



Clients First Business Solutions
NAVISION TRAINING VIDEOS

NAVISION Training and Educational Videos

Maximize your return on investment (ROI) in Microsoft® Dynamics® Nav (Navision) with educational materials from Clients First. These comprehensive training videos and accompanying workbooks are invaluable. Teach new employees, first-time, or even advanced Navision users with self-paced video training. Each video is divided into logical chapters that correspond to a training manual that you print from the CD-ROM. Students are asked to take a test following each major topic in the workbook. The answers are presented on the video so the student can see and review how each process is performed.

The video CD's may be installed on your internal network for use by anyone, at a single location, who is an employee of your organization. The license will even permit you to duplicate the CD's (restrictions apply) so that employees can use the videos off-site.

The Navision Video Training Library saves time and money by permitting employees to learn and review the videos as often as necessary. Check out each video's table of contents later in this document.

Special Discount for Clients First Support Plan Customers

Clients who subscribe to a Navision Support Plan are entitled to the following Video Library discounts:

Platinum Support	–	12.5%
Gold Support	–	7.5%
Silver	–	5%
No Support	–	0%

Navision 4.0 Training Videos and Workbooks

Description	Course Length*	Level	Cost \$
Getting Started with Navision	4 to 8 hours	Beginner	\$395
Getting Started with Navision Workflow	16 to 24 hours	Beginner	\$795
Getting Started with Master Files	4 hours	Beginner	Included with Workflow
Navision Setup	16 hours	Super Users	\$795
Navision Manufacturing	32 hours	Intermediate	\$1,575
The Navision Designer – Tables & Forms	16 to 24 hours	Advanced / Administrator	\$795
Navision Report Writer	16 hours	Advanced	\$395
* Estimated time to complete the course			

DESCRIPTION OF NAVISION VIDEO TRAINING COURSES

Getting Started with Navision

This video is intended to familiarize you with features available throughout Navision. The workbook and CD movies are designed to teach you the basics of Navision. You will learn how to add, change, and delete information. You will also learn how to personalize Navision for your company. The class will cover the following topics in segments:

- Moving around in Navision
- Card and List Windows
- How to Add, Change, and Delete
- Journals versus Ledgers
- Tips on Entering Data
- Searching, Finding, and Viewing Information
- Short Cut Keys
- Adding Master Records
- Vendor Activities – Purchase Orders Processing
- Customer Activities - Sales Order Processing
- Open Computer Test
- Advanced Topics and Tips
- Where is the data?
- Exam

Getting Started with Navision Workflow

This CD focuses on the Navision Workflow and is designed to strengthen and extend the information you learned on the “Getting Stated with Navision”. We will address many common business activities needed to operate Navision for distribution (buy/sell) organizations. This course will take 2 to 3 days to complete. Topics include:

Distribution (Buy/Sell) Workflow

- Introduction
- What needs to be ordered?
- How to enter Purchase Orders
- How to receive a product
- How to enter Vendor Invoice against a PO
- How to enter a Sales Quote
- How to enter a Sales Order
- How to ship a product
- How to Invoice products
- How to Invoice services
- Periodic Update to GL processes
- How to use “Charge Items”

Vendor Management

- Direct entry of Vendor Invoice
- How to print Checks

Customer Management

- How to enter Cash Receipts
- How to enter a Customer's Deposit
- Customer Statement & AR Aging Report
- Reminders and Finance Charges

Financial Management

- Review of real time Trial Balance
- Simple Financial Statements
- Printing Financial Reports
- How do transactions post to GL?
- How to enter Adjusting Journal Entries

Resources

- How to setup Resources
- How to establish capacities
- Job Costing 101

Inventory and Procurement Tips

- The Requisition Worksheet
- Physical Inventory

Reporting Tips

- Reporting in Navision

Cash Management

- Reconciling the check book

Additional Topics

- Credit Memos
- Locations
- How to apply open entries
- Statistics
- Units of Measure

Getting Started with Navision Master Files

This CD focuses on the Navision master files and is included at no-charge with the purchase of the Workflow or Setup CD's.

Item Master File

- Item Card – General Tab
- Item Card – Invoicing Tab
- Item Setup Exercise #1
- Item Setup Answer
- Item Card – Replenishment Tab
- Item Card – Command Buttons
- Item Card – Sales Menu
- Item Setup Exercise #2
- Item Setup Answer Key

Customer Master File

- Customer Card – General & Communication Tab
- Customer Card – Additional Tabs
- Customer Card – Command Buttons

Vendor Master File

- Vendor Card – Review of Tabs
- Vendor Card – Command Buttons

DESCRIPTION OF NAVISION VIDEO TRAINING COURSES

Navision Setup

This Setup video is intended for organizations that are beginning or in process of implementing their Navision system. It is also designed for individuals that require a deeper knowledge of the Navision environment. Topics include::

First Steps

- How to use this Training CD
- Using the Navigation Pane
- How to create a new Company
- The Setup Checklist

Setup

- Accounting Periods
- Number Series
- Chart of Account Numbers
- COA consideration if using Dimensions
- Account Schedules
- Dimensions
- Analysis Views

Static Data Entry

- Payment Terms, Shipment Methods, Tax Setup
- Customers, Vendors, Items
- Defaults Setup & Quick Edit Forms

Data Migration – Importing Static Data

- Data Migration Considerations
- Import using the RIM Tool
- Import using Dataports

Transactional Data Entry

- Journal Type Transactions
- Journal Setups
- Document Type Transactions

Setup of Posting Groups, Taxes, and Reports

- Posting Groups
- Tax Setup
- Report Selections
- Check your setup

Opening Entries

- GL, Customer, and Vendor opening balances
- Opening Sales Quotes and Opening Sales Orders

Data Migration – Part II – Import Transactional Data

- Importing into Journals
- Importing into Documents

System Administration

- Security
- Backup and Restore
- Importing Modified Objects

Periodic Activities

- Posting Dates and Year End Close

Navision Manufacturing

This Navision Manufacturing Training is designed as a 4 day course to lead you through setup and basic operation of the software for companies that have purchased the Navision manufacturing granules. These granules include production bill of materials, production work orders, routings (capacity planning), and MRP. Course topics include:

Introduction & Setup

- Introduction and System Overview
- Manufacturing Setup

Product Design

- Items
- Production BOM (Bill of Materials)
- Routings
- Putting it all together
- Routing Link Codes

Capacities

- Capacities Setup
- Machine Centers
- Work Centers

Planning

- Sources of Demand
- Sales Orders and Blanket Sales Orders
- Production Forecasts

Creating Production Orders to fulfill the demand

- Planning Worksheet (MPS/MRP)
- Order Planning (Manual MRP)
- Production Scheduling (Not covered at this time)

Creating Purchase Orders to Subcontractors

- Subcontracting Worksheet

Daily Operation

- Production Orders (PPO, FPPO, RPO)
- Consumption Journal
- Output Journal

History

- Finished Production Orders

DESCRIPTION OF NAVISION VIDEO TRAINING COURSES

Navision Report Writer

NAVISION offers many customization and report writing features. This video course will take you through the many tools that you can use to customize the reports to suit your individual needs. This class is an introduction and covers the following topics:

- Meet Mr. Wizard (Your first report)
- Enhancing your report
- Sorting
- Filtering
- Adding additional fields to an existing report
- Totals (Sub-Totals and Grand Totals)
- Table Relationships
- Formatting Tips
- Variables
- Variable Totals
- Request Filters
- Table Filters
- Copying and Renaming Reports
- Add Reports to a Menu
- Exercise – “Open Sales Order” Report
- Exercise – “Shipped, but not Invoiced” Report
- Exercise – “What is coming in?” Report
- How to Export / Import your reports
- The 4 Types of Reports.
- Adding “Report Filters” and “Name” to Report Header

Navision Designer – Tables & Forms

The Navision Designer training course is not designed for everyone. The Navision Object Designer is a technical tool and should be limited to system administrators with a thorough understanding of business and Navision functionality and have the requirement to modify the working environment of the software. The Object Designer is only available to organizations that have specifically licensed the functionality. The course topics include:

Table and Form Introduction

- Application Diagram and Table Diagram
- What is the Object Designer?
- What is a Table?
- Where data lives
- What is a Form?
- Adding existing fields to existing forms
- Adding new fields

Table Designer

- Numbering Methods
- Adding a new Table
- Documentation
- Keys
- Dual Keys

Form Designer

- Tabular Forms
- Card Forms
- How to add a new form
- Form Properties
- Field Properties
- Spiff up your forms
- How to add a command button
- How to add a menu button
- Button Properties
- Show Hide column control
- How to modify a form from the application

Additional Designer Topics

- Sorting Table Data
- Setting Table Properties
- What is a Flow Field?
- Flow Fields – Sum
- Flow Fields – Sum a value
- Flow Fields – Count
- Flow Fields – Lookup
- Exporting your FOB
- Importing your FOB
- Navigation Pane Designer

Additional Information

In addition to our classroom and onsite training, the **Navision Video Library** is an invaluable tool to maximize your knowledge and productivity. Please contact your account manager to answer any questions or purchase any of the training video courseware described in this document.

Please note that these videos generally pertain to Navision 4.0, although much of the operation and functionality applies to earlier versions.



Harnessing Technology to Achieve Business Improvement

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