bill-to City Coventry		Quantity Shipped 0
Bill-to Address 153 Thomas Drive		Unit of Measure Code PCS
Ship-to Code		Line Discount %

When you tap on a line on the [lines list](#) or tap Add button, the order line card will be displayed and you can check/modify the following details of the line: Type, No., Description, Unit Price, Location Code, Quantity, Outstanding Quantity, Quantity Shipped, Unit of Measure Code, Line Discount %, Line Amount, Currency Code and Shipment Date. All fields are editable except Outstanding Quantity, Quantity Shipped, Currency Code.

If you enter a new item, the program automatically retrieves the price from the Unit Price field in the Item table. If a sales price is set for this item and this customer, the unit price will be retrieved from the Sales Price table.

Extra functions:



Tap the icon on the No. field to open the card of the selected item. The icon is available only if the Type is Item.



Tap the icon on the No. field to scan a barcode with a proper No. (it is available on all line types).





Return order

Return order list



In this menu you find the list of return orders. The following information appears in the list: No, Sell to Customer Name, Document Date and Status. You can filter by No., Sell-to Customer No., Sell-to Customer Name, Sell-to City, Sell-to Address, Bill-to Customer No., Bill-to Name, Bill-to City, Bill-to Address, Ship-to Code, Ship-to Name, Ship-to City, Ship-to Address, Order Date, Document Date, Shipment Date, Prepayment %, Currency Code and Status.

Tap a line to open the [Return order card](#).

Tap the Add button on the toolbar to create a new return order.

Return order card

When you tap on a return order in the return orders list, the program will open the corresponding return order's card and you can view the following details of the return order: No., Sell-to Customer No., Sell-to Customer Name, Sell-to City, Sell-to Address, Bill-to Customer No., Bill-to Name, Bill-to City, Bill-to Address, Ship-to Code, Ship-to Name, Ship-to City, Ship-to Address, Order Date, Document Date, Shipment Date, Prepayment %, Currency Code, Salesperson and Status.

Editable fields: all fields are editable except Status.

Extra functions:



Tap the icon on the Sell-to Customer No. field to open the card of the selected customer.



Tap the icon on the Bill-to Customer No. field to open the card of the selected customer.





Tap the icon on the Ship-to Code field to open the [Ship-to Address card](#).

Toolbar functions:



Tap the Lines icon to open the [Return Order Lines list](#), showing the lines of the return order.

Return order line list

CRONUS Ltd.

Return order: 1001 - Selangorian Ltd.

Return order line: 1001 - Selangorian Ltd.

4104420070127 - Spring 5 mm: 1 PCS
Unit Price Excl. VAT: 100 Line Amount Excl. VAT: 100

When you tap the Lines icon the on the [Return Order card](#), the return order lines list will be displayed. The following information appears in the list: No, Description, Quantity, Unit of Measure Code, Unit price, Line Amount, Currency Code. You can filter by the following fields: Type, No., Description, Unit Price, Location Code, Quantity, Outstanding Quantity, Quantity Shipped, Unit of Measure Code, Line Discount %, Line Amount, Currency Code and Shipment Date.

Tap a line to open the [Return order line card](#).

Tap the Add button on the toolbar to create a new line.





Return order line card

When you tap on a line on the [lines list](#) or tap Add button, the order line card will be displayed and you can check/modify the following details of the line: Type, No., Description, Unit Price, Location Code, Quantity, Outstanding Quantity, Quantity Shipped, Unit of Measure Code, Line Discount %, Line Amount, Currency Code and Shipment Date. All fields are editable except Currency Code.

If you enter a new item, the program automatically retrieves the price from the Unit Price field in the Item table. If a sales price is set for this item and this customer, the unit price will be retrieved from the Sales Price table.

Extra functions:



Tap the icon on the No. field to open the card of the selected item. The icon is available only if the Type is Item.



Tap the icon on the No. field to scan a barcode with a proper No. (it is available on all line types).

Sales workflow example

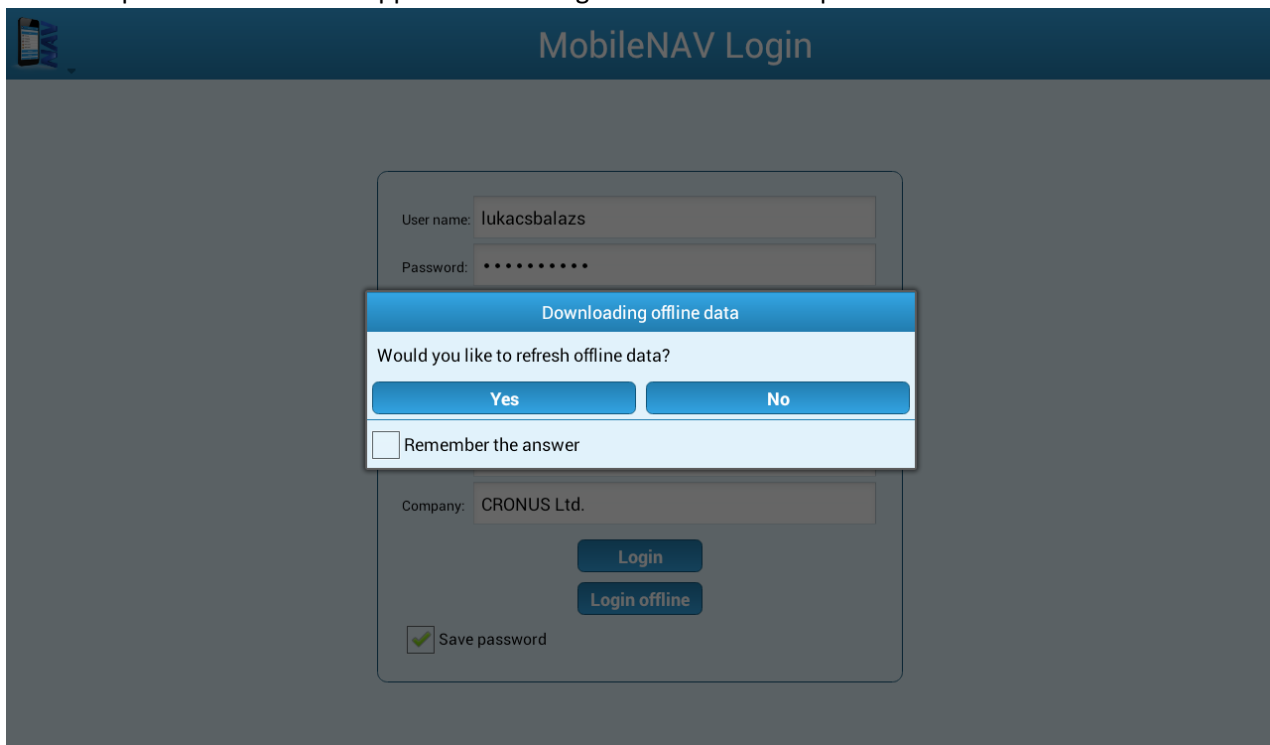
Let's see a typical example for the sales module. Brad, the sales manager visits a customer, who wants to buy a new item. As a first step Brad launches MobileNAV application on his Tablet in offline mode and initiates a Synchronization to retrieve the modifications. He uses the map integration to navigate to the customer. On the site he creates a new quote. Because Brad offered good price, the customer accepts the quote and Brad creates order from the quote.

Let's see the procedure.





1. Open the MobileNAV application and log in offline mode. Tap Yes to refresh offline data.

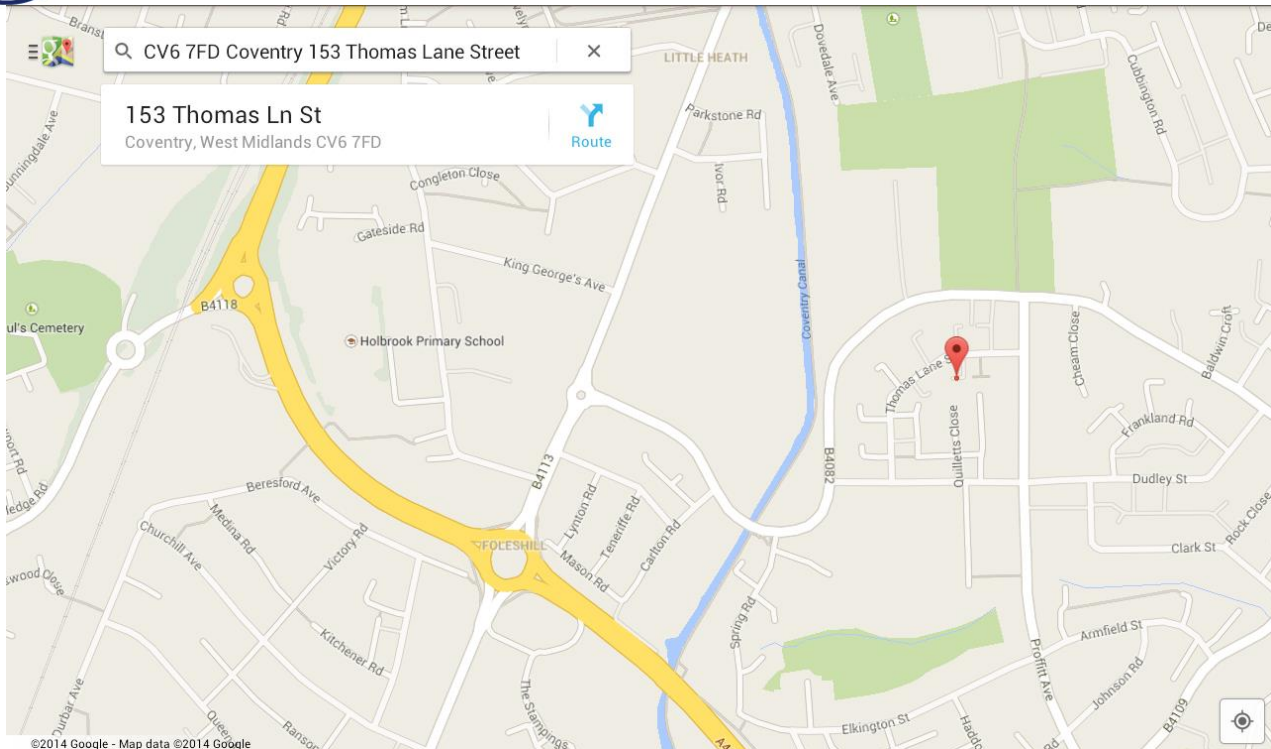


2. Go to Sales-Customers, and open the card of the customer you want to visit.



3. Tap the map icon on the City line to open the Customer's address in Google Maps.





4. From here you can also start GPS navigation to plan a route to the address.
5. Tap Back to go back to MobileNAV application.
6. Tap the Documents icon on the toolbar of the customer card and select Quotes.
7. Tap the Add button on the toolbar to create a new sales quote. Note that the Sell-to, Bill-to and Ship-to addresses, the document dates, and so on are prefilled with data, so normally the salesperson does not need to modify it.

CRONUS Ltd.

Customer: Selangorian Ltd.

No. 20000

Name Selangorian Ltd.

Name 2

City Coventry

Post Code CV6 7FD

Address 153 Thomas Lane Street

Address 2

Phone No.

E-Mail selangorian.ltd@cronuscorp.net

Home Page

Sales quote: Selangorian Ltd.

1051 - Selangorian Ltd.

Order Date: 1/22/15 - Bart Duncan

- Selangorian Ltd.

Order Date: - Bart Duncan

Sales quote: - Selangorian Ltd.

No.

Sell-to Customer No. 20000

Sell-to Customer Name Selangorian Ltd.

Sell-to City Coventry

Sell-to Address 153 Thomas Lane Street

Bill-to Customer No. 20000

Bill-to Name Selangorian Ltd.

Bill-to City Coventry

Bill-to Address 153 Thomas Lane Street

Ship-to Code

Documents Refresh Delete Import/Export

Add Own Filter Sort Refresh

Lines Make Order Refresh Delete





8. Tap the Lines button and then the Add button, to create a new line.

The screenshot shows the MobileNAV interface for 'CRONUS Ltd.'. It consists of three panels:

- Sales quote: - Selangorian Ltd.**
 - No.
 - Sell-to Customer No. 20000
 - Sell-to Customer Name Selangorian Ltd.
 - Sell-to City Coventry
 - Sell-to Address 153 Thomas Lane Street
 - Bill-to Customer No. 20000
 - Bill-to Name Selangorian Ltd.
 - Bill-to City Coventry
 - Bill-to Address 153 Thomas Lane Street
 - Ship-to Code
- Quote line: - Selangorian Ltd.**
 - Unit Price Excl. VAT: Line Amount Excl. VAT: 0
- Quote line: - :**
 - Type Item
 - No.
 - Description
 - Unit Price Excl. VAT
 - Location Code
 - Quantity (with + and - buttons)
 - Unit of Measure Code
 - Line Discount %
 - Line Amount Excl. VAT 0
 - Currency Code

At the bottom, there are navigation buttons: Lines, Make Order, Refresh, Delete, Add, Filter, Sort, Refresh, Refresh, Delete, Hide fields, and Navigation.

9. Select an Item like ATHENS Desk, modify the Quantity to 5, and add some Line Discount %, let's say 10%.

The screenshot shows the MobileNAV interface for 'CRONUS Ltd.' with the same three panels as before, but with updated data:

- Sales quote: - Selangorian Ltd.** (Same as previous screenshot)
- Quote line: - Selangorian Ltd.**
 - 1896-S - ATHENS Desk: 5 PCS
 - Unit Price Excl. VAT: 649.4 Line Amount Excl. VAT: 2,922.3
- Quote line: 1896-S - ATHENS Desk: 5 PCS**
 - Type Item
 - No. 1896-S
 - Description ATHENS Desk
 - Unit Price Excl. VAT 649.4
 - Location Code
 - Quantity 5 (with + and - buttons)
 - Unit of Measure Code PCS
 - Line Discount % 10
 - Line Amount Excl. VAT 2,922.3
 - Currency Code

At the bottom, there are navigation buttons: Lines, Make Order, Refresh, Delete, Add, Filter, Sort, Refresh, Refresh, Delete, Hide fields, and Navigation.

10. Tap on the box icon next to the item no. to see the item card.





CRONUS Ltd.

Quote line: - Selangorian Ltd.

1896-S - ATHENS Desk: 5 PCS
Unit Price Excl. VAT: 649.4 Line Amount Excl. VAT: 2,922.3

1896-S - ATHENS Desk: 5 PCS

Type
Item

No.
1896-S

Description
ATHENS Desk

Unit Price Excl. VAT
649.4

Location Code

Quantity
5

Unit of Measure Code
PCS

Line Discount %
10

Line Amount Excl. VAT
2,922.3

Currency Code

Refresh

Delete

Hide fields

Navigation

Item: ATHENS Desk

No.
1896-S

Description
ATHENS Desk

Description 2

Unit Price
649.4

Inventory
254

Base Unit of Measure
PCS

Item Category Code

Product Group Code

Inventory Posting Group
RESALE

Item Disc. Group

Picture

Refresh

Hide fields

11. Create a second line tapping the Add button on the line list again. Select a new item, using your printed item catalogue which also contains barcodes of the items. Tap on the barcode icon next to the No. field and scan the barcode with the device's camera. Enter 5 as Quantity.

CRONUS Ltd.

Sales quote: - Selangorian Ltd.

No.

Sell-to Customer No.
20000

Sell-to Customer Name
Selangorian Ltd.

Sell-to City
Coventry

Sell-to Address
153 Thomas Lane Street

Bill-to Customer No.
20000

Bill-to Name
Selangorian Ltd.

Bill-to City
Coventry

Bill-to Address
153 Thomas Lane Street

Ship-to Code

Lines

Make Order

Refresh

Delete

Quote line: - Selangorian Ltd.

1896-S - ATHENS Desk: 5 PCS
Unit Price Excl. VAT: 649.4 Line Amount Excl. VAT: 2,922.3

1972-S - MUNICH Swivel Chair, yellow: 5 PCS
Unit Price Excl. VAT: 123.3 Line Amount Excl. VAT: 616.5

Add

Filter

Sort

Refresh

1972-S - MUNICH Swivel Chair, yellow: 5 PCS

Type
Item

No.
1972-S

Description
MUNICH Swivel Chair, yellow

Unit Price Excl. VAT
123.3

Location Code

Quantity
5

Unit of Measure Code
PCS

Line Discount %
0

Line Amount Excl. VAT
616.5

Currency Code

Refresh

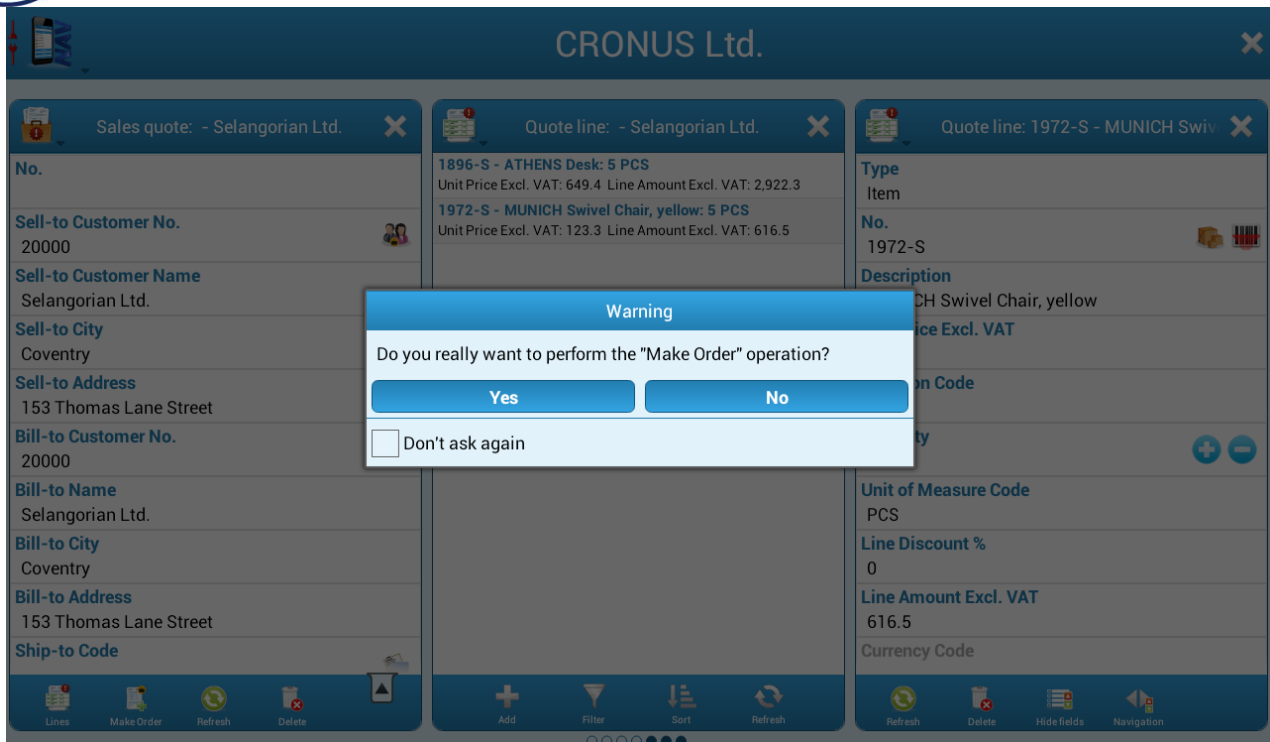
Delete

Hide fields

Navigation

12. On the sales quote card tap on the Make Order button on the toolbar to create the sales order.





13. Tap Yes. Because you are in offline mode, the Make Order operation will be executed only when you next time synchronize the data.
14. Let's say, that now you have Internet access on the device, so you would like to synchronize your offline modifications to the Dynamics NAV server. To do that, tap the MobileNAV menu (top left corner), and select Synchronization.

Note that all of your offline modifications are listed on this panel.

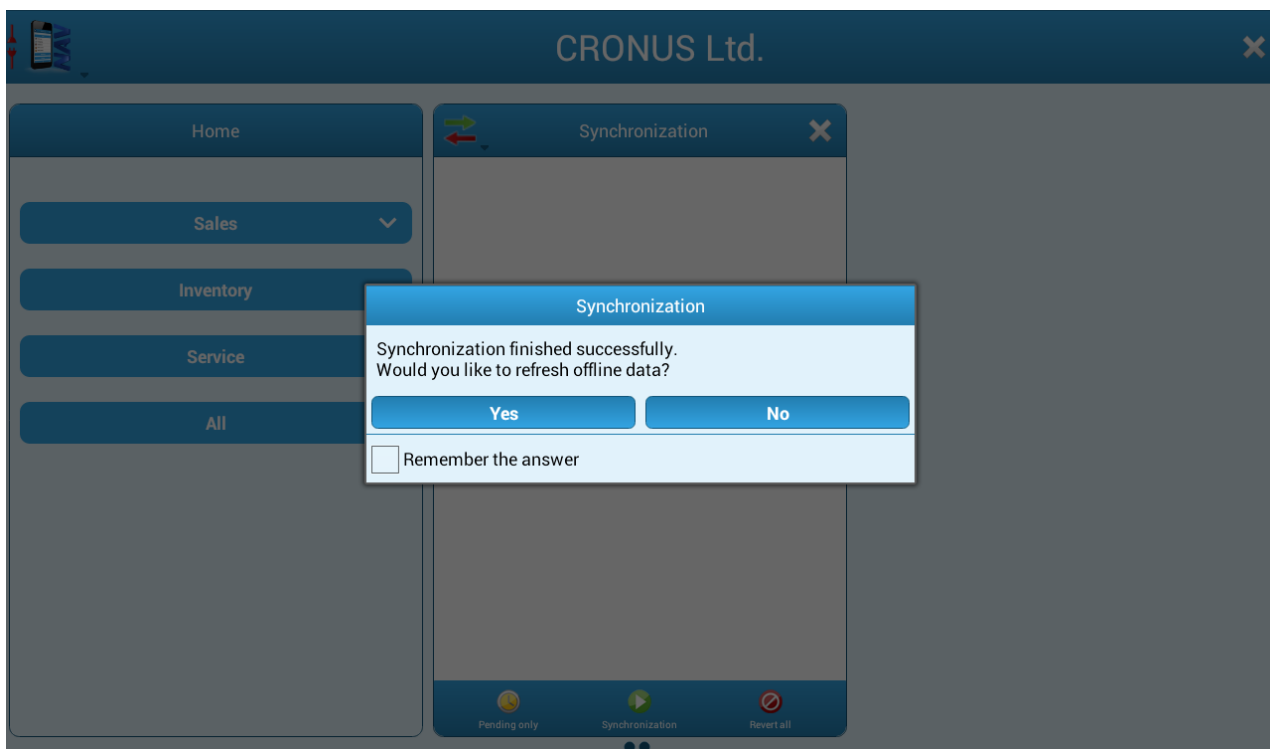




15. Tap the Synchronization button on the toolbar to start uploading your offline modifications.



16. After successful upload, you will be asked whether you would like to refresh the offline data. Tap Yes for that.



Now it will download the newly created sales order.





CRONUS Ltd.

Sales order

1003 - Selangorian Ltd.

Document Date: 1/22/15 - Released

1008 - Selangorian Ltd.

Document Date: 3/25/14 - Released

1009 - Selangorian Ltd.

Document Date: 1/22/15 - Open

1013 - Selangorian Ltd.

Document Date: 4/7/14 - Open

Add

Own

Filter

Sort

Refresh

Sales order: 1013 - Selangorian Ltd.

No.

1013

Sell-to Customer No.

20000

Sell-to Customer Name

Selangorian Ltd.

Sell-to City

Coventry

Sell-to Address

153 Thomas Lane Street

Bill-to Customer No.

20000

Bill-to Name

Selangorian Ltd.

Bill-to City

Coventry

Bill-to Address

153 Thomas Lane Street

Ship-to Code

Lines

Send Approval

Refresh

Delete

Order line: 1013 - Selangorian Ltd.

1896-S - ATHENS Desk: 5 PCS

Unit Price Excl. VAT: 649.4 Line Amount Excl. VAT: 2,922.3

1972-S - MUNICH Swivel Chair, yellow: 5 PCS

Unit Price Excl. VAT: 123.3 Line Amount Excl. VAT: 616.5

Add

Filter

Sort

Refresh





Inventory

Concept

You can access the item list and item card in offline mode as well.

Items

Item list



In this menu you find the list of the items. By tapping the Refresh button you see all items (or maximum 1000). The list contains item details, such as Description, Description2, Item no., Inventory and Base Unit of Measure.

Remember: This data is updated when you synchronize.

Tapping the barcode icon will activate the barcode reader. The barcode will act as an item filter.

When you tap on an item in item list, the program will open the selected [Item card](#).

Item card

If you select an Item in the Item list the Item card opens, and you can view the following details: No., Description, Description2, Inventory, Qty. on Purchase Order, Qty. on Sales Order, Base Unit of Measure, Item Category Code, Product Group Code and Inventory Posting Group. These are non-editable fields.





Toolbar functions:



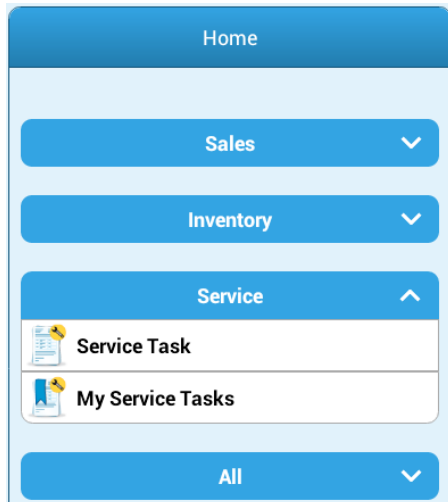
Tap this icon to upload and take a picture of the selected item.





Service

Concept



The service module is designed for service technicians who work out of office and would like to maintain a paperless work environment with a smartphone or tablet.

The back-office registers the Service orders in Dynamics 365 Business Central. The service tasks will be assigned to the available resources with the proper skills. Once the service order has been properly registered and assigned, then the service technicians can access them in MobileNAV. After offline synchronization, the service technician will see the assigned service task.

Service technicians can fill out the Service item worksheet by entering the symptom codes and registering the item and resource usages. He can also register the Start and Finish date and time, and set the status accordingly.

Service Task

Service Task list





In the Service Task list you find all of the Service Tasks (Service item lines). The following information appears: Service Item No, Item No, Description, Priority and Symptom code. You can filter and sort the list according to these data.

Tap a line to open the [Service Task card](#).

Service Task card

If you select a Service Task the card opens and you can view the following details of the Service Task: Document No, Service Item No, Item No, Description, Priority, Symptom Code, Fault Area Code, Fault Code, Resolution Code, Repair Status Code, Starting Date, Starting Time, Finishing Date and Finishing Time.

The following fields are editable: Symptom Code, Fault Area Code, Fault Code, Resolution Code, Repair Status Code, Starting Date, Starting Time, Finishing Date and Finishing Time.

Extra functions:



Tap the icon on the Document No field to open the [Service Order card](#) of the actual Service Order.

Toolbar functions:



Tap the Lines icon to open the [Service Lines](#) where you can register the item and resource usage for the actual Service Task.



Tap the Start button to set the Status of the Service Task to in Process. The Starting Date and Starting Time are automatically filled with the actual date and time.



Tap the Finish button to set the Status of the Service Task to Finished. The Finishing Date and Finishing Time are automatically filled with the actual date and time.



Tap this button to check the allocated resources. The [Resource Allocation list](#) will open.

Service Order card

If you select a Service Order the card opens and you can view the following details of the Order header: No, Customer No, Name, City, Postcode, Address, Address2, Phone No, E-Mail, Contact No, Contact Name, Salesperson, Status, Priority, Order Date, Starting Date, Starting Time and Currency Code.

Toolbar functions:



Tap the Lines toolbar button to open the [Service Order Line list](#) which contains the created service tasks for this Service order.





Service Line list

The Service Line list can be opened from the [Service Task card](#) by tapping the Lines button on the toolbar. This list contains the registered item or resource usages and costs. In the list, you can see the following details: Type, No, Line No, Description, Quantity and Unit of Measure Code.

Tap a line to open the [Service Line card](#).

Tap the Add button on the toolbar to create a new Service Line.

Service Line card

If you select a Service Line, this card opens and you can view the following details of the Service Line: Type, No, Spare Part Action (in case of Item type), Replaced Item No (in case of Item type), Description, Service Item serial No, UOM Code, Location Code, Quantity, Unit Price Excl. VAT, Line Discount %, Line Amount Excl. VAT, Currency Code, Symptom Code, Fault Area Code, Fault Code and Resolution Code.

The following fields are editable: all fields are editable except the Currency Code.

Tap the Delete button on the toolbar to delete the selected Service Line.

Extra functions:



Tap the box icon on the No field to open the [Item Card](#), which contains the details about the Item.



Tap the barcode icon on the No field to scan the barcode. In the base configuration the barcode should be the item No.





Resource Allocation list

The Resource Allocation list can be opened from the [Service Task card](#) by tapping the Resource Allocations button on the toolbar. This list contains the allocated resources to the actual Service Task. In the list you can see the following details: Resource No, Service Item Description, Description and Status.

Tap a line to open the [Resource Allocation card](#).

Resource Allocation card

If you select a Resource Allocation, this card opens and you can view the following details: Status, Resource No, Description, Service Item Description, Allocated Hours, Reason Code, Starting Time and Finishing Time.





My Service Task

My Service Task list

Document No.	Service Item No.	Item No.	Description	Priority	Symptom Code	Fault Area Code	Fault Code	Resolution Code	Repair Status Code
S0000020	18	80001	Computer III 533 MHz	Low	No function	General	Not operating	Product exchange (repair too expensive)	
S0000021			Computer III 866 MHz						

This list contains the Service Tasks which are assigned to the currently logged in user depending on his Resource No configured in MobileNAV User Setup. Let's say you have MARK configured as Resource No, then you will see only those Service Tasks in the list which has an Active allocation for MARK. In the list you can see the following details: Document No, Priority, Resolution Code and Description fields.

Tap a line to open the [Service Task card](#).

Service workflow example

Let's see a typical example for the service module. As a first step the back office will create a new Service Order and allocate Mark, as service technician. After that Mark launches the MobileNAV application on his Tablet in offline mode and initiates a Synchronization to retrieve the latest service tasks. Then he navigates to My Service Tasks and checks the details. On the customer's site he fills out the Service Item Worksheet. After finishing the job the back office see the finished task and can post the Service Order.

Let's see the procedure.

1. Open the Dynamics 365 Business Central client.
2. Go to Departments/Service/Order Processing/Service Orders and create a new Service Order. Fill out the Customer No. and create a new Line. Check the Document No.





New - Service Order - SO000022 - Guildford Water Department

CRONUS Ltd. ?

HOME ACTIONS NAVIGATE

View Demand Overview Order Promising Statistics E-Mail Queue Dimensions Comments Post... Test Report... Post and Print... Shipments Invoices History Print Send To Show Attached Page

SO000022 - Guildford Water Department

General

No.: SO000022 E-Mail: guildford.water.department@c...
Description: City: Guildford
Customer No.: 50000 Service Order Type:
Contact No.: CT000063 Contract No.:
Name: Guildford Water Department Response Date: 2015.01.29.
Address: 25 Water Way Response Time: 15:00:00
Post Code: GU7 5GT Priority: Low
Contact Name: Mr. Jim Stewart Status: Pending
Phone No.: Release Status: Open

Customer Service Hi...
Customer No.: 50000
Quotes: 0
Orders: 10
Invoices: 1
Credit Memos: 0
Pstd. Shipments: 0
Pstd. Invoices: 0
Pstd. Credit Mem...: 0

Service Item Line De...
Service Item No.: 19
Component List: 0
Troubleshooting: 1
Skilled Resources: 1

Notes
[Click here to create a new note.](#)

Lines

Line	Service It...	Item No.	Service It...	Serial No.	Description	Repair Stat...	War...
19	80005	DESKTOP	HP739038762	Computer III 866 MHz	INITIAL		

Invoicing 50000 | 14 DAYS | 2015.02.11.
Shipping GU7 5GT | Mr. Jim Stewart
Details
Foreign Trade

OK

3. Select the created line, and go to Functions/Resource Allocations, select the existing Non-active line and allocate MARK as Resource No., enter the Allocation Date and Allocated Hours.

Edit - Resource Allocations - SO000022

CRONUS Ltd. ?

HOME

New View List Cancel Allocation
Edit List Allocate to all Service Items
Delete

New Manage Functions Planning View Show Attached Page

Resource Allocations Type to filter (F3) Status No filters applied

Status	Service It...	Service Item Description	Resource No.	Allocat...	Allocated Hours
Active	19	Computer III 866 MHz	MARK	2014.04.02.	0.0





4. Check the assigned Resource No. for your MobileNAV user in Departments/MobileNAV/Users. It should be MARK.

User ID	Salesperson...	Salesperson Name	Service Res...	Location C...	First Login Date
MAJORT\DEMO_EN	PS	Peter Sadow	MARK		2013.12.02. 13:4
MULTISOFT\MAJORT	PS	Peter Sadow	LINDA		2013.12.02. 13:4

5. Login to the MobileNAV application, open the Service category, and choose [My service task list](#).
6. Find and open the new Service Task with the Document No. created in step 2.

My Service Tasks

- SO000020 - Low - Product exchange (repair too expensive)
Computer III 533 MHz
- SO000021 - Low -
Computer III 866 MHz
- SO000022 - Low -
Computer III 866 MHz

Service Tasks: SO000022 - Low -

Document No.
SO000022

Service Item No.
19

Item No.
80005

Description
Computer III 866 MHz

Priority
Low

Symptom Code

Fault Area Code

Fault Code

Resolution Code

Repair Status Code

Service Line: SO000022 - Low -

No results found.

Note that the Symptom Code, Fault Codes are empty, and there are no registered lines for the Service Item Worksheet.





7. Tap the extra icon on the Document No. field. This will open the [Service Order card](#) with the details of the Service Order.

The screenshot shows the MobileNAV app interface for CRONUS Ltd. It features three main panels: 'My Service Tasks', 'My Service Tasks: SO000022', and 'Service Order: SO000022 - Guildford Water Department'. The 'Service Order' panel displays detailed information for the selected service order.

Document No.	No.
SO000022	SO000022
Service Item No.	Customer No.
19	50000
Item No.	Name
80005	Guildford Water Department
Description	City
Computer III 866 MHz	Guildford
Priority	Post Code
Low	GU7 5GT
Symptom Code	Address
	25 Water Way
Fault Area Code	Address 2
Fault Code	Phone No.
Resolution Code	E-Mail
	guildford.water.department@cronuscorp.net
Repair Status Code	Contact No.

The bottom of the screen shows a navigation bar with icons for Filter, Sort, Refresh, Lines, Start, Finish, Resource Alloc..., and Hide fields.

8. Tap the Start button. Note that the Repair Service Status changes to Service in progress and the Starting Date and Time has been filled in with the current date and time.





CRONUS Ltd

My Service Tasks

- SO000020 - Low - Product exchange (repair too expensive)
Computer III 533 MHz
- SO000021 - Low -
Computer III 866 MHz
- SO000022 - Low -
Computer III 866 MHz

SO000022 - Low -
Low

Symptom Code

Fault Area Code

Fault Code

Resolution Code

Repair Status Code
Service in process

Starting Date
4/2/14

Starting Time
12:58 AM

Finishing Date

Finishing Time
12:00 AM

No results found.

9. Enter the Symptom Code, Fault Area Code, Fault Code and Resolution Code.

CRONUS Ltd

My Service Tasks

- SO000020 - Low - Product exchange (repair too expensive)
Computer III 533 MHz
- SO000021 - Low -
Computer III 866 MHz
- SO000022 - Low - Product exchange (repair too expensive)
Computer III 866 MHz

exchange (repair too expensive)

Low

Symptom Code
No function

Fault Area Code
General

Fault Code
Not operating

Resolution Code
Product exchange (repair too expensive)

Repair Status Code
Service in process

Starting Date
4/2/14

Starting Time
12:58 AM

Finishing Date

Finishing Time
12:00 AM

No results found.

10. Tap the Lines toolbar button to open the [Service Line list](#) of this Service Task.
11. Tap the Add toolbar button to create a new line.





CRONUS Ltd

My Service Tasks:

Low

Symptom Code

No function

Fault Area Code

General

Fault Code

Not operating

Resolution Code

Product exchange (repair too expensive)

Repair Status Code

Service in process

Starting Date

4/2/14

Starting Time

12:58 AM

Finishing Date

Finishing Time

12:00 AM

Service Line: SO000022 - Low -

Resource - -

Service Line: Resource - -

Type

Resource

No.

Spare Part Action

Replaced Item No.

Description

Service Item Serial No.

Unit of Measure Code

Location Code

Quantity

Unit Price Excl. VAT

Lines

Start

Finish

Resource Alloc...

Add

Filter

Sort

Refresh

Refresh

Delete

Hide fields

Navigation

12. Tap the No. field to select your Resource No., and select MARK from the list.
13. Modify the Quantity field to 2.

CRONUS Ltd

Product exchange (repair too expensive)

Low

Symptom Code

No function

Fault Area Code

General

Fault Code

Not operating

Resolution Code

Product exchange (repair too expensive)

Repair Status Code

Service in process

Starting Date

4/2/14

Starting Time

12:58 AM

Finishing Date

Finishing Time

12:00 AM

Service Line: SO000022 - Low -

Resource - MARK -

Mark Hanson - 2 HOUR

Service Line: Resource - MARK -

Type

Resource

No.

MARK

Spare Part Action

Replaced Item No.

Description

Mark Hanson

Service Item Serial No.

Unit of Measure Code

HOUR

Location Code

Quantity

2

Unit Price Excl. VAT

Lines

Start

Finish

Resource Alloc...

Add

Filter

Sort

Refresh

Refresh

Delete

Hide fields

Navigation





14. Tap the Add button on the [Service Line list](#) again to create an additional new line.
15. Modify the Type to Item.

The screenshot displays the MobileNAV application interface for 'CRONUS Ltd'. It features three main panels:

- My Service Task:** Contains fields for Symptom Code (No function), Fault Area Code (General), Fault Code (Not operating), Resolution Code (Product exchange (repair too expensive)), Repair Status Code (Service in process), Starting Date (4/2/14), Starting Time (12:58 AM), Finishing Date, and Finishing Time (12:00 AM).
- Service Line: S0000022 - Low -:** Contains fields for Resource - MARK - (Mark Hanson - 2 HOUR) and Item - -.
- Service Line: Item - -:** Contains fields for Type (Item), No., Spare Part Action, Replaced Item No., Description, Service Item Serial No., Unit of Measure Code, Location Code, Quantity, and Unit Price Excl. VAT.

The bottom navigation bar includes icons for Lines, Start, Finish, Resource Alloc..., Add, Filter, Sort, Refresh, Refresh, Delete, Hide fields, and Navigation.

16. Tap the No. field to select an Item, or you can scan a barcode with a proper Item No.
17. Set Quantity to 1.





CRONUS Ltd

My Service Tasks: S0000022 - Low

Low

Symptom Code

No function

Fault Area Code

General

Fault Code

Not operating

Resolution Code

Product exchange (repair too expensive)

Repair Status Code

Service in process

Starting Date

4/2/14

Starting Time

12:58 AM

Finishing Date

Finishing Time

12:00 AM

Lines Start Finish Resource Alloc...

Service Line: S0000022 - Low

Resource - MARK -
Mark Hanson - 2 HOUR

Item - 80103-T -
19" M009 Monitor - 1 PCS

Add Filter Sort Refresh

Service Line: Item - 80103-T

Type
Item

No.
80103-T

Spare Part Action

Replaced Item No.

Description
19" M009 Monitor

Service Item Serial No.

Unit of Measure Code
PCS

Location Code

Quantity
1

Unit Price Excl. VAT

Refresh Delete Hide fields Navigation

18. Go back to the [Service Task card](#), and tap the Stop button. Note that the Repair Service Status changed to Service is finished, and the Finishing Date and Time has been filled with the actual date and time.

CRONUS Ltd

ks: S0000022 - Low - Product exch

Low

Symptom Code

No function

Fault Area Code

General

Fault Code

Not operating

Resolution Code

Product exchange (repair too expensive)

Repair Status Code

Service is finished

Starting Date

4/2/14

Starting Time

12:58 AM

Finishing Date

4/2/14

Finishing Time

01:03 AM

Lines Start Finish Resource Alloc...

Service Line: S0000022 - Low

Resource - MARK -
Mark Hanson - 2 HOUR

Item - 80103-T -
19" M009 Monitor - 1 PCS

Add Filter Sort Refresh

Service Line: Item - 80103-T

Type
Item

No.
80103-T

Spare Part Action

Replaced Item No.

Description
19" M009 Monitor

Service Item Serial No.

Unit of Measure Code
PCS

Location Code

Quantity
1

Unit Price Excl. VAT

Refresh Delete Hide fields Navigation





19. Let's say, that now you have Internet access on the device, so you would like to synchronize your offline modifications with the Dynamics 365 Business Central server. To do that, tap the MobileNAV menu (top left corner), and select Synchronization.
Note that all of your offline modifications are listed on this panel.

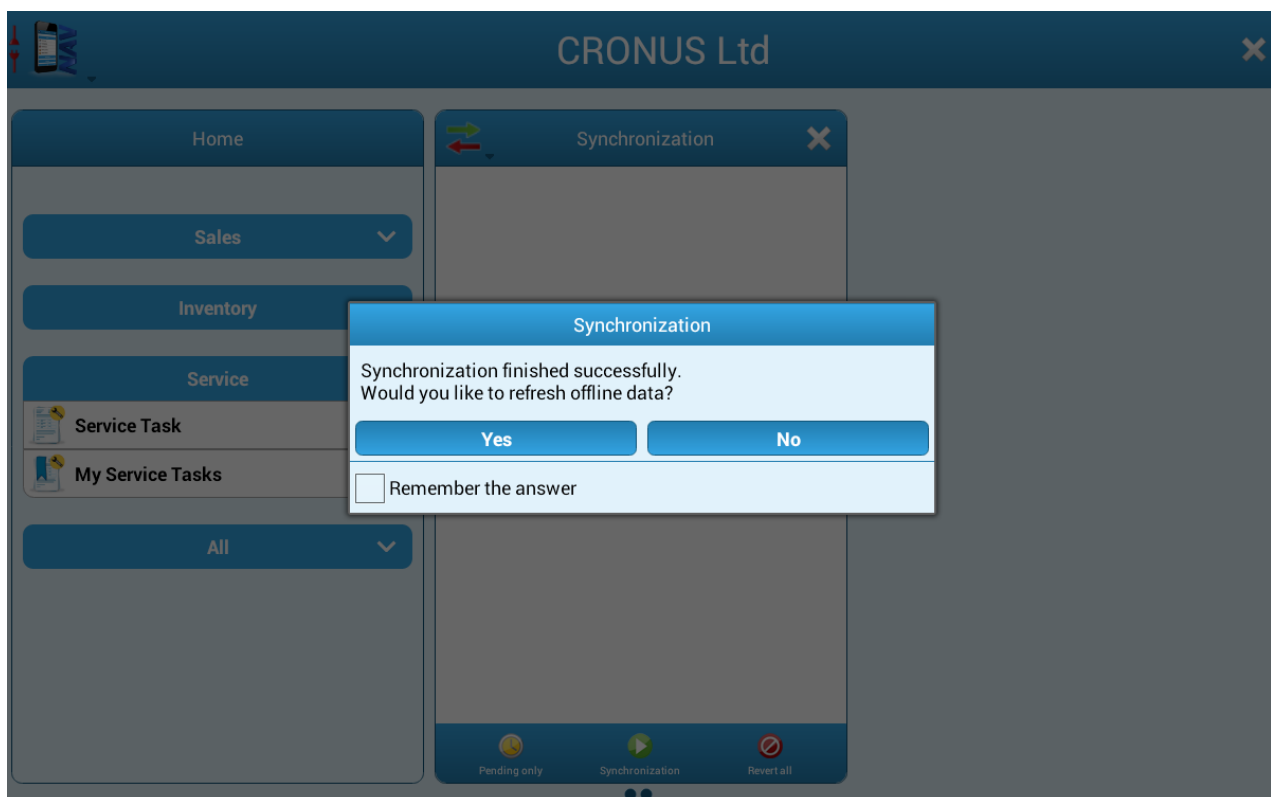


20. Tap the Synchronization button on the toolbar to start uploading your offline modifications.





21. After successful upload, you will be asked whether you want to refresh the offline data. Tap Yes.



22. Now the latest Service tasks will be downloaded again.





23. Go back to the [My Service Task list](#).



Note that the processed Service Task disappeared from the list.





24. Open Dynamics 365 Business Central client again.
25. Go to Departments/Service/Order Processing/Service Orders and find the processed Service Order. Note that the Status is now Finished.
26. Select the existing line, and tap Functions/Service Item Worksheet. Note that the Service Item Worksheet has been filled successfully from the mobile device.

19 Computer III 866 MHz

CRONUS Ltd.

HOME

View Edit Demand Overview Adjust Service Price Comments Worksheet OneNote Notes Links Refresh Go to Previous

19 Computer III 866 MHz

General

Document No.: SO000022

Service Item No.: 19

Item No.: 80005

Service Item Group Code: DESKTOP

Serial No.: HP739038762

Fault Reason Code:

Document Type: Order

Loaner No.:

Service Shelf No.:

Service Price Group Code:

Fault Area Code: 1

Symptom Code: 1

Fault Code: 11F

Resolution Code: Z1

Repair Status Code: FINISHED

Lines

Functions Line Find Filter Clear Filter

Type	No.	Description	Location C...	Unit of Mea...	Quantity	Fault Reaso...	Fault Ar
Resource	MARK	Mark Hanson		HOUR	2	1	
Item	80103-T	19" M009 Monitor			1	1	

Customer

Shipping

Details

OK

