Navision Tips & Tricks

1. **COPY RECORDS**: To copy card information:
   Example: Item Card
   a. Go to an item that closely resembles the new one you want to set up
   b. Edit, select
   c. Edit, copy
   d. F3 to insert new record
   e. Edit, paste
   f. You get 2 errors, just say Ok
   g. When you get back to the item no., enter in your new item no.
   h. Make changes to your new item card

2. **SEARCH NAME**: When entering journal lines or documents, you can use the Search Name whenever you are prompted for a vendor, customer, bank, item or G/L Account number.

3. **SALES OVERVIEW**: Add these easy to use Sales Forms to your menu to get a sales overview:
   a. Form 7172 (Sales Orders)
   b. Form 7174 (Sales Invoices)
   Filter on any combination of fields

4. **SALES & PURCHASE CODES**: Use these codes as tools to help you enter similar & repetitive information on sales or purchase documents.

   Purchase Codes:
   a. Setup: Go to Administration, Application Setup, Purchase, Standard Purchase codes. Click Purchase, Card to set up coding
   b. Assign purchase codes to the vendor on the purchases button
   c. On purchase documents, go to the functions button and get std. vendor purchase codes customer sales codes

   Sales Codes:
   a. Setup: Go to Administration, Application Setup, Sales & Marketing, Standard sales codes. Click Sales, Card to set up coding
   b. Assign sales codes to the customer on the sales button
   c. On sales documents, go to the functions button and get std. customer sales codes

5. **COPY LINK**: If you need to get another user to go to an exact location within Navision, go to Edit, Copy Link and email the link to another user. When the user enters the link into their browser it will take them to the exact location.

6. **RESCUE FEATURE**: When you accidentally type incorrect data in a field on a record (ex. Customer or item card) and enter through it, you can rescue your data by hitting the Navision F4 (delete) key and then saying "No" to delete the record.

7. **EDITING 1099 INFORMATION**: If you need to correct 1099 information after a vendor invoice or payment has been entered and posted, do so by going to the vendor ledger entry and clicking twice in the 1099 code and/or 1099 amount fields to edit. [Note – if these fields are not available in view/show columns, we can help you bring them in to be viewed.]

8. **WINDOWS FUNCTIONALITY**: Don't forget you can use basic windows shortcut keys in Navision. Examples:
    ➢ If you're in a tabular screen and need to go to the last row, you can use Ctrl-End. Or Ctrl-Home to go to the first row.
    ➢ End will take you to the last field in the row. Home to the first field in the row.
    ➢ In a card view (such as customer, vendor, item, etc.), Page-Down will take you to the next card. Page-Up to the previous card. Ctrl-Home to the first card. Ctrl-End to the last card.
    ➢ Within a card, Ctrl-Page-Down takes you to the next tab. Ctrl-Page-Up to the previous tab.

9. **ZOOM**: To see a list of all available fields in a table, select Tools, Zoom (Ctrl-F8). This also shows the name of the table at the top of the screen.

Navision Cheat Sheet

Shortcut Keys

Key	Description	Shift	Ctrl
F1	Help	What is…	Mark
F2	Edit	Assist Edit	Designer
F3	Insert		
F4	Delete		Close
F5	List	Card	Ledger Entries
F6	Drill-down		Next Window
F7	Field Filter	Flow Filter	Table Filter
F8	Copy Field	Sort	Zoom
F9	Stats	1099 Stats	Reconcile
F11	Post	Post & Print	
F12	Main Menu	Obj. Designer	

Filters:

Enter	This Includes
1000	1000
>1000	Greater than 1000
>=1000	Greater than or equal to 1000
1000..	Greater than or equal to 1000
<1000	Less than 1000
<=1000	Less than or equal to 1000
..1000	Less than or equal to 1000
<>1000	Not equal to 1000
1000..2000	From 1000 to 2000
1000|2000	1000 and 2000
*00	Ending in 00
1000..2000&*00	From 1000 to 2000 that end in 00
<>''	Not equal to blank

Date Entry:

Enter	This returns
103007	10/31/07
15	The 15th of the current month
1030	October 30th of the current year
T	For today's date
W	For the system work date
Y	Year to date range
P	Accounting Period (month) to date range