MobileNAV User Guide

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Working with the MobileNAV client

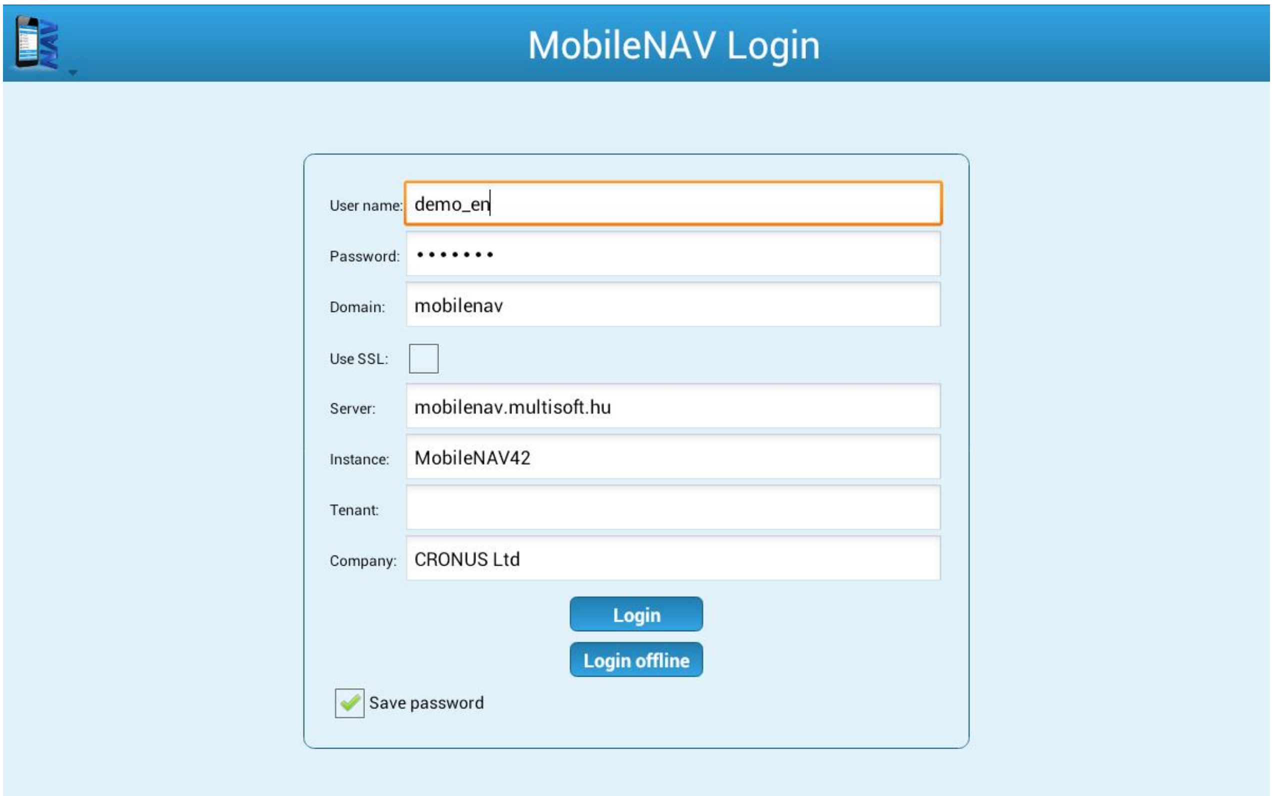
MobileNAV provides Microsoft Dynamics NAV functionality on mobile devices, which is an ideal solution for field agents on the road, for warehouse agents managing the inventory of your company, and for anyone who works in an environment without access to a desktop computer. With Internet access, they 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.

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.

Address: 1112 Budapest 36 Kőérberki út
Postal address: 1506 Budapest P.O. box: 5.
Tel: +36 1 3101492 • **Fax:** +36 1 3101497
E-mail: contact@mobilenav.com
www.mobilenav.com

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:



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.

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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

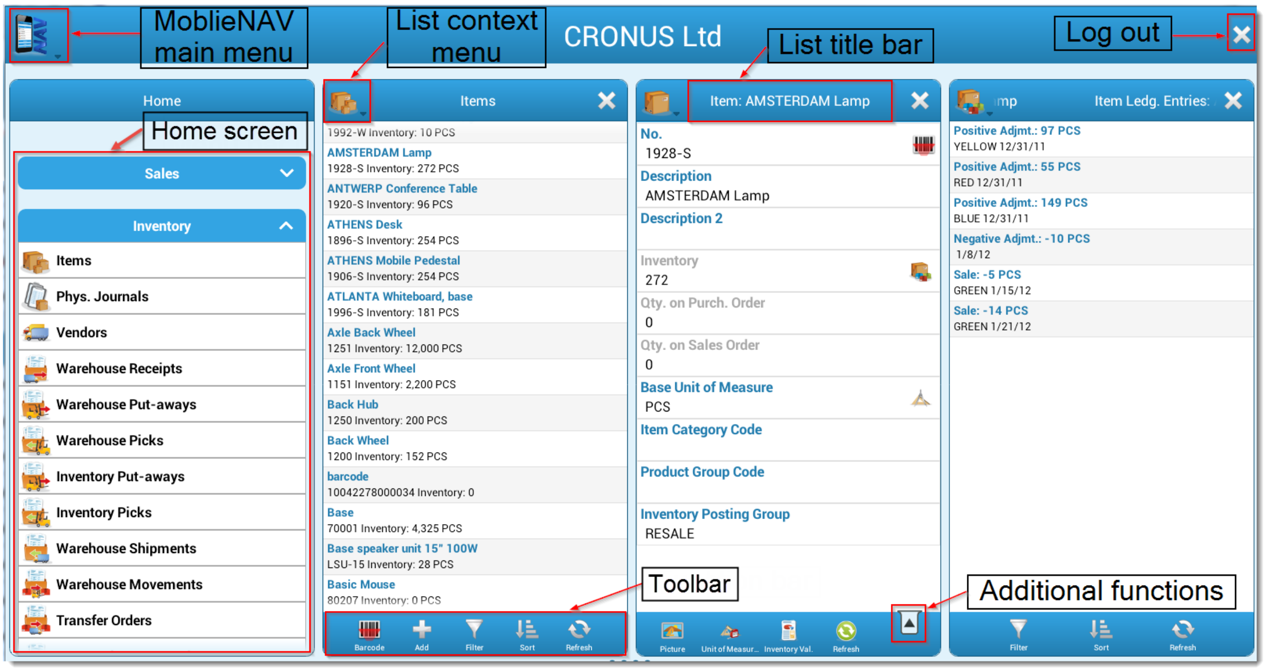
MobileNAV provides additional options to help you log in to the app. To see these options in the login menu, tap the MobileNAV icon in the top-left corner.

You have the following options:

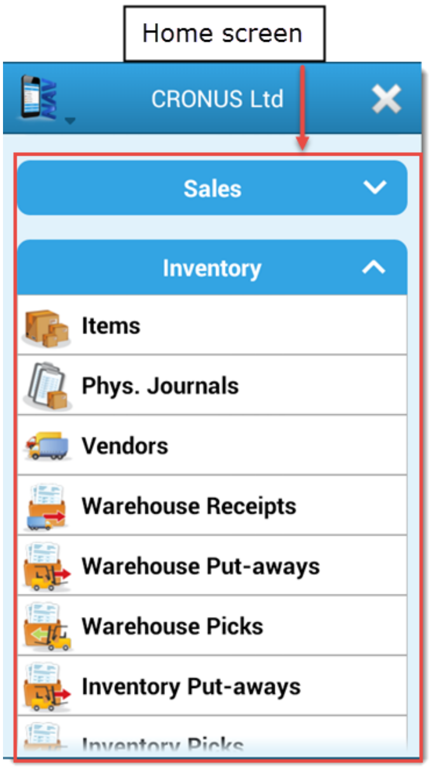
Reset to demo server: Resets the login settings so that you can connect to the demo server, with which you can access a fully working demo version of the MobileNAV app.
Login configurations: Displays your saved login configurations. In case you need access to multiple companies or multiple database instances 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.

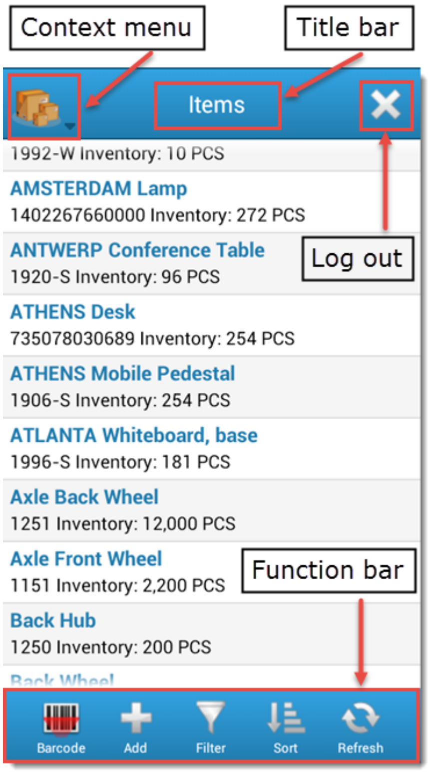
Getting around in MobileNAV

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:





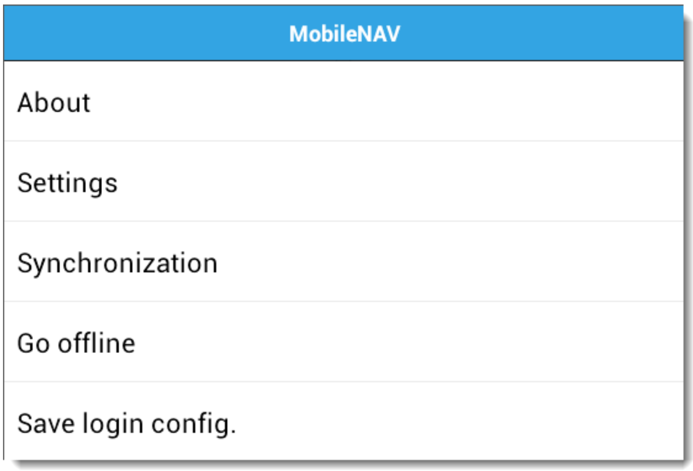
The workboard is the home page of MobileNAV from where you can access the MobileNAV main menu and start navigating on the home screen.

About the MobileNAV main menu

The main menu, allows you to do the following:

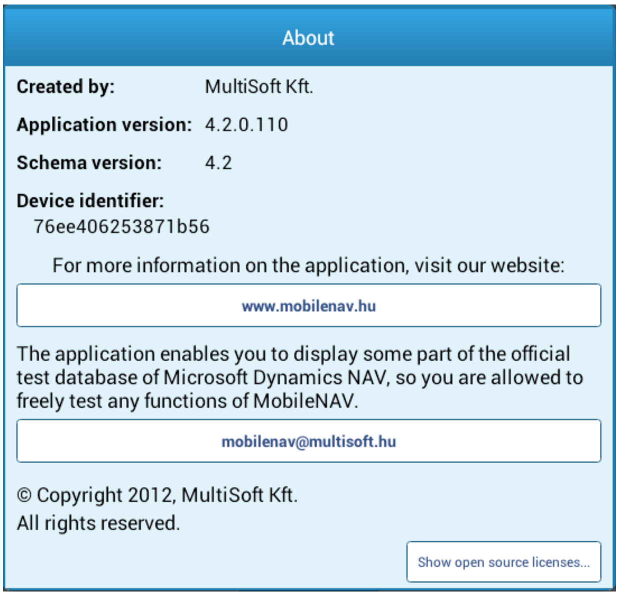
- View basic information about the application
- Change the settings of the MobileNAV app. For example, you can setup your barcode reader.
- Use the app in offline mode and synch your changes after reconnecting
- Save your login configuration

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.

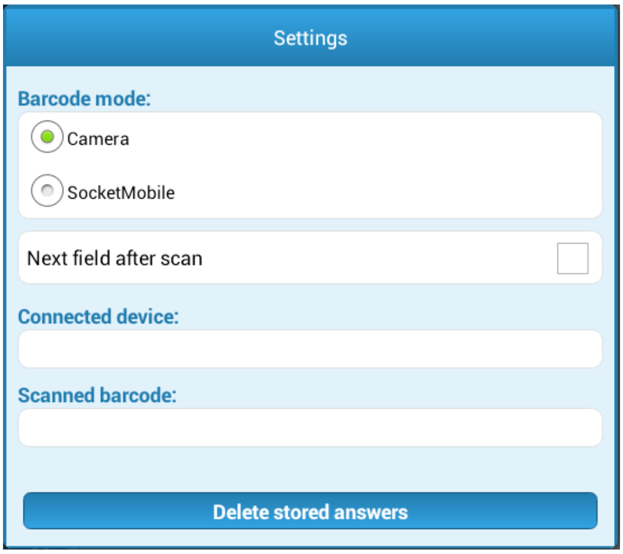
Connection monitoring interval: Here you can set the time interval in seconds of monitoring Internet connection.

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.



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.

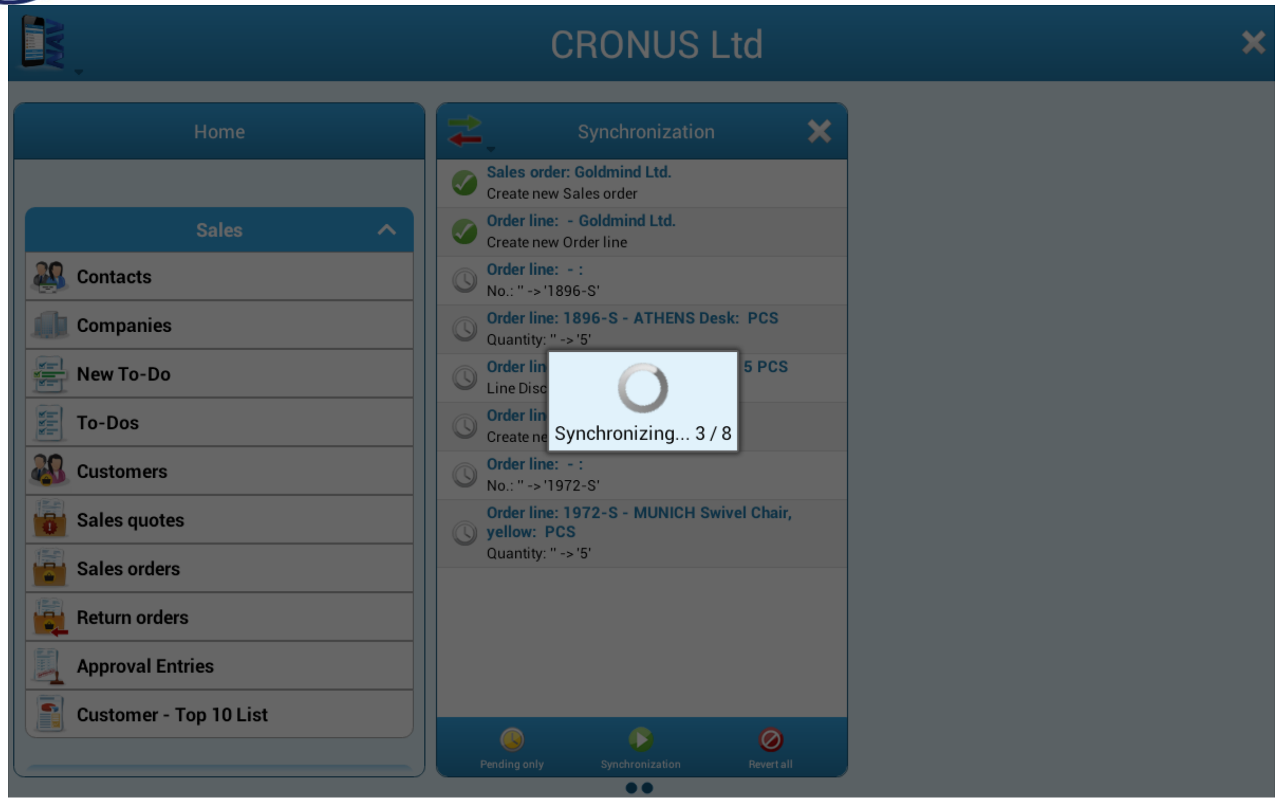
Smart scanning: Select this option to allow smart scanning. With smart scanning you do not need to handle the scanning focus inside a list or card anymore, because the system will find out what has been scanned and insert the value into the proper field. You can scan a Cross Reference Number, a Bin Code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



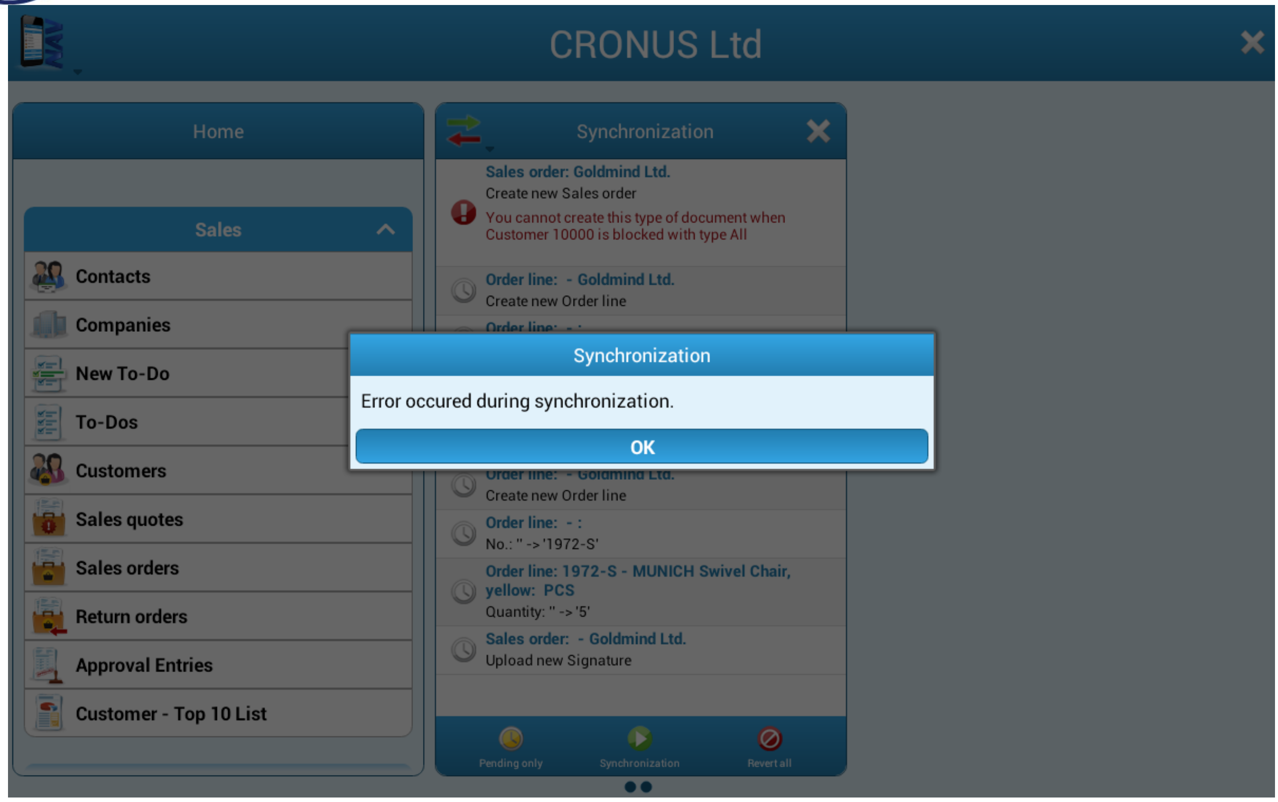
Background synchronization

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 databasefor some reason. The error message will

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Postal address: 1506 Budapest P.O. box: 5.
Tel: +36 1 3101492 • **Fax:** +36 1 3101497
E-mail: contact@mobilenav.com
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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,

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Postal address: 1506 Budapest P.O. box: 5.
Tel: +36 1 3101492 · **Fax:** +36 1 3101497
E-mail: contact@mobilenav.com
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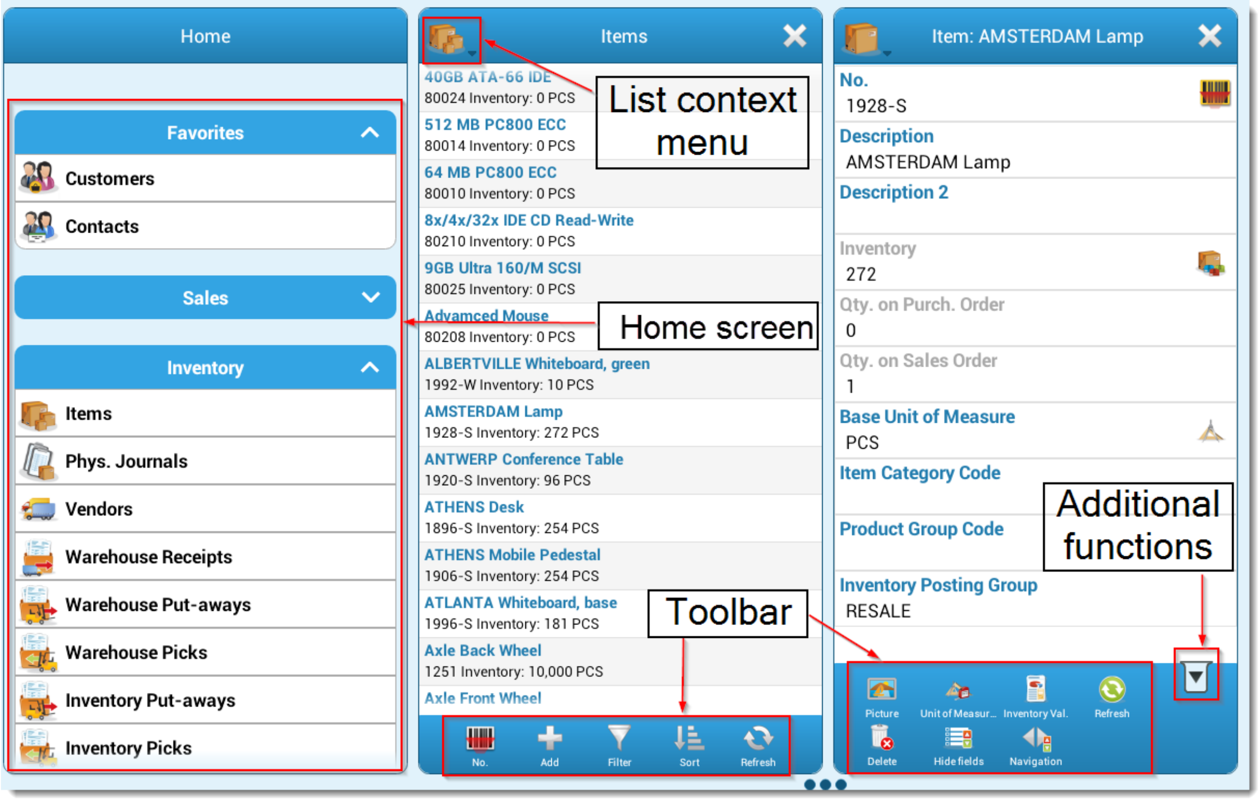
MobileNAV goes offline, online options will not be available, data is taken from the offline database and synchronization is done automatically when the connection is restored.

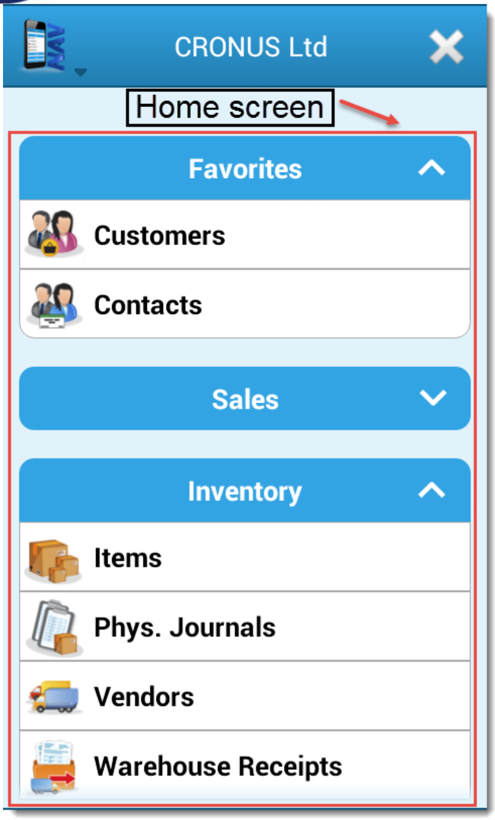
Enable **Auto online/offline mode** and set the time interval for checking the connection to the server under Settings.

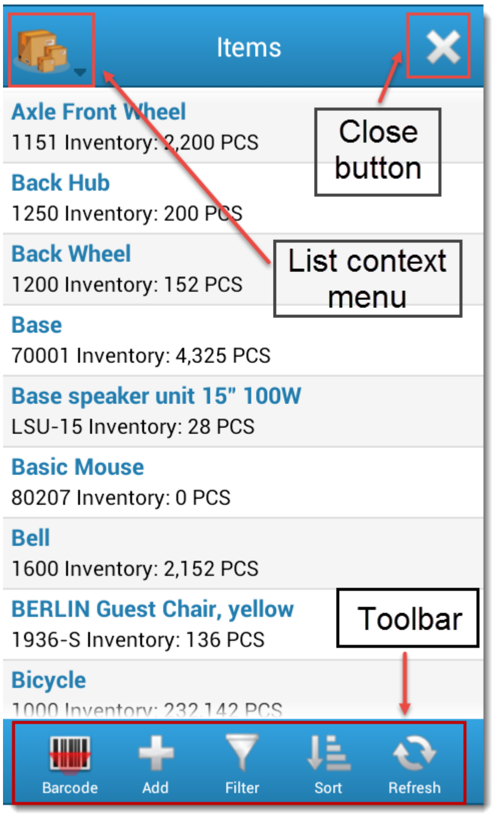
→ *ez viszont meg ott van a telomon a menuben*Navigating in MobileNAV

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**.

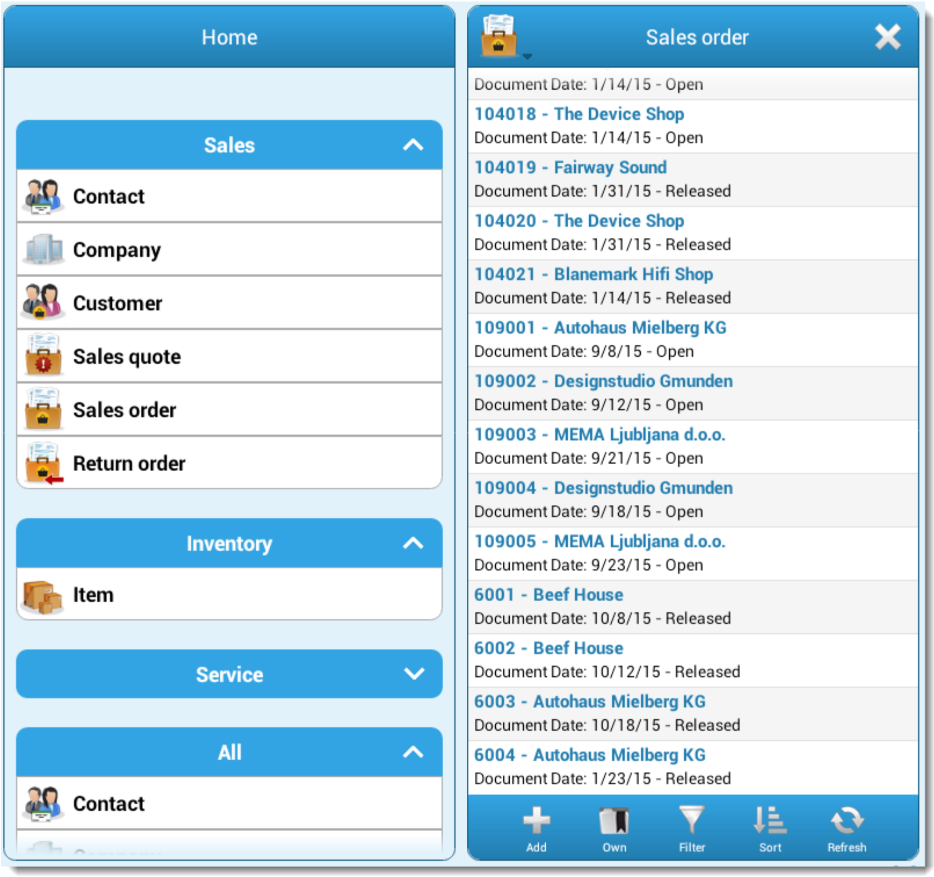
How to get help

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:

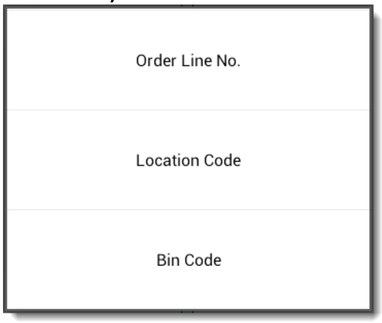
A list with a single barcode filter field

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.



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 filter 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

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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.

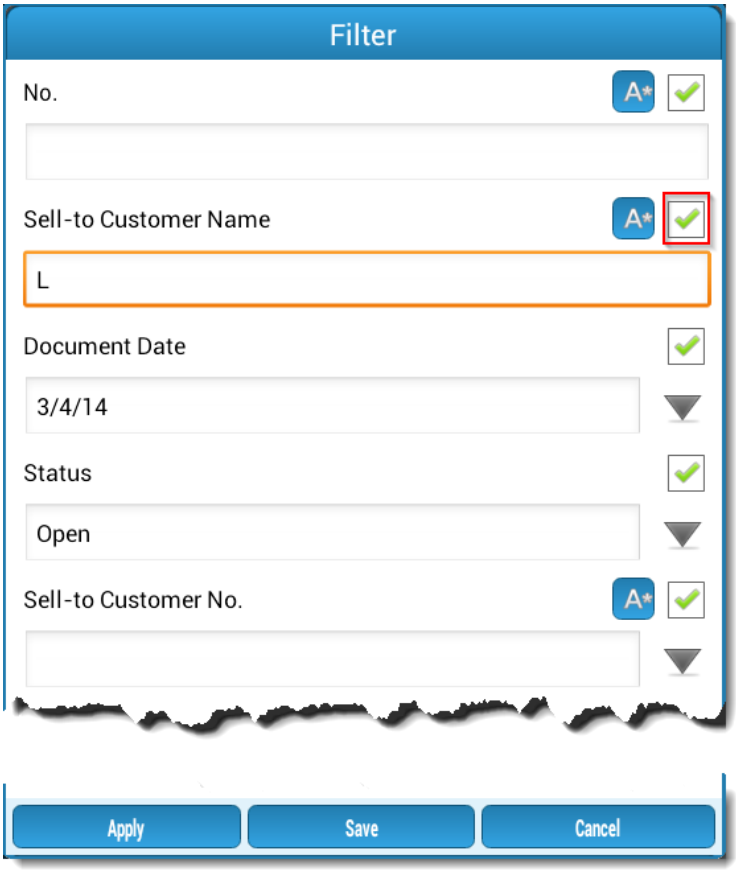
The **Own** filter is enabled by default ; therefore, when you open a list where this filter is available, you only see your own items. In some cases you may have to tap the filter to disable it and see any results.

***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.



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 *Jo*hn Smith and *Jo*hanna Doe, but not Steve *Jo*hnson. 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 *Jo*hn Smith, *Jo*hanna Doe, and Steve *Jo*hnson. Dynamics 365 Business Central, you can type **Jo** to view the same results.

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Postal address: 1506 Budapest P.O. box: 5.
Tel: +36 1 3101492 · **Fax:** +36 1 3101497
E-mail: contact@mobilenav.com
www.mobilenav.com

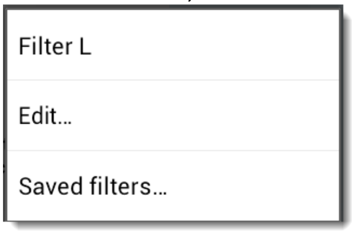
The application saves your last used filtering setting.

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

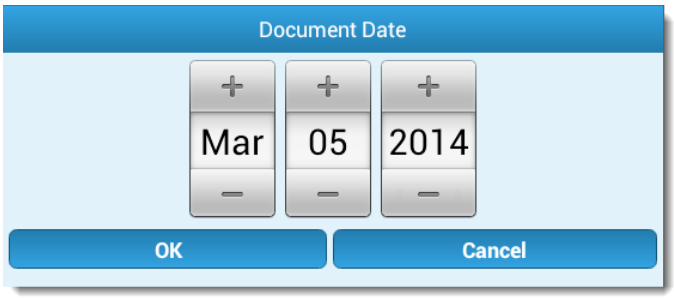
Cards have the following field types:

Text: Type any character into a text field.

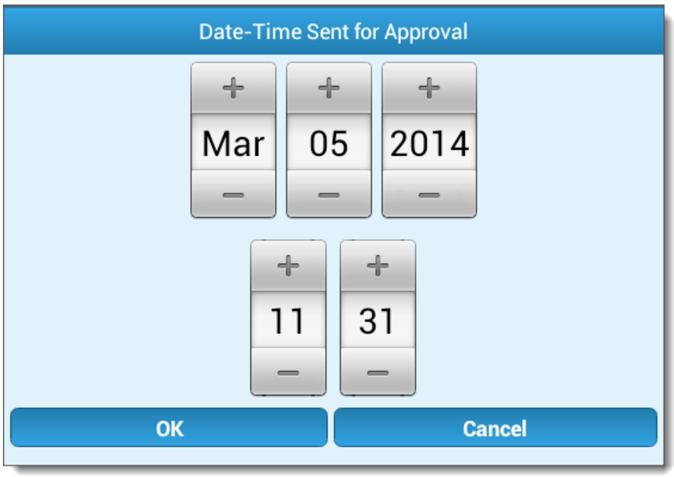
Integer: Type any number or character into the field.

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.



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.



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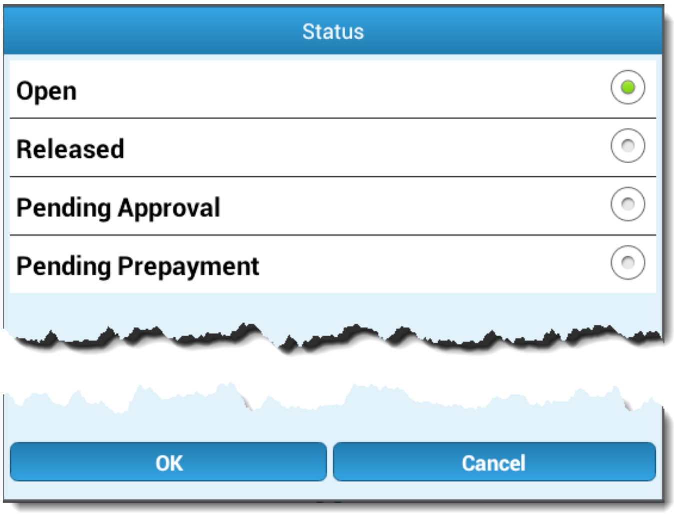
Options: Tap the arrow next to the field and select an option from the list and tap **OK**.



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

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

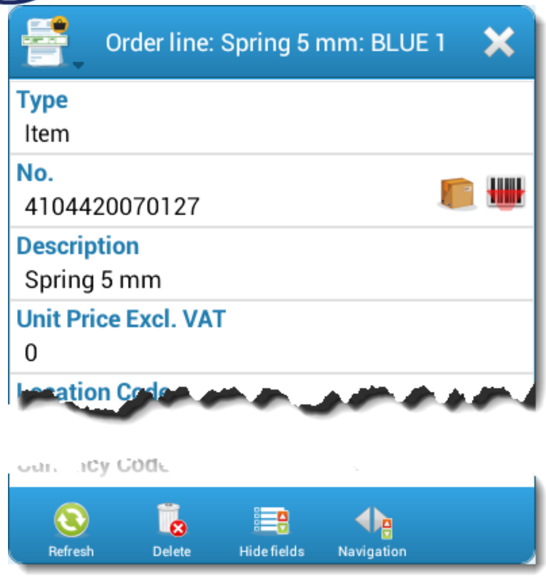
From MobileNAV, you can easily navigate to the website of your contact or open a linked document. To do so,

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

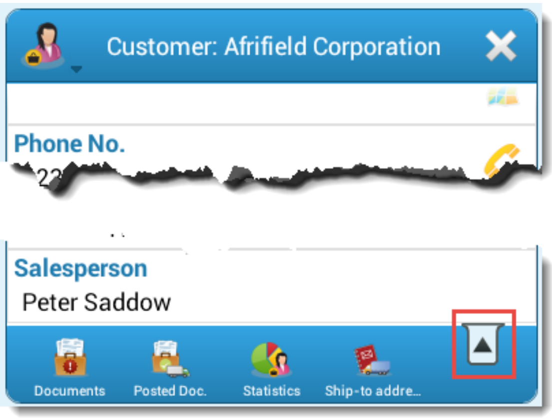
A related card contains the details of an item that is only marginally mentioned on another card. For instance, the No. field in a **Sales Order Line** only contains the identifier of an item that does not necessarily tell you much about the underlying product.



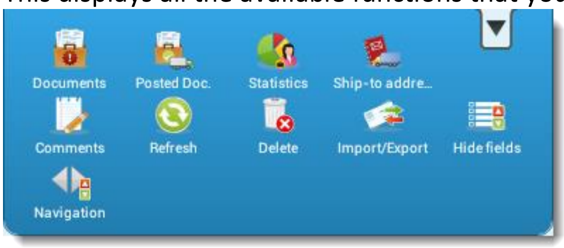
You can, however, tap the  icon to open the card of the related item that provides the details of that item.

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.

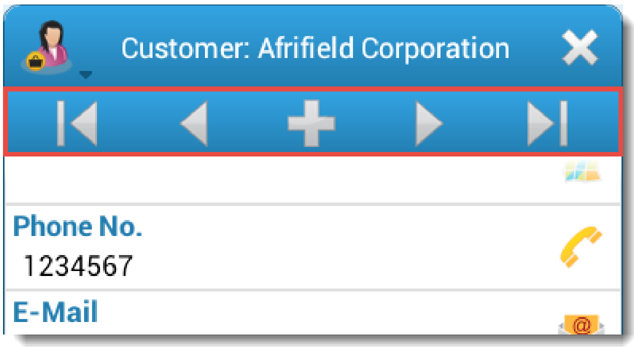
Standard tools

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

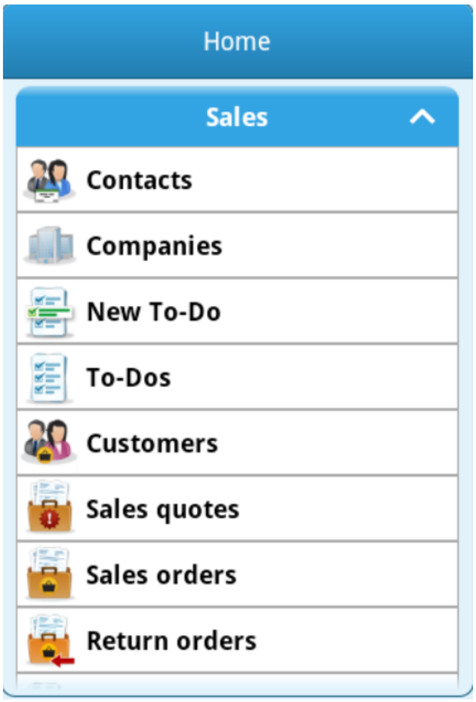
execute a process-only report. For example, calculate and generate the consumption journal lines

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.

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Postal address: 1506 Budapest P.O. box: 5.
Tel: +36 1 3101492 • **Fax:** +36 1 3101497
E-mail: contact@mobilenav.com
www.mobilenav.com

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 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

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 expect 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.

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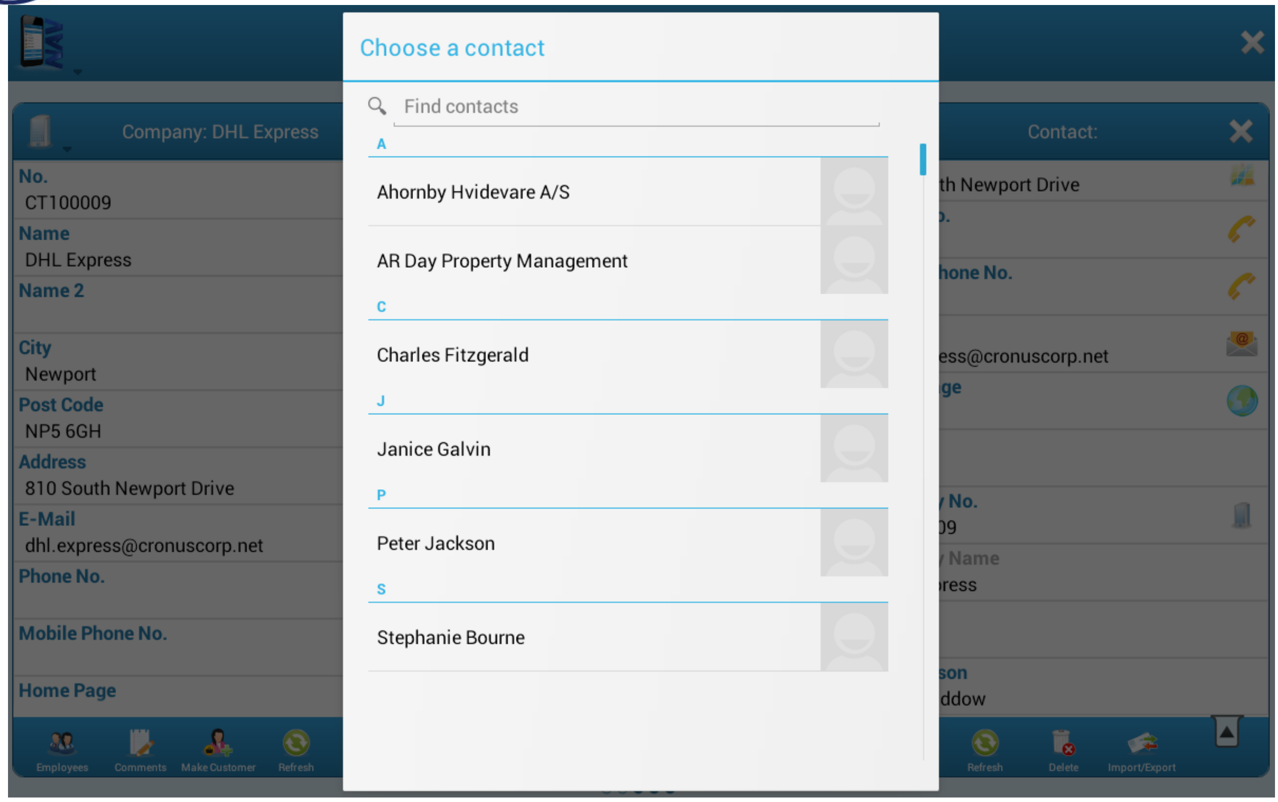
Postal address: 1506 Budapest P.O. box: 5.
Tel: +36 1 3101492 • **Fax:** +36 1 3101497
E-mail: contact@mobilenav.com
www.mobilenav.com

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.

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.

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.

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

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

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.

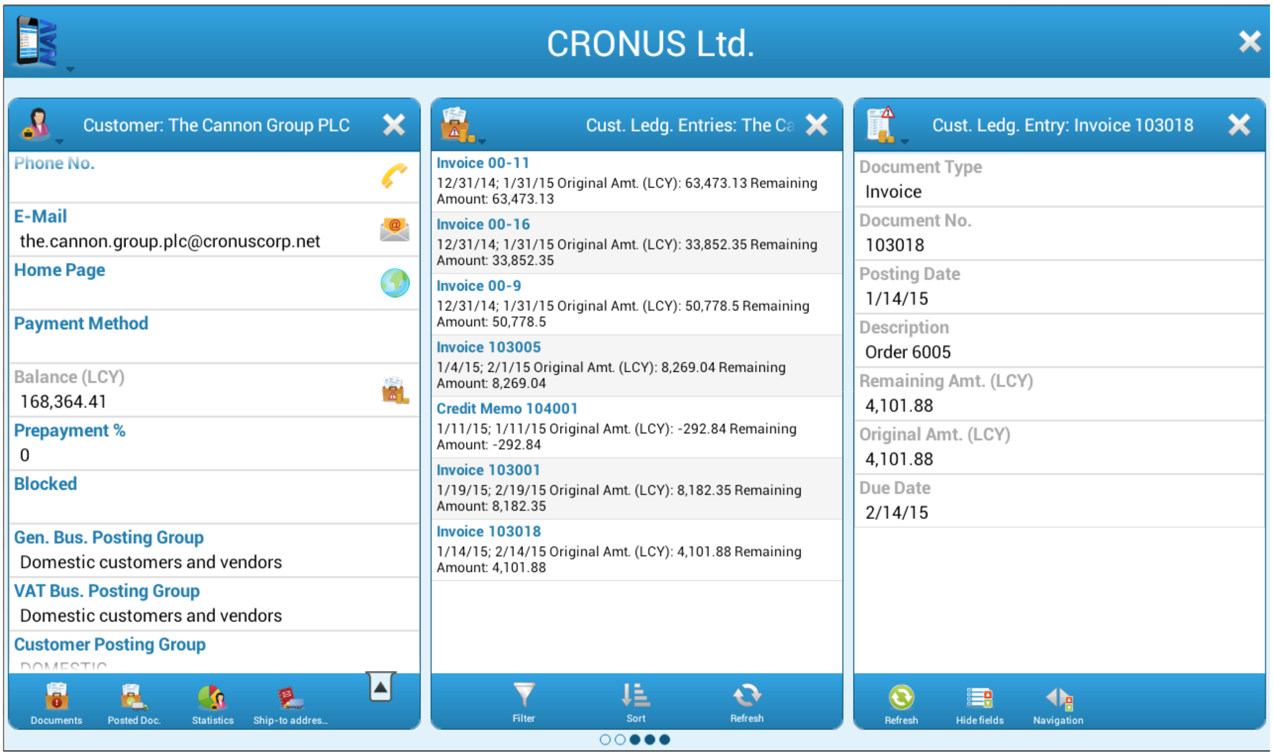
Tap the Statistics button to display the Customer Statistics card.

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



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

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.

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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

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.

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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.

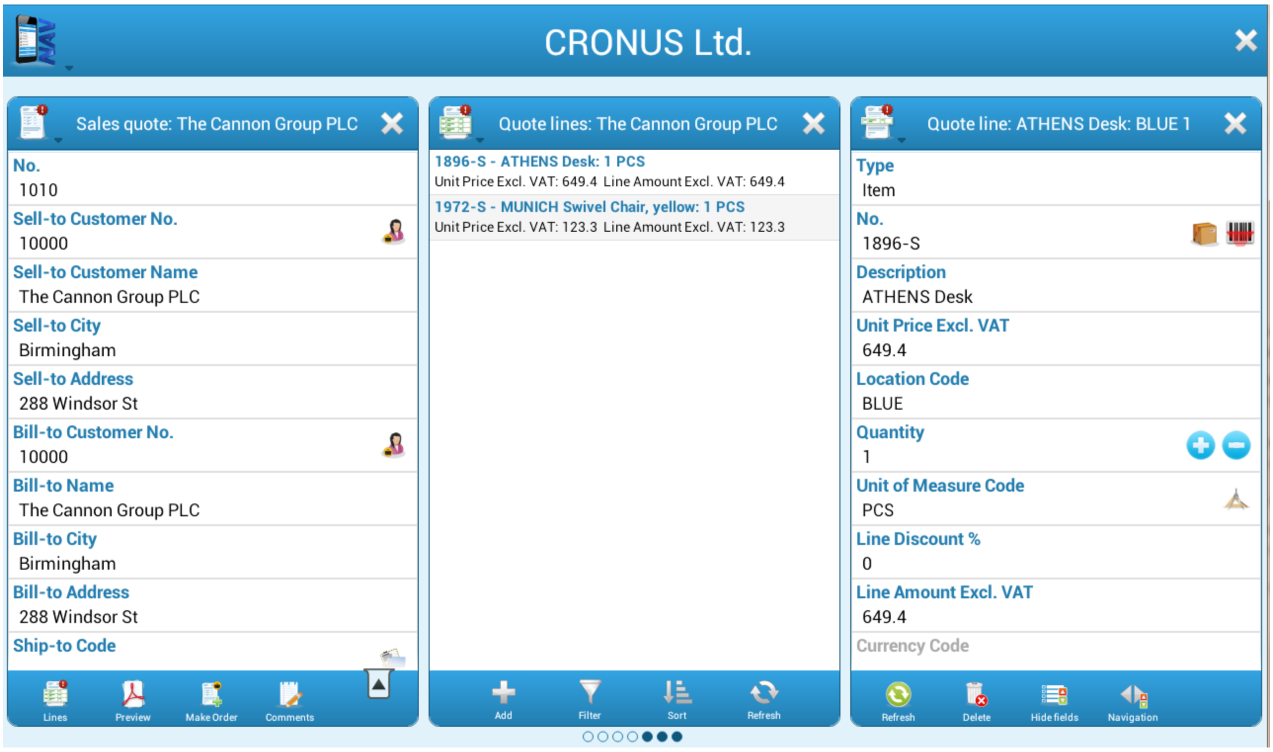
Sales quote lines list

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



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.

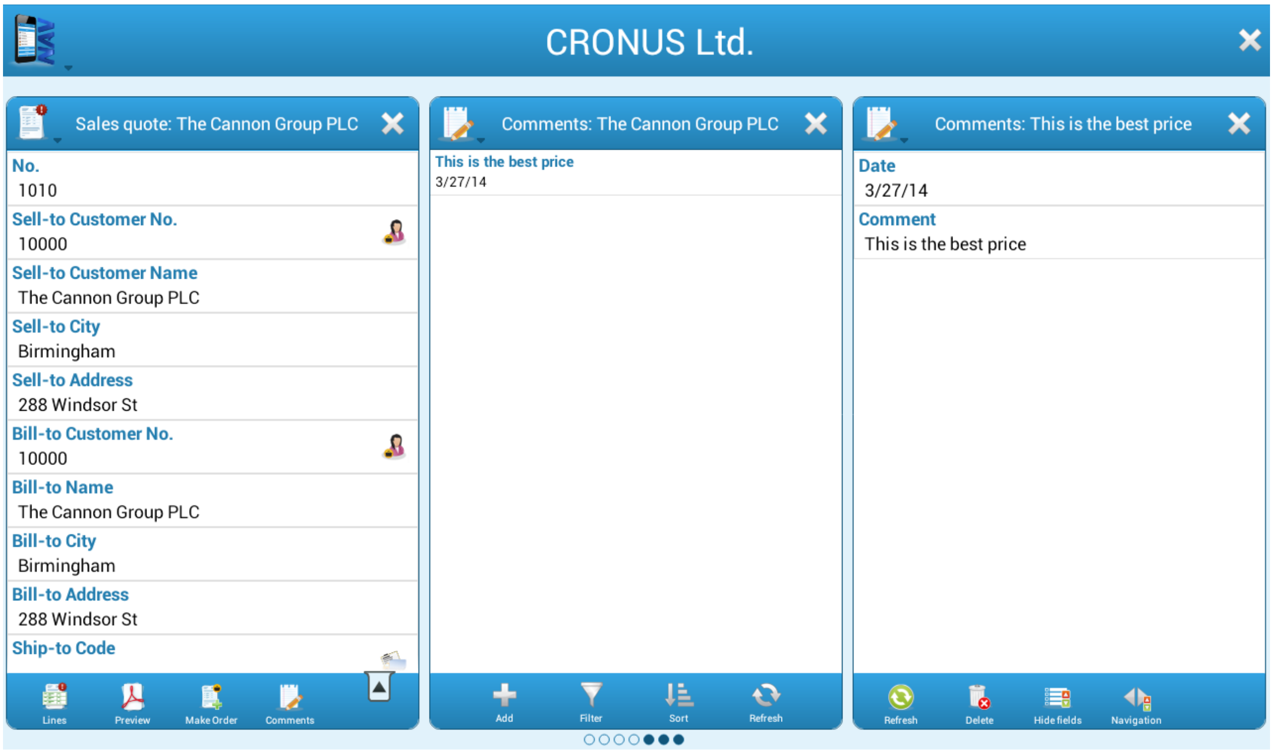
Extra functions:

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



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

When you tap the Lines icon the 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.

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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

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

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:

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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.

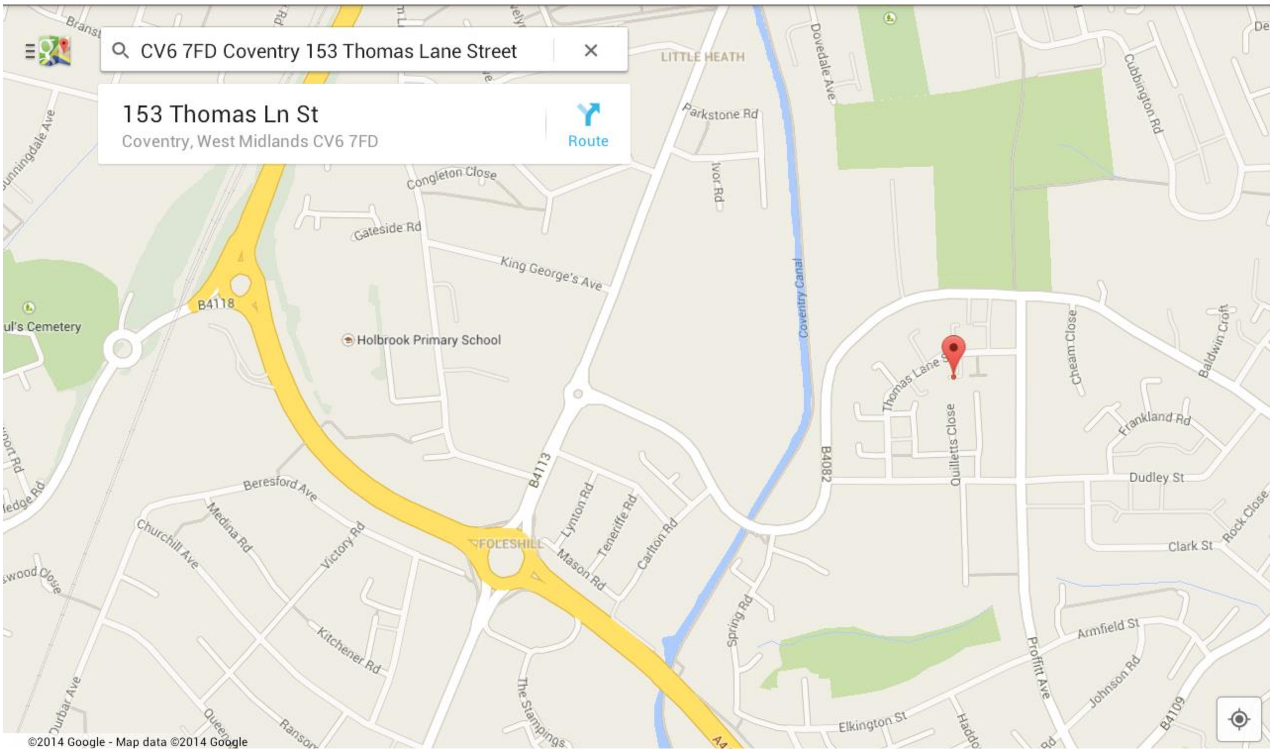
Sales workflow example

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.

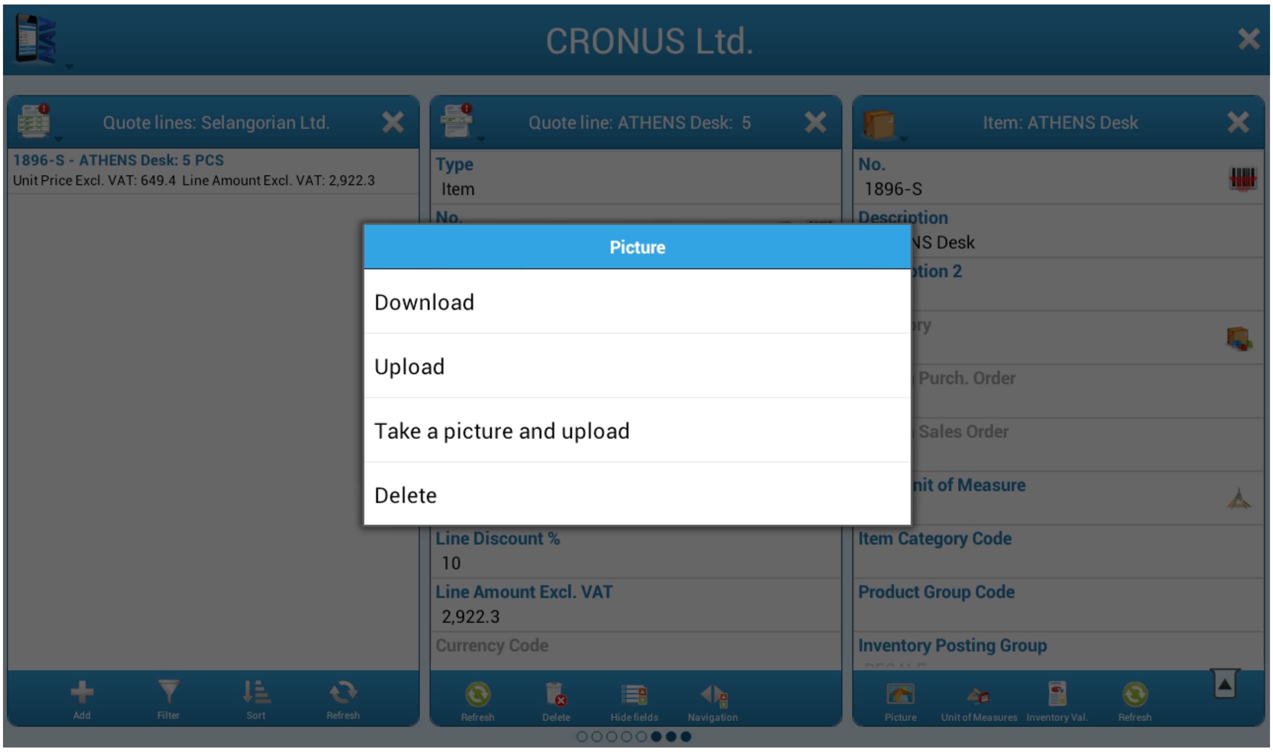
7. Tap on the Add button on the toolbar to create a new sales quote. Note that the Sell-to, Bill-to and Ship-to addresses, the document dates, and so on are prefilled with data, so normally the salesperson does not need to modify it.

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

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

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

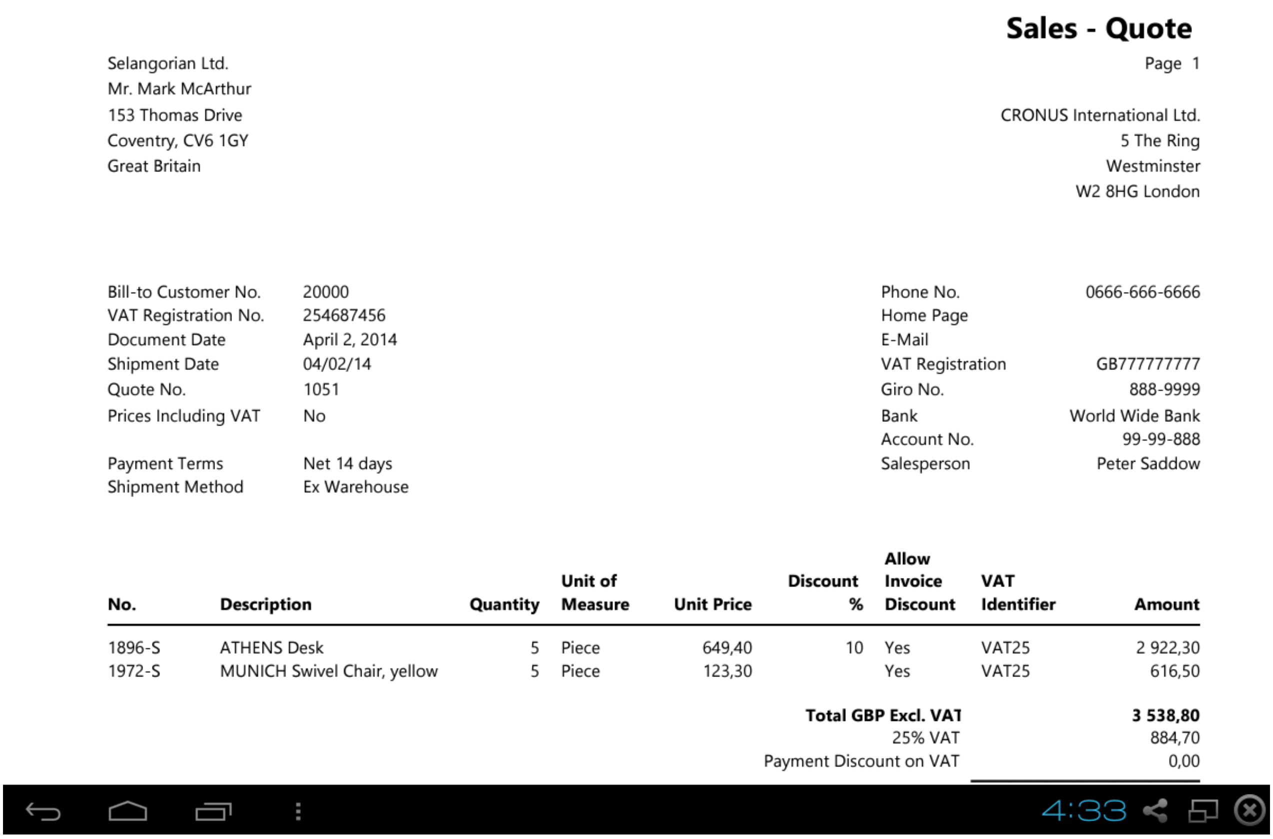
11. Tap the Picture button and then tap Download.



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.

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.



Sales - Quote

Page 1

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

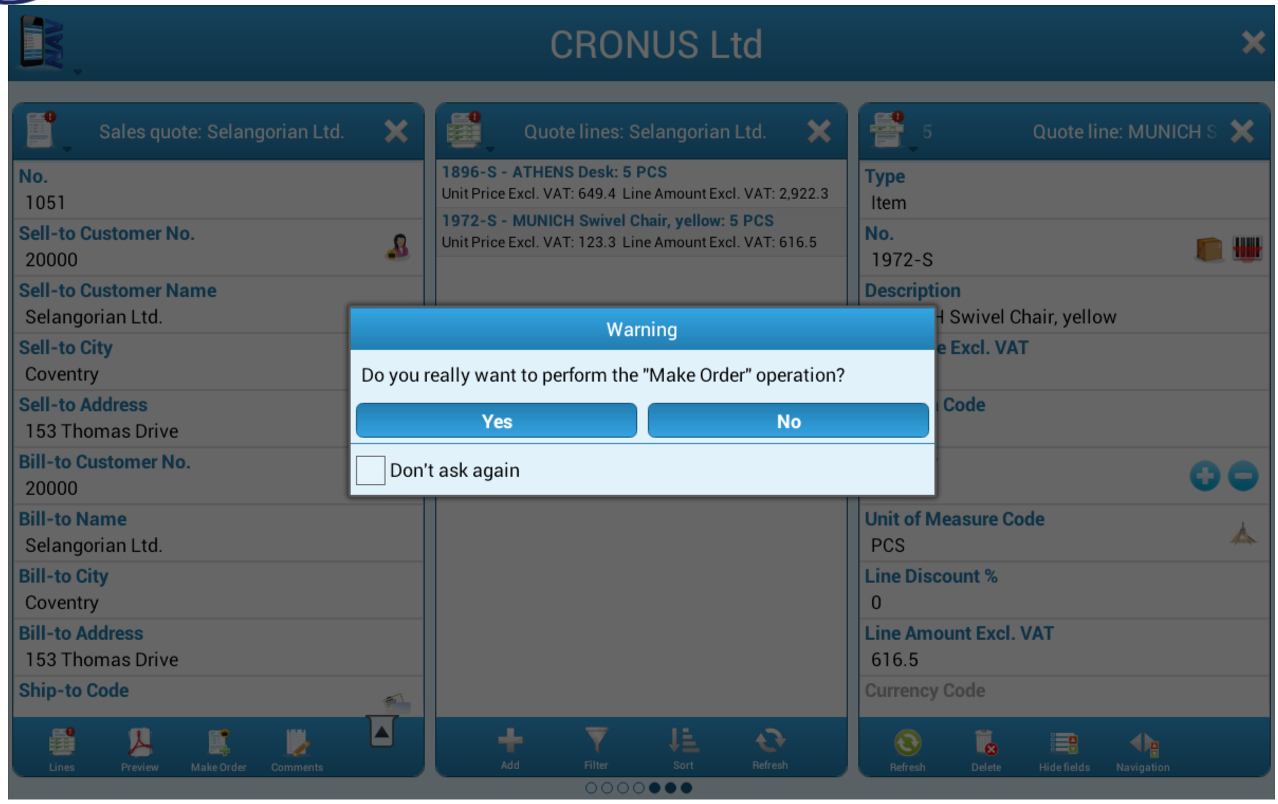
CRONUS International Ltd.
5 The Ring
Westminster
W2 8HG London

Bill-to Customer No.	20000	Phone No.	0666-666-6666
VAT Registration No.	254687456	Home Page	
Document Date	April 2, 2014	E-Mail	
Shipment Date	04/02/14	VAT Registration	GB777777777
Quote No.	1051	Giro No.	888-9999
Prices Including VAT	No	Bank	World Wide Bank
		Account No.	99-99-888
Payment Terms	Net 14 days	Salesperson	Peter Saddow
Shipment Method	Ex Warehouse		

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

4:33

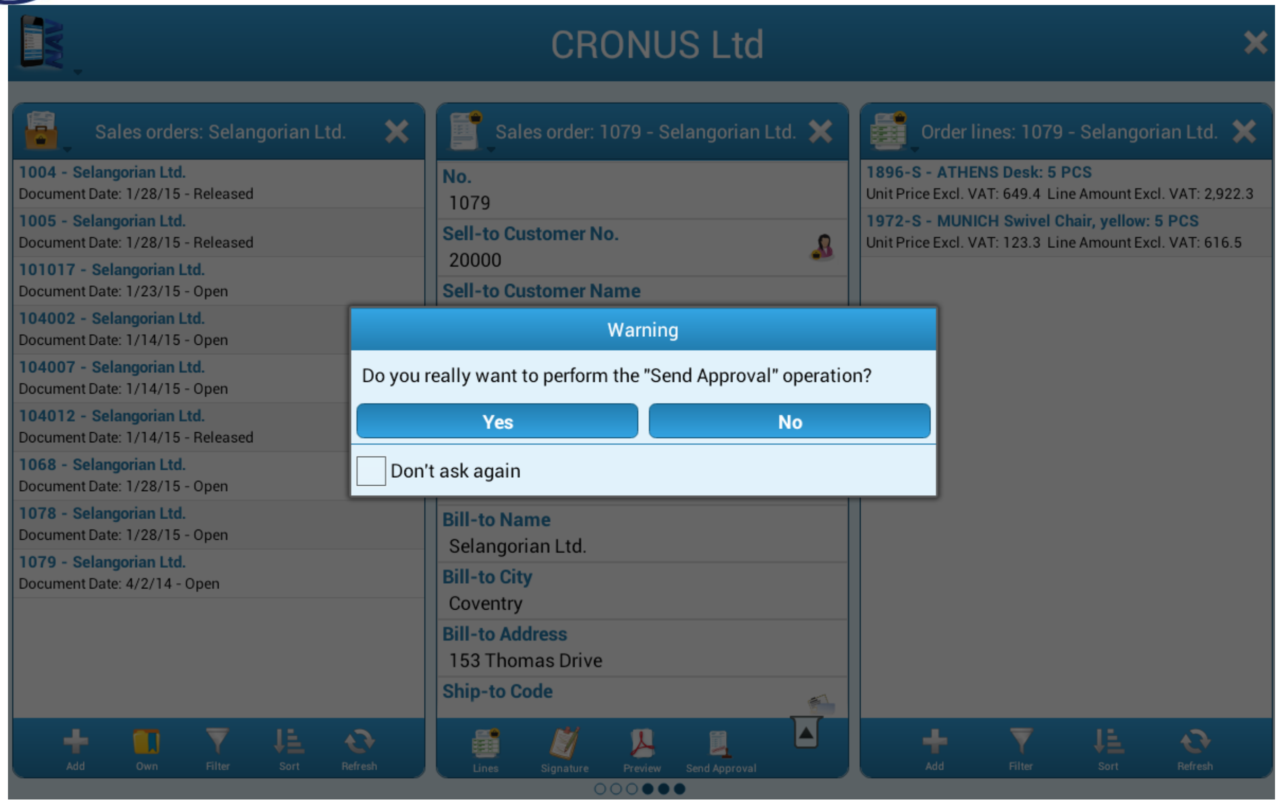
15. Tap Back to go back to MobileNAV application.
16. On the sales quote card tap the Make Order button on the toolbar to create the sales order.



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.

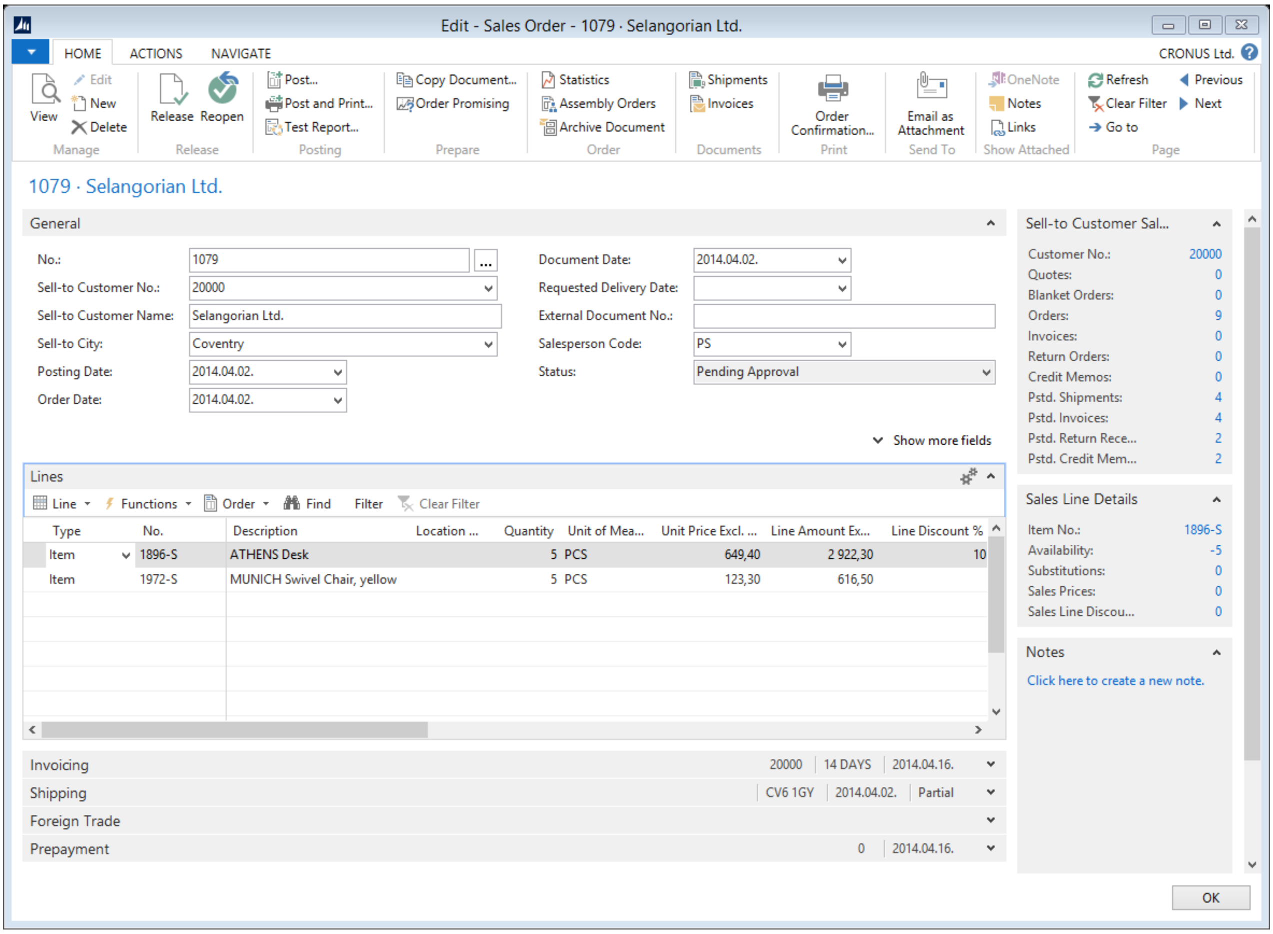
19. The customer confirms his order with his signature. Tap on the Signature icon, tap on Upload, and then the customer signs the touchscreen.

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.



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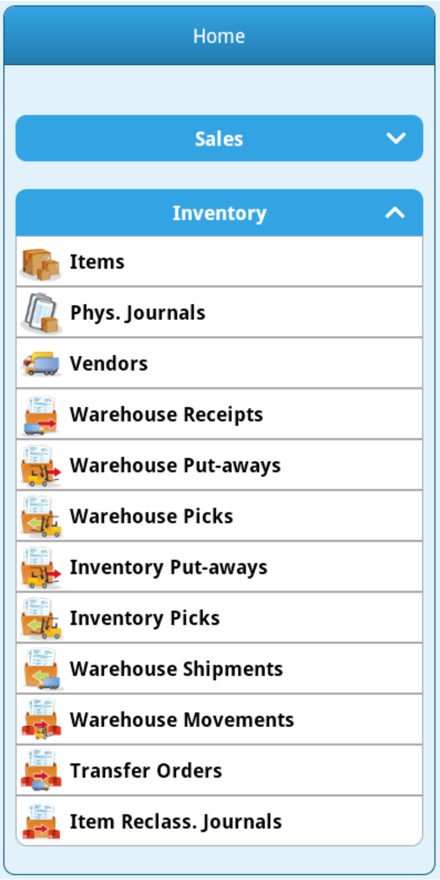
Inventory

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.

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www.mobilenav.com

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

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 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, Adress2 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 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.

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www.mobilenav.com

Warehouse Receipt Lines list

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.

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Warehouse Put-aways list

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.

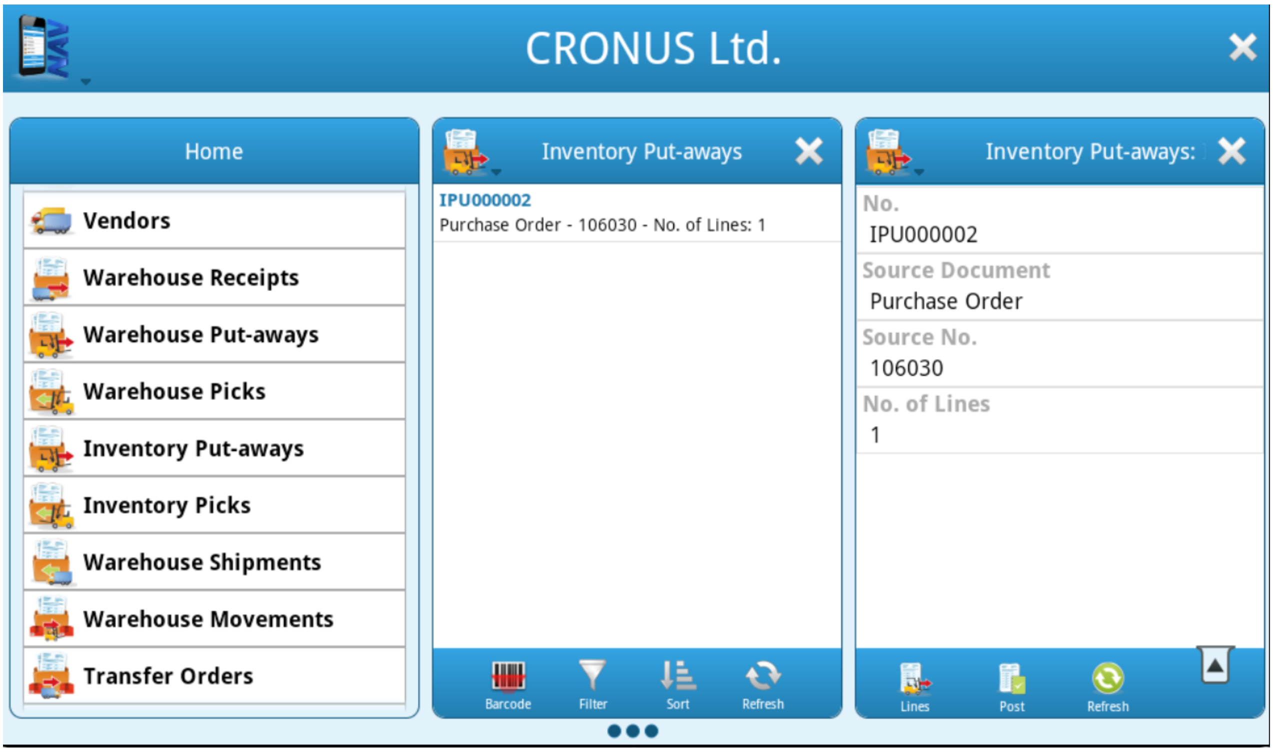
Toolbar functions:

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



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

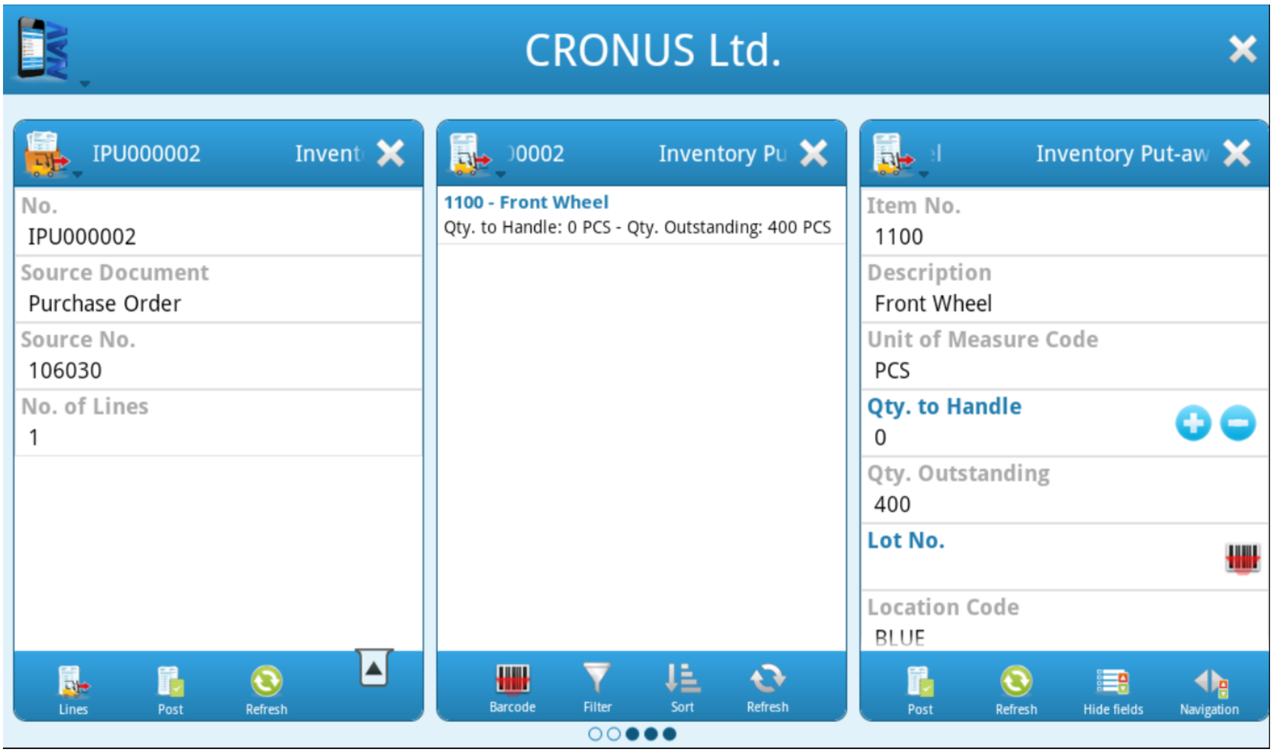
The Inventory Put-aways card has the following details: No, Source Document, Source No. and No. of Lines. These are non-editable fields.

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

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

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

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.

Address: 1112 Budapest 36 Kőérberki út
Postal address: 1506 Budapest P.O. box: 5.
Tel: +36 1 3101492 • **Fax:** +36 1 3101497
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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.

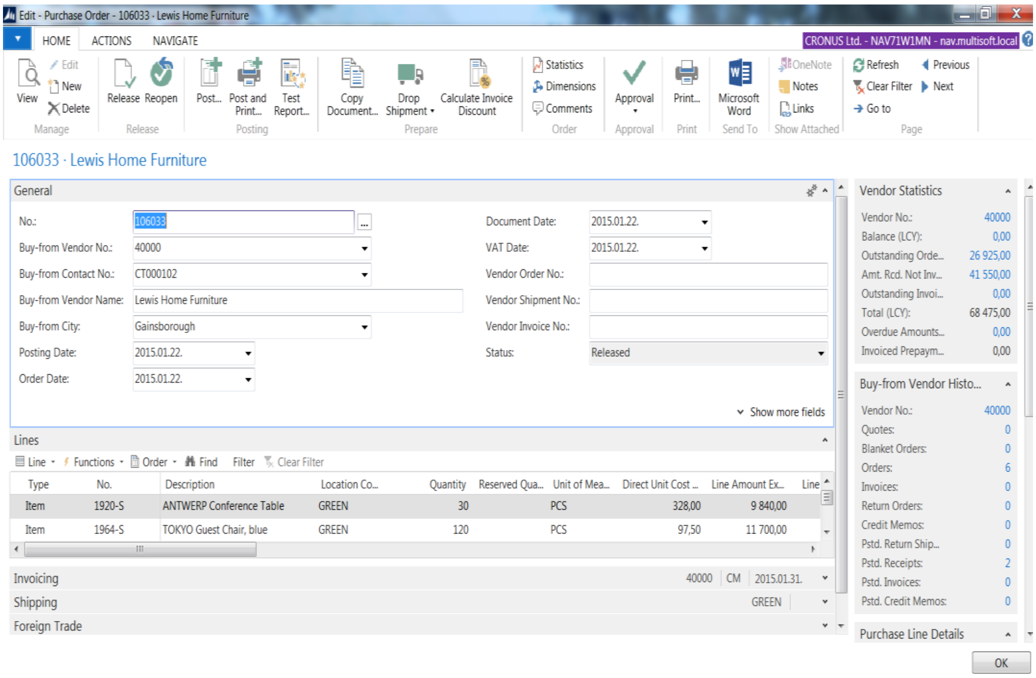
Tap the measure icon on the Unit of Measure Code field to change the available unit of measure.

Inventory workflow example

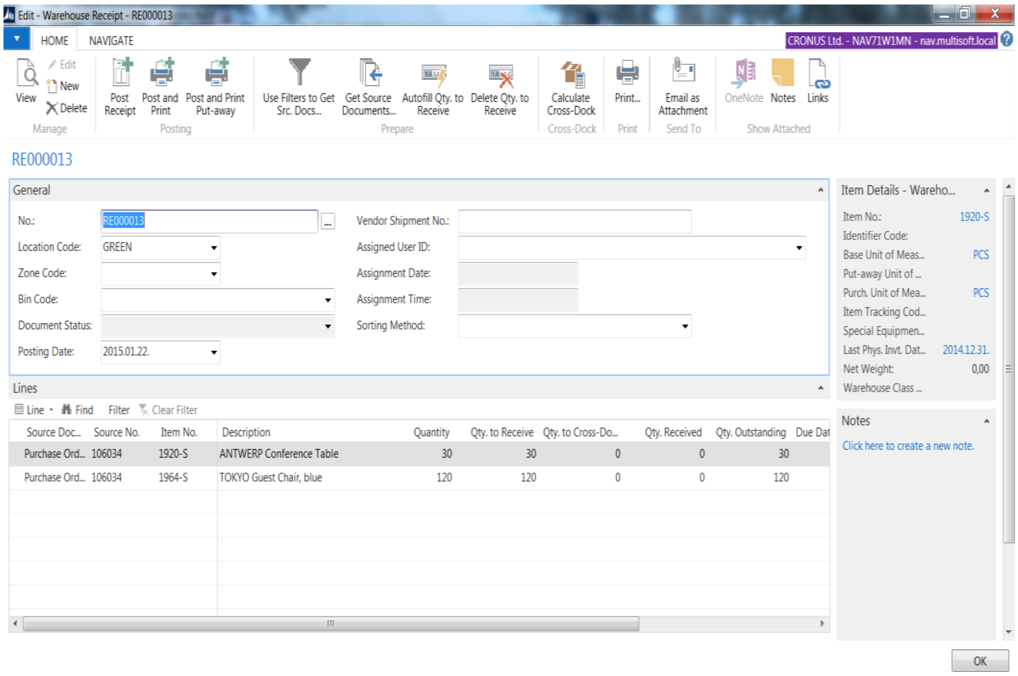
Let’s see a typical example for the Inventory module. The purchaser creates a purchase order in Dynamics 365 Business Central. When the items are received the warehouse back office employee creates a receipt for this purchase order in Dynamics 365 Business Central. The Receipt can be posted in the MobileNAV 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.



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

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.

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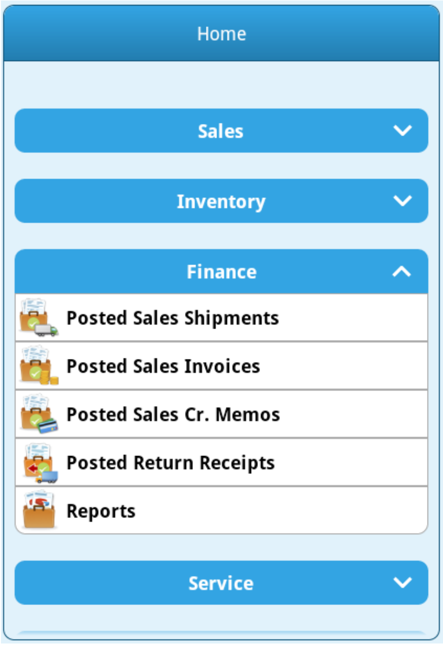
8. The Warehouse Put-away line is registered and disappears from this screen. If you want to register another Line you have to fill the Qty. to Handle field with the handled quantity. If all Lines are correct, tap the Register button on the Warehouse Put-away Line card and all Lines of the Warehouse 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

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

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

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

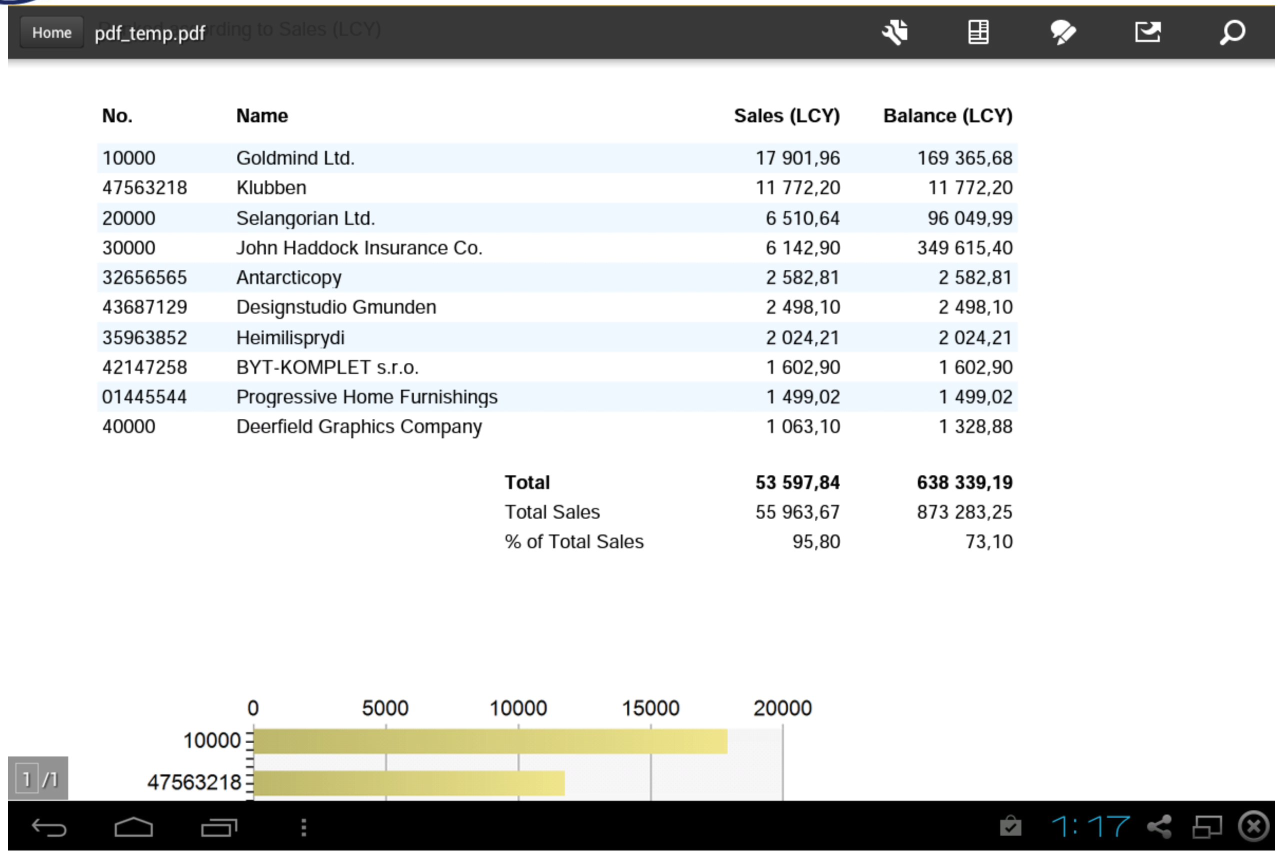
This process-only report is available from the Consumption Journal card, where you can generate the Consumption Journal Lines by opening the Calculate Consumption report, specifying certain filter criteria on the report request form, and then execute the process-only report.

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

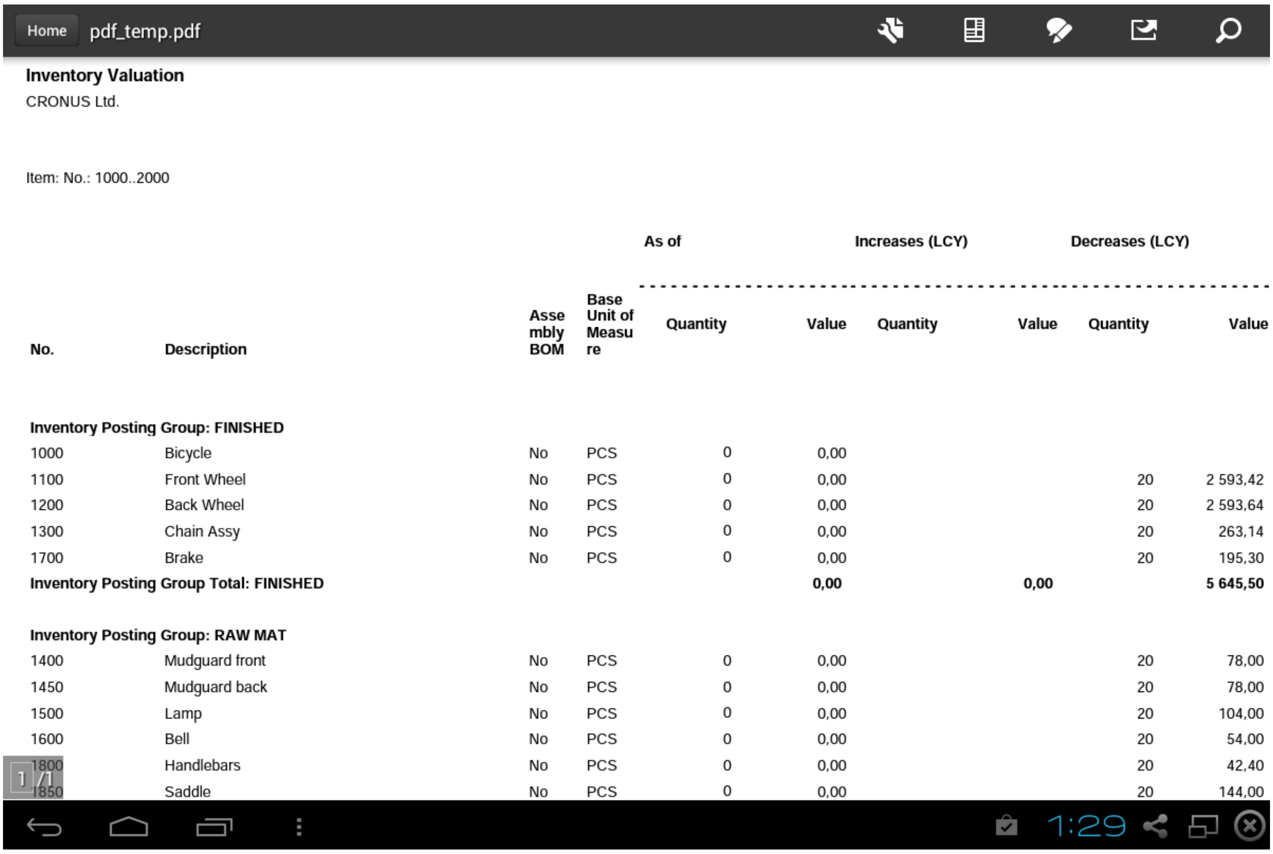
Inventory Valuation

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

No.	Description	Assembly BOM	Base Unit of Measure	As of Quantity	As of Value	Increases (LCY) Quantity	Increases (LCY) Value	Decreases (LCY) Quantity	Decreases (LCY) 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

1 /1
1:29

Address: 1112 Budapest 36 Kőérberki út
Postal address: 1506 Budapest P.O. box: 5.
Tel: +36 1 3101492 • **Fax:** +36 1 3101497
E-mail: contact@mobilenav.com
www.mobilenav.com

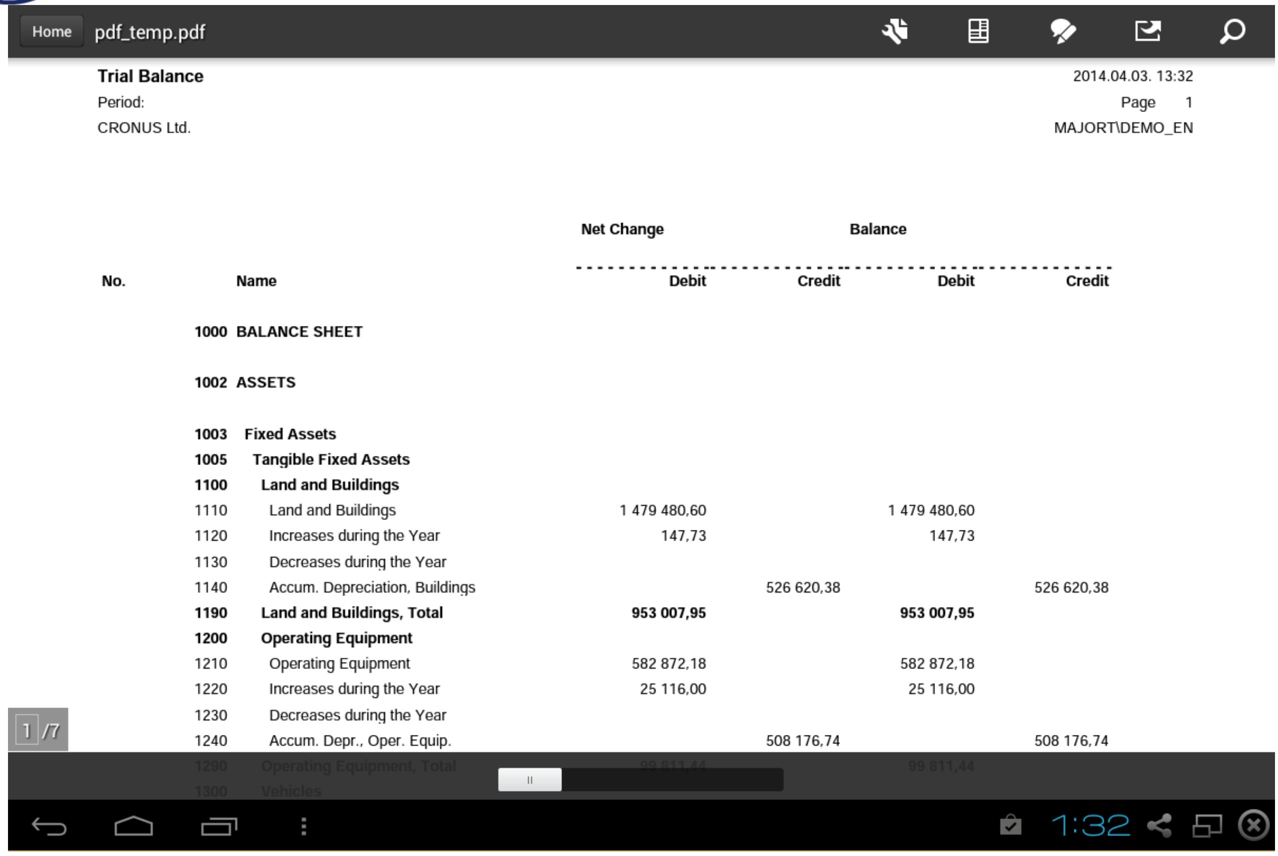
Trial Balance

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.



Trial Balance 2014.04.03. 13:32
Period: Page 1
CRONUS Ltd. MAJORT\DEMO_EN

No.	Name	Net Change Debit	Net Change Credit	Balance Debit	Balance 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	99 811,44		99 811,44	
1300	Vehicles				

Finance workflow example

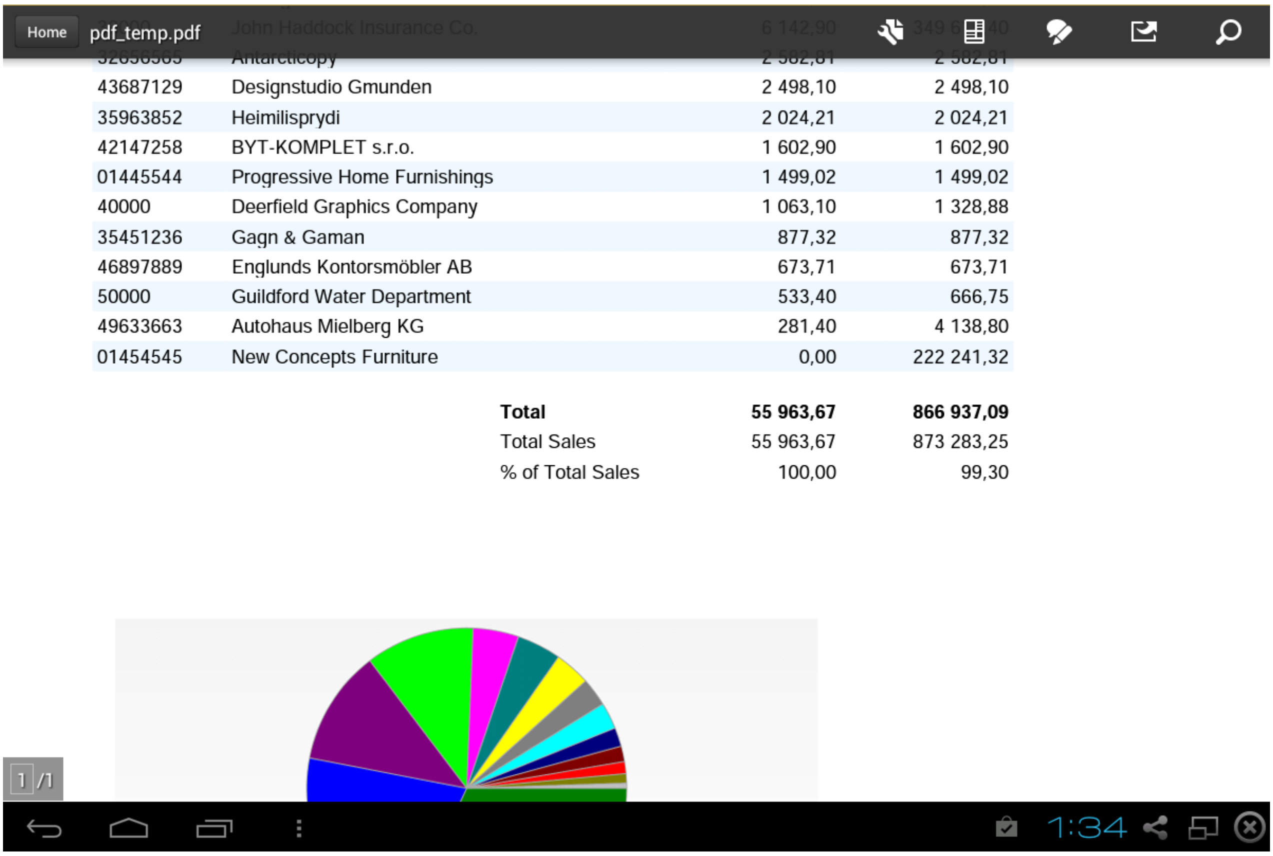
Let's see a typical example for the finance module. As a financial manager, Jack has to go to a meeting where he has to demonstrate the company's top buying customers. As a manager, Jack has no time to go to the office and print-out the list of their top 15 customers. He can easily get this information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

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

5. Tap on the Show as PDF button.



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
35451236	Gagn & Gaman	877,32	877,32
46897889	Englunds Kontorsmöbler AB	673,71	673,71
50000	Guildford Water Department	533,40	666,75
49633663	Autohaus Mielberg KG	281,40	4 138,80
01454545	New Concepts Furniture	0,00	222 241,32
	Total	**55 963,67**	**866 937,09**
	Total Sales	55 963,67	873 283,25
	% of Total Sales	100,00	99,30

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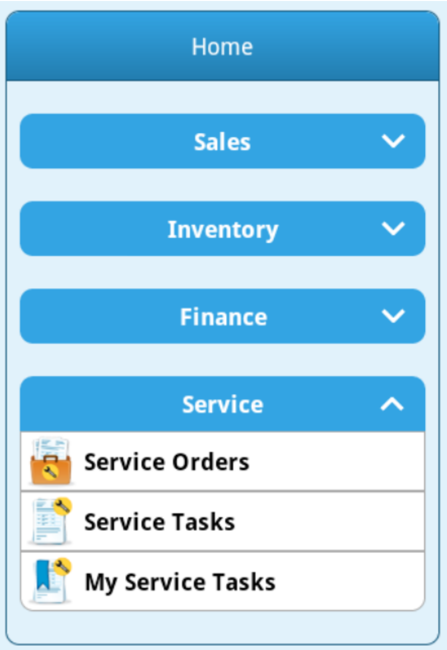
Service

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

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.

Service Tasks

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 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

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

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

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).

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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.

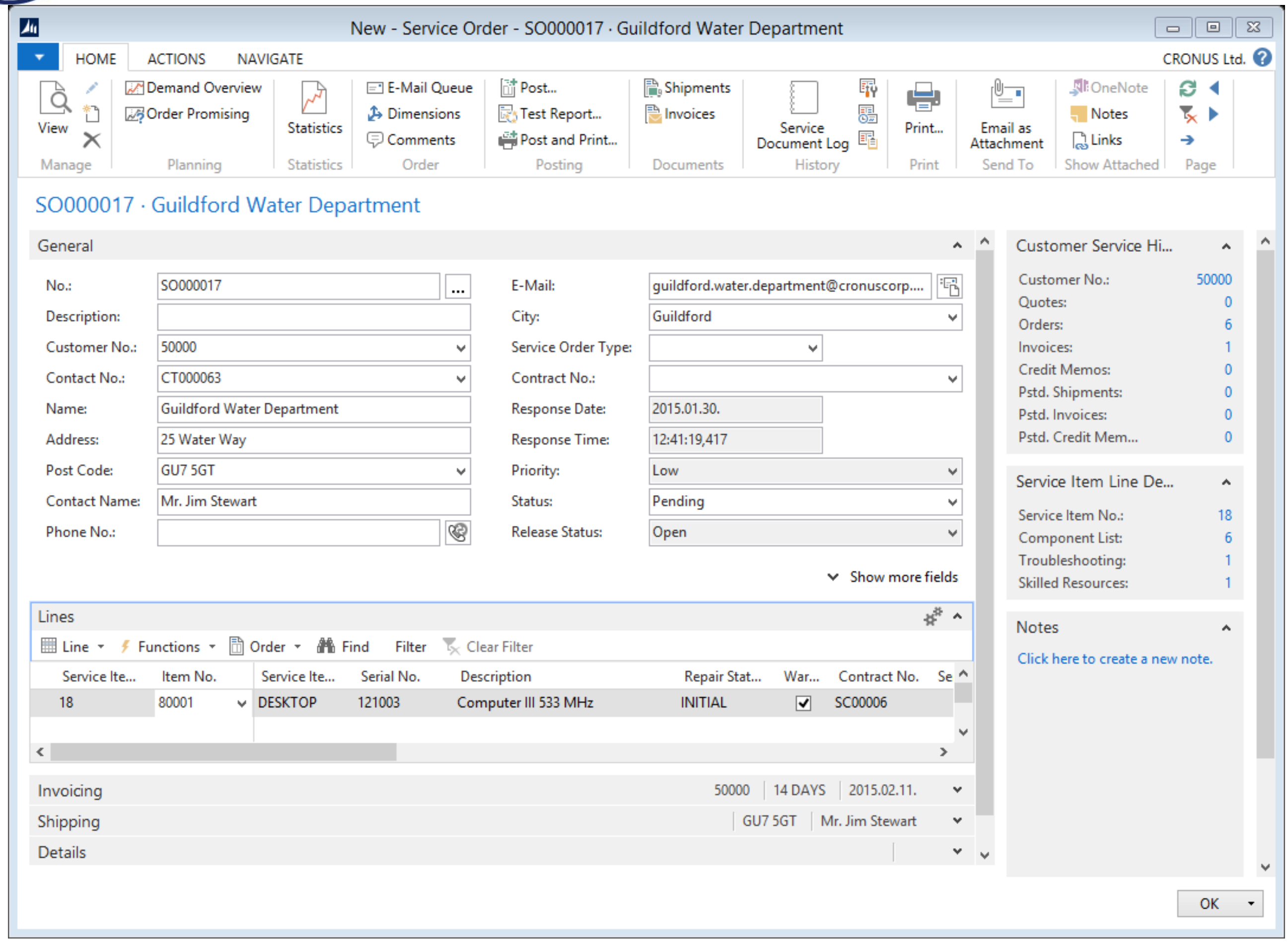
Tap a line to open the Service Task card.

Service workflow example

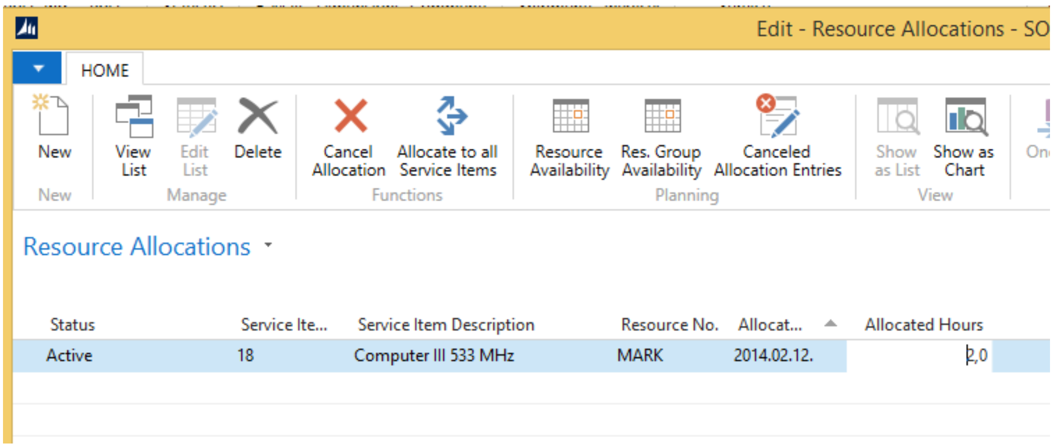
Let's see a typical example for the service module. As a first step the back office will create a new Service Order and allocate Mark, as service technician. After that Mark launches MobileNAV application on his Tablet and goes to the My Service Tasks and checks the details. He uses the map integration 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.

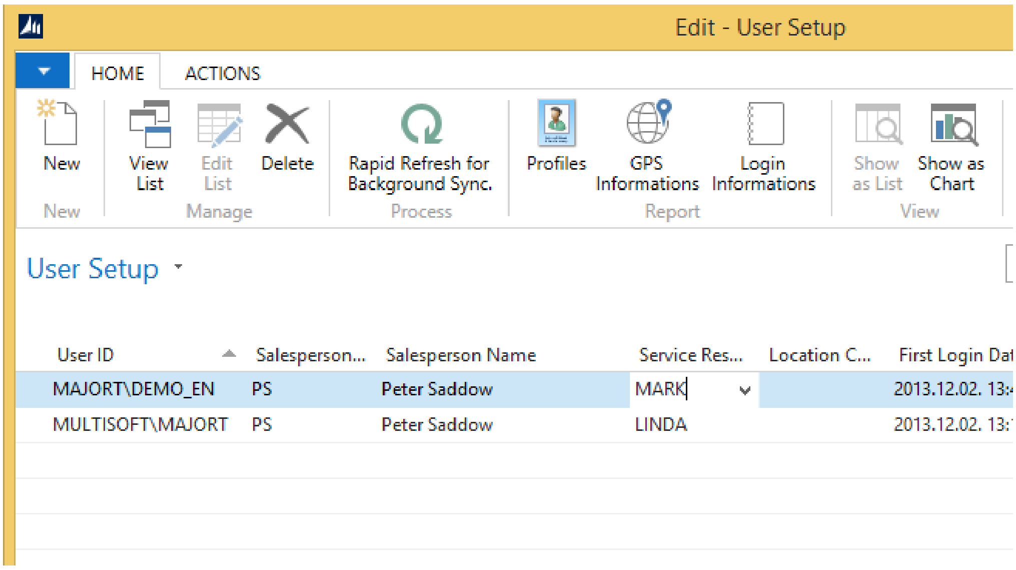
1. Open the Dynamics 365 Business Central client.
2. Go to Departments/Service/Order Processing/Service Orders and create a new Service Order. Fill out the Customer No. and create a new Line. Check the Document No.



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.



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

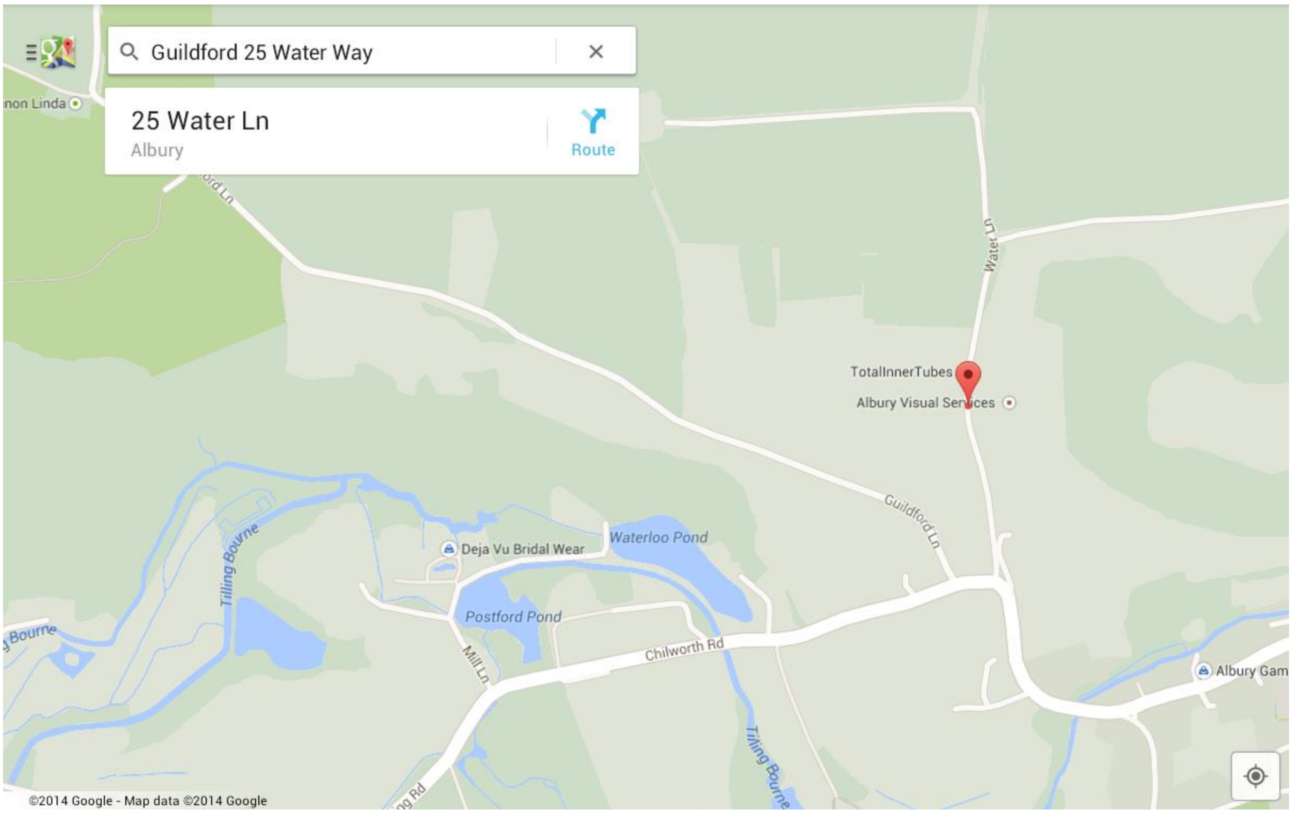


5. Login with MobileNAV application, and open the Service category, and choose [My service task list](#).
6. Find and open the new Service Task with the Document No. created in step 2.

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.

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.

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

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.

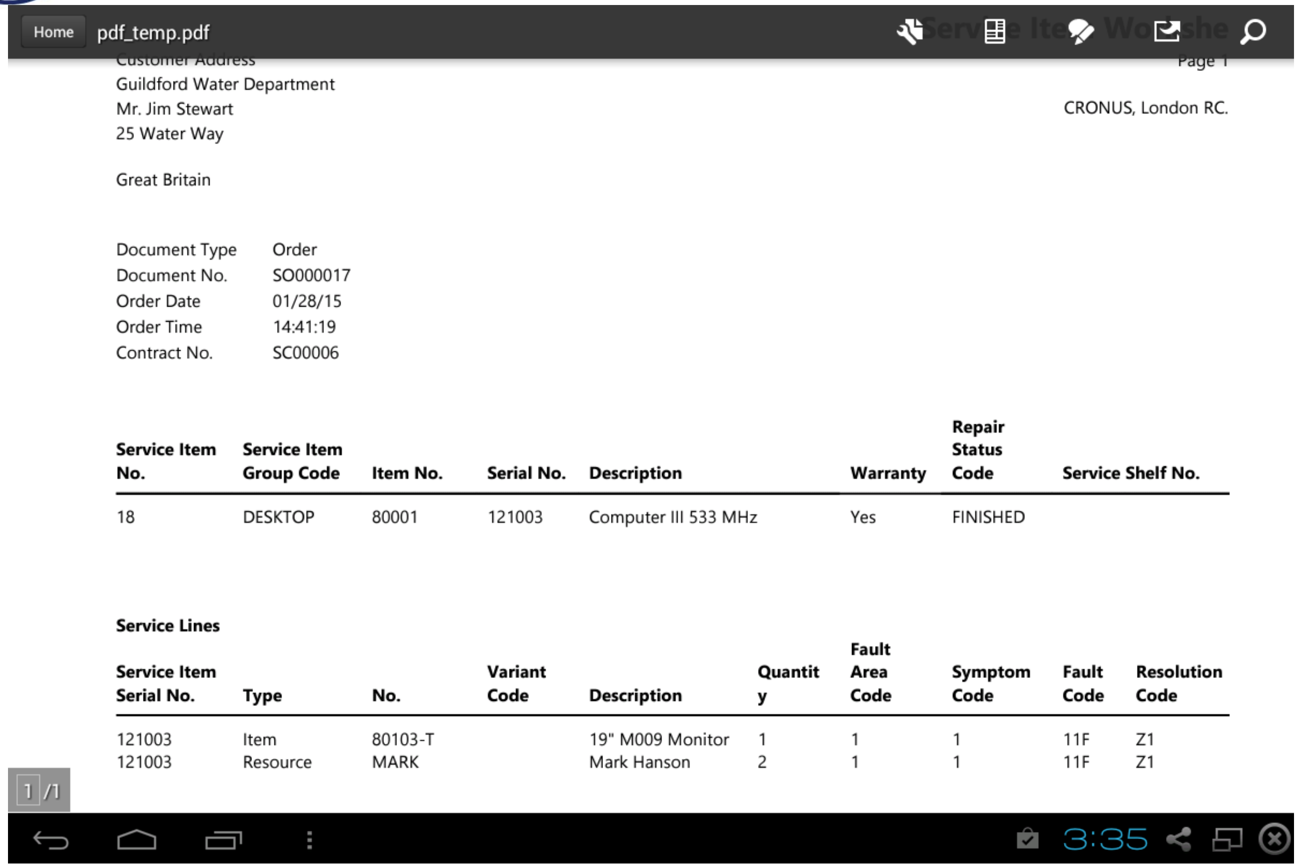
15. Tap the No. field to select your Resource No., and select MARK from the list.
16. Modify the Quantity field to 2.

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.

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.

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.

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



Customer Address Page 1

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

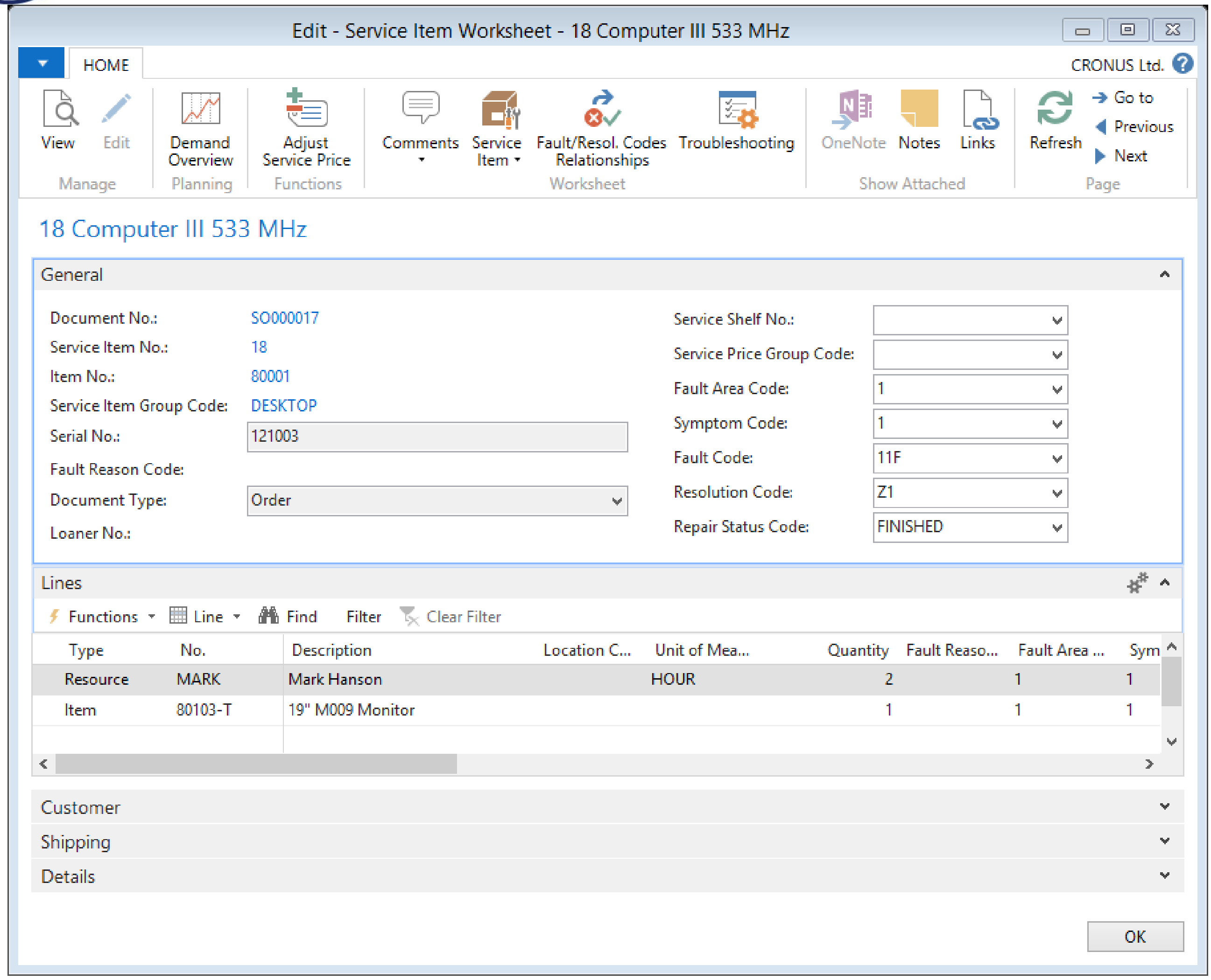
Service Item Serial No.	Type	No.	Variant Code	Description	Quantity	Fault Area Code	Symptom Code	Fault Code	Resolution Code
121003	Item	80103-T		19" M009 Monitor	1	1	1	11F	Z1
121003	Resource	MARK		Mark Hanson	2	1	1	11F	Z1

1 /1

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.

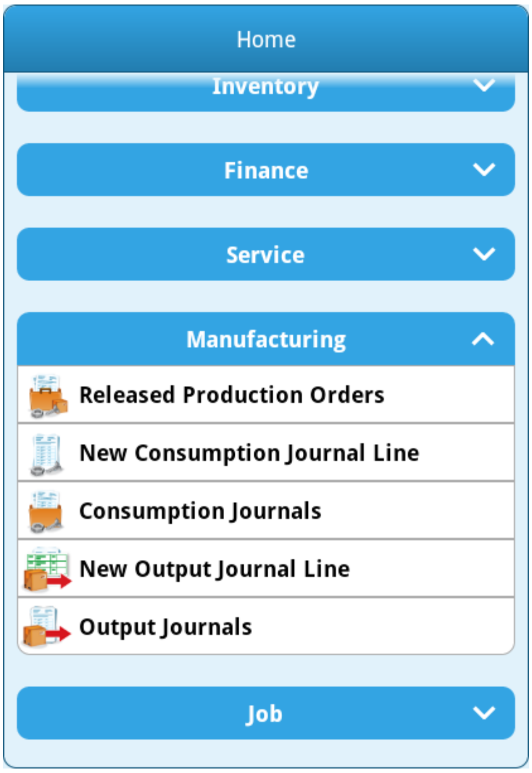
Note that the processed Service Task disappeared from the list.

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
HOME
CRONUS Ltd.
View
Edit
Manage
Demand Overview
Planning
Adjust Service Price
Functions
Comments
Service Item
Fault/Resol. Codes Relationships
Troubleshooting
Worksheet
OneNote
Notes
Links
Show Attached
Refresh
Go to
Previous
Next
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.

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Released Production Orders

Released Production Orders list

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

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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

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.

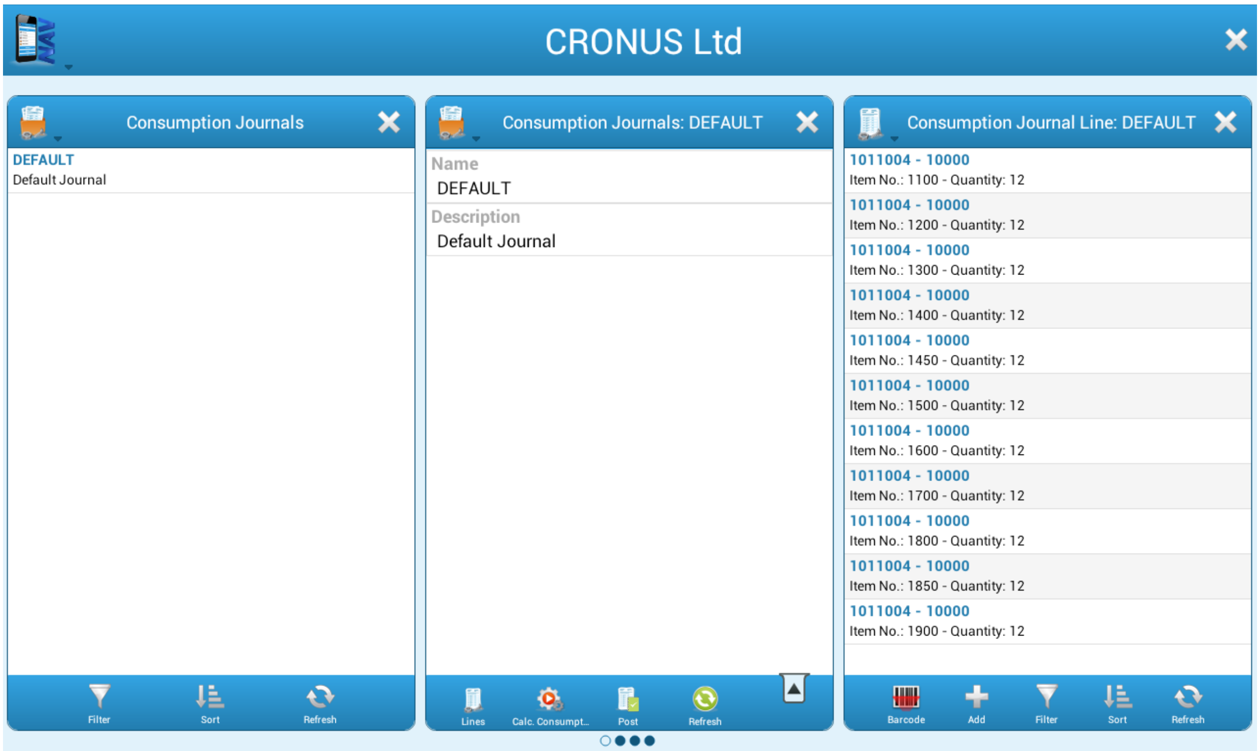
Consumption Journals

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



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

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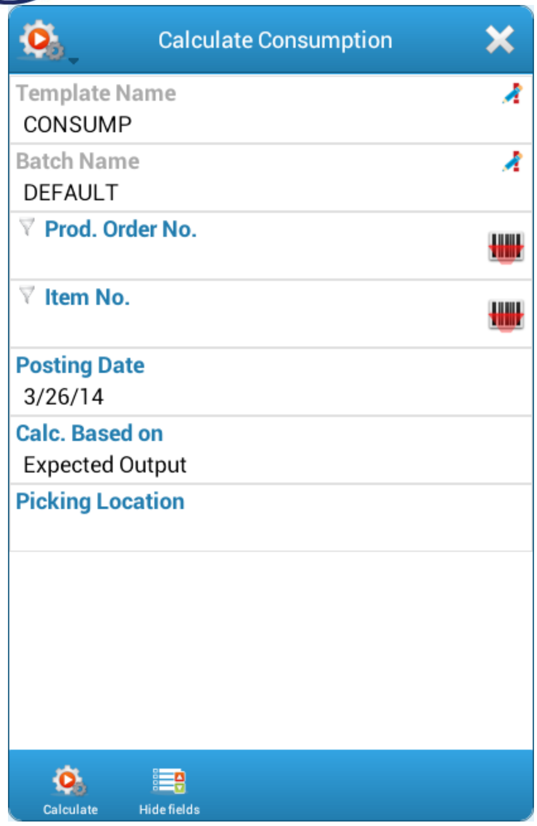

On the Consumption Journals card, the Calculate Consumption toolbar function is available, which can calculate the consumption for a selected Released Production Order and Item No.

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

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.

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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.

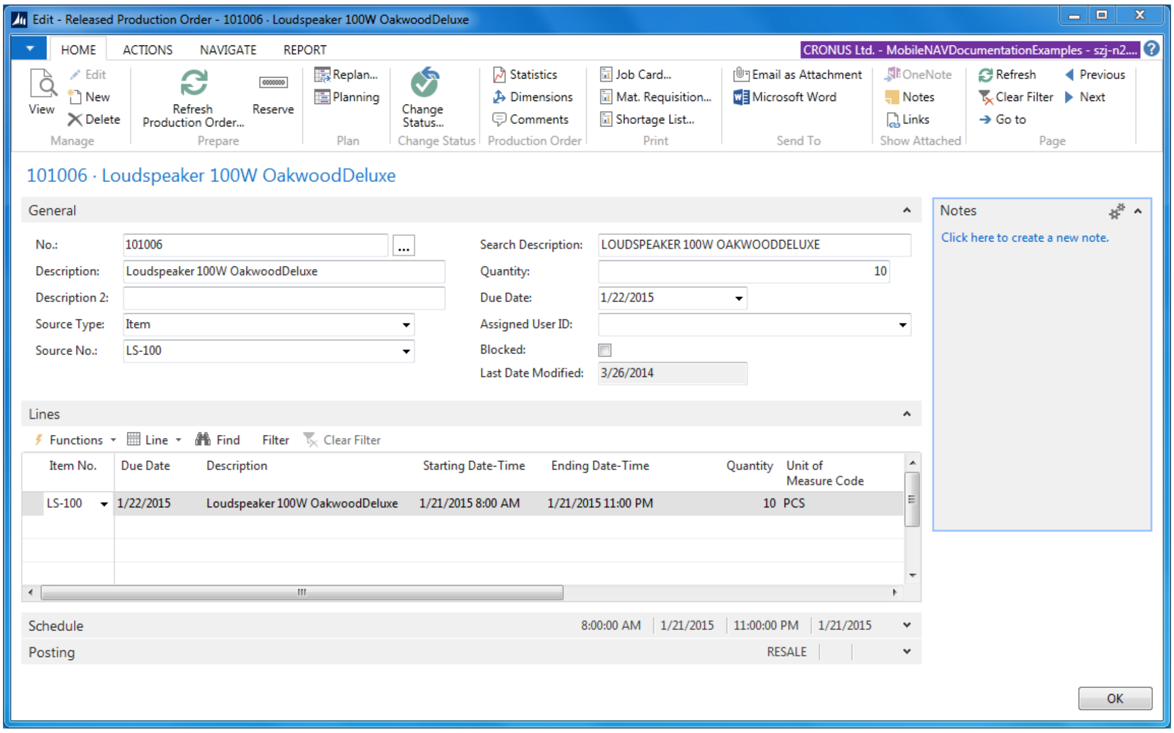

Tap this icon in the Unit of Measure Code field to open the Item Unit of Measure card.

Manufacturing workflow example

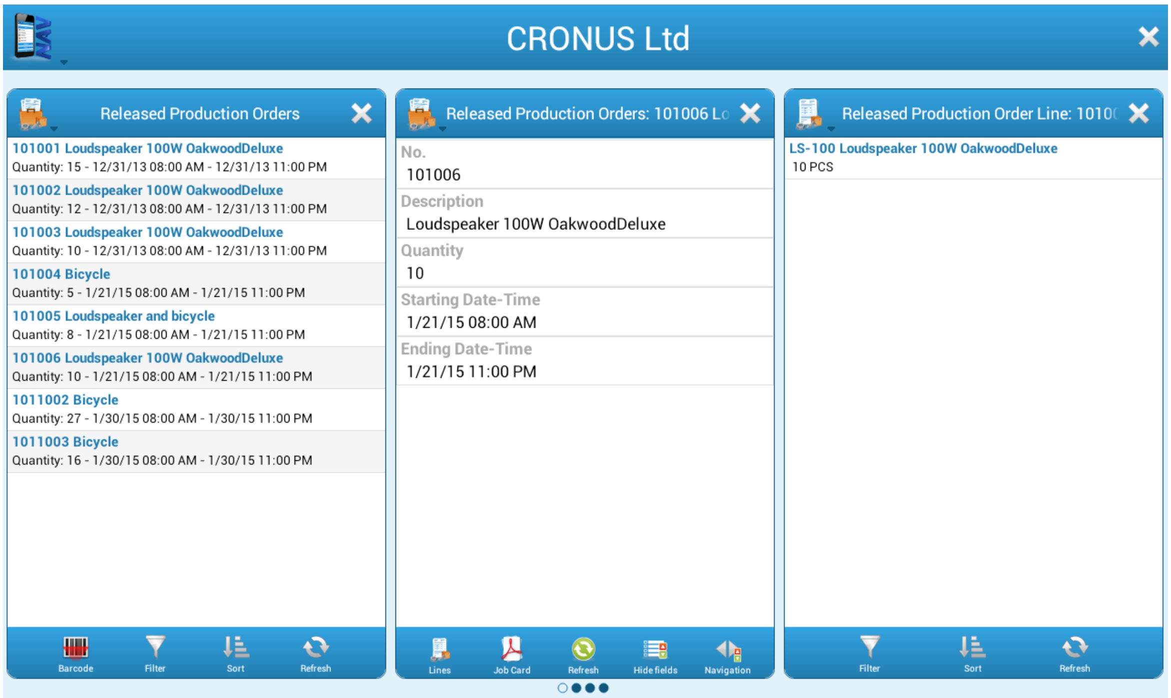
Let’s see an example of the Released Production Journal usage. The back office prepares the Released Production Journal for 10 pieces of LS-100 loudspeaker.
Timothy Sneath, the production assistant at Cronus Ltd uses his smartphone to continue the manufacturing process in the workshop. He first finds 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.



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.



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).

4. The generated Production Journal Lines appear.

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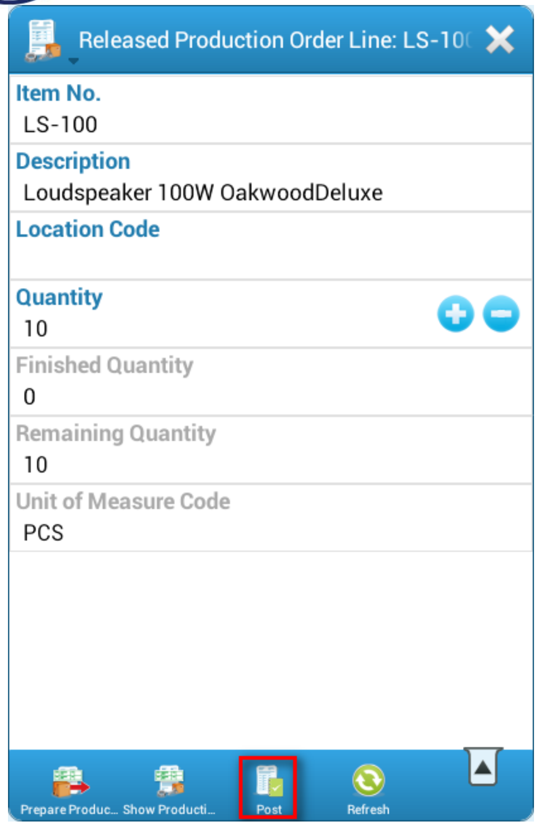
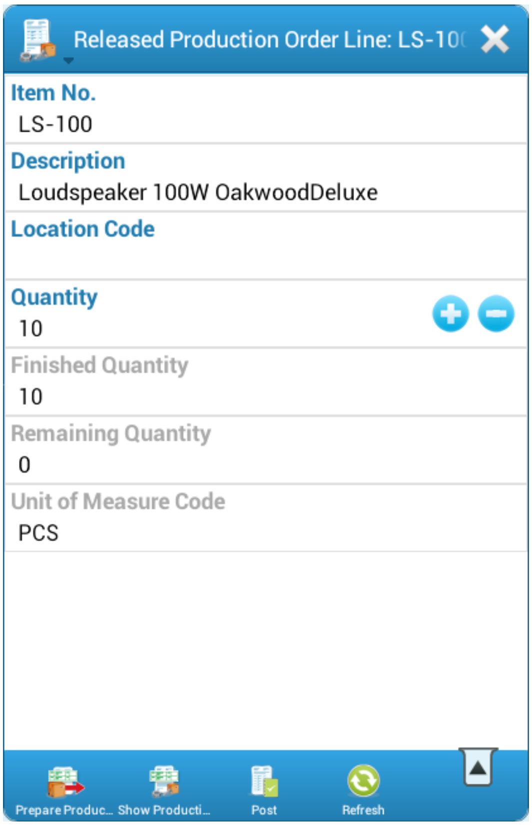
5. Tap on the Consumption type journal line with Item No. = SPK-100. The detailed Production Journal Line card opens. Adjusts the spike consumption quantity to 42 (planned consumption quantity was 40).

6. Tap the Post toolbar icon to post the Released Production Order.



7. After the successful post operation, the Finished Quantity on the Released Production Order changes from 0 to 10.



Address: 1112 Budapest 36 Kőérberki út
Postal address: 1506 Budapest P.O. box: 5.
Tel: +36 1 3101492 • **Fax:** +36 1 3101497
E-mail: contact@mobilenav.com
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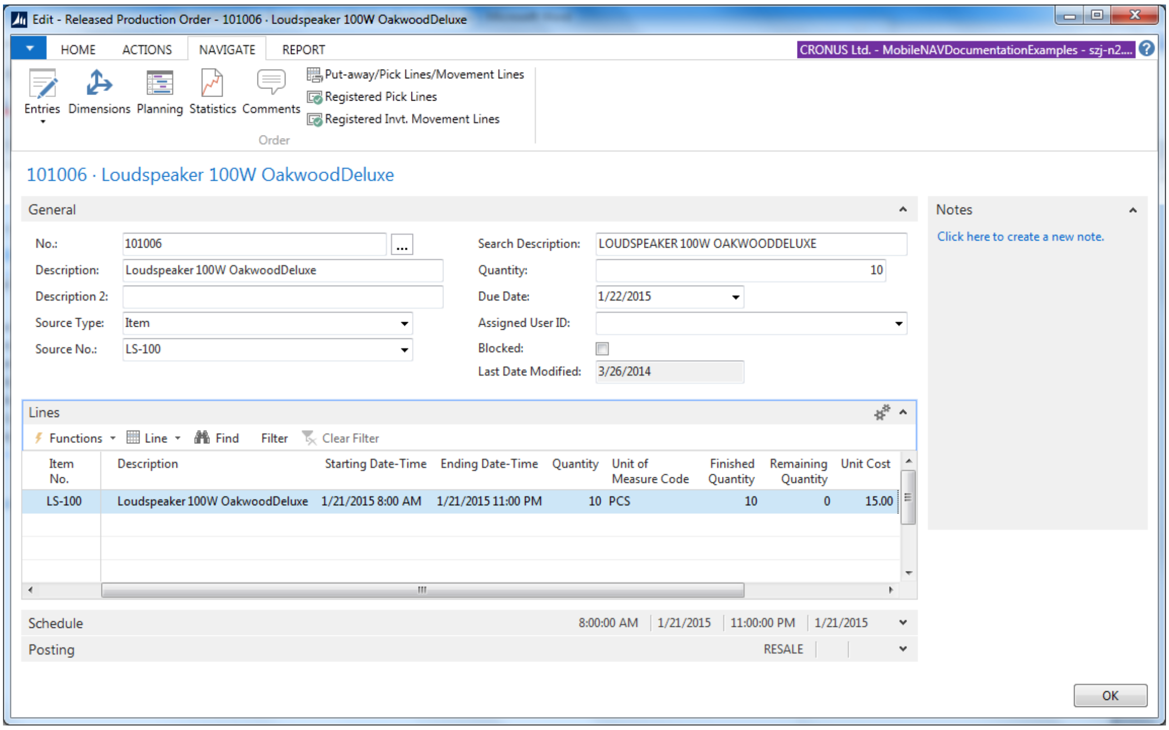
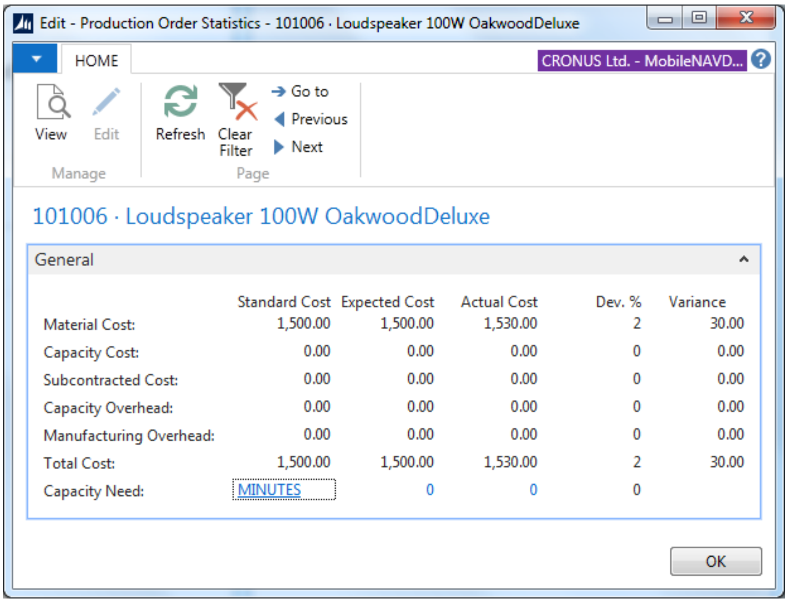
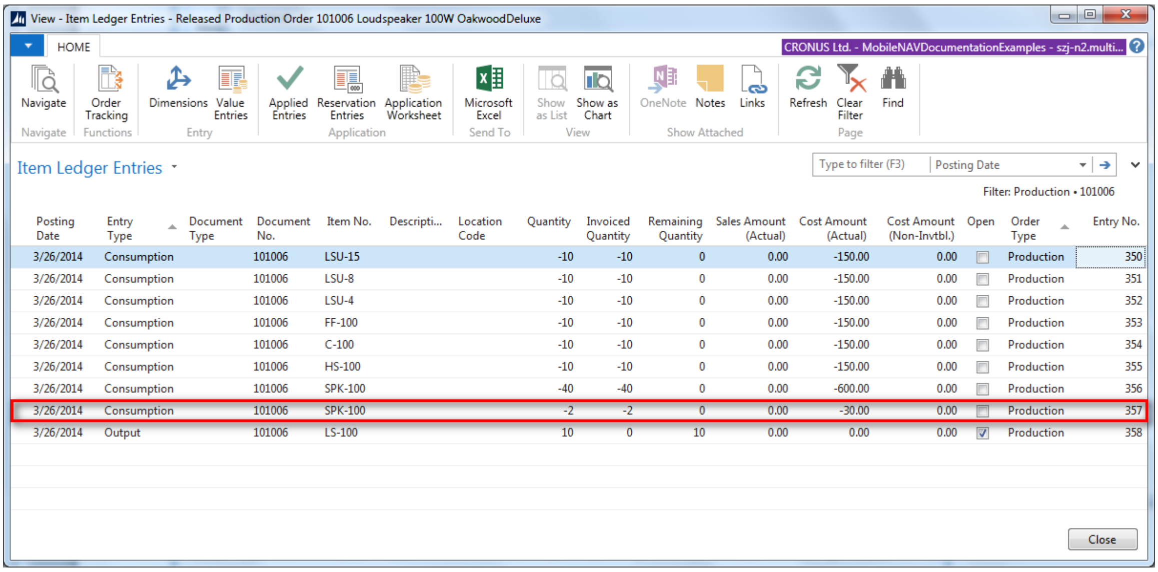
8. Colleagues in the back office check the Released Production Order 101006. They check the Finished Quantity and the Remaining Quantity. They see that the production has finished.



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.



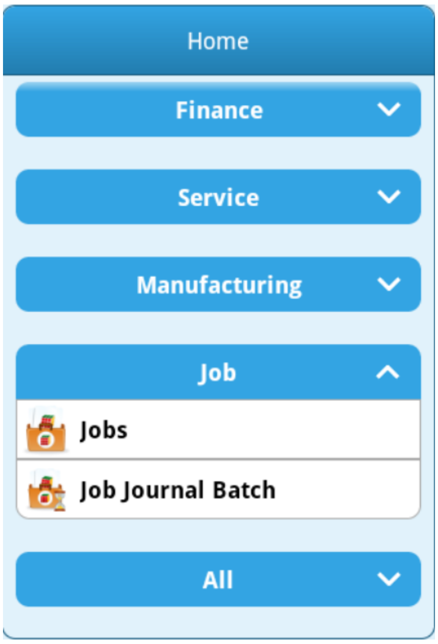
10. Finally they check the Item Ledger Entries of the Released Production Order using toolbar function Entries/Item Ledger Entries. They can see what caused the deviation of the material cost.



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	☐	Production	350
3/26/2014	Consumption		101006	LSU-8			-10	-10	0	0.00	-150.00	0.00	☐	Production	351
3/26/2014	Consumption		101006	LSU-4			-10	-10	0	0.00	-150.00	0.00	☐	Production	352
3/26/2014	Consumption		101006	FF-100			-10	-10	0	0.00	-150.00	0.00	☐	Production	353
3/26/2014	Consumption		101006	C-100			-10	-10	0	0.00	-150.00	0.00	☐	Production	354
3/26/2014	Consumption		101006	HS-100			-10	-10	0	0.00	-150.00	0.00	☐	Production	355
3/26/2014	Consumption		101006	SPK-100			-40	-40	0	0.00	-600.00	0.00	☐	Production	356
3/26/2014	Consumption		101006	SPK-100			-2	-2	0	0.00	-30.00	0.00	☐	Production	357
3/26/2014	Output		101006	LS-100			10	0	10	0.00	0.00	0.00	☑	Production	358

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 end 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

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:

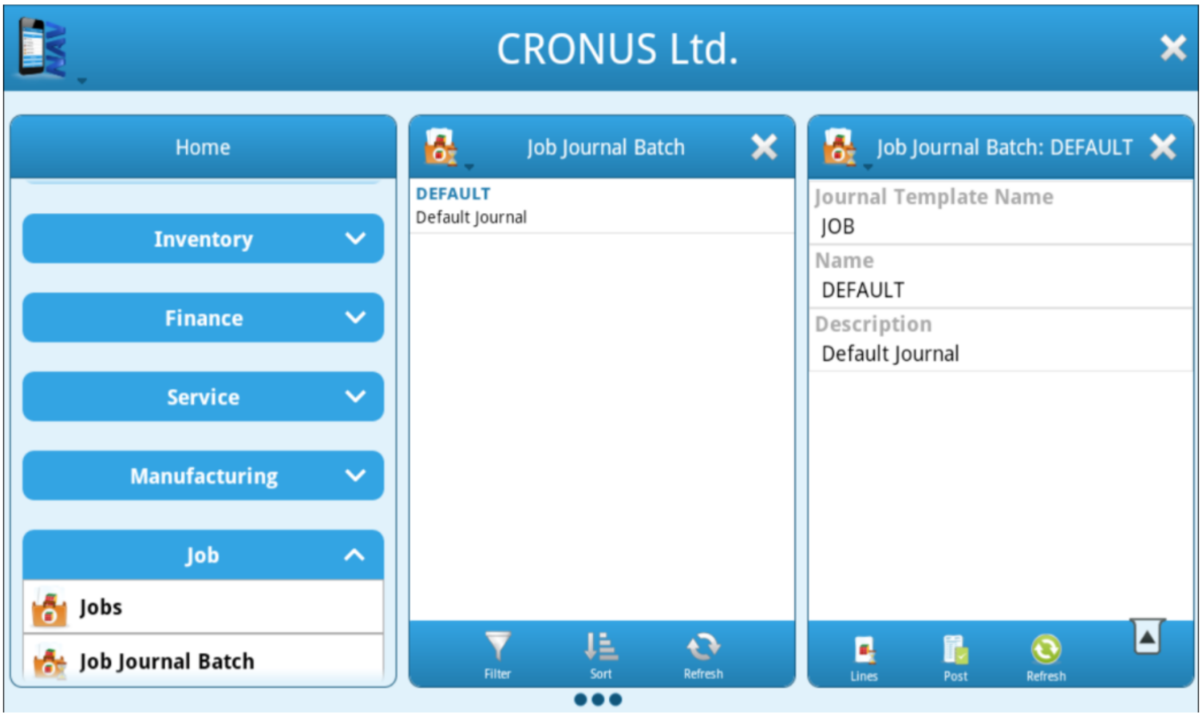
Tap the icon on the No. field in case of Type = Item to open the Item card.

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.

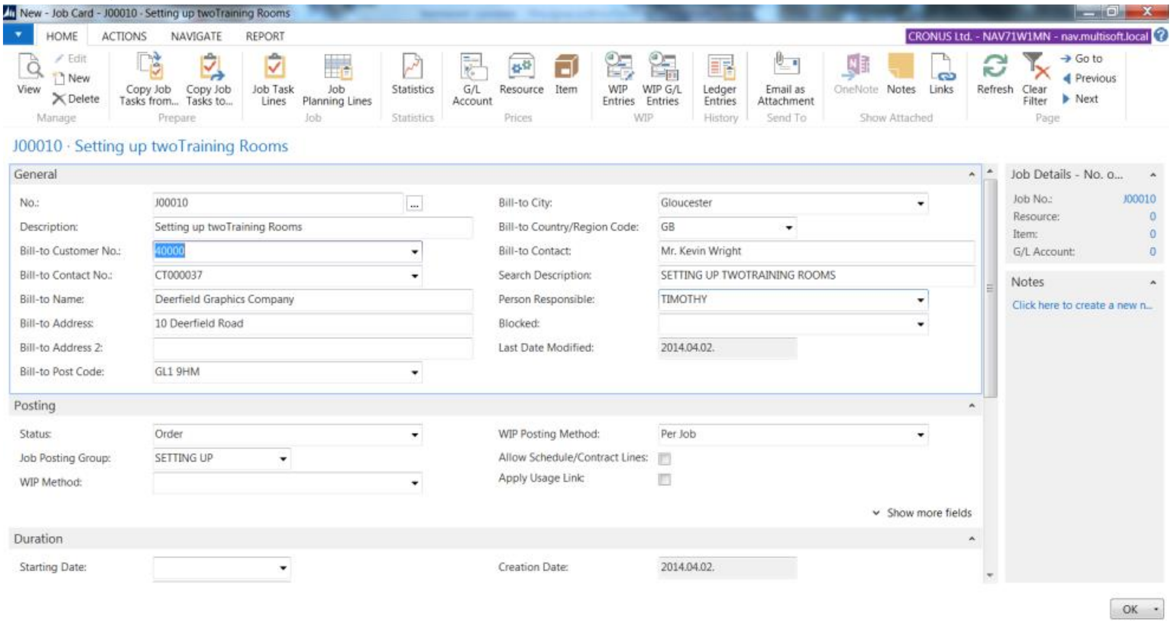
Tap the barcode icon on the No. field in case of Type = Item to select the Item with barcode scanning (by default the Item No. is used).

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.



3. Go to the Job Task Lines and create new Job tasks to the new Job.

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Postal address: 1506 Budapest P.O. box: 5.
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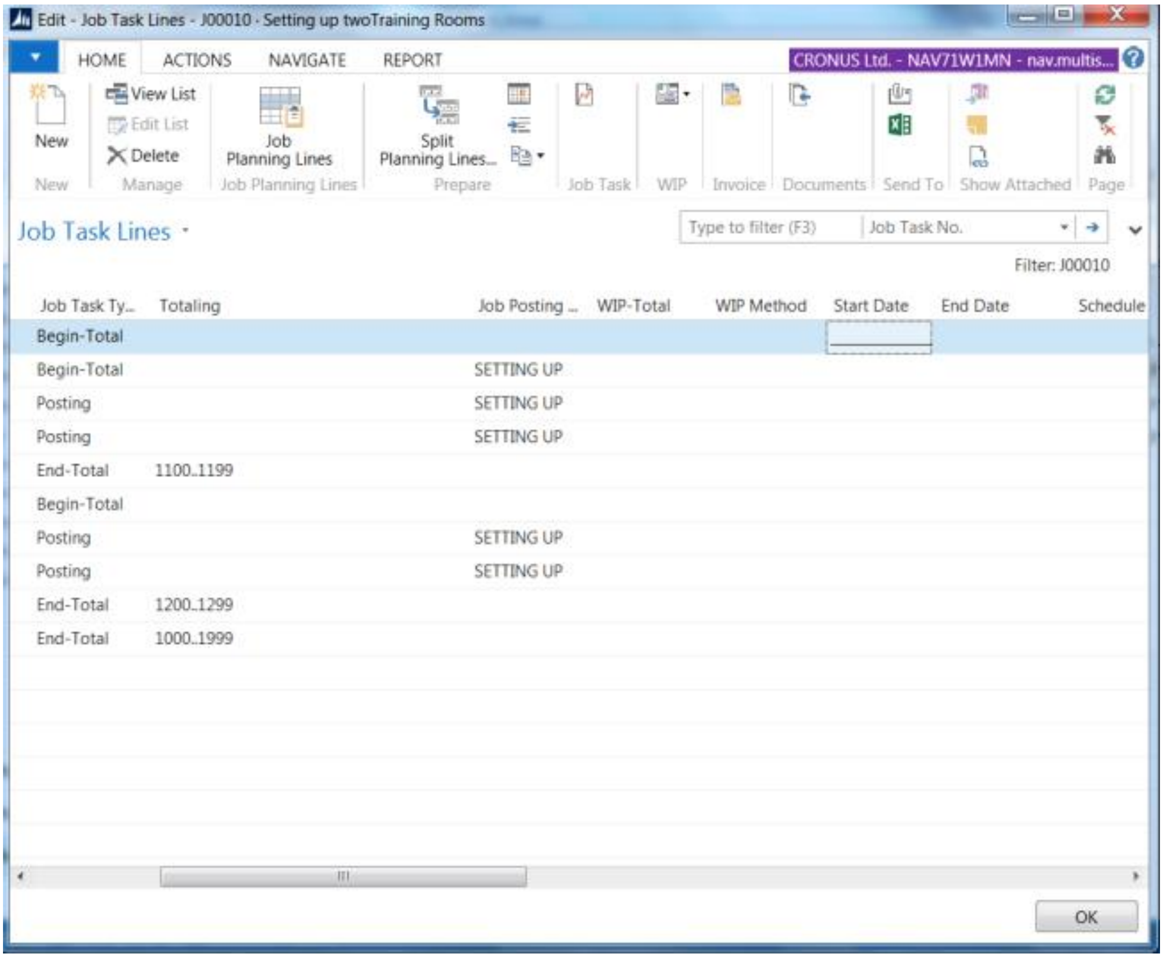

4. Open the MobileNAV client.
5. Go to the Jobs and select the new Job which is already in the list. The Job card opens up. Tap the Tasks button to check the tasks. Choose the first task with Posting type and tap the Planning Lines, then tap Add. Type in the planned data. For resource select the Type "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
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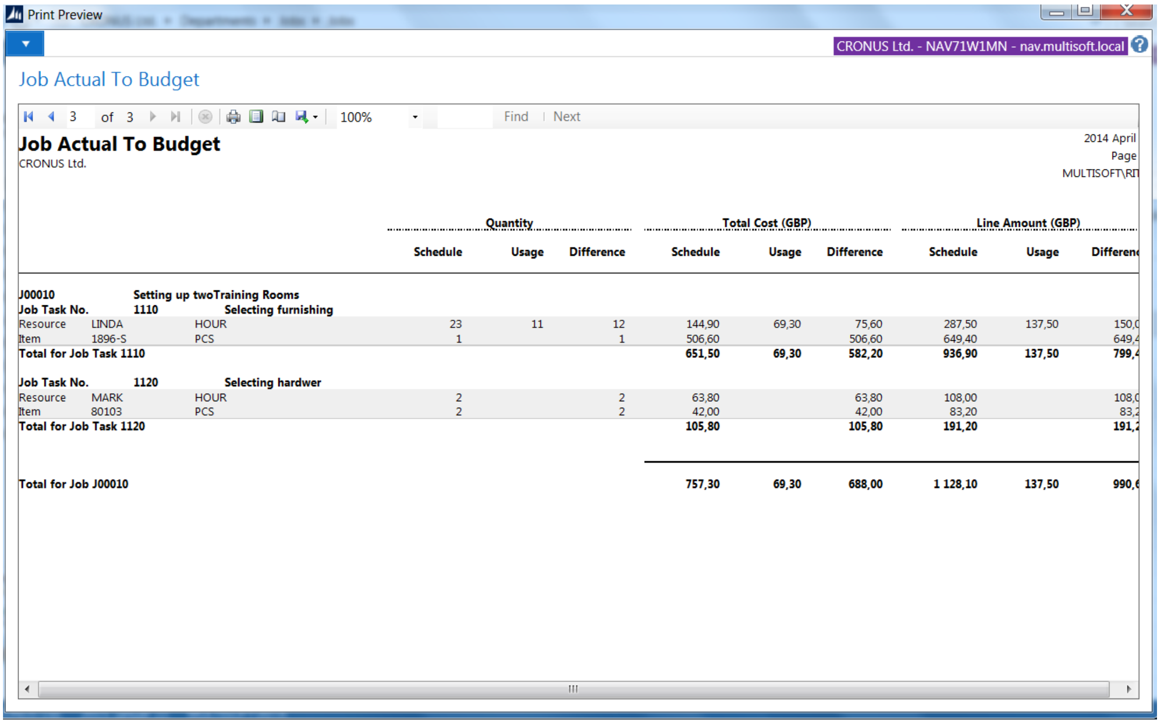
Job No. **J00010** **Setting up twoTraining Rooms**

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 Task No.		**1110**			**Selecting furnishing**					
Shedule	04/02/14	Resour		LINDA	Linda Martin	12	HOUR	75.60	0.00	150.00
Shedule	04/02/14	Item		1896-S	ATHENS Desk	1	PCS	506.60	0.00	649.40
Shedule	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**					
Shedule	04/02/14	Resour		MARK	Mark Hanson	2	HOUR	63.80	0.00	108.00
Shedule	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.

8. Go back to the Journal Batch card and tap the Post button. The registered lines will be posted.
9. 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.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Job Actual To Budget
3 of 3 100% Find | Next

Job Actual To Budget
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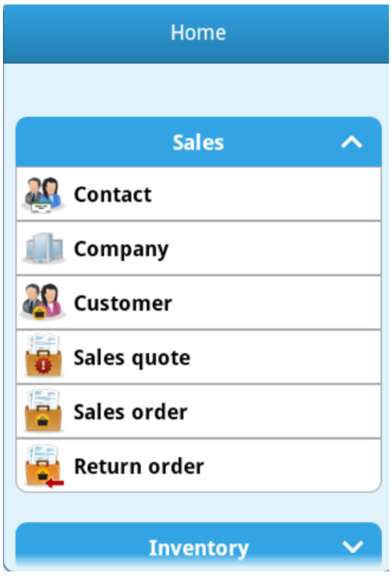
			Quantity			Total Cost (GBP)			Line Amount (GBP)		
			Schedule	Usage	Difference	Schedule	Usage	Difference	Schedule	Usage	Differen
J00010	**Setting up twoTraining Rooms**										
Job Task No.	**1110**	**Selecting furnishing**									
Resource	LINDA	HOUR	23	11	12	144,90	69,30	75,60	287,50	137,50	150,0
Item	1896-S	PCS	1		1	506,60		506,60	649,40		649,4
Total for Job Task 1110						**651,50**	**69,30**	**582,20**	**936,90**	**137,50**	**799,4**
Job Task No.	**1120**	**Selecting hardwer**									
Resource	MARK	HOUR	2		2	63,80		63,80	108,00		108,0
Item	80103	PCS	2		2	42,00		42,00	83,20		83,2
Total for Job Task 1120						**105,80**		**105,80**	**191,20**		**191,2**
Total for Job J00010						**757,30**	**69,30**	**688,00**	**1 128,10**	**137,50**	**990,6**

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.

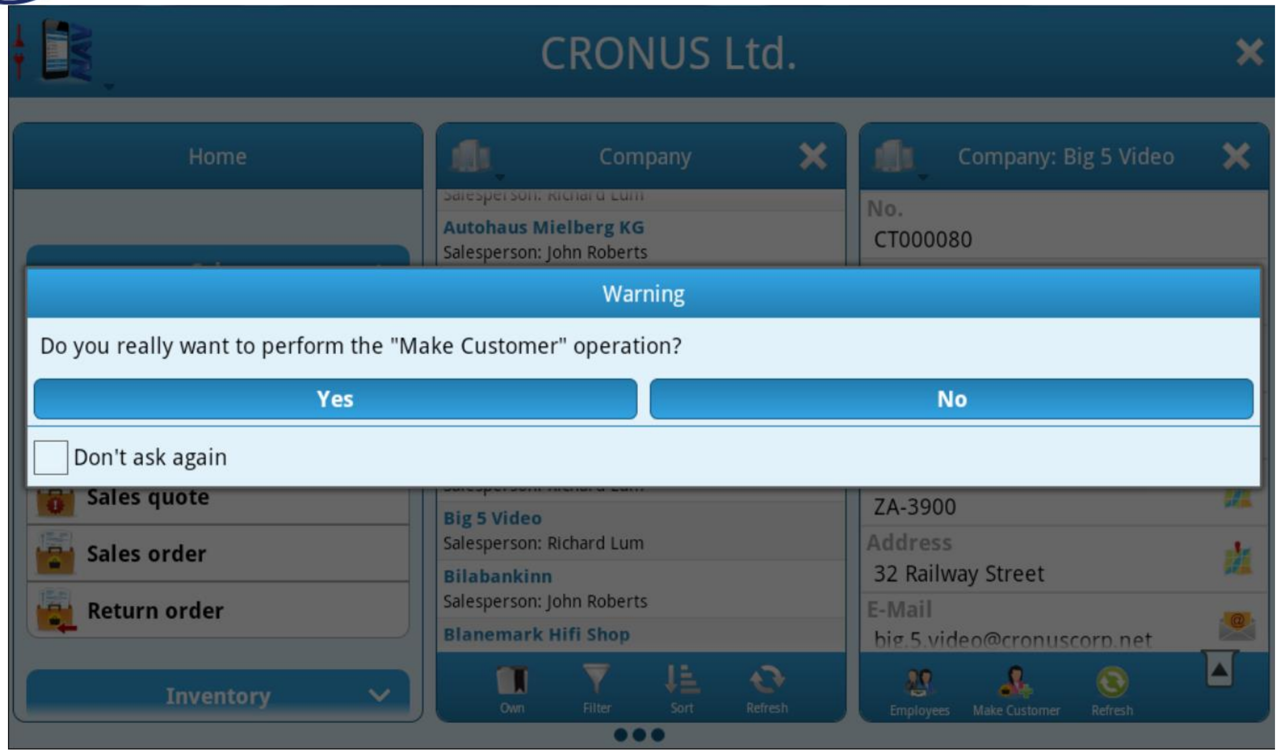
CRM workflow example

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.

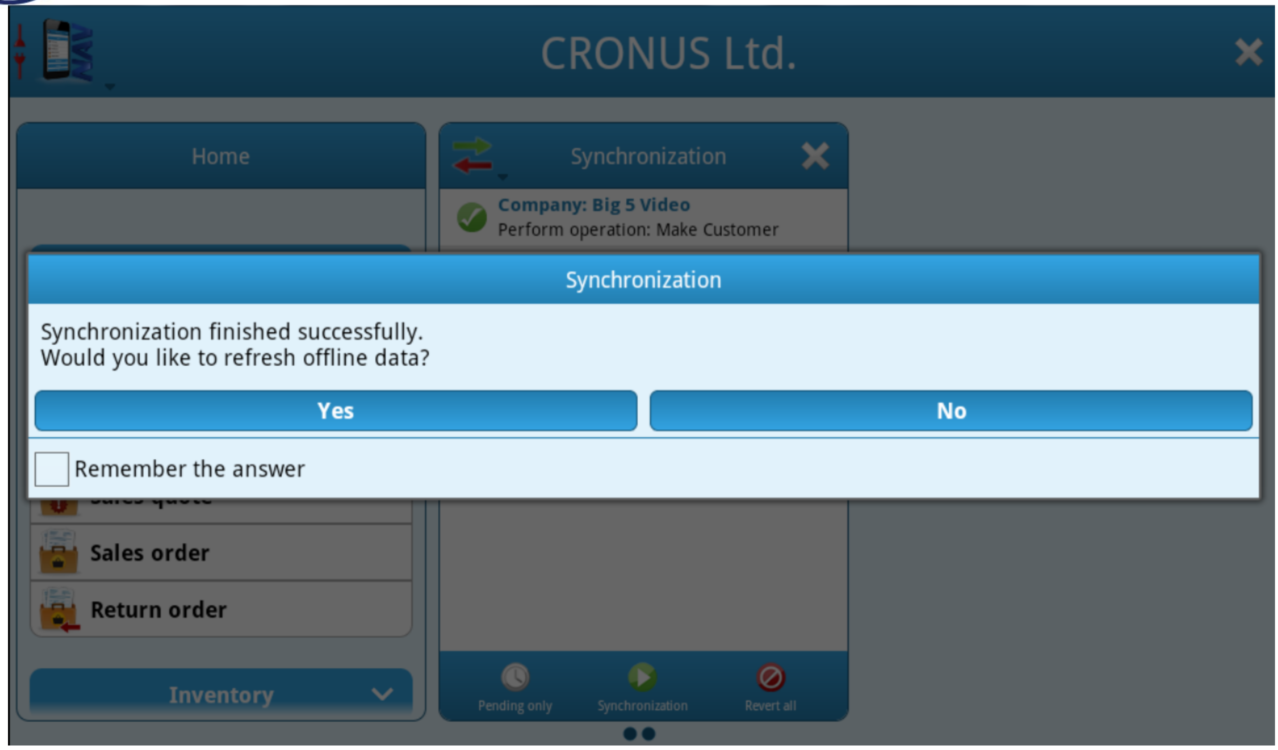
1. Open the MobileNAV application and log in offline mode. Tap Yes to refresh offline data.
2. Go to the Sales/Company and find the Big 5 Video in the Company list.

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.

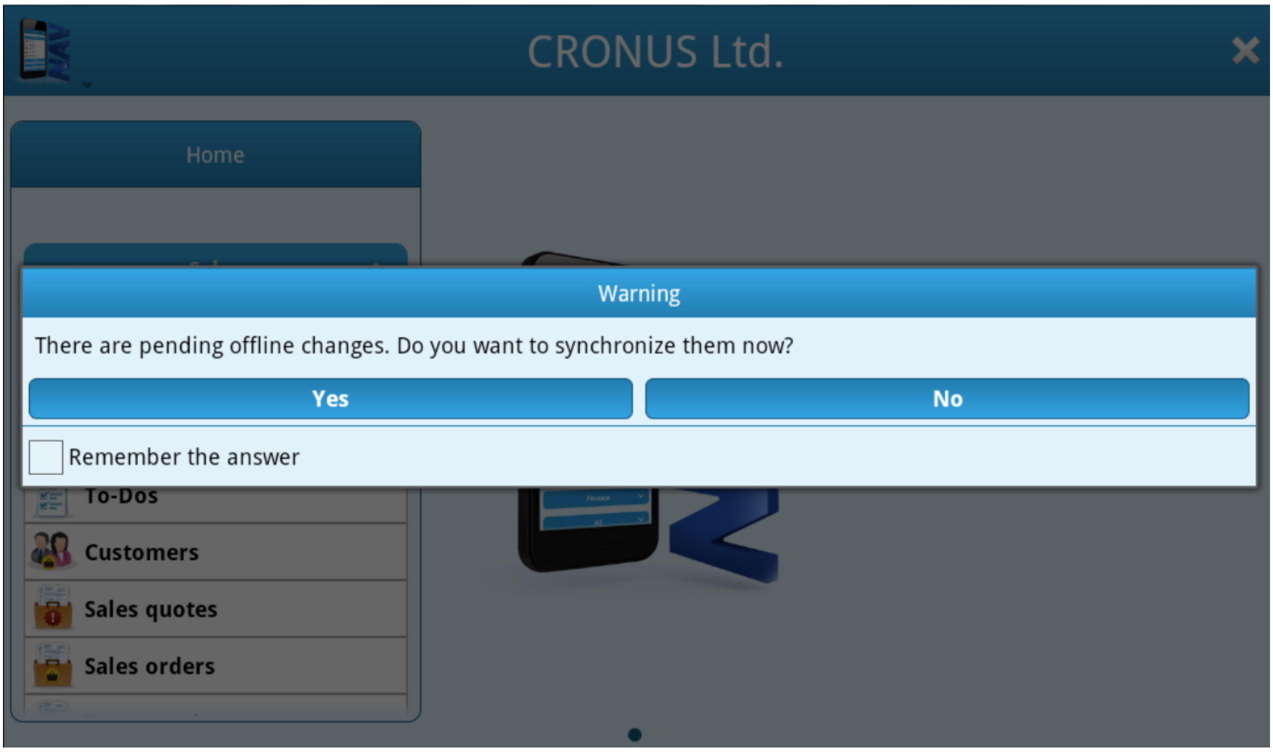
6. Tap “Yes”. The offline database will be refreshed.



7. Verify that the customer list now contains Big 5 Video.

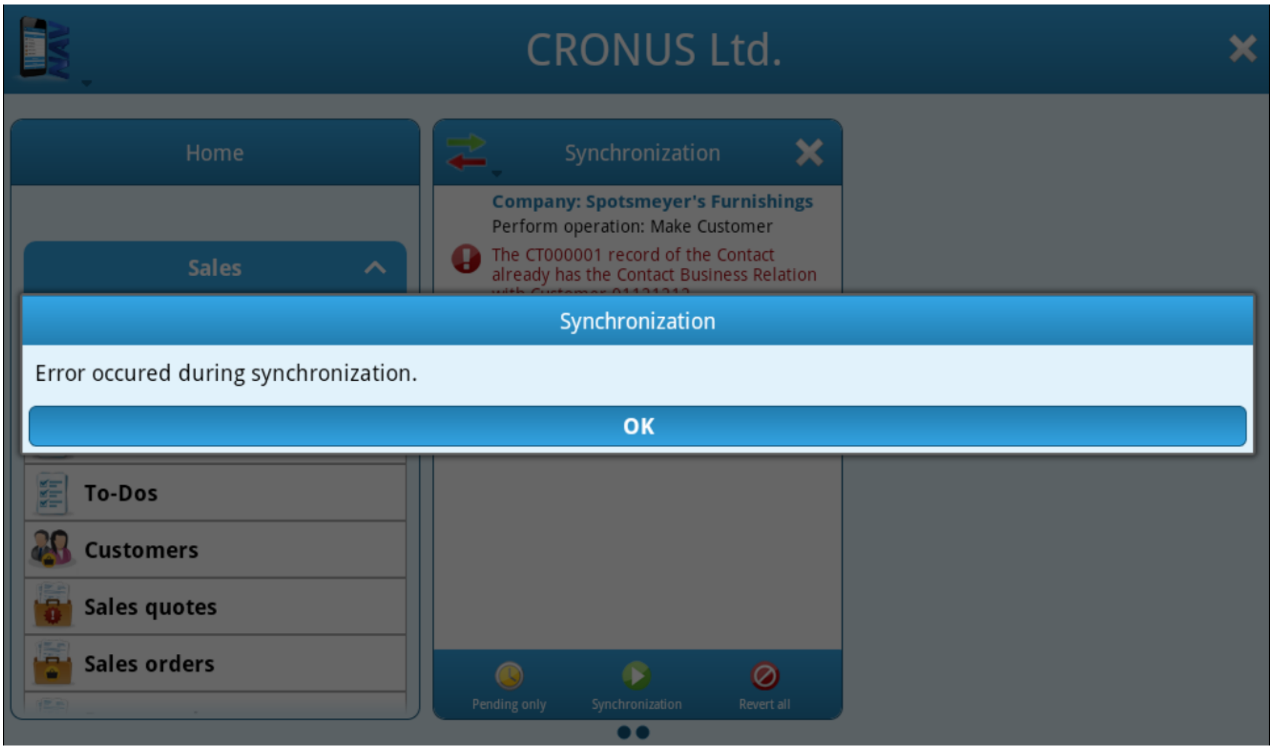
8. Try to make a customer on the same way from the Spotsmeyer's Furnishings Company. Go to the Sales/Company and find the Spotsmeyer's Furnishings in the Company list.

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.



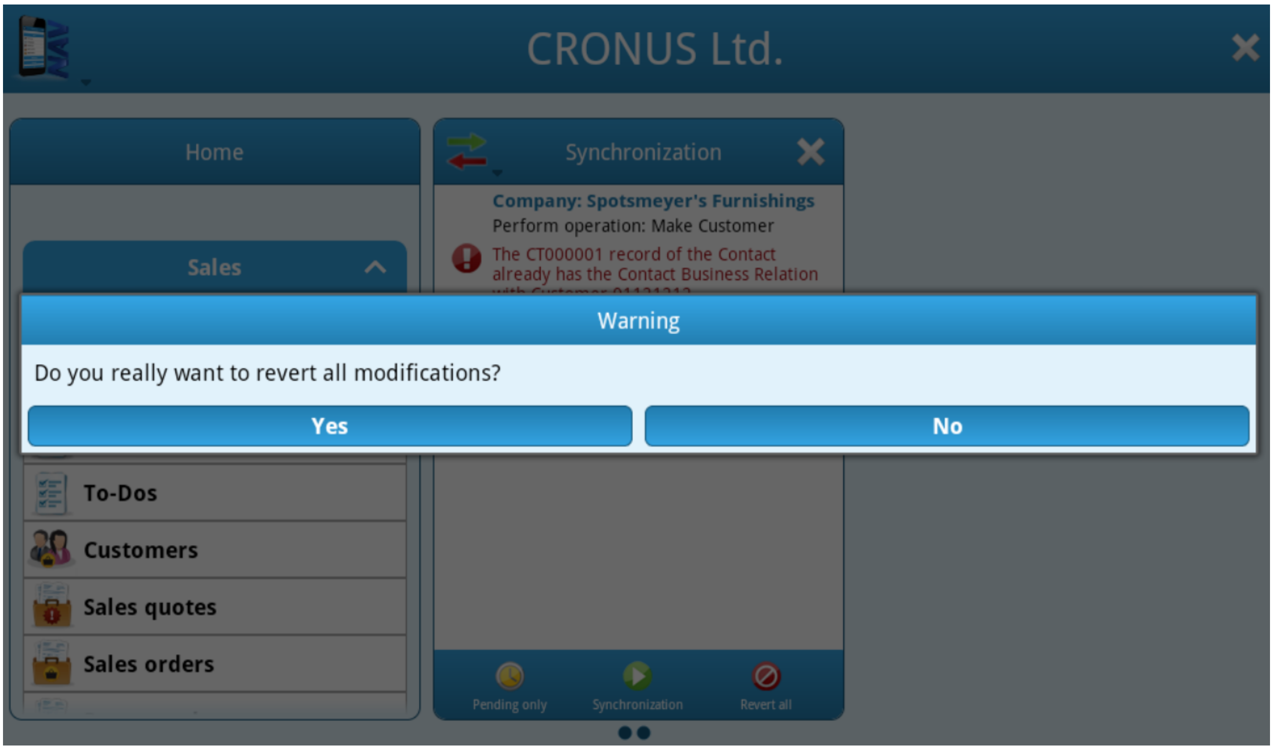
10. Tap "Yes". The system recognizes the changes in offline mode.

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

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

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

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.

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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

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.

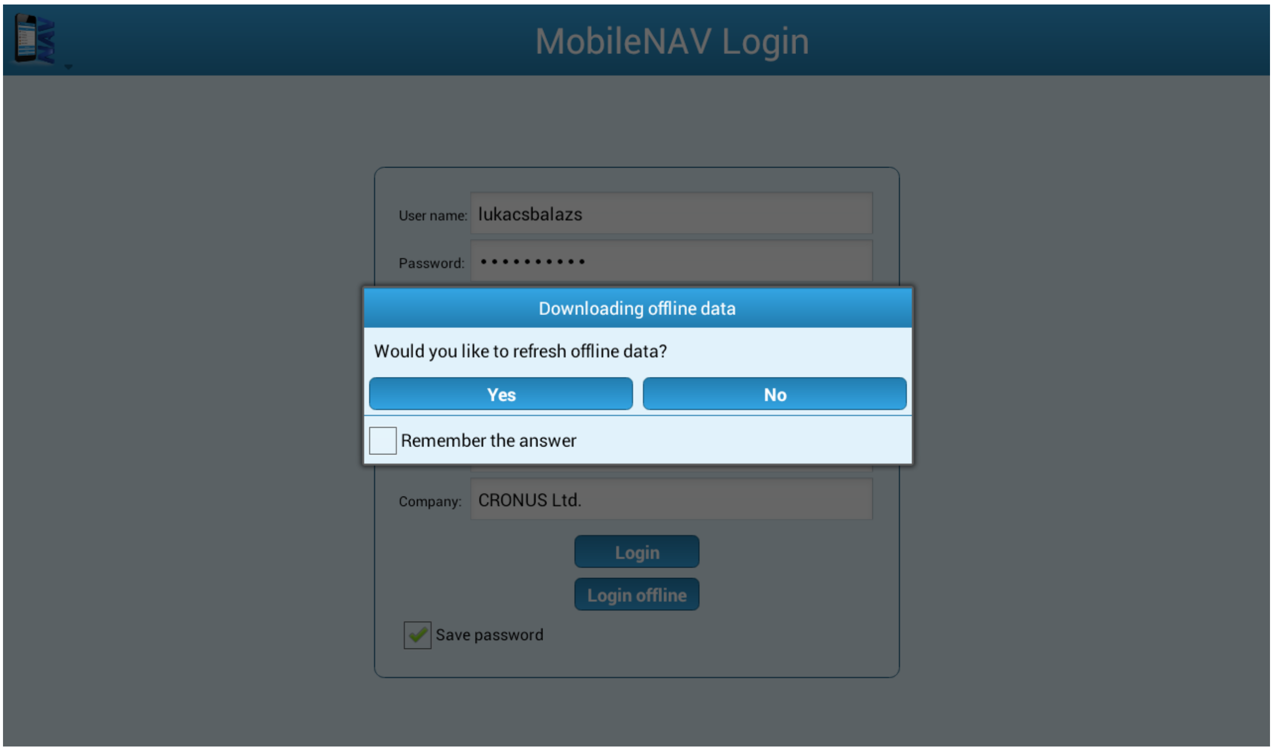
Tap the icon on the No. field to scan a barcode with a proper No. (it is available on all line types).

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.

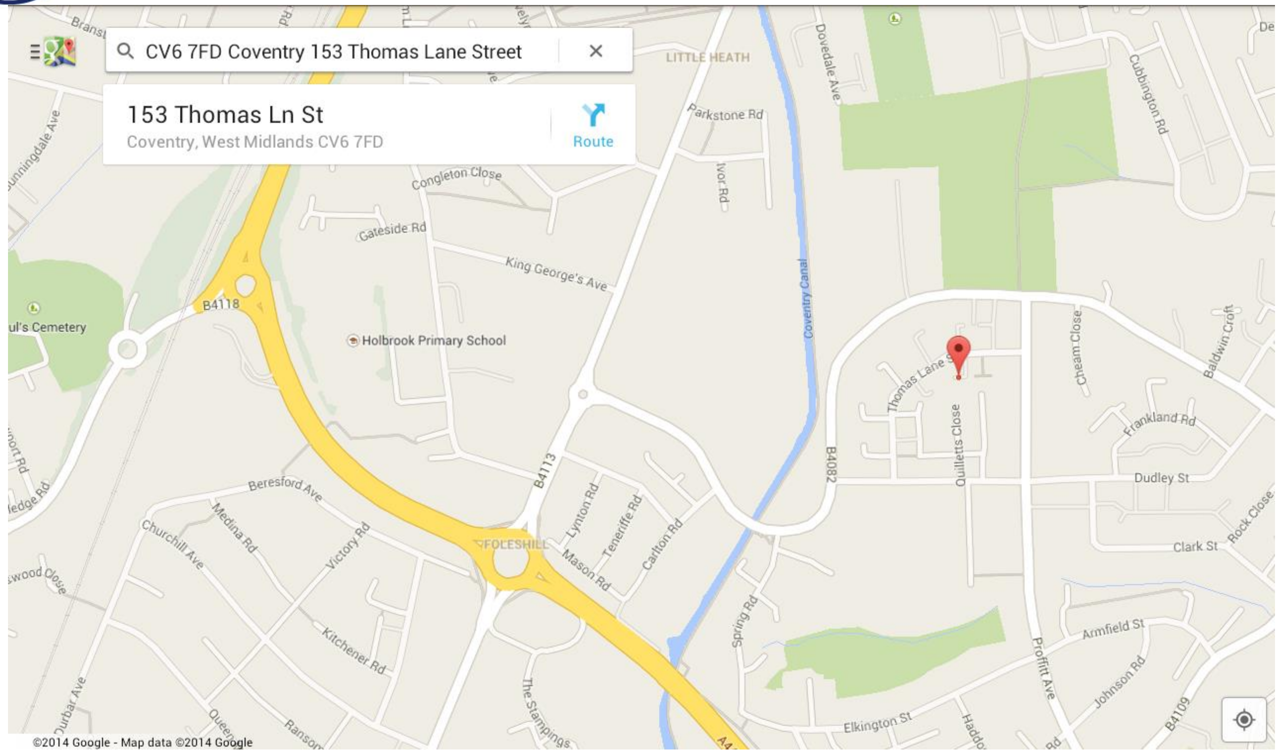
Let's see the procedure.

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.

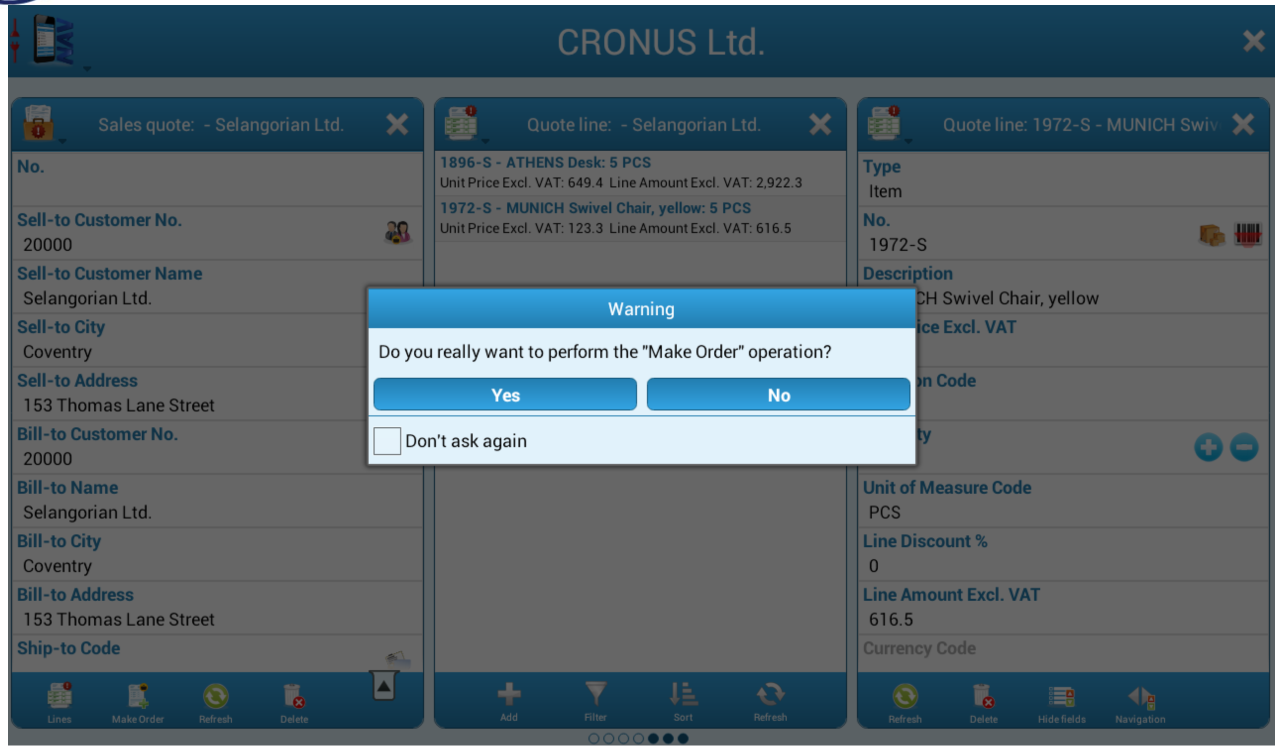
8. Tap the Lines button and then the Add button, to create a new line.

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

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

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.

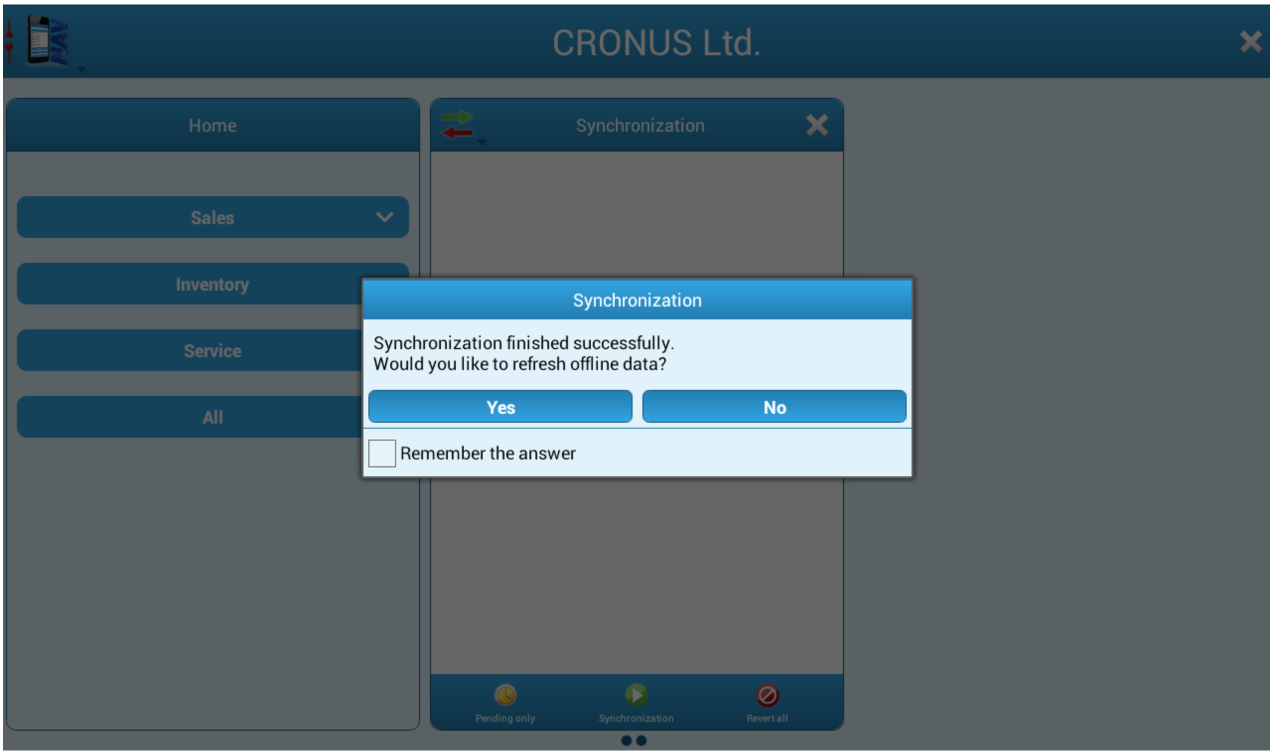
12. On the sales quote card tap on the Make Order button on the toolbar to create the sales order.



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.

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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.

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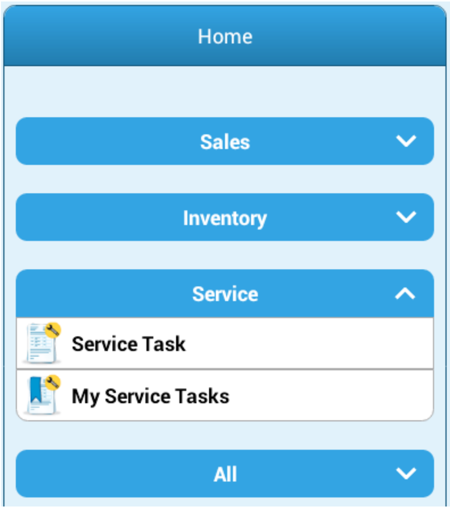
Service

Concept



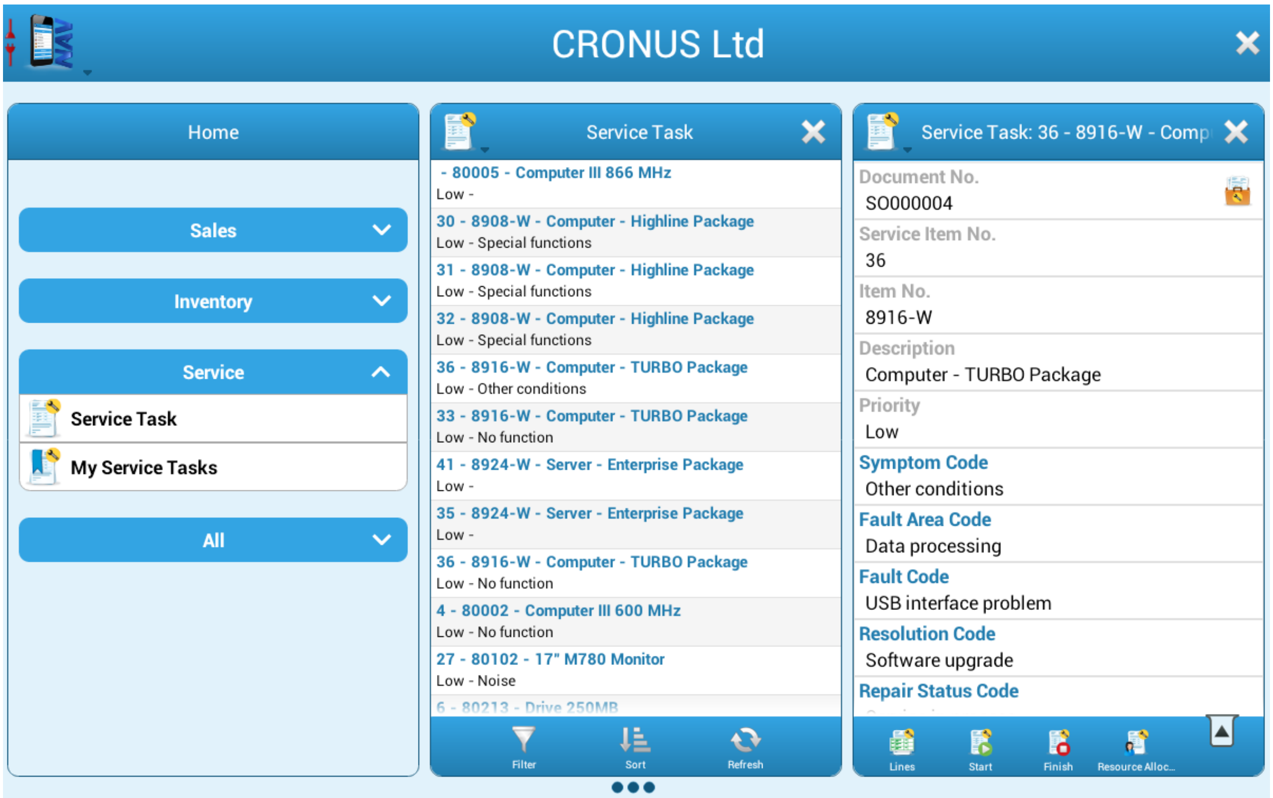
The service module is designed for service technicians who work out of office and would like to maintain a paperless work environment with a smartphone or tablet.

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

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.

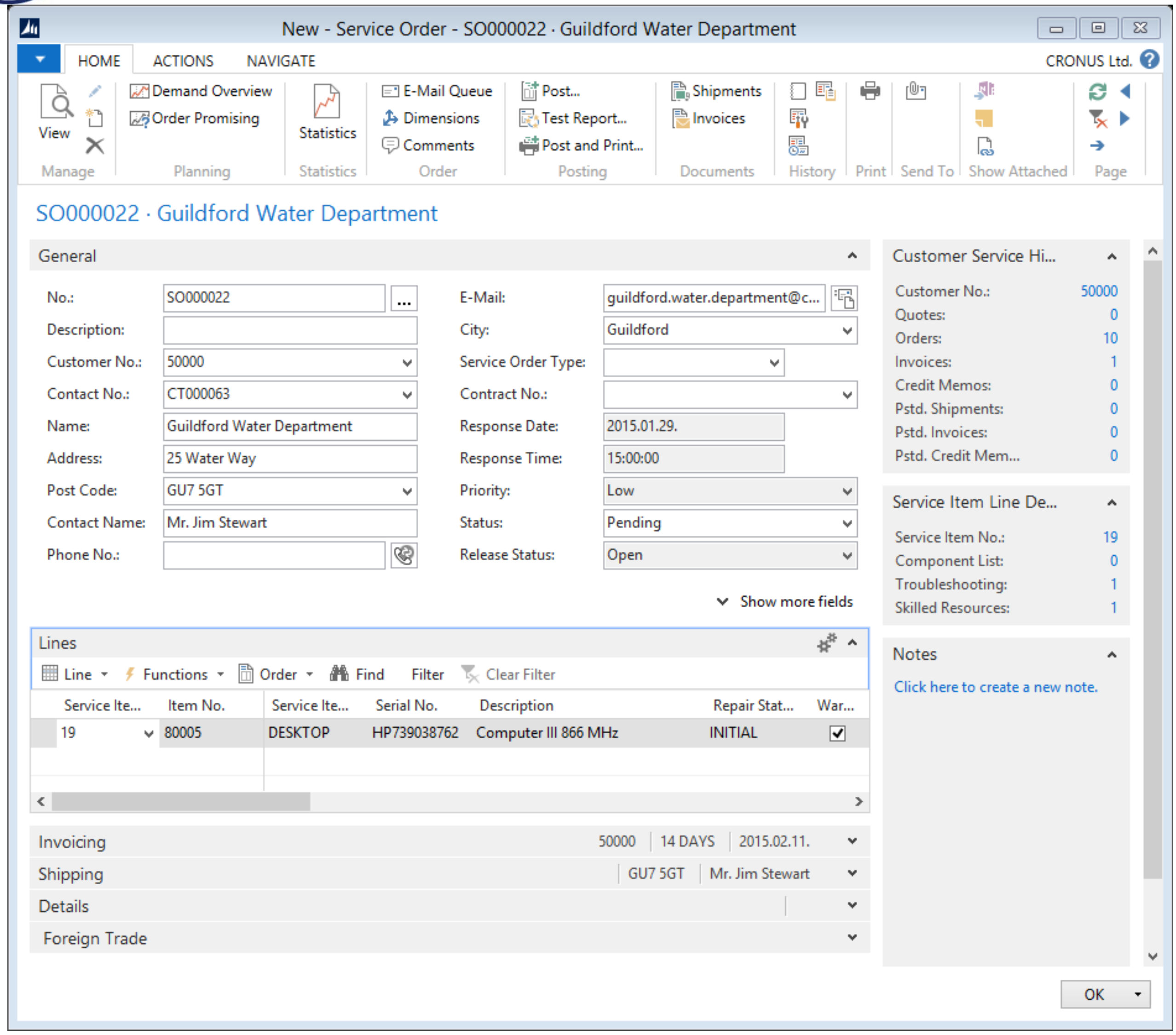
Tap a line to open the Service Task card.

Service workflow example

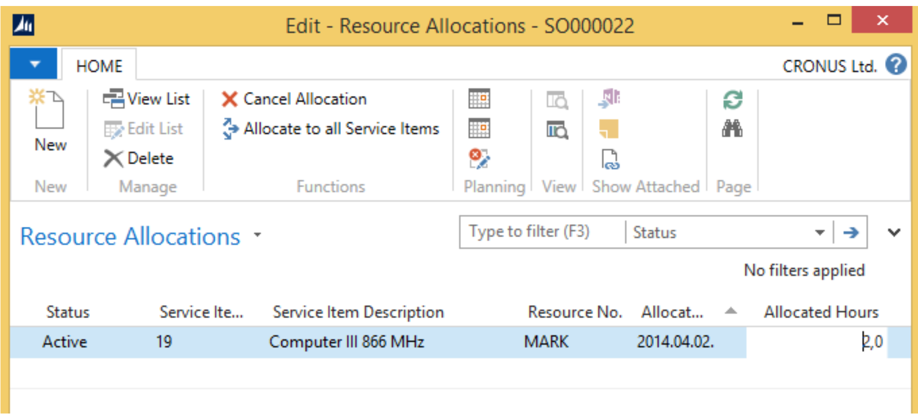
Let's see a typical example for the service module. As a first step the back office will create a new Service Order and allocate Mark, as service technician. After that Mark launches the MobileNAV application on his Tablet in offline mode and initiates a Synchronization to retrieve the latest service 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.

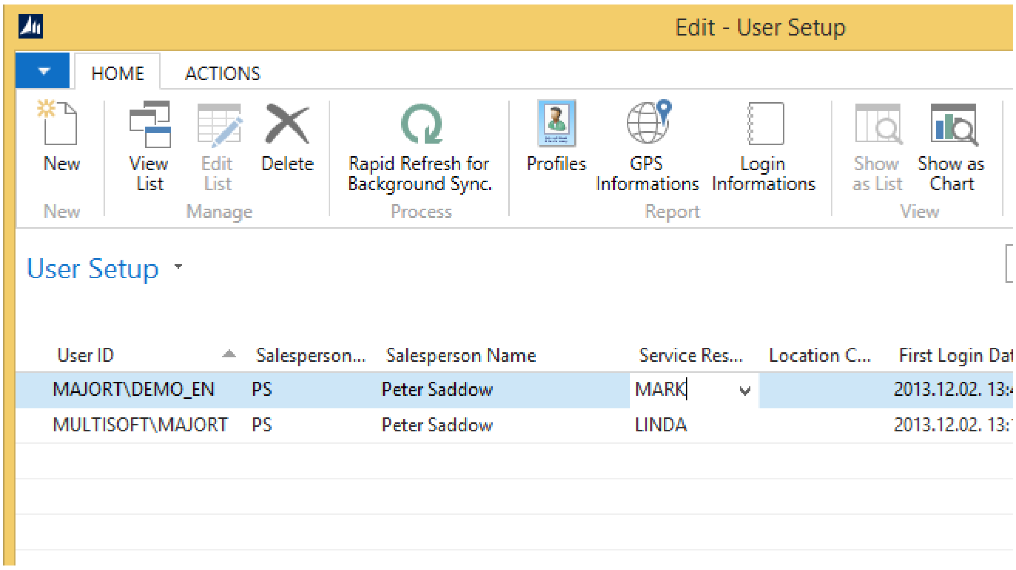
1. Open the Dynamics 365 Business Central client.
2. Go to Departments/Service/Order Processing/Service Orders and create a new Service Order. Fill out the Customer No. and create a new Line. Check the Document No.



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.



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



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.

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.

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.

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9. Enter the Symptom Code, Fault Area Code, Fault Code and Resolution Code.

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.

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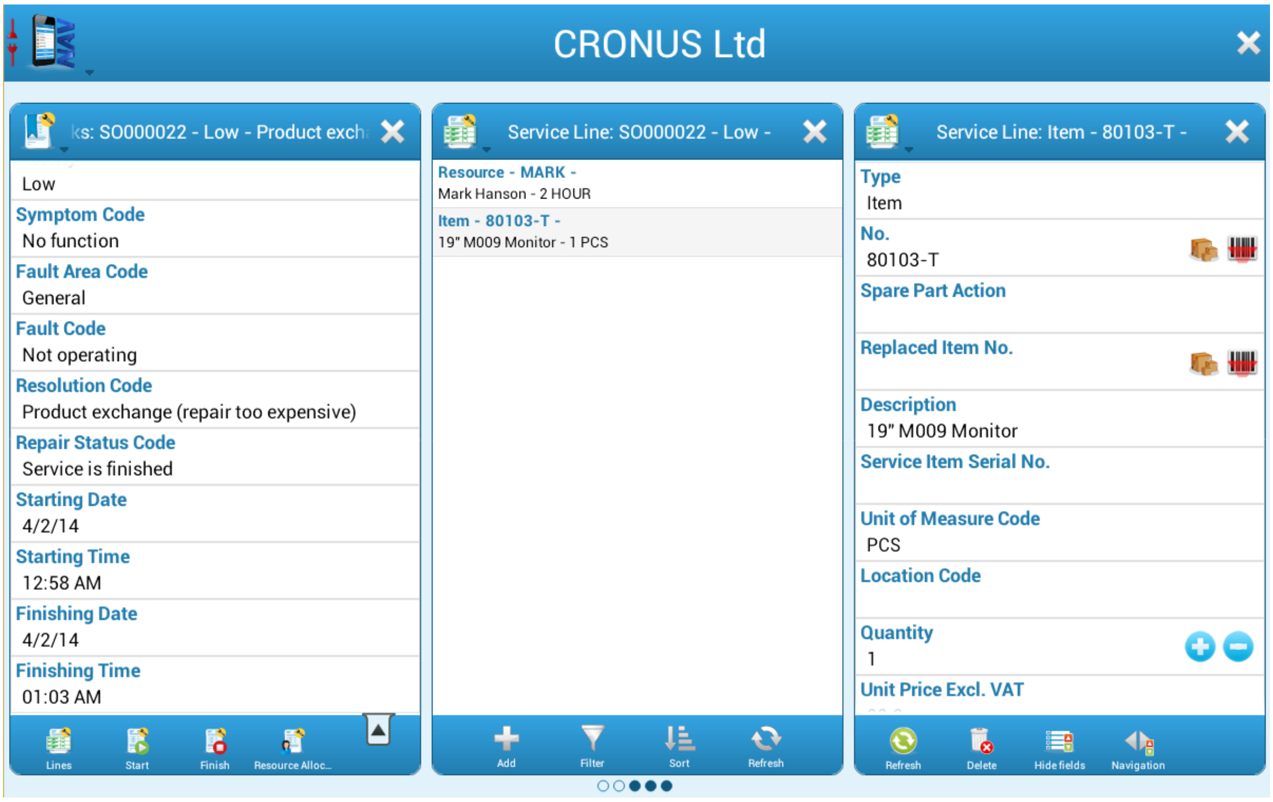
12. Tap the No. field to select your Resource No., and select MARK from the list.
13. Modify the Quantity field to 2.

14. Tap the Add button on the Service Line list again to create an additional new line.
15. Modify the Type to Item.

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.

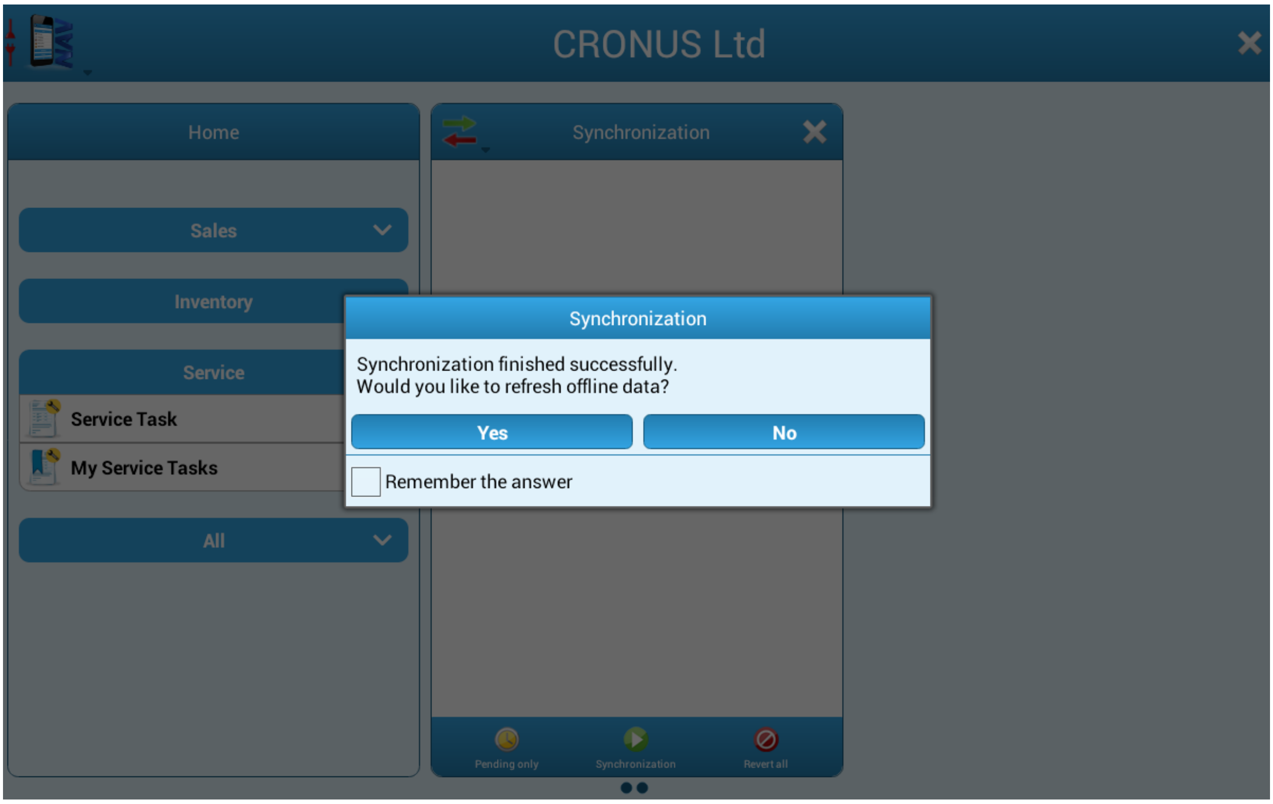
18. Go back to the Service Task card, and tap the Stop button. Note that the Repair Service Status changed to Service is finished, and the Finishing Date and Time has been filled with the actual date and time.



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.

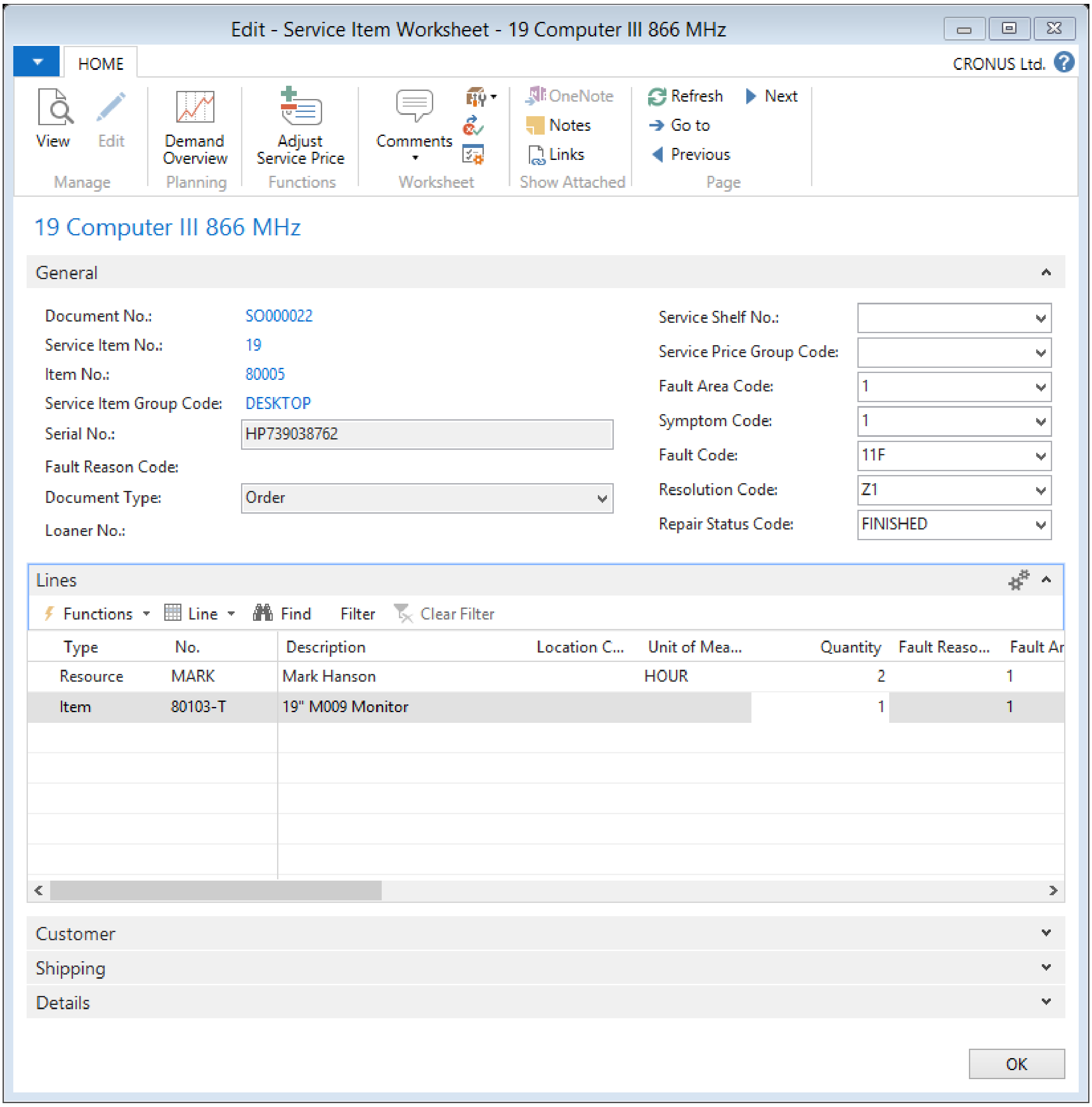


22. Now the latest Service tasks will be downloaded again.

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.



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