

---

## MICROSOFT DYNAMICS NAV – COURSE OUTLINE

### 1) MICROSOFT DYNAMICS NAV – APPLICATION SETUP

#### Module 1: Set Up a Company by Using RapidStart Services

This module explains the RapidStart Services for the application setup.

##### Lessons

- Manual Setup vs. RapidStart Services
- Rapid Start Services Process Flow
- Create and Export a Configuration Package
- Configure a New Company by Using RapidStart Services
- Data Migration by Using Rapid Start Services
- Transfer Opening Balances by Using RapidStart Services

After completing this module, students will be able to:

- Explain the dependencies between RapidStart Services and manual setup work.
- Describe the different components and processes of RapidStart Services.
- Explain and demonstrate all tasks in a RapidStart Services process.
- Create a configuration worksheet.
- Create a configuration package.
- Create a configuration questionnaire.
- Create a configuration template.
- Initialize a new company with a configuration package.
- Migrate customer data.
- Transfer opening balances.

#### Module 2: Manage User Rights and Profiles

This module explains the different level of security in Microsoft Dynamics NAV 2013. Lessons

- Authentication
- Set Up User Rights
- Create a New Permission Set



- 
- Apply Security Filters
  - User-Specific Setup
  - User Profile Setup
  - Best Practices

### Lab : Set Up New Users

- Susan
- Alicia
- Cassie

After completing this module, students will be able to:

- Explain how authentication works in Microsoft Dynamics NAV.
- Manage security for Windows client users.
- Set up a new user.
- Explain the concepts of permission sets and permissions.
- Create a new permission set, and assign permissions to it.
- Apply security filters in Microsoft Dynamics NAV.
- Perform user-specific setup.
- Create, assign, and work with user profiles.

### Module 3: Set Up Number Series

This module explains the purpose of company-wide number series.

#### Lessons

- Number Series

### Lab : Create a Number Series

After completing this module, students will be able to:

- Explain the purpose of company-wide number series.
- Set up number series.

- 
- Create number series relations.

#### Module 4: Set Up Trail Codes

This module explains what trail codes are used for.

##### Lessons

- Lessons 1 to 3: Source Code and Reason Codes
- Navigate the Audit Trail

After completing this module, students will be able to:

- Explain and set up trail codes, source codes, and reason codes.

#### Module 5: Set Up General Journals Templates and Batches

This module explains the purpose of journal templates and journal batches set up.

##### Lessons

- Journal Templates, Batches, and Lines
- Create Journal Templates and Batches

#### Lab : Create a Journal Batch

After completing this module, students will be able to:

- Explain the purpose and organization of journal templates and journal batches.
- Create general journal templates and general journal batches.

Module 6: Set Up Posting Groups This module explains the purpose of posting groups.

##### Lessons

- Specific Posting Groups
- General Posting Groups

- 
- General Posting Setup
  - VAT Posting Groups
  - VAT Posting Setup
  - Best Practices
  - Post and Review a Sales Transaction

Lab : Set Up and Assign a Vendor Posting Group

Lab : Set Up and Assign a Product Posting Group

Lab : Copy a General Posting Setup Line

Lab : Create and Assign a VAT Product Posting Group

Lab : Copy a VAT Posting Setup

Lab : Post and Review a Purchase Transaction

After completing this module, students will be able to:

- Explain and set up specific posting groups.
- Explain and set up general posting groups.
- Create a General posting setup.
- Create an Inventory posting setup.
- Explain and set up VAT posting groups.
- Create a VAT posting setup.
- Describe posting setups based on the chart of accounts.
- Demonstrate how posting groups direct a sales transaction.

## Module 7: Set Up Dimensions

This module explains the benefits and purposes in using dimensions.

### Lessons

- Dimensions and Dimension Values

- 
- Setting Up Dimensions in General Ledger Setup
  - Dimension Combinations
  - Lessons 4 to 5: Default Dimensions and Account Type Default Dimensions
  - Default Dimension Priority
  - Conflicting Default Dimensions

Lab : Set Up a Dimension with Dimension Values

Lab : Set Up a Dimension Combination

Lab : Assign Default Dimensions to a Single Account

Lab : Assign Default Dimensions to Multiple Accounts

Lab : Assign Vendor Account Type Default Dimensions

After completing this module, students will be able to:

- Explain and set up dimensions and dimension values.
- Explain and set up global and shortcut dimensions.
- Explain and show how dimension combinations are set up.
- Explain and show how single and multiple default dimensions are set up.
- Explain and show how account type default dimensions are set up.
- Explain and show how default dimension priorities are set up.
- Explain the possibility and resolution of conflicting default dimensions.
- Show how to use dimension and dimension values in journals and documents under different dimension setup scenarios.

## Module 8: Set Up and Manage Document Approvals

This module explains the basic Document Approval set up tasks.

### Lessons

- Set Up Document Approvals
- Set Up the Notification System

**AWANSOFT TECHNOLOGY SDN BHD**

C-5-6 Plaza Mont Kiara, 2 Jalan Kiara, 50480 Kuala Lumpur, Malaysia

Tel: +6 017 555 2100

Fax: +6 03 6201 3882

Email: [awansoft@awansoft.biz](mailto:awansoft@awansoft.biz)

URL: [www.awansoft.biz](http://www.awansoft.biz)



- 
- Set Up a Sales Document Approvals System
  - Use the Document Approval System

### Lab : Set Up a Purchase Document Approvals System

After completing this module, students will be able to:

- Set up the general features of the document approval system.
- Set up approval templates.
- Set up user logons for use with document approvals.
- Set up approval users in a hierarchy.
- Set up the notification system for approvals.
- Send an approval request.
- Approve a sales or purchase document.
- Maintain substitute approvers.
- Manage overdue notifications.