



# MobileNAV Installation Guide of AL Extension for Business Central

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# **Installing MobileNAV solution**

#### 1. Install MobileNAV extension

You can install MobileNAV extension in the following ways:

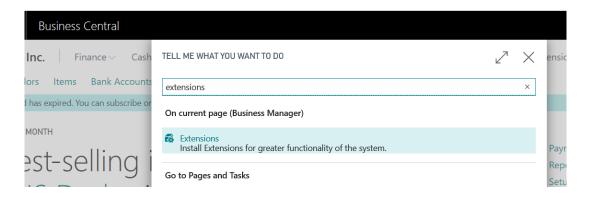
- Install from Extension Marketplace (only in Business Central SaaS)
- Upload extension manually (only in Business Central SaaS)
- Install extension with PowerShell (only in Business Central on-prem)

#### 1.1 Install from Extension Marketplace (only in Business Central SaaS)

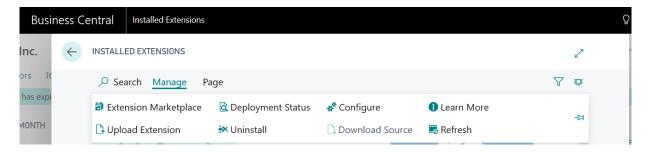
In this step you will install the MobileNAV extension from the Dynamics 365 Business Central AppSource as follows:

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- 1. Launch Dynamics 365 Business Central SaaS, and log in with your account
- 2. Press ALT + Q for quick search Extensions



3. Press Manage, and select Extension Marketplace



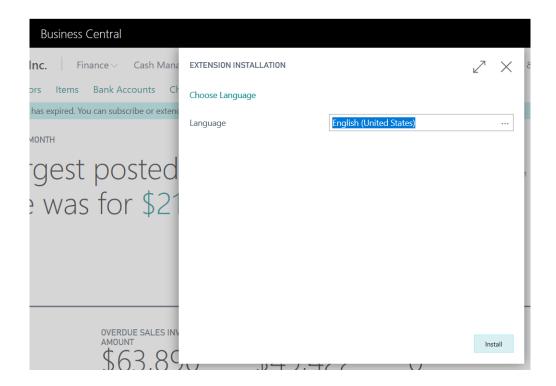
- 4. Search for MobileNAV, and press Free Trial
- 5. Fill out the form with your contact details, and press Continue





This app requires some basic profile information. We have pulled your Microsoft Account data to help you get started. AppSource will save your information for next time.					
Name *	Test	User			
Work email ★	testuser@mobilenavtest.onmicrosoft.com				
Job title					
Company	Test Company				
Country / region	United States of America				
Phone number *	+1-234-567-8900				
I give Microsoft permission to use or share my account information so that the provider or Microsoft can contact me regarding this product and related products. I agree to the provider's terms of use and privacy policy and understand that the rights to use this product do not come from Microsoft, unless Microsoft is the provider. Use of AppSource is governed by separate terms and privacy.					
		Continue			

6. Choose Language and press Install



7. A message will appear stating that the extension installation is in progress. Press OK



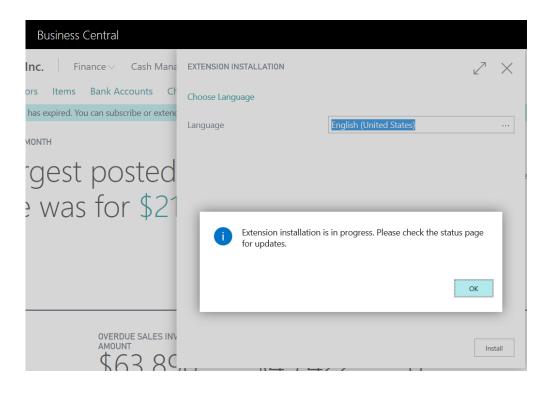
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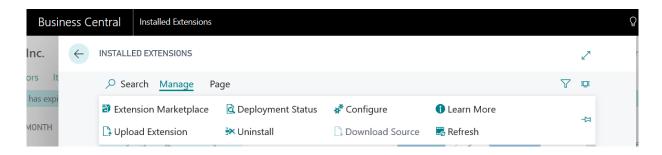
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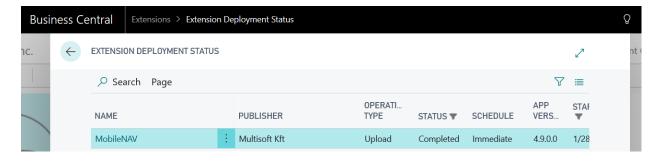




8. Go back to Extensions, and select Deployment Status



9. Wait until the status of MobileNAV extension will be Completed





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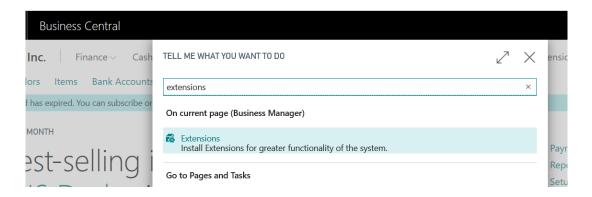


#### **Upload extension manually (only in Business Central SaaS)**

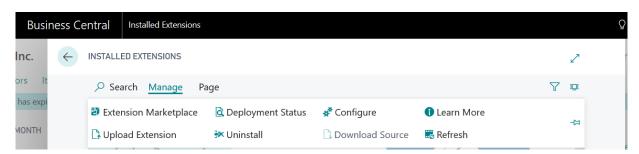
In this step you will upload the MobileNAV extension manually into the Dynamics 365 Business Central as follows:

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- 1. Launch Dynamics 365 Business Central SaaS, and log in with your account
- 2. Press ALT + Q for quick search Extensions



3. Press Manage, and select Upload Extension

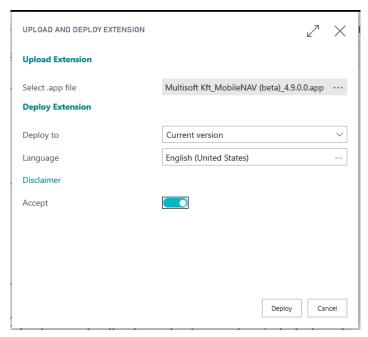


4. Browse the MobileNAV AL package (.app file), select which version do you want to deploy to, select the language you want to install and accept the disclaimer

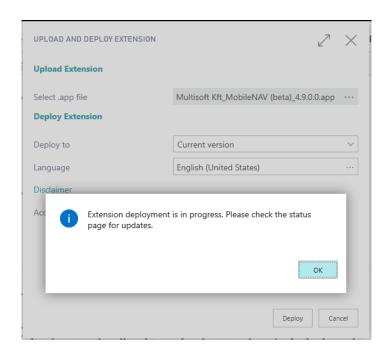


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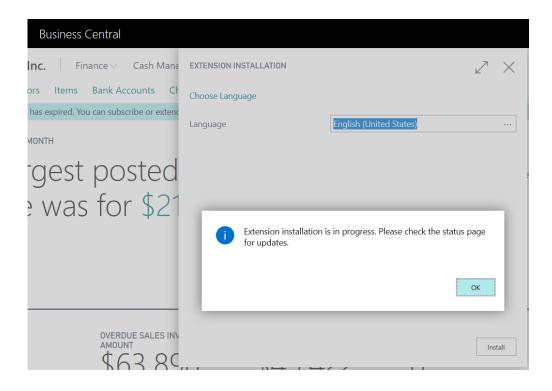
5. Press **Deploy** to start the deployment



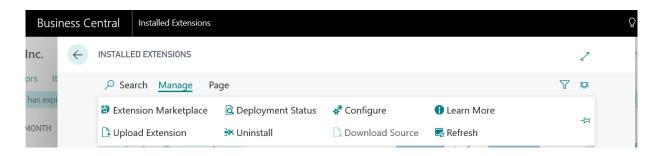
6. A message will appear stating that the extension installation is in progress. Press OK



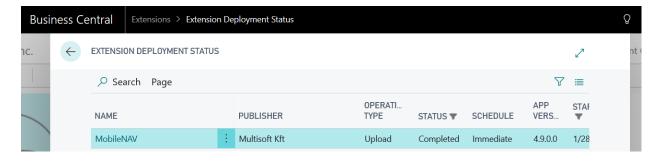




7. Go back to Extensions, and select Deployment Status



8. Wait until the status of MobileNAV extension will be **Completed** 





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#### 1.3 Install extension with PowerShell (only in Business Central on-prem)

In this step you will install the MobileNAV extension with PowerShell into the Dynamics 365 Business Central as follows:

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- 1. Log in to the server computer which has Dynamics 365 Business Central installed with an account which has proper rights for installing extension packages
- 2. Copy the MobileNAV AL package (.app file) and the provided PowerShell script (Install-Uninstall-Upgrade-MobileNAV.ps1) to server computer
- 3. Run the PowerShell script (right click on the .ps1 file, and select Run with PowerShell)

- 4. Enter "i", and press "Enter"
- 5. Enter the version you are about to install (the end of the .app file name)

```
Administrator: Windows PowerShell

Do you want to Install, Upgrade or Uninstall?

[I] Install [U] Upgrade [N] Uninstall [?] Help (default is "I"): i

Version to install: 4.9.0.6
```

6. Press "Enter" to start the installation, and wait until it finishes

```
Administrator: Windows PowerShell

Cmdlet Start-NAVServerInstance 13.0.24... Microsoft.Dynamic Microso
```

# 2. Set up MobileNAV with Assisted Setup

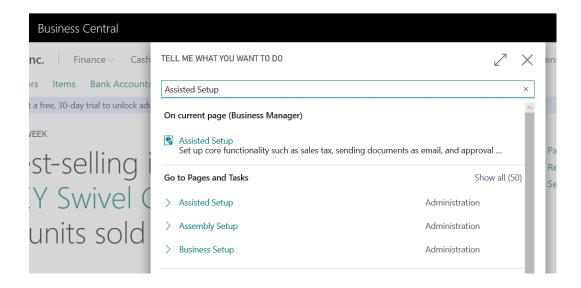
You can set up MobileNAV with an Assisted Setup, which drives you thru the necessary steps, or you can execute the necessary steps individually.

In this step you will execute the Assisted Setup for MobileNAV.

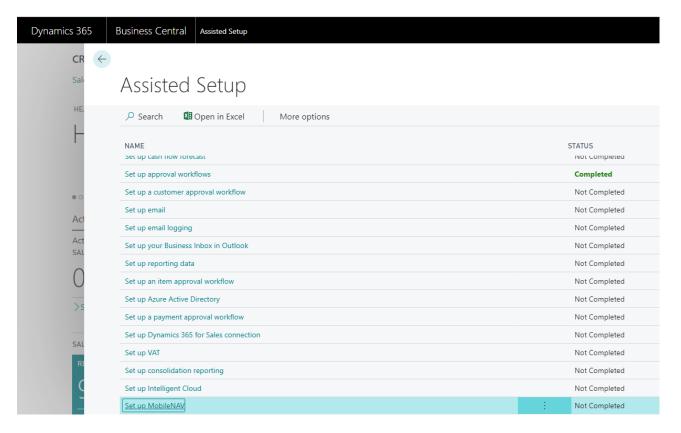
- 1. Launch Dynamics 365 Business Central SaaS, and log in with your account
- 2. Press ALT + Q for quick search Assisted Setup







3. Select the "Set up MobileNAV" Assisted Setup

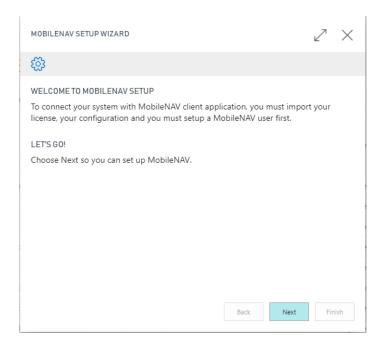


4. Welcome screen: Press Next

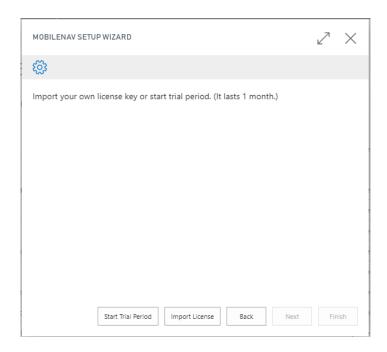








5. **MobileNAV License:** Press **Start Trial Period** to start a trial period for 30 days with 5 devices or press **Import License** to import your MobileNAV License String you got from your Dynamics 365 Business Central partner or from MobileNAV Sales Team.



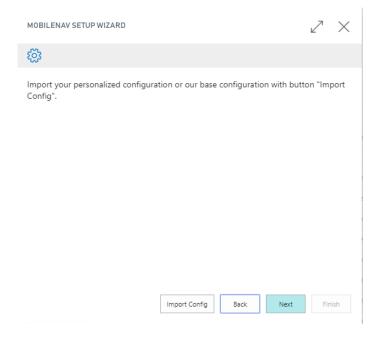
6. **MobileNAV Configuration:** Press **Import Config** and decide whether you want to import the Base Configuration of MobileNAV, or you would like to import a customized MobileNAV Configuration

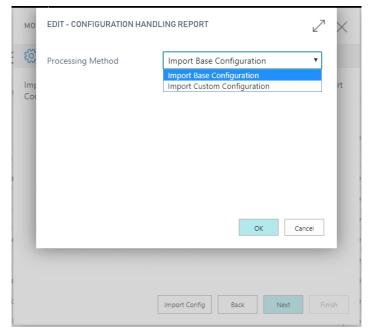




XML. In the second case, you need to browse the custom configuration XML file, and then the import will be started.

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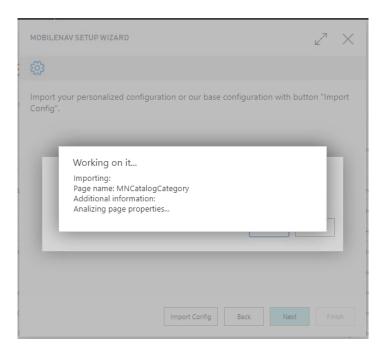
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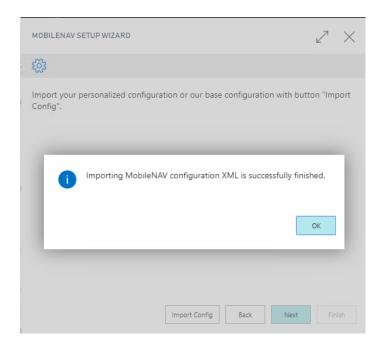
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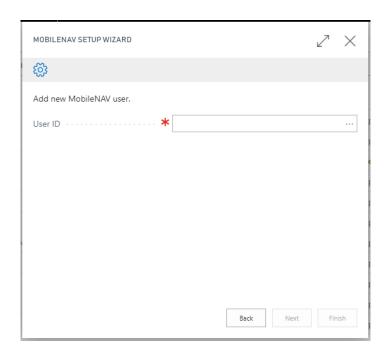




7. **MobileNAV Users:** in this step you can set up users for MobileNAV. First you need to choose an already existing user in Dynamics 365 Business Central. Please note that setting up the users in Dynamics 365 Business Central should be done prior this step.







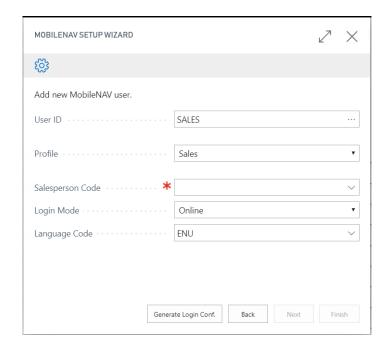
After selecting the user, you need to assign a MobileNAV profile to the user.

In case you have imported the base configuration, you will see a "simplified" profile selector, where you need to select

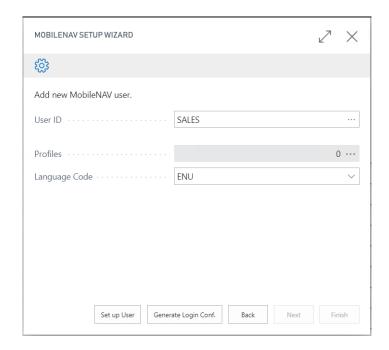
- a Profile (like Sales, Service, etc.),
- a Login Mode (like Online, Offline or Auto Online/Offline),
- and an initial **Language Code** for the user (the user can change language anytime, but his initial configuration will be generated based on the selected language here)







In case you have imported a custom configuration, then you will see a slightly different screen, where you need to assign at least one **Profile**, and select an initial **Language Code** for the user. The user can change language anytime, but his initial configuration will be generated based on the selected language here. After that you can press the **Set up User** where you can do the rest of the User Setup, like select Login Mode, etc.

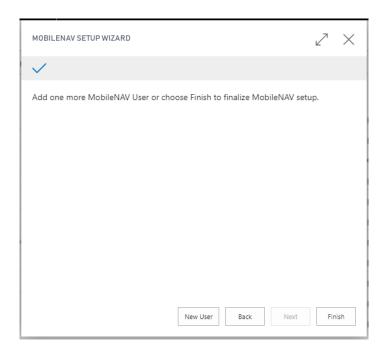




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- 8. Press **Generate Login Conf.** to generate a special XML file for MobileNAV app, which you can use for sending connection details to the MobileNAV user. See <u>Generate Login Configuration XML for MobileNAV client (optional)</u> for details.
- 9. If you want to set up additional users, press **New User**, or press **Finish** to finish the Assisted Setup.



# 3. Set up MobileNAV "manually"

You can set up MobileNAV with an Assisted Setup, which drives you thru the necessary steps, or you can execute the necessary steps individually.

These steps are the following:

- Import MobileNAV License String
- Import MobileNAV Configuration
- Set up MobileNAV Users

### 3.1 Import MobileNAV License String

In this step you will import the MobileNAV License String. The MobileNAV License String can be ordered from your Dynamics 365 Business Central partner or from MultiSoft Ltd.

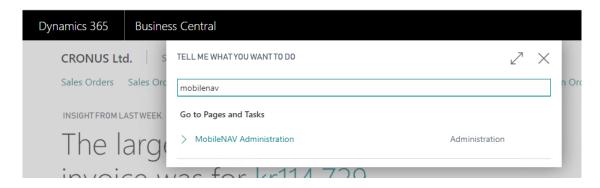
To import the MobileNAV License String, do the following:

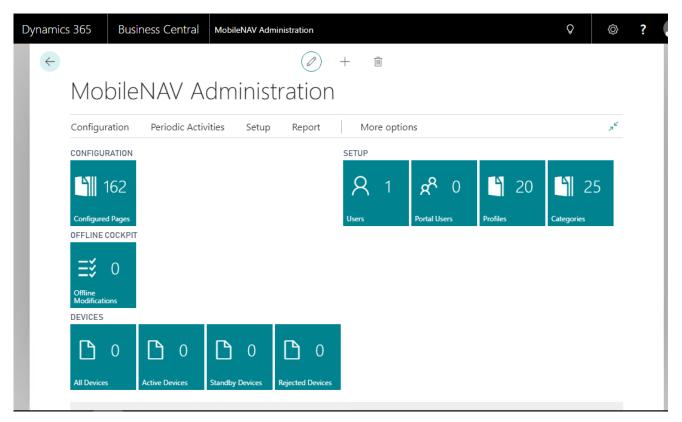
- 1. Launch Dynamics 365 Business Central SaaS, and log in with your account
- 2. Press ALT + Q for quick search MobileNAV Administration











#### 3. Select "All Devices"





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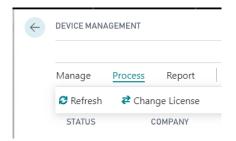
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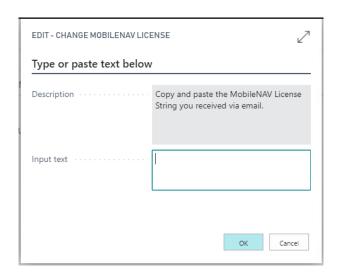
E-mail: contact@mobilenav.com



4. Select "Process" -> "Change License"



5. After confirming the message, a window opens where you can enter your MobileNAV License String



- 6. Enter your MobileNAV License String, and press **OK**
- 7. Check the information section on the Device Management window, which shows information about your license



### 3.2 Import MobileNAV Configuration

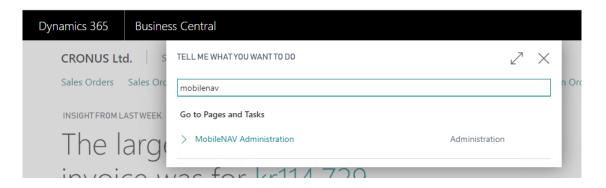


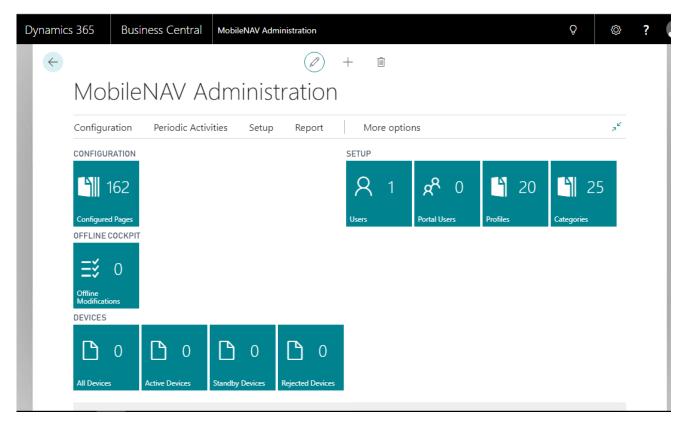


In this step you will import the MobileNAV Configuration. You can import a custom configuration, which has been customized and exported in another environment (like dev or test system), or you can import the base configuration.

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- 1. Launch Dynamics 365 Business Central SaaS, and log in with your account
- 2. Press ALT + Q for quick search MobileNAV Administration





3. Select "Configuration" -> "Configuration Handling"







4. Select whether you want to import the base configuration, or you want to import a custom configuration



5. In case you have selected importing custom configuration, then you need to browse the configuration XML file



6. The import of MobileNAV configuration will start



7. Wait until the import finishes



### 3.3 Set up MobileNAV users

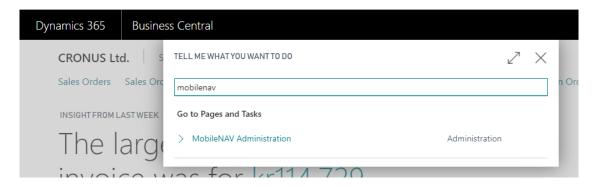
In this step you set up MobileNAV users.

1. Launch Dynamics 365 Business Central SaaS, and log in with your account

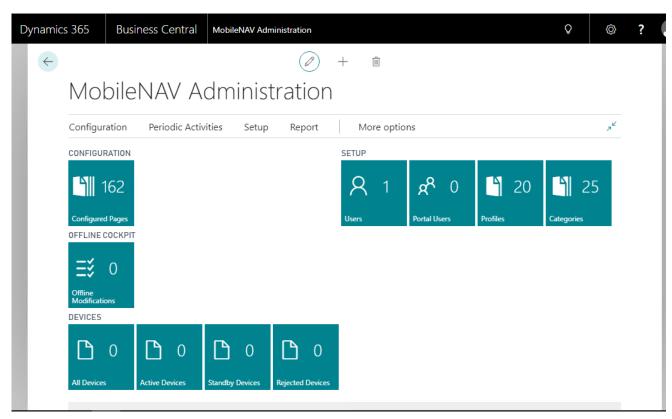




2. Press ALT + Q for quick search MobileNAV Administration



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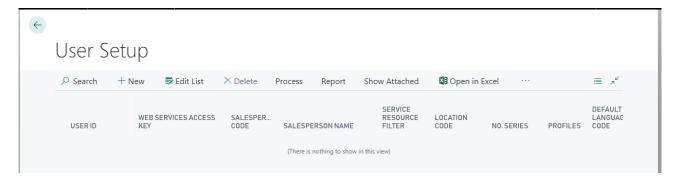


3. Select "Users"



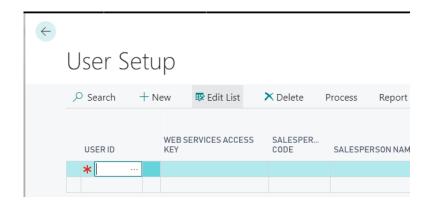






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4. Press "New"



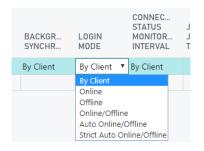
- 5. Select the already existing Dynamics 365 Business Central user for User ID column
- 6. Select at least one profile for the user. MobileNAV base configuration contains thematic profiles separately for sales, service, warehouse, purchase, production, project, marketing and finance. For each profile, we have created an "online" and an "offline" version. The "online" version does not cache or download offline data (only certain lookup pages), so if the device loses the connection, then you cannot work. The "offline" version does download most of the offline data, but you need to optimize and filter the offline pages if necessary, otherwise the client app would download too much data.





PROFILES + New			
CODE	DESCRIPTION		
MARKETING OFFLINE	Marketing Offline		
MARKETING ONLINE	Marketing Online		
PRODUCTION OFFLINE	Production Offline		
PRODUCTION ONLINE	Production Online		
PURCHASE OFFLINE	Purchasing Offline		
PURCHASE ONLINE	Purchasing Online		
SALES OFFLINE	Sales Offline		
SALES ONLINE	Sales Online		
SERVICE OFFLINE	Service Offline		
SERVICE ONLINE	Service Online		
WHS_ADV OFFLINE	Warehouse Advanced Offline		
WHS_ADV ONLINE	Warehouse Advanced Online		
THE PASE OFFICE	111 1 2 200		

- 7. Fill out those columns which makes sense for the type of user you have selected
  - a. Salesperson Code: for sales and marketing users
  - b. Service Resource Filter: for field service users
  - c. Location Code: for warehouse users
  - d. GPS Tracking Enabled: for users whose GPS position should be reported to the server
  - e. Movement Worksheet Name and Movement Journal Name: for warehouse users who are willing to use Ad-hoc Movement
  - f. Job Journal Template and Job Journal Batch: for project users
- 8. Turn **On** or **Off** the Background Synchronization of MobileNAV for the user, or leave it on "**By Client**", the mobile user can device it
- 9. Select Login Mode for the user:



- a. By Client: the user can decide
- b. Online: the user will be forced to log into online mode always
- c. Offline: the user will be forced to log in offline mode always
- d. **Online/Offline:** the user can use both online and offline mode via using the Go Online or Go Offline in MobileNAV
- e. Auto Online/Offline: the user will be forced to use Auto Online-Offline mode, he cannot



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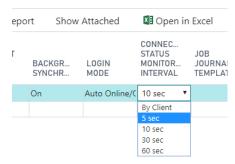


ERP anywhere

change these settings on his device.

- f. Strict Auto Online/Offline: the user will be forced to use Auto Online-Offline mode in strict mode, he cannot change these settings on his device. Strict mode means, that if the user has pending offline changes, which are not uploaded yet, then he is not allowed to execute any online feature.
- 10. If you have selected Online or Auto Online/Offline as Login Mode, then you can also select Connection Status Monitoring Interval, which specifies how frequently should the MobileNAV app check the connection to the server, or you can leave it as "By Client", so the user can set the value on the device.

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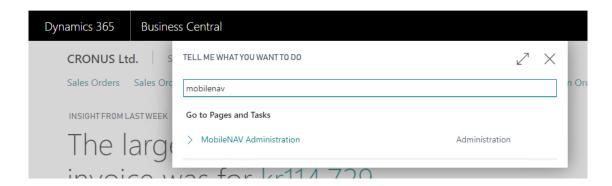


11. Press Generate Login Conf. to generate a special XML file for MobileNAV app, which you can use for sending connection details to the MobileNAV user. See Generate Login Configuration XML for MobileNAV client (optional) for details.

# 4. Generate Login Configuration XML for MobileNAV client (optional)

Optionally, you can generate Login Configuration XML from the MobileNAV User Setup, and send that file to the client devices, so that the users can import it, and it will fill out most of the login parameters.

- 1. Launch Dynamics 365 Business Central SaaS, and log in with your account
- 2. Press ALT + Q for quick search MobileNAV Administration

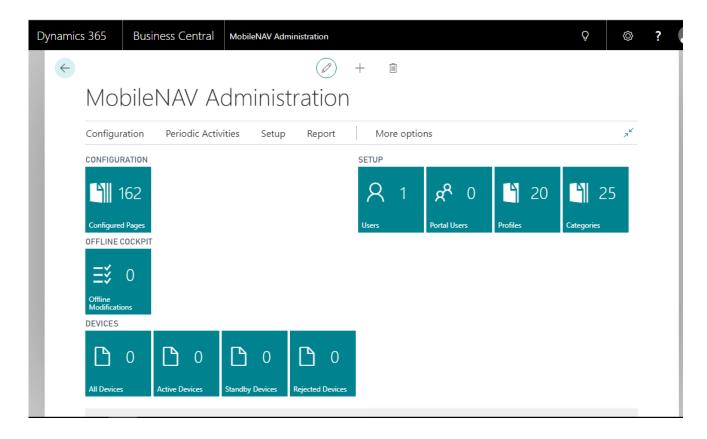




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3. Select "Users"



4. Press "Process" -> "Generate Login Configuration"



5. Select the "Authentication Type", and fill and correct the fields for the Login Configuration



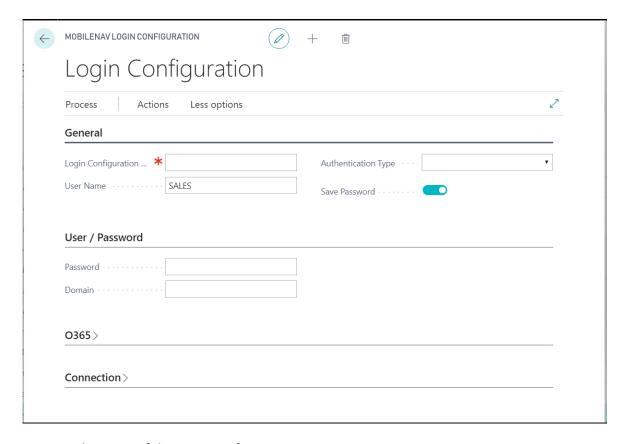
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Postal address: 1506 Budapest P.O. box: 5.

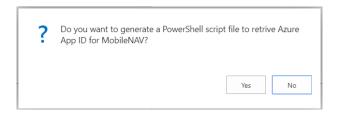
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- 6. Enter the name of the Login Configuration
- 7. Choose the Authentication Type
  - a. If you choose User/Password, then fill the User / Password section
  - If you choose Office 365 authentication, then the system will offer you to download a
     PowerShell script for configuring the Office 365 authentication for MobileNAV on the Azure
     AD, which helps you filling out the O365 section on the page



8. Modify the Connection details: **Server** might need to be changed for IP address or the external address of the Service Tier





Connection	
Use SSL · · · · · · · ·	Tenant · · · · · ·
Server · · · · · · MobileNAVDemoBC:7047	Company · · · · · CRONUS Ltd.
Instance BC130	

- 9. Press "Generate Login Configuration File" button to generate the XML file
- 10. If necessary, change the file extension to ".mnlc"
- 11. Send the file to the mobile device

# 5. Login with MobileNAV client application

Verify that everything is properly installed and configured. You will log in from the MobileNAV application to your Dynamics 365 Business Central server.

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- 1. If you have chosen internal server with VPN connection, then first connect via VPN on the mobile device
- Launch the MobileNAV client application. By default, the login configuration selector will show
   "<Demo server>" which you will connect to the MobileNAV demo servers, where you can check the
  latest base configuration of MobileNAV.



- 3. Press the Login Configuration selector, which opens the Login Configuration list
- 4. Press "Import" to import the Login Configuration XML you have generated in MobileNAV User Setup, or Press "New" to create a new Login Configuration
- 5. Depending on the Authentication Type of your Dynamics 365 Business Central, you can choose "User/Pw" or "O365".
  - a. In case of "User/Pw" you need to enter the following
    - i. Enter the user name to one of the configured MobileNAV user's login name.
    - ii. Enter the password to one of the configured MobileNAV user's password.
    - iii. Enter the domain to your domain name. Leave it empty if you are using Business Central Authentication.
  - b. In case of "O365" you need to enter the following:
    - i. **Enter the Tenant ID**, which is the URL friendly name or the GUID of the Azure Active Directory.

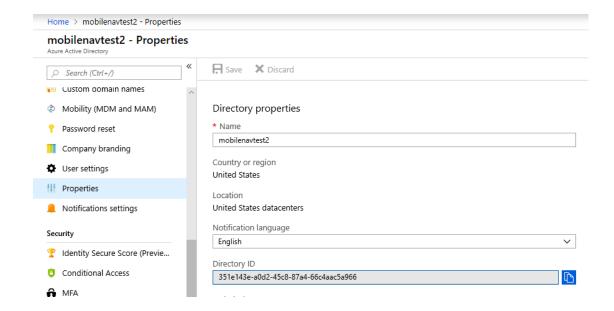
You can find this under



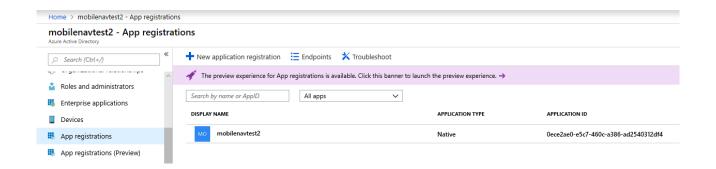




- Azure Active Directory -> Properties -> Name (like: mobilenavtest2.onmicrosoft.com) or
- Azure Active Directory -> Properties -> Directory ID (like: 351e143e-a0d2-45c8-87a4-66c4aac5a966)



ii. **Enter the App ID**, which is the Application ID (GUID) of the Native App registration of the Azure Active Directory. It is important that the App registration's Application Type is Native, and not "Web app / API". You can find this under Active Directory -> App registrations.



In case of Business Central SaaS, this App registration needs to have permission to "Dynamics 365 Business Central". You can find this under Active Directory -> App registrations -> {Native App registration} -> Settings -> Required permissions.



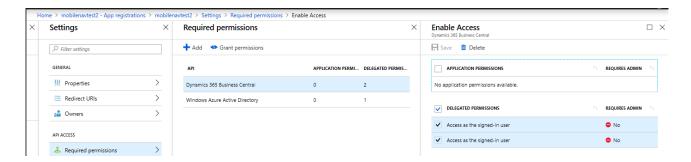
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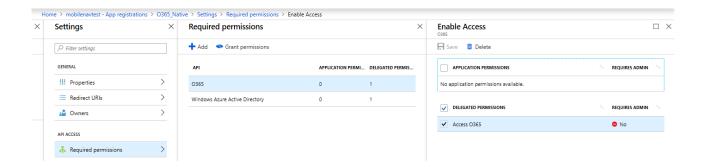
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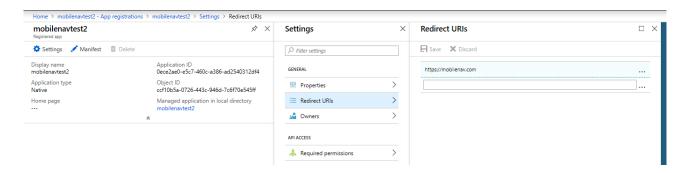




In any other case, this App registration needs to have permission to a "Web app / API" type App registration. You can find this under Active Directory -> App registrations -> {Native App registration} -> Settings -> Required permissions.



iii. **Enter Redirect Uri,** which is (one of) the Redirect URI of the Native App registration specified in App ID. You can find this under Active Directory -> App registrations -> {Native App registration} -> Settings -> Redirect URIs. The Redirect URI can be anything, like "https://mobilenav.com".





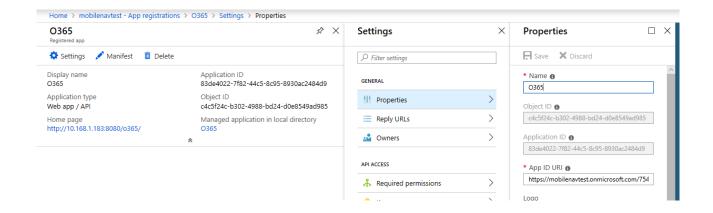




iv. Enter App ID Uri, which is the App ID Uri of the "Web app / API" type App registration.

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- In case of Business Central SaaS, there is a built-in "Web app / API" App registration, and you need to enter: "https://api.businesscentral.dynamics.com"
- In case of any other type of NAV, you have a "Web app / API" type App registration, and you can find this information under: Active Directory -> App registrations -> {Web app /API App registration} -> Settings -> Properties -> App ID Uri.

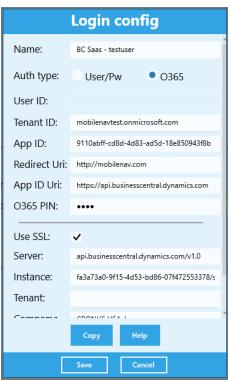


- 6. Check the Use SSL option if you have configured the server's SOAP web services with SSL encryption.
- 7. Enter the server and the port address of your server's SOAP web service. Please note that if you choose to use internal server with port forwarding, then you need to replace the computer name with the external address.
- 8. Enter the instance to the instance name you have set for server.
- 9. Enter the company to the company name that you want to connect to.

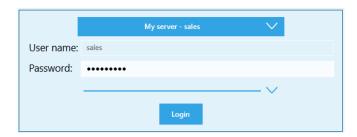








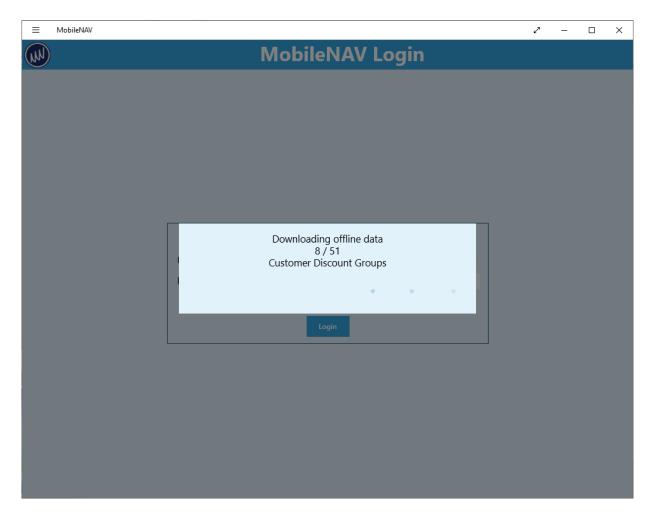
10. Press **Save** to save the Login Configuration. At this point MobileNAV will test the connection to the server. If the credentials you have provided are proper, then the new Login configuration will be stored and selected, and you will go back to the Login screen automatically.



- 11. Click Login.
- 12. Wait until the login takes place.







13. Verify that you have successfully logged in.







Typical errors during log in include the following:

- Invalid credentials: the user name, password or the domain that you have entered is invalid.
- Connection to the server failed: the SSL, server, or port that you have entered is invalid.
- Invalid instance name: the instance name that you have entered in invalid.
- Invalid company name or the server is not MobileNAV compatible: the company name that you have entered is invalid or the MobileNAV solution is not properly installed and configured.

# **Uninstalling MobileNAV extension**

In order to successfully remove the MobileNAV extension, you need to do the following:

- 1. Launch Dynamics 365 Business Central SaaS, and log in with your account
- 2. Press ALT + Q for quick search Extensions



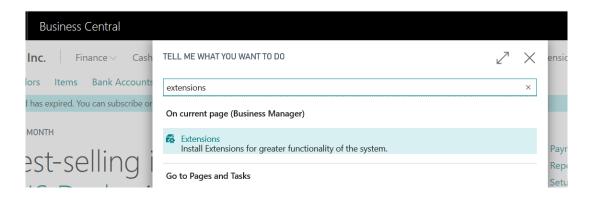
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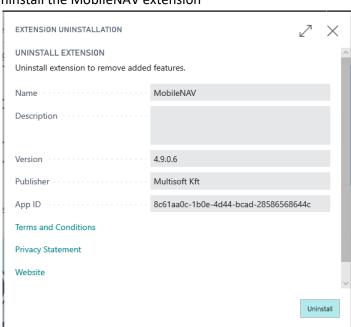


3. Search for MobileNAV, and press the "..." on the top right corner of MobileNAV extension





4. Select Uninstall to uninstall the MobileNAV extension



5. Press Uninstall on the Extension Uninstallation window





# **Backup and Restore**

MobileNAV does not have any external configuration file or data, so the standard Dynamics 365 Business Central backup and restore is enough.

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# **Hardware requirements**

Since MobileNAV does not have any separate server-side component, and it is just a light-weight Add-on of Dynamics 365 Business Central, its hardware requirements match with the hardware requirement of the Dynamics 365 Business Central product.



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