Getting started with ForNAV Customizable Report Pack

## Setting up the ForNAV Report Pack

This document outlines how to set up the ForNAV Report Pack and the options you can select and modify. It describes:

- The ForNAV setup wizard

- The ForNAV Setup page

- The ForNAV Reports page

The ForNAV setup wizard

To set up the ForNAV Report Pack, go to the **Assisted Setup** and run the **ForNAV setup** wizard.

If you don't run the **ForNAV setup** wizard, you are notified the first time you try to print a report:
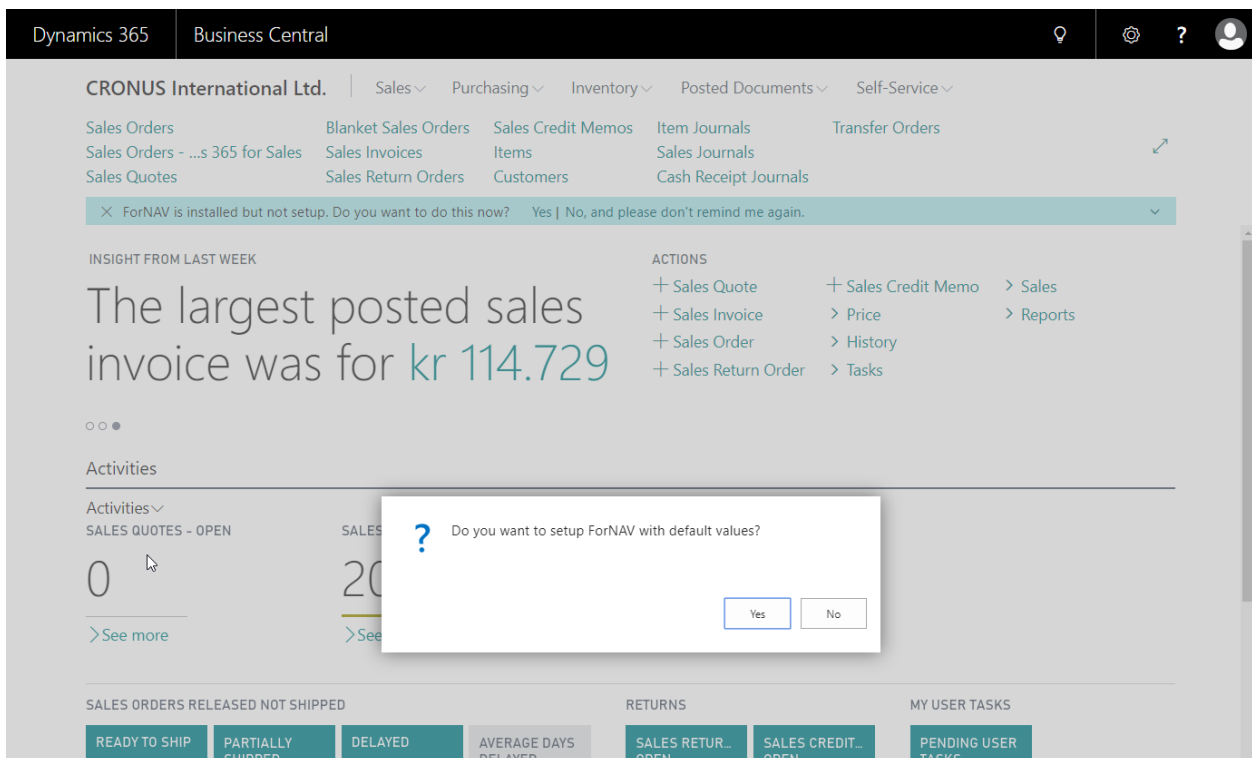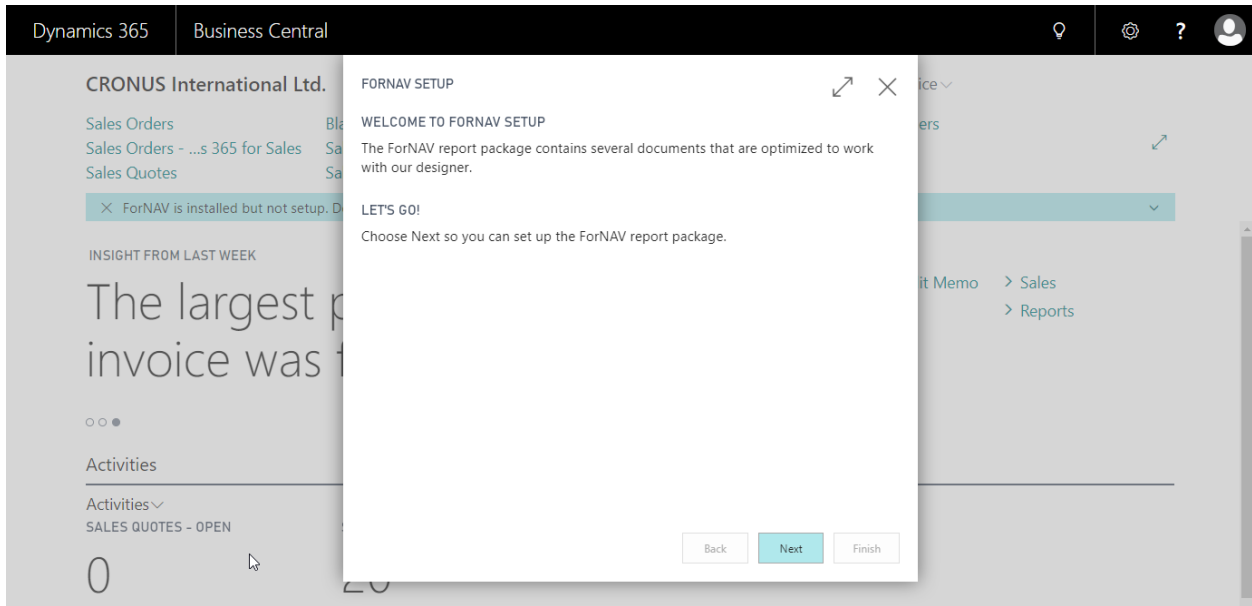

If you click **Yes**, the following default settings apply:

- **VAT Report Type** field: *Multiple Lines*
- All other options are left blank

If you click **No**, you are taken through the **ForNAV setup** wizard, where you can select the relevant options (please see the following sections for an explanation of these options).

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Let's go. Click **Next.**
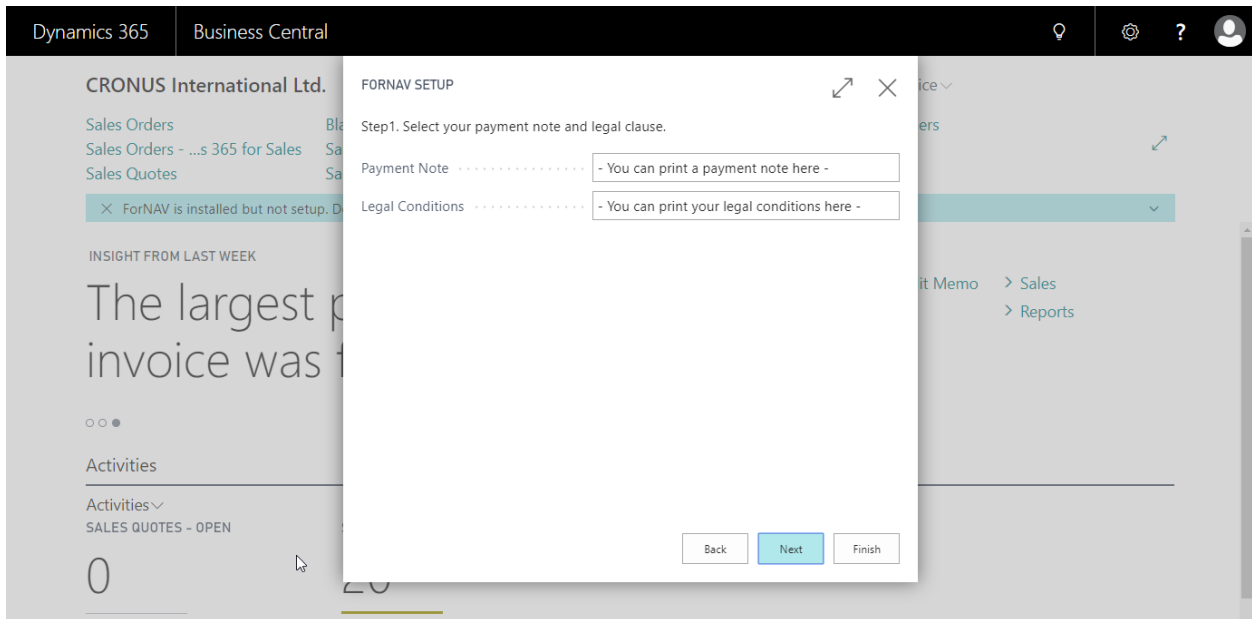
The **Payment Note** is placed to the left of the total amount on the document.

**Legal Conditions** are placed at the very bottom of the document.

Later, in the **ForNAV Setup** page, you have the option to add legal conditions in multiple languages.

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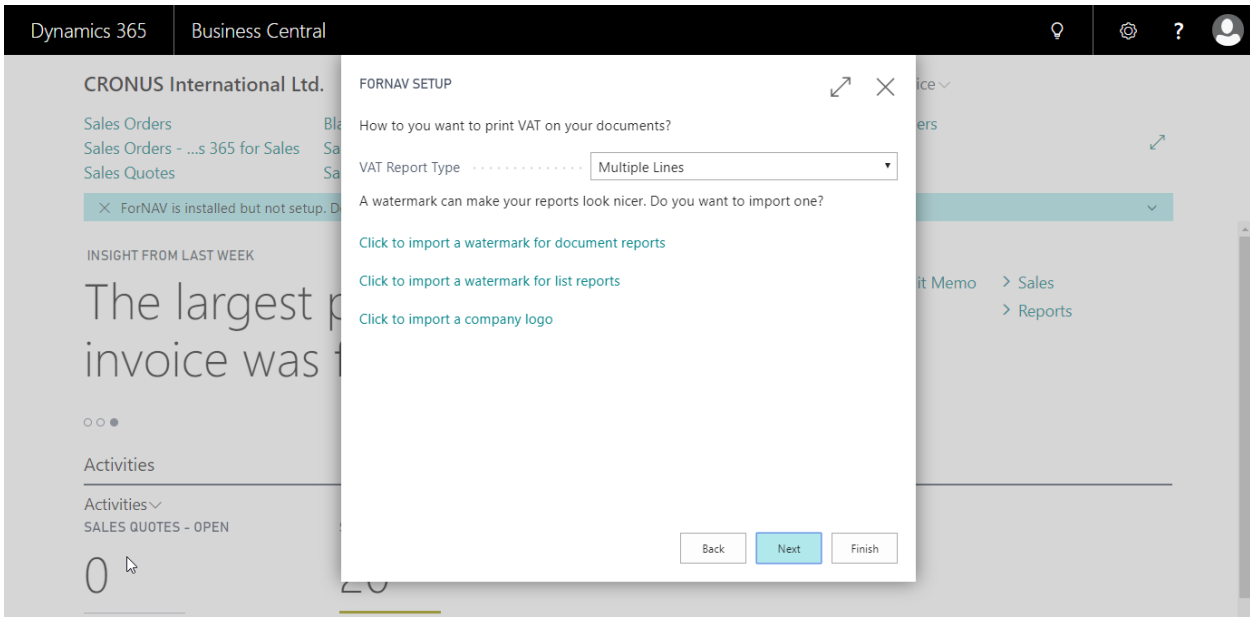
The **ForNAV setup** wizard automatically detects the North American localization, based on the existence of table 10000, and it suggests the **Sales Tax** documents. For all other localizations, the **Sales VAT** documents are selected.

For more details on VAT setup, please see the following section in this document.
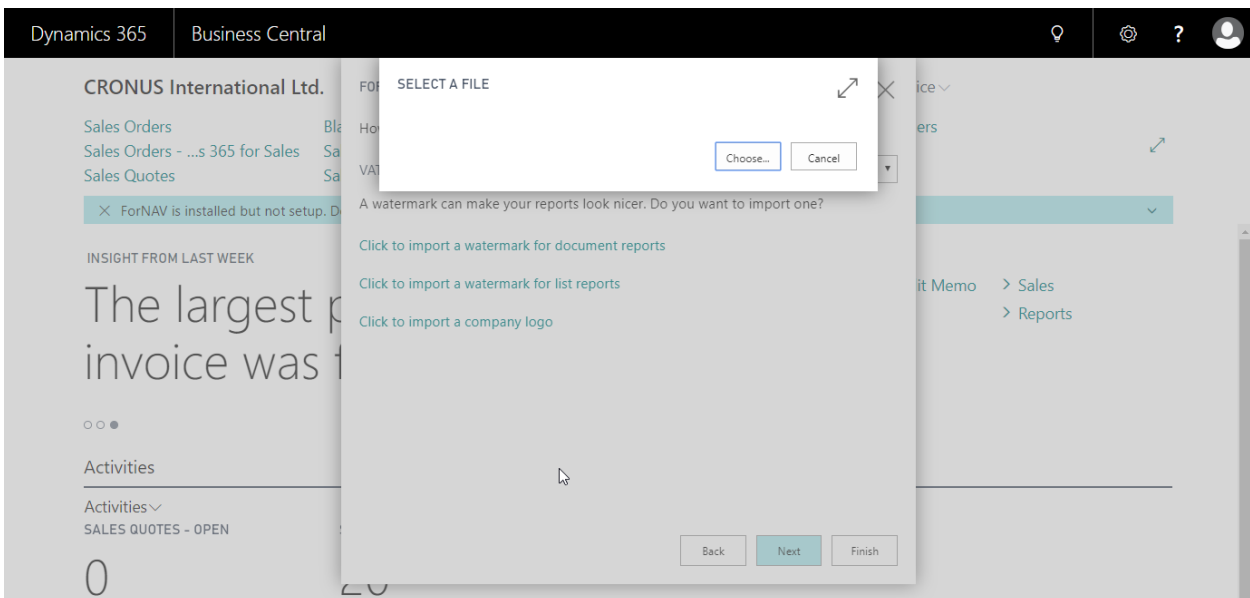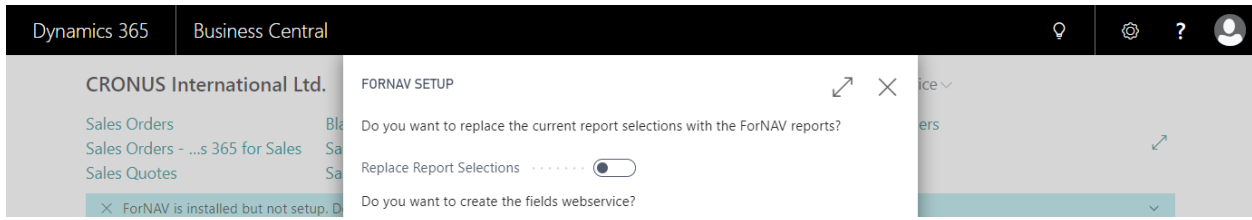

Next, you can choose watermarks and a logo.

If you don't import a company logo, the **ForNAV setup** wizard copies your logo from the **Company Information** (if any) to the **ForNAV Setup** page.

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You can replace the report selection for sales, purchase, and reminder documents in Microsoft Dynamics 365 Business Central. This means that the ForNAV reports are printed when you click **Print,** under **Order Confirmation**, **Invoice**, and so on.

You can also let the wizard create the webservice that is needed to design reports in ForNAV.
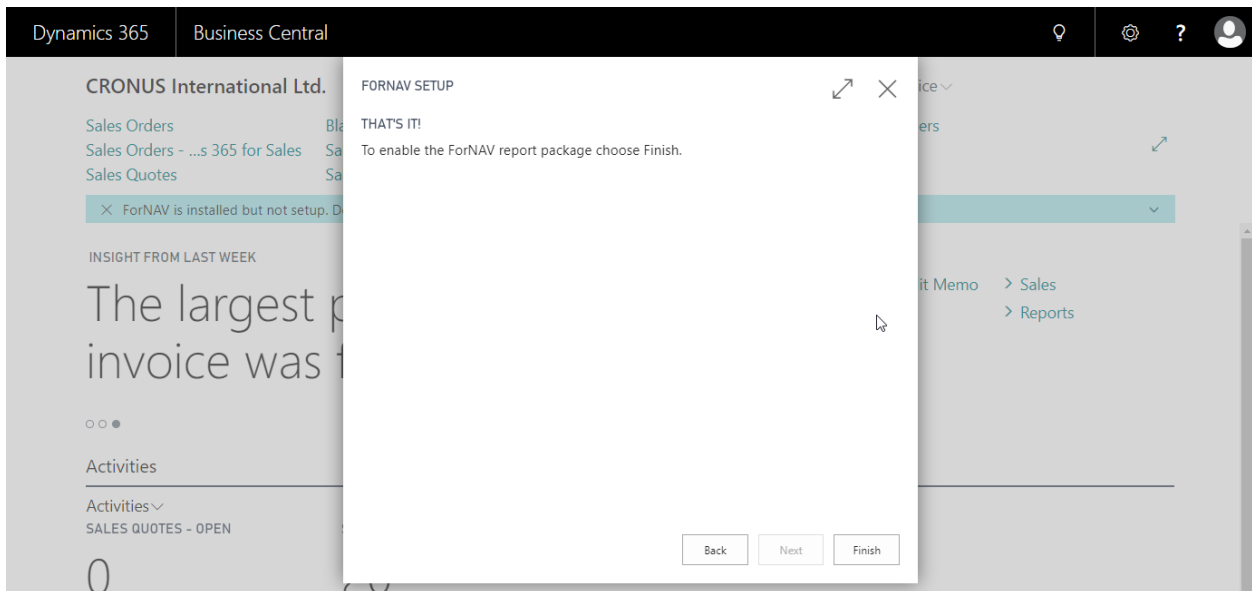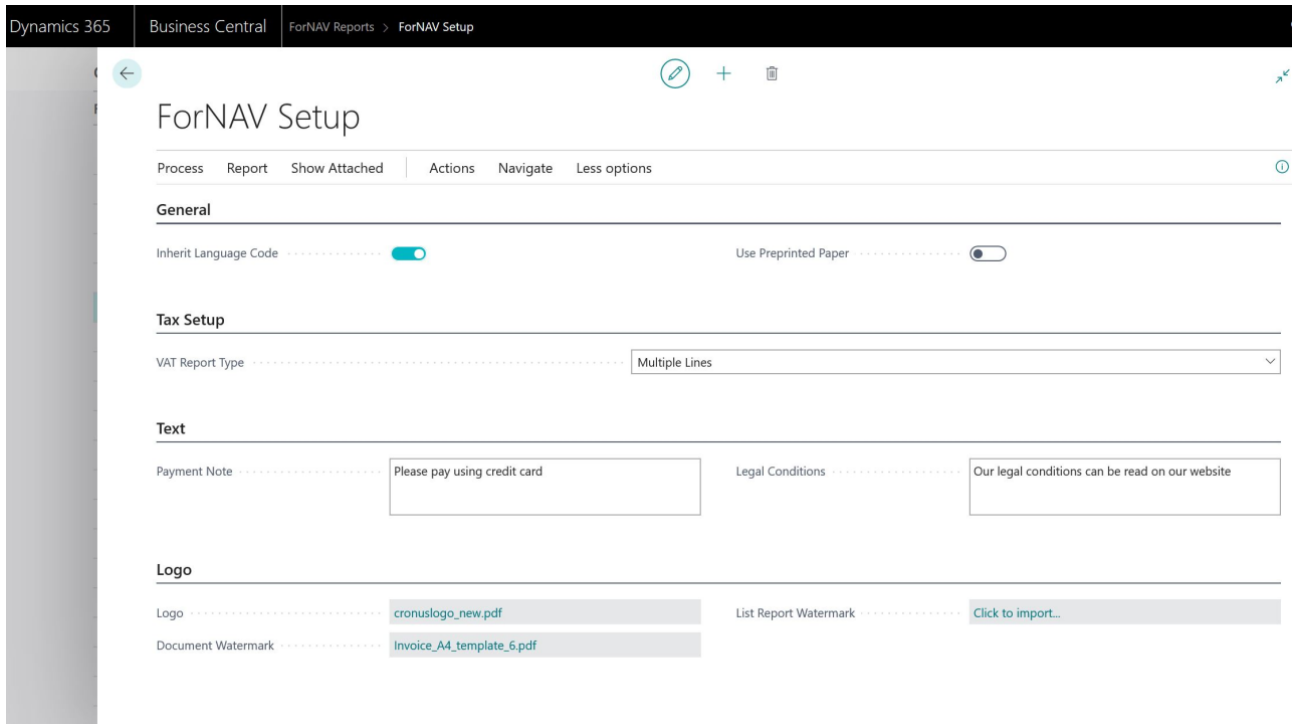

That's it – click **Finish** and you're done.

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The ForNAV Setup page

You can manually modify your settings in the **ForNAV Setup** page.

To find the **ForNAV Setup** page, press ALT+Q and type *ForNAV Setup.*

General section

To specify that ForNAV should use the language translation to languages other than your local language, select the **Inherit Language Code** field. For example, select this option if you are running Microsoft Dynamics 365 Business Central in the UK and you want your invoices to your German customers to have German captions. To fully benefit from this feature, you must install all the relevant languages in Dynamics 365 Business Central.

To specify that your logo is pre-printed on your paper, select the **Use Preprinted Paper** option.

Tax Setup section

In the **VAT Report Type** field, select the kind of VAT amount specification that you want. The default option is **Multiple Lines**, which means the VAT specification is only printed when a sales invoice has two or more percentages of VAT. Alternatively, click **Never** to never print the specification, or **Always**, to always print the specification.

If you are running the North American version of Dynamics 365 Business Central using Sales Tax, this option is not relevant.

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Text section

The **Payment Note** is placed to the left of the total amount on the document.

Legal Conditions are placed at the very bottom of the document.

These fields are optional and can be left blank.

Logo section

In this section, you can select your **Logo**, **Document Watermark,** and **List Report Watermark**.

The logo that is printed on the reports is the one that you import here (and not the logo that you have under **Company Information**, unless you have run the **ForNAV setup** wizard, which copies your **Company Information** logo). The reason for having a separate logo in the **ForNAV Setup** page is that ForNAV supports a PDF file as your logo, as well as most picture formats (such as jpg, gif, and bmp).

> **NOTE**
> To support better scaling and a higher resolution in your logo, we recommend using PDF.

To see the standard ForNAV watermark templates, on the **Process** tab, click **Download Watermarks**. You can also build and add your own watermarks. Simply design the watermark in, for instance, Microsoft Word and save it as a PDF.

> **NOTE**
> Smaller file sizes of watermarks perform better when printing large reports

On the tabs in the **ForNAV Setup** page, you have the following additional options:
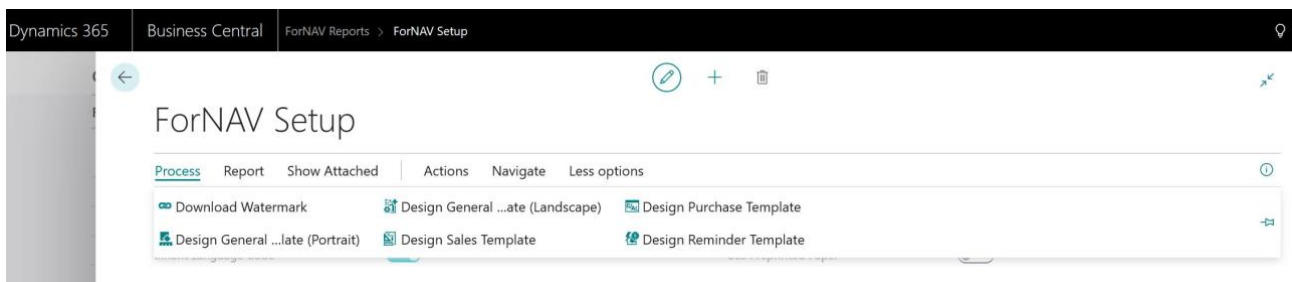
Process tab

- **Download Watermark** – select any of the standard ForNAV watermarks on www.fornav.com/report-watermarks

- **Design General Template (Landscape)** – design your general template in landscape format.
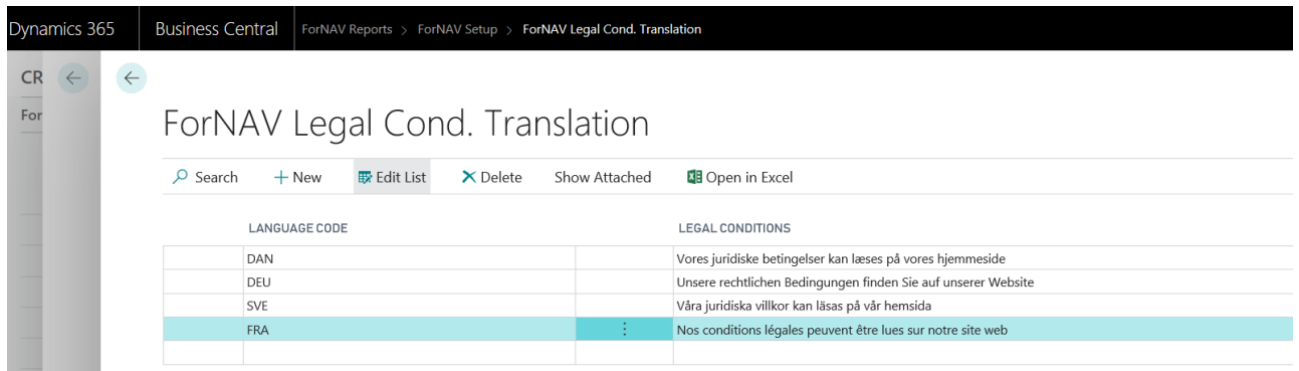
- **Design Purchase Template** – design your purchase template.

- **Design General Template (Portrait)** – design your general template in portrait format.

- **Design Sales Template** – design your sales template.

- **Design Reminder Template** – design your reminder template.

When you want to design your reports, you must download and install the ForNAV Designer from our website: www.fornav.com/download. This requires you to run a Windows PC.

Report tab

- **Translations** – select the languages that you want to translate your legal conditions into.

Show Attached tab

- **Notes** – here you can work with notes.

- **Links** – here you can select links.

Actions tab

- **Watermark** – you can download watermarks from our website.

- **Delete Visuals** – delete the link to the **Document Watermark**, **List Watermark**, or **Logo** that you are using on your reports. Use this option if you want to switch to another watermark or logo, or if you no longer want watermarks or a logo on your reports.

- **System, Replace Report Selection** – replace all your current sales, purchase and reminder document reports with the ForNAV document reports. For example, when you click **Print** on an order confirmation, Dynamics 365 Business Central prints the ForNAV Order Confirmation and not the standard confirmation.

    NOTE
    This will not replace the non-document reports. You can use the **ForNAV Replace Selection** option to change other reports (press ALT+Q and type *ForNAV Replace*…). You can find a full list of the ForNAV reports in the **ForNAV Reports** page (see the following section for more details).

- **System, Create ForNAV Webservice** - select this option to expose the **Fields webservice** (7702). You can also select this in the wizard. This is required if you want to modify or build reports using the ForNAV Designer.

- **Template** – here you can design your templates. This requires that you have installed the ForNAV Designer on your local Windows PC.

Navigate tab

- **Translations** – another way to get access to and select the languages that you want to translate your legal conditions into.

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The ForNAV Reports page

The sales and purchase document reports are automatically added to the **Report Selection** page in Dynamics 365 Business Central, if you select the **Replace Report Selections** option in the **ForNAV Setup** page (see the previous section in this document).

You can find all the ForNAV reports on the **ForNAV Reports** page, both the ones we deliver and the ones you create yourself. You can run all the reports from here. This is also where you can add additional reports that you have created yourself. This is simply done by starting the name of the report with *ForNAV*.

To find the **ForNAV Reports** page, press ALT+Q and type *ForNAV Reports*.

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