



"I want you to PRINT THIS PAGE and TAPE IT TO YOUR WALL so you will remember to attend our very content-rich webinar."

~ Rick Baxter

"NAV 2009 RTC Personalization Tools"

- Date:** Monday, October 3, 2011 (ID: 650-738-899)
- Time:** 10:00am Pacific / 11 MT / 12 CT/ 1:00pm Eastern
- Fee:** Free and open to the Public.
- URL:** Meeting link will be sent after you register.
- Audio:** Listen with your computer speakers.
- Duration:** 70 Minutes + Q&A at the end
- Registration:** www.CostControlSoftware.com/Webinars/Schedule

Tips To Get the Most Out Of This Call

1. Print this "Study Guide" so you can **take notes** during the call
2. Think how you can quickly **implement** the secrets revealed.
3. Make a deadline to **complete** at least 3 things you learned.

SPECIAL NOTE: This webinar starts on time according to www.Time.gov so please dial-in eight minutes early so you don't miss any content. Your courtesy is appreciated.



Rick Baxter's
Dynamics NAV Secrets Series

8 Key Attributes of “Personalization” for NAV 2009 RTC

Attribute	Explanations
1. Real Time	All Data is updated in Real Time
2. Easy Access	Improve Lookup of data. (Drill Down too.)
3. Reporting	Screen Views that work for you
4. Ease of Use	Movement is intuitive and quick
5. Role Tailored	Screen Layout is Tailored to your Role. - “Small Business Role” - shown
6. Consistent	Consistent Look and Feel. (Outlook) Consistent Navigation.
7. Screen Content	The system enables the user to define their screens for more efficient use.
8. Display	Relevant information always at your finger tips.

**This is a class on how to personalize/customize NAV 2009 RTC to make it as efficient as possible to use.
This is *not* a class on daily workflow within NAV 2009 RTC.**

We will cover the following 14 topics:

- 1. Customize/Personalize the “Role Center”**
 - Page Components Placement
 - “My Customers”
 - Charts (New Chart Wizard in FP)
 - Notifications
 - Outlook

- 2. Customize the Navigation Pane**
 - Button placement
 - New Menu (My Stuff)
 - Restore Defaults

- 3. Customize the Action Pane (Item List sample)**
 - Column Controls: Width and Headings
 - Choose Columns
 - Freeze Pane
 - Customize this Page
 - Display Options
 - Action Pane

- 4. FactBoxes**
 - Position
 - Fields to include

- 5. FastTabs (ie: Customer Card example)**
 - Add, Remove
 - Sequence
 - Each Tabs Fields promotion

- 6. “Action” Pane**
 - How to control
 - How to promote (ie: Promote “Send to Excel”)
 - How to add new Group

7. **“Reports”**
 - How to control position
8. **Queries and Filters**
 - Tips (*24*) (Case Sensitive)
 - “Save View”
9. **Notifications & Notes (VS Comments)**
 - How they work
10. **Document Links**
 - How they work
11. **Chart Parts VS Chart Pane**
 - How they work (Pre-Built VS On-Demand)
 - “XT Charts” part of Foundation Pack from Cost Control.
12. **21 Pre-Defined Role Centers**
 - How they work
 - Cost Control’s Role Centers in Foundation Pack
13. **Personalization VS Globalization**
 - End-User Personalization
 - How to make it “Global”
 - Page Designer Class (\$395)

New in SP1/R2 (6 of 79)

1. **Search**
 2. **Save Filters**
 3. **Improved Reporting (Cost Control Class - \$595)**
 4. **Better Help w/ Walk Through**
 5. **F8 = Ditto, F2 = Edit, F4=Lookup, F7=Statistics**
 6. **About this Page**
 7. **About this Report**
-

The replay of this class will be available upon request. (\$97)

Cost Control's "Home Study" Classes: (See Page 7)

CLASSIC:

Setup
Workflow
Tables and Forms
Report Writer
NAV Manufacturing
Job Manager

RTC:

Getting Started with RTC \$795
Page Designer (\$395)
Report Designer (\$795)

14 Big Benefits of Pre-Recorded Classes

- Your money isn't wasted on a one-time class you may forget.
You own the CDs.
- Peace of mind. You don't have to fret if you don't get it the first time. You can re-watch as needed to refresh your training.
- **New employees can get all the basics.**
- Save Money. Most economical training materials available.
- You are in control. You can learn at your own pace.
- Practice what we preach. Many exercises are provided to reinforce the lectures.
- More control. You can watch individual learning segments at will.
- **Become an educated user before the training comes on-site.** These classes prepare you for asking the tougher questions.
- Learn from the "teaching" experts. Our NAV trainers know how to teach and know NAV.
- Reinforcement: Many learning segments have: Lecture, Exercise, and Answer Key

How to order "Getting Started with Dynamics NAV 2009 RTC"?

1. Print the Order Form on the page 6.
2. Fill out the order form.
3. Fax (or just send an e-mail)

The products shown today may be purchased from:

Rick Baxter

rick.baxter@costcontrolsoftware.com

**Cost Control Software Inc
15443 Oak Road
Carmel, IN 46033**

(317) 846-6025

Learn more:

www.CostControlSoftware.com

Schedule of future Webinars:

www.CostControlSoftware.com/webinars/schedule

Add-ons and Training Materials for:

 Microsoft Dynamics™ NAV