

Dynamics-NAV 5.0 Style Sheets

Style Sheet Tool

Introductions

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- Installing the Style Sheet Tool
- Managing Style Sheets
 - Creating a Style Sheet
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 - Importing the Style Sheet

Select field(s) in Dynamics-NAV



Setup Word Mail Merge
Document in Word



Import Word Mail Merge
Docment in Dynamics-NAV



Word Mail Merge Document is
automaticly converted into XSLT

Installing the Style Sheet Tool

- ❑ Import (StyleSheetToolW110.fob)
- ❑ Run **Form 680** Style Sheet Card:

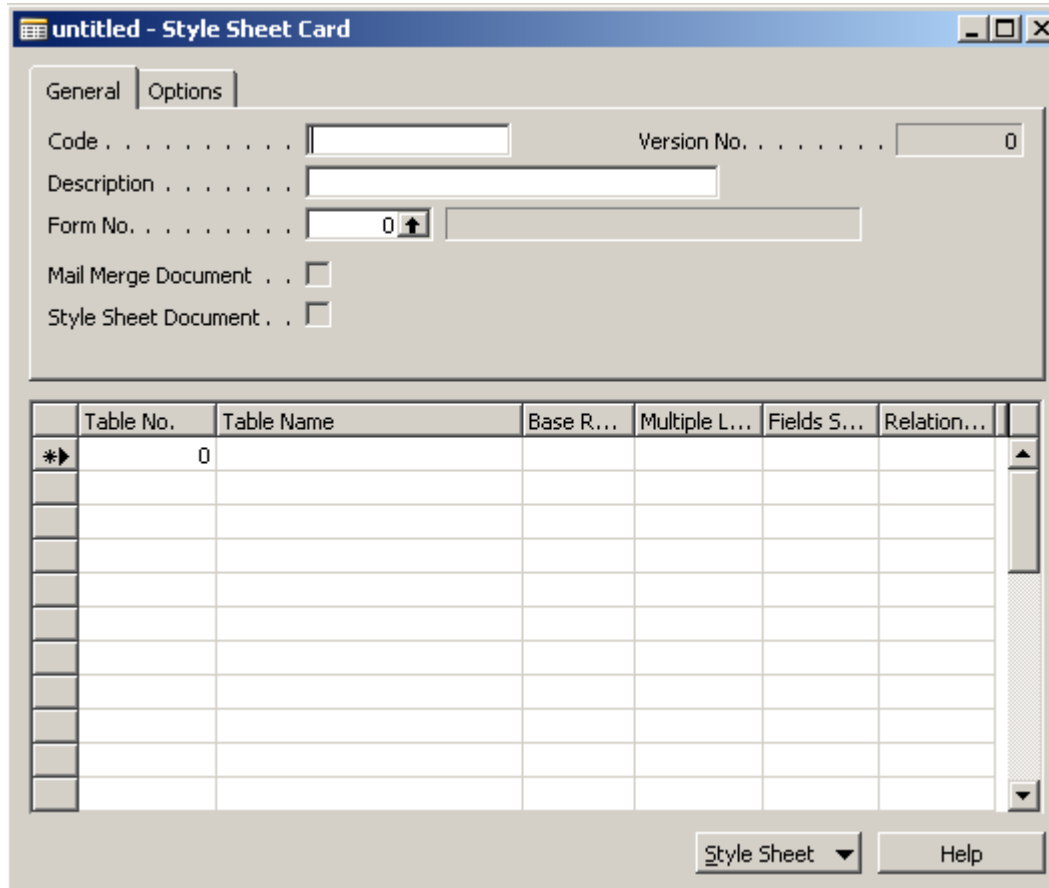


	Table No.	Table Name	Base R...	Multiple L...	Fields S...	Relation...
*▶	0					

Creating a Style Sheet

- ❑ In the Object Designer, select **Style Sheet Card** (form 680) and click Run.
- ❑ To create a new record, click **F3**.
- ❑ In the Code field, **provide a code for naming the style sheet** you are about to create.
- ❑ In the Description field, type in a description of the style sheet, for example, item card.
- ❑ In the **Form No.** field, click the AssistButton and in the Style Sheet Object List window, select the Item Card form (form 30).

Creating a Style Sheet

- In the **Table No. field**, click the AssistButton and in the Style Sheet Object List window, select the Item table that is associated with Item Card. In this case it is table 27.
- In the **Base Record** field, select the Base Record check box.
- Click Style Sheet, **Select Fields** to open the Item – Style Sheet Fields Used List window.
 - These fields are the ones you want to show in the final, merged Word document.

Creating a Style Sheet

- Click the AssistButton and in the **Style Sheet Field List** window, select, for example, the fields No., Description, Base Unit of Measure and Unit Price.
 - The **Include Caption check box** in the Item – Style Sheet Fields Used List window has automatically been selected for each field.
 - This will **make** the **caption** of the fields **available** in your **Word** document.
 - If you do not want captions but only want the data fields to be visible on your document, clear the check box for the field captions you do not want.
- Close the Style Sheet Fields Used List window.

Creating a Style Sheet

ITEM CARD - Style Sheet Card

General Options

Code ITEM CARD Version No. 0

Description Item Card

Form No. 30 ↑ Item Card

Mail Merge Document . .

Style Sheet Document . .

	Table No.	Table Name	Base Record	Multiple Lines	Fields Selected	Relation...
▶	27	Item	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	

Style Sheet ▼ Help

Creating a Mail Merge

- ❑ On the style sheet card that you just created, click **Style Sheet, Create Mail Merge**.
- ❑ This will **open** up **Word**. The fields you have chosen for the Item Card will now be available in Word.
- ❑ In Word, click the **Mailings tab, Insert Merge Field** and select each field one at a time. Design the document as necessary by adding your own text and pictures.
- ❑ **Close Word** when you are finished.
- ❑ You will now return to Microsoft Dynamics NAV.
- ❑ **Click Yes** to import the mail merge document.

Creating a Mail Merge

- ❑ Click **Yes** to convert the mail merge document to a style sheet document.
- ❑ Click **Yes** to update Manage Style Sheets. This will associate the style sheet you just created with the Item Card.
- ❑ In Microsoft Dynamics NAV, on the main menu, click Sales & Marketing, Inventory & Pricing, Items to open the **Item Card**.
- ❑ On the Toolbar, click **Send Options**.
- ❑ In the Send Style Sheet Card to Microsoft Word - Program Selection window, select Microsoft Word and click **Send**.

Creating a Mail Merge

- A Word document will be **generated** based on the Item Card style sheet you have just created, and the data from the Item Card is **imported** to a Word document.

Modifying a Style Sheet

- ❑ The following steps will describe **how to modify an existing** Item Card **style sheet**. In this example, more information will be added to the style sheet, such as information about the **company**.
- ❑ On the Item Card style sheet that was created in the previous steps, in the Table No. field, click the AssistButton and in the Style Sheet Object List window, select the **Company Information table (79)**.
- ❑ This time, the Base Record check box is not selected, since the Item table is still the base record.
- ❑ Click Style Sheet, **Select Fields** to open the Item – Style Sheet Fields Used List window.

Modifying a Style Sheet

- ❑ Click the AssistButton and in the Style Sheet Field List window, select, for example, the fields **Name**, **Address** and **City**. This time, clear the field captions check box for all fields.
- ❑ Close the Item – Style Sheet Fields Used List window.
- ❑ On the **Options tab**, select the **Include Work Date** field.
- ❑ Then select the check box for the **Include Data Link** field, and for the **Use MS Default Hyperlink** field which underlines the hyperlink in the Word document.
- ❑ Clear the check box for the **Use System Generated Hyperlink** field and enter the **text click here** in the **Data Link Caption** field.

Modifying a Style Sheet

ITEM CARD - Style Sheet Card

General Options

Include Work Date . . .

Include Data Link

Use MS Default Hyperli...

Use System Generated...

Data Link Caption

Use Default Language ...

	Table No.	Table Name	Base Record	Multiple Lines	Fields Selected	Relation...
	27	Item	✓		✓	
▶	79	Company Information			✓	

Style Sheet ▼ Help

Modifying a Style Sheet

- ❑ Click Style Sheet, Open Mail Merge.
- ❑ Word opens.
- ❑ **Add the new fields** and **reformat** the document by, for example, inserting a company logo and changing the layout.
- ❑ Close Word.
- ❑ You will now return to Microsoft Dynamics NAV.
- ❑ Click **Yes** to overwrite the existing mail merge document.
- ❑ Click **Yes** to convert the mail merge document to a style sheet document.
- ❑ Click **Yes** to overwrite the existing style sheet document.

Modifying a Style Sheet

- ❑ Click **Yes** to update Manage Style Sheets.
- ❑ Open the Item Card and click **Send Options** on the Toolbar.
- ❑ In the Send Style Sheet Card to Microsoft Word – Program Selection window, select Microsoft Word and click Send.
- ❑ A Word document will be generated based on the modified Item Card style sheet.

Deployment of Style Sheets

- The following steps will provide you with guidelines on how to use your style sheets on another installation:
 - **Exporting** the Style Sheet
 - **Importing** the Style Sheet

Exporting the Style Sheet

- ❑ In the Object Designer, select Style Sheet Card (form 680) and click Run.
- ❑ On the Style Sheet Card, in the Code field, select the style sheet you want to export to another installation.
- ❑ Click **Style Sheet, Manage, Definition, Export**.
- ❑ Name the definition, for example, sales order, and save the document in XML format.
- ❑ Click **Save**.
- ❑ Click Yes to export the mail merge document.
- ❑ Name the document, for example, sales order.
- ❑ Click Save.

Importing the Style Sheet

- ❑ In the Object Designer, select Style Sheet Card (form 680) and click Run.
- ❑ On the Style Sheet Card, in the Code field, select the style sheet you want to import to another installation.
- ❑ Click **Style Sheet, Manage, Definition, Import.**
- ❑ Select the definition you created in the export called sales order.xml and click Open.
- ❑ Click Yes to import a mail merge document for this style sheet definition.
- ❑ Select sales order.doc and click Open.
- ❑ Click Yes to convert the mail merge document.
- ❑ Click Yes to update Manage Style Sheets.

- Parking Lot Issues
- Any other questions
- Any other comments



The End...

- Thank you for attendance and participation.



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