



advanced  
solutions



ISSUE 1

## NAV NEWS SEPTEMBER 2009

### WELCOME TO CAD ADVANCED'S INAUGURAL CLIENT NEWSLETTER... NAV NEWS!

We will be writing to you each Quarter to keep you informed about what's new in the world of Microsoft Dynamics NAV and CAD Advanced Solutions.

### OUR NEWSLETTER WILL INCLUDE 4 KEY SECTIONS:

- 1 **'What's New'**...this includes the latest updates and development in Dynamics NAV
- 2 **'Industry Focus'**...a look at what businesses and industries are implementing Dynamics NAV and the stories they have to tell.
- 3 **'NAV Tips'**...simple tools and tips to help you get the most out of Dynamics NAV
- 4 **'NAV Add-Ons'**...industry specific and generic add-ons, that assist businesses in gaining further productivity with Dynamics NAV

## WHATS NEW

### MICROSOFT DYNAMICS NAV 2009

Microsoft releases the latest version of the NAV product – Microsoft Dynamics NAV 2009. Microsoft Dynamics NAV 2009 simplifies access to user information, improves organisational agility and integrates seamlessly with a wide range of applications. It enables enhanced reporting, and offers increased functionality, operates with concurrent users and effectively scales along with your business.

#### Microsoft Dynamics NAV 2009 enables:

- Enhanced personal productivity with Role Tailored views that allow your team to **accomplish more every day by providing a clear overview of daily tasks and relevant information**
- You to connect, adapt and grow through the flexible three-tier architecture, which simplifies the process of adding additional functionality, and allows you to **scale your solution as your business grows**
- **Improved Data Exchange through web services**, which allow you to easily share information with other business applications while maintaining data integrity and security
- Better use of data, with enhanced reporting and new layouts that allow for **visually appealing reports that communicate information effectively**
- A high return on investment because it integrates seamlessly with the other Microsoft Office **programs you already use**, and allows your employees to access programs such as Outlook, Excel and Word right from their Role Centers, so they can easily find, use and share information.

To learn more about how a Microsoft Dynamics NAV 2009 upgrade or installation can help improve your business, and your bottom line, talk to your CAD Advanced Solutions Consultant today. We speak your language, we know your business and we're here to help you make the right decision for your unique situation.



 Microsoft Dynamics<sup>™</sup> NAV

**WITH CLIENTS IN  
NEW ZEALAND  
AND AROUND THE  
WORLD THEIR CREDIT  
INSURANCE AND  
FINANCIAL SURETY  
RELATED PRODUCTS ARE  
AVAILABLE THROUGH  
AN INTERNATIONAL  
DISTRIBUTION NETWORK  
THAT THEY HAVE  
DEVELOPED OVER A  
NUMBER OF YEARS.**

## INDUSTRY FOCUS

### **CONTRACTORS BONDING LIMITED IS THE LARGEST AND OLDEST PROVIDER OF CREDIT SURETY AND FINANCIAL RISK IN NEW ZEALAND.**

The origins of CBL's business was closely linked with the provision of performance bonds to the contracting industry. It was in this financial risk niche market that CBL developed its primary area of expertise, a heritage which is reflected in CBL's ongoing involvement with, and support of, the New Zealand Contractors Federation. Today they are able to provide a wide range of niche financial and credit risk products for corporate banks and government agencies and other clients in a number of countries. With clients in New Zealand and around the world their credit insurance and financial surety related products are available through an international distribution network that they have developed over a number of years, supported by their offices in Auckland, Kuala Lumpur and London.

Before switching to Dynamics NAV, CBL had separate systems for Financial Management and Insurance Contracts. Administration and Operational staff operated in their own areas of information with data transfers required to update billing and financial records. With their expanding business the custom developed Database for the Insurance Contracts was also becoming a bottle neck in operations with slow data retrieval and search features.

CAD Advanced Solutions Ltd conducted transactional walkthroughs and discussion of the current system with operational staff. This enabled a detailed design and project scope document to be written detailing a new Insurance Contracts module to be written within Dynamics NAV. This new module operates in conjunction with the Dynamics NAV Customer Relationship Management and Receivables modules providing one source of information and fully integrated billing capabilities.

Since installing the Dynamics NAV solution CBL has experienced a number of benefits including greatly enhanced visibility into all operations and superior data access speed. The new Insurance Contracts module has allowed one point of data entry and billing while also enabling the operations staff to see total policy exposure for clients easily and even outstanding amounts from the Insurance Contract. Operations and Administration staff no longer work in isolation from each other enabling improvement in company operations.



Help	
Microsoft Dynamics NAV Classic Help	
C/SIDE Reference Guide	
What's This?	Shift+F1
Overview of F Keys	Ctrl+Alt+F1
About Microsoft Dynamics NAV Classic	

## NAV TIPS

### MICROS FIND THAT SHORTCUT KEY!

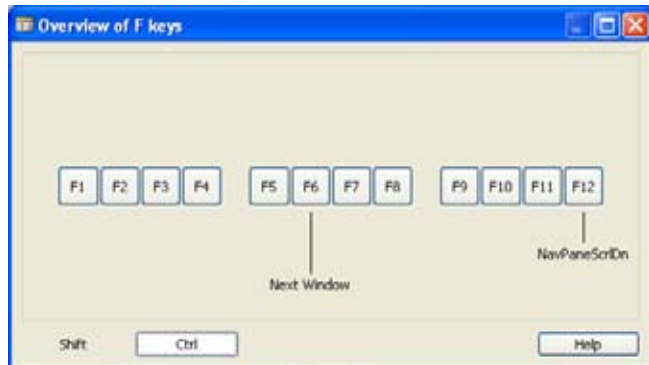
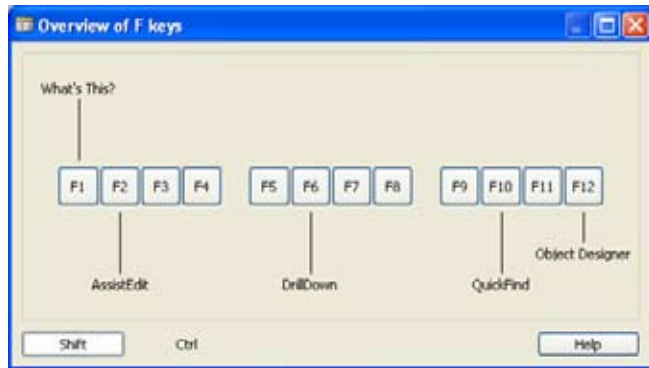
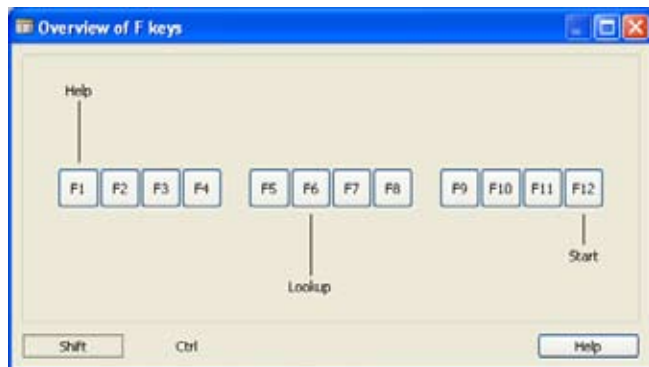
You probably know that Dynamics NAV contains a large number of "shortcut keys" for most commonly performed actions, which is great for those of us who don't like to use a mouse or find it quicker or easier to just use the keyboard.

Not sure or can't remember what all the shortcut keys are in NAV? Well, NAV contains a built in tool to remind you of the various key combinations and to utilise them.

From the HELP menu, click on "Overview of Shortcut Keys" (or select Ctrl+Alt+F1, yes, there's even a shortcut to the shortcuts!):

The "Overview of F keys" helper screen will open. The screen indicates what the shortcut keys will do in NAV depending on the combination of keys selected.

Note that the Overview tool is also interactive – for example if you are on a "lookup" field (such as G/L Account No.) when you open the tool and you click on "F6" above NAV will actually perform the lookup for you and open the list of G/L Accounts.



## NAV ADD-ONS

### PDF EMAIL AND FAX SOLUTION FOR MICROSOFT DYNAMICS NAV

#### *About the Software*

#### **Microsoft Dynamics NAV software current features**

Unfortunately standard Microsoft Dynamics NAV documents cannot be emailed or faxed from within the application unless they are emailed in HTML format which often distorts the document layout and is therefore unacceptable for documents to be sent to external parties. In addition this functionality is only available at individual document level and not for bulk sending.

#### **Key Benefits of our Integrated CAD Advanced Solutions PDF Email/Fax Solution**

- Email PDF attachments for standard business documents
- Fax standard business documents using Microsoft Fax Server
- Email or Fax one off business documents such as invoices, credit memo's or customer statements.
- Bulk send business documents to selected customers/vendors using standard NAV filters
- Solution workflow is simple and consistent with printing a standard business document in NAV.
- Modular design means other NAV documents/reports can be modified to also use Email/Fax functionality (estimate 3-4 hours per document)
- Standard reports supported are Customer Statement, Invoice, Credits, Reminders and Vendor Purchase Order, Cheque Remittance Advice and DC Remittance Advice.
- Ability to choose between PDF Creator (free) or Amyuni (license required) PDF creation utility to create PDF Files (Amyuni is recommended for larger organisations)
- Communication log tables displays history of emailed / faxed documents including error log

*Please contact your CAD Advanced Solutions Consultant for Pricing*



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