# Hi! I'm NAVIGATE PRO,
your Dynamics *NAVigate* experience
more than fast, more than cool!

Navigate Pro - Help

Navigate Pro allows users to find all sales and purchase documents related to a starting one.

Usage

1. Press Navigate Pro icon whenever it is present (in the document card pages you can find it under "Process" submenu). It will open Navigate Pro, starting from the selected document
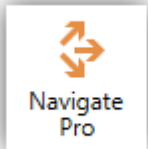
2. Arrange icons on the screen as you prefer, just click on a document icon and drag it on the canvas. Press "Show Flow" button to arrange the icons in the starting positions.
3. Double click to open the selected document
4. Hover on a document icon to highlight existing relationships
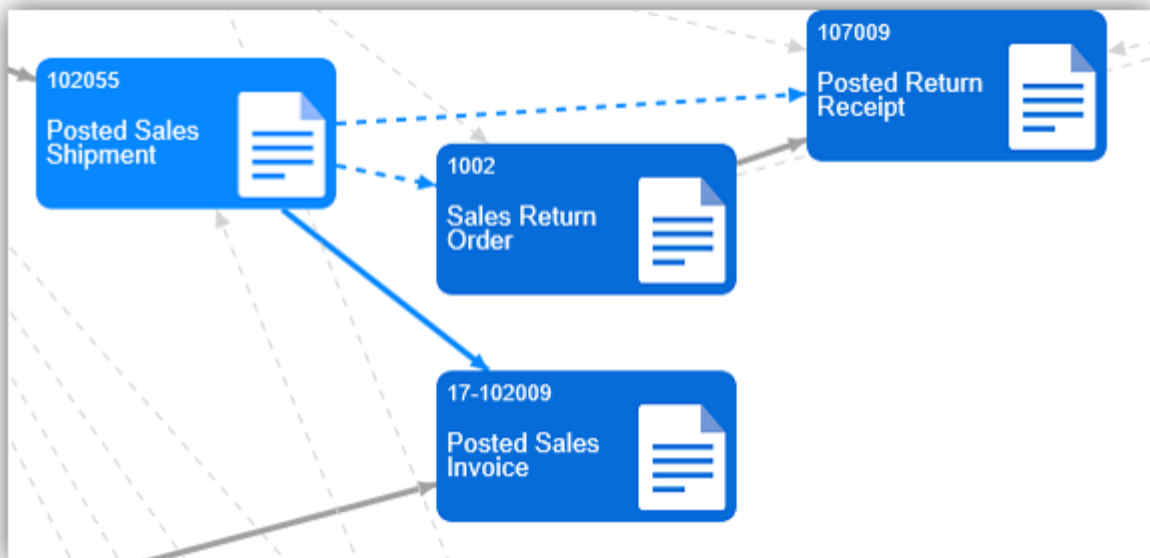
5. Right click to see the behaviour that your partner set up for you (only on premise version)

Relationship Type

Each Document can be connected to one or more other documents.
The linked arrow head points to the documents logically created by the first one (i.e. invoice is created by order) or to the documents where you can link or connect lines from the original document (i.e. sales return order from Sales Shipments).

Relationships can be drawn in 2 ways:

- Solid line when the destination document is directly created by the original one (Make Order, Make Invoice or Post)

- Dashed line when the relationship is due to indirect operations, like item ledger entry connections (Apply to entry no., Apply from entry no.) or value entries relations

Exception: an invoice can hold 2 different documents in its header, order and quote, even if it is generated only by the order. In this case, relationship between quote and Invoice is dashed.

Lack of Credit Memos

Credit Memos are shown in the flow when they are directly linked ("Applied to") the original invoice, because they are reversing. The system allows you to create Credits Memos in different ways: it could be possible that they will not be linked to the Invoices so Navigate Pro will not show them (in the image, grey icon shows the missing Credit Memo). In the example below, the Sales Return Order 1008 has been used to send back item of the Invoice (in orange): the Credit Memo created by the Sales Return Order should has been connected to the amount of the Invoice.
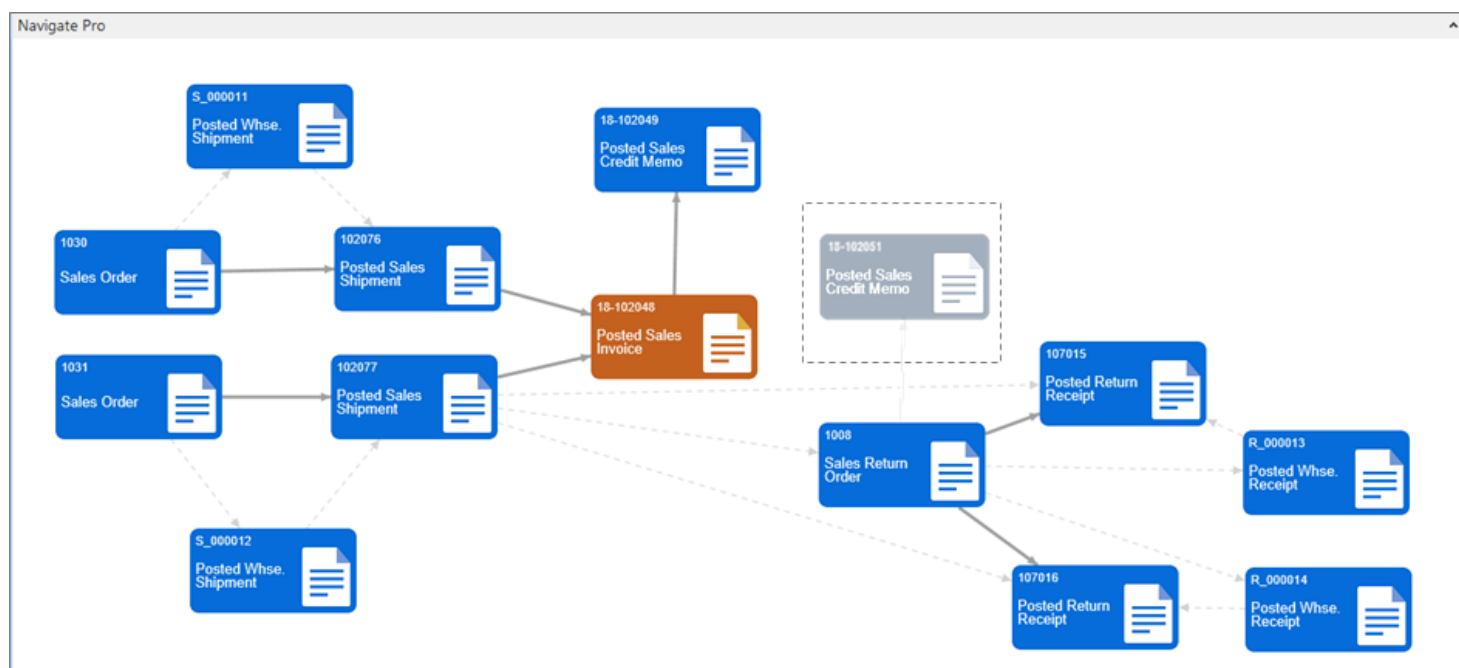
Notes

1. Only Sales and Purchase flows are covered by the application, plus warehouse shipments and receipts, if they are used in the selling or purchasing process
2. Blanket orders are not shown, since they could generate a high number of connections, and because the real tracking starts from the order generated by the blanket order

Release Notes

Navigate Pro allows users to find all sales and purchase documents, related to a starting one.

Sales

- Quotes
- Orders
- Shipments
- Posted Invoices
- Return Orders
- Return Receipts
- Posted Credit Memos
- Archived Quotes
- Archived Orders
- Archived Return Orders
- Prepayment Invoices
- Prepayment Credit Memos

Purchase

- Quotes
- Orders
- Receipts
- Posted Invoices
- Return Orders
- Return Shipments
- Posted Credit Memos
- Archived Quotes
- Archived Orders
- Archived Return Orders
- Prepayment Invoices
- Prepayment Credit Memos

Warehouse*

- Warehouse Shipments
- Posted Warehouse Shipments
- Warehouse Receipts
- Posted Warehouse Receipts

* Just as part of Sales and Purchase flow. Cannot be selected to start research.