# ENHANCE

## Microsoft Dynamics NAV 5.0

## The Style Sheet Tool for Microsoft Dynamics NAV

User's Guide

The Style Sheet feature in Microsoft® Dynamics™ NAV 5.0 has been enhanced with a new tool that allows you to easily create and modify style sheets in Microsoft® Office Word® without programming knowledge.

This document describes how to install and use the tool to ease your work with style sheets.

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www.microsoft.com/dynamics/nav



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### Introduction

The release of Microsoft Dynamics NAV 5.0 introduced the option to export any form (apart from matrix forms) from Microsoft Dynamics NAV to Microsoft® Office Word® and Microsoft® Office Excel®. By simply clicking a button, Microsoft Dynamics NAV will generate an XML document that works in conjunction with an XML style sheet that passes the requested information to either Word or Excel.

Seven style sheets have been included in Microsoft Dynamics NAV 5.0. You can read about these in the White Paper, Creating XML Style Sheets for Data Export from Microsoft Dynamics NAV 5.0. However, if you want to create more style sheets or modify an existing one, you need to have knowledge of XML and C/AL programming in order to add the relevant data elements.

To simplify this process, a style sheet tool has been created that does not require programming knowledge. The first version of this tool will support the export of data to Word, and this means that the only skill required to create additional style sheets is some end user knowledge of Word.

In general, all you need to do is set up a definition in Microsoft Dynamics NAV by selecting the fields that you want to be visible in the final Word document, convert the information to Word and format the style sheet template as needed.



## Setting Up and Managing Style Sheets with the Style Sheet Tool

Installing the Style Sheet Tool in Microsoft Dynamics NAV

#### Attention

When you install the style sheet tool, you must be aware of code unit 403. You must either import the code unit and replace the existing one, or manually add the code necessary. To learn more about this code unit, see Appendix II – Changes to Codeunit 403.

- 1. Open the Object Designer and click File, Import...
- 2. In the *Import Objects* window, select the relevant .fob file (StyleSheetToolW110.fob) and click **Open**.
- 3. Click Yes to import all objects.

In the *Import Objects* window, you can see the number of objects that have been created or replaced.

💷 Impor	t (	Dł	oje	ect	ts			_	. • 💌	
Import Completed										
Created.									18	
Replaced									1	
Merged .									0	
Deleted .									0	
Skipped .									0	
OK.										

#### 4. Click OK.

The object files have now been imported and you can start working with the style sheet tool.

- 5. To get an overview of all the objects you have imported, open the Object Designer.
- 6. In the left hand menu, click All.
- 7. Click the Version List field.
- 8. On the menu bar, click View, Field Filter...
- 9. In the window that appears, enter the criteria to be met, in this case \*Style Sheet Tool\*, and then click **Apply**.

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🗖 Tabla	ID		Name	Modified	Version List	
	•	680	Style Sheet Header	]	Style Sheet ToolW 11.0	-
== Form		681	Style Sheet Tables		Style Sheet ToolW 11.0	
- Report		682	Style Sheet Fields		Style Sheet ToolW11.1	
		683	Style Sheet Table Relations		Style Sheet ToolW11.0	
🕴 Datap <u>o</u> rt		684	Style Sheet Setup		Style Sheet ToolW11.0	
MI port		685	Style Sheet Link		Style Sheet ToolW 11.0	
		680	Style Sheet Card		Style Sheet ToolW11.0	
😪 <u>C</u> odeunit		681	Style Sheet Tables Used Subfrm		Style Sheet ToolW11.0	
MenuSuite		682	Style Sheet Fields Used List		Style Sheet ToolW11.1	
		683	Style Sheet List		Style Sheet ToolW11.0	
All		684	Style Sheet Table Relations		Style Sheet ToolW11.0	
		685	Style Sheet Object List		Style Sheet ToolW11.0	
		686	Style Sheet Field List		Style Sheet ToolW11.0	
		687	Style Sheet Setup		Style Sheet ToolW11.0	
		403	Application Launch Management		NAVW 15.00, Style Sheet ToolW 11.0	
		680	Style Sheet Management		Style Sheet ToolW11.1	
		681	Style Sheet Functions		Style Sheet ToolW11.0	
		682	Style Sheet Data Management		Style Sheet ToolW11.1	
		680	Style Sheet Definition		Style Sheet ToolW11.1	-
	< _					F

#### Creating an Item Card Style Sheet

#### Attention

The following examples have been created in Microsoft Word 2007. This means that if you have Microsoft Word 2003 installed, the scenarios could look a little different.

To create a new style sheet for the Item Card and make the information on the Item Card available in Word, complete the following steps:

- 1. In the Object Designer, select Style Sheet Card (form 680) and click **<u>R</u>un**.
- 2. To create a new record, click F3. You now have a blank style sheet to work with.
- 3. In the **Code** field, provide a code for naming the style sheet you are about to create. This could be, for example, *ITEM CARD*.
- 4. In the **Description** field, type in a description of the style sheet, for example, item card.
- 5. In the Form No. field, click the AssistButton and in the Style Sheet Object List window, select the Item Card form (form 30).

📰 Style Sheet Object	List	×
ID	Name	
28	Vend. Invoice Discounts	
29	Vendor Ledger Entries	
30	Item Card	
31	Item List	
35	Item Translations	
36	Bill of Materials	
37	Where-Used List	
38	Item Ledger Entries	
39	General Journal	
40	Item Journal	
41	Sales Quote	Ŧ
	OK Cancel Help	

- 6. 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.
- 7. In the **Base Record** field, select the **Base Record** check box.
- 8. Click <u>Style Sheet</u>, <u>Select Fields</u> 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.
- 9. In the Field No. field, 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.
- 10. Select the **Currency** check box for the **Unit Price** field, if you want the price displayed with two decimals in the final Word document. If you don't check it, the number of decimals in the original data field, will be displayed.

**Note** You can only select the **Currency** check box for decimal type fields. If you try to select the **Currency** check box for other field types, you will get an error message.

Field No.	Field Name	Include Caption	Currency		
1	No.	~		*	
3	Description	~			
8	Base Unit of Measure	~			
18	Unit Price	~	~		
				Ŧ	

11. Close the Item - Style Sheet Fields Used List window.

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The fields to use for this item card have now been defined and you are ready to merge the selected fields into a Word document as mail merge fields.

Creating a Mail Merge with the Item Card Style Sheet

1. On the style sheet card that you just created, click **Style Sheet**, **Create Mail Merge**.

General Optio Code Description Form No	Style Sheet Card	Item Card	Version No		. 0		
Mail Merge Docu Style Sheet Doc	ment	Base	Multiple	Fields		1	
Table No.           2	7 Item	Record ✓	Lines		Relationships		
				List Select	Fields	shins	F5
			0	<u>C</u> reate <u>O</u> pen <u>C</u> onve	Mail Merge Mail Merge rt Mail Merge to	o Style S	iheet
				<u>M</u> anag	je	SHEELS	

This will open up Word. The fields you have chosen for the Item Card will now be available in Word.

2. 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.

The mail merge could look like this:

For item no. «Item\_No» the «CAPTION\_Item\_Base\_Unit\_of\_Measure» is «Item\_Base\_Unit\_of\_Measure». The product name is «Item\_Description» and the cost is «Item\_Unit\_Price». 3. Close Word when you are finished.

You will now return to Microsoft Dynamics NAV.

- 4. Click **Yes** to import the mail merge document.
- 5. Click Yes to convert the mail merge document to a style sheet document.
- 6. Click **Yes** to update Manage Style Sheets. This will associate the style sheet you just created with the Item Card.
- 7. In Microsoft Dynamics NAV, on the main menu, click **Sales & Marketing**, **Inventory & Pricing**, **Items** to open the Item Card.
- 8. On the Toolbar, click **Send Options**.



9. In the Send Style Sheet Card to Microsoft Word - Program Selection window, select Microsoft Word and click Send.

📰 Send Item Card to Microsoft	Nord - Program Selec 💼 💷 💌
Name	Style Sheet
Microsoft Excel	Default 🔺
Microsoft Word	item card
	•
Send	Cancel Help

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 which now looks like this:

For item no. 766BC-B the Base Unit of Measure is PCS.
The product name is CONTOSO Office System and the cost is 1.787,60.

**Note** Although the number of decimals in the original **Unit Price** data field is four, the price is displayed in Word with two decimals, because the **Currency** check box was selected.

766BC-B CONTOSO Office	System - Item Ca	rd				×
General Invoicing Replenis	nment Planning	Foreign Trade	Item Tracking	E - Commerce	Warehouse	
Costing Method Star Cost is Adjusted	1.245,80 •		Gen. Prod. VAT Prod. F Inventory F Net Invoice	Posting Group   Posting Group.   Posting Group.   d Qty	RETAIL VAT25 FINISHED	<ul> <li>1</li> <li>1</li> <li>5</li> </ul>
Overhead Rate            Indirect Cost %         .           Last Direct Cost         .	0,00 0 1.245,80		Item Disc. ( Sales Unit o	Group	A PCS	•
Price/Profit Calculation. Price Profit %	e=Cost+P 💌 30,30879 1.787,5999	>				
	<u>I</u> tem ▼	S <u>a</u> les 🔻	Purchases 🔻	Functions	▼ Help	

#### Modifying Item Card 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 Card 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 (table 79). This time, the Base Record check box is not selected, since the Item table is still the base record.

9

ITEM CARD - S	tyle Sheet Card					×		
General Option:	S							
Code       ITEM CARD       Version No.       0         Description       item card       1         Form No.       30 •       Item Card         Mail Merge Document       .       .         Style Sheet Document       .       .								
Table No.	Table Name	Base Record	Multiple Lines	Fields Selected	Relationships			
27	Item	~		~		*		
▶ 79	Company Information			~		_		
						_		
						-		
						-		
			5	tyle Sheet	▼ Help			

- In the Field No. field, click <u>Style Sheet</u>, <u>Select Fields</u> to open the Company Information

   Style Sheet Fields Used List window.
- 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.
- 4. Close the Company Information Style Sheet Fields Used List window.
- 5. On the **Options** tab, select the **Include Work Date** field.

ITEM CARD - Style Sheet Card					×				
General Options									
Include Work Date 📝									
Include Data Link 🔽	Indude Data Link 📝								
Use MS Default Hyperli 🔽									
Use System Generated									
Data Link Caption dick here									
Use Default Language									
	Base	Multiple	Fields		1				
Table No. Table Name	Record	Lines	Selected	Relationships	-				
27 Item	~		~						
79 Company Information			~		- 1				
					- 1				
					- 1				
					- 1				
					- 1				
					-				
					Ŧ				
		G	ande Charat		_				
			style Sheet	<ul> <li>Help</li> </ul>					

- 6. 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.
- 7. Click Style Sheet, Open Mail Merge.

Word opens.

8. Add the new fields and reformat the document by, for example, inserting a company logo and changing the layout.



9. Close Word.

You will now return to Microsoft Dynamics NAV.

- 10. Click Yes to overwrite the existing mail merge document.
- 11. Click Yes to convert the mail merge document to a style sheet document.
- 12. Click Yes to overwrite the existing style sheet document.
- 13. Click Yes to update Manage Style Sheets.
- 14. Open the Item Card and click Send Options on the Toolbar.
- 15. 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.



#### Creating an Item List Style Sheet

The following steps will guide you through the procedure of setting up a new style sheet for the Item List.

- 1. In the Object Designer, select Style Sheet Card (form 680) and click **<u>R</u>un**.
- 2. Create a blank card and fill in the **Code** field and **Description** field.
- 3. In the Form No. field, click the AssistButton and in the Style Sheet Object List window, select the Item List form (form 31)
- 4. 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 List. In this case it is table 27.
- 5. In the Base Record field, select the Base Record check box.
- 6. This is a list form, therefore, select the **Multiple Lines** field and click **OK** when you are prompted with the following notification:



#### Attention

After you have selected Multiple Lines and you create or modify a mail merge document, you need to create a table in Word and put the fields that you choose inside this table. The table can have as many lines as you would like, but only the last line will be used to show the multiple lines. All previous lines of the table will be considered headers. This means that any formatting applied to the first row will apply to the headings and any formatting applied to the last line will be used for all the subsequent rows.

- 7. Click <u>Style Sheet</u>, <u>Select Fields</u> to open the *Item Style Sheet Fields Used List* window.
- 8. In the **Field No.** field, click the AssistButton and in the **Style Sheet Field List** window, select, for example, the fields **No.**, **Description** and **Unit Price**. Select the **Currency** check box for the **Unit Price** field, if you want the price displayed with two decimals in the final Word document.
- 9. Close the Item Style Sheet Fields Used List window.
- 10. On the **Options** tab, select the check box for the **Include Data Link** field and clear the check box for the **Use MS Default Hyperlink Fmt**. and **Use System Generated Caption** fields. In the **Data Link Caption** field, enter, for example, *Price List*, as this could be a price list for your sales people.

IT	EM LIST - Sty	le Sheet Card					×
Ger	neral Option	s					
Inc	lude Work Dat	e 🕅					
Inc	lude Data Link	🔽					
U	lse MS Default	Hyperli					
U	lse System Ger	nerated 🔳					
D	ata Link Captio	on Price List					
Use	e Default Lang	uage					
			Base	Multiple	Fields		1
	Table No.	I able Name	Record	Lines	Selected	Relationships	
-	27	item	•		C.J		-
							-
				_			
				S	tyle Sheet	✓ Help	

The fields to use for this item list have now been defined and you are ready to merge the selected fields into a Word document as mail merge fields.

Creating a Mail Merge with the Item List Style Sheet

- 1. On the style sheet card that you just created, click **<u>Style Sheet</u>**, <u>**C**</u>**reate Mail Merge**.
- 2. In Word, click the *Mailings* tab, *Insert Merge Field* and select each field one at a time. Start with the *MULTILINE\_BEGIN\_Item* field and end with the *MULTILINE\_END\_Item* field to indicate where the table begins and ends. In between, create a table with the relevant number of rows and columns. Finally, the document header should be the *DataLink* field.
- 3. Design the document as necessary by adding your own text, formatting and pictures. See the following example of a style sheet for a list:

«DataLink»		
MULTILINE_BEGIN_Item»		
CAPTION_Item_No»	«CAPTION_Item_Description»	«CAPTION_Item_Unit_Price»
CAPTION_Item_No»	«CAPTION_Item_Description» «Item_Description»	«CAPTION_Item_Unit_Price» «Item_Unit_Price»

4. Close Word when you are finished.

In Microsoft Dynamics NAV, you will convert the new mail merge template to a style sheet.

- 5. Click **Yes** to import the mail merge document.
- 6. Click **Yes** to convert the mail merge document to a style sheet document.
- 7. Click **Yes** to update Manage Style Sheets. The new style sheet will be added to Manage Style Sheets for the Item List.
- 8. In Microsoft Dynamics NAV, on the main menu, click **Sales & Marketing**, **Inventory & Pricing**, **Items** to open the Item Card.
- 9. On the Item Card, open the Item List by clicking **<u>Item</u>**, <u>**List**</u>.

766BC-B CONTOSO Office	System - Item Card				
General Invoicing Replenis	shment Planning For	eign Trade Item	Tracking	E - Commerce	Warehouse
No	5BC-B 📖 🥒	S	Search Deso	cription	CONTOSO OFFIC
Description CO	NTOSO Office System	I	nventory.	[	5
Base Unit of Measure PCS	S 🗈	ç	Qty. on Pur	ch. Order [	0
Bill of Materials 🗸		Ģ	Qty. on Pro	d. Order [	0
Shelf No	2	q	Qty. on Cor	mponent Lines	0
Automatic Ext. Texts 🛛 .		ç	Qty. on Sale	es Order	0
Created From Nonstoc		ç	Qty. on Ser	vice Order	0
Item Category Code.		s	Service Iten	n Group	
Product Group Code	•	в	Blocked	[	
			ast Date M	lodified	25-06-07
		-			20 00 07
	Item ▼ S <u>a</u> l	es 🔻 🛛 Purch	hases 🔻	Functions	✓ Help
	List		F5		
	Stockkeeping Uni	ts			
	E <u>n</u> tries		•		
	Statistics		•		
	Items by Location	ı			
	Item Availability	у	•		
	Bin Contents				
	Comments				

- 10. On the Toolbar, click **Send Options**.
- 11. 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 Item List style sheet you have just created, and the data from the Item List is imported to a Word document which now looks like this:

No.	Description	Unit Price
1000	Bicycle	4.000,00
1250	Back Hub	1.100,00
80005	Computer III 866 MHz	20,80
30006	Team Work Computer 533 MHz	175,10
0007	Enterprise Computer 667 MHz	247,50
80024	40GB ATA-66 IDE	35,60
766BC-A	CONTOSO Conference System	5.413,80
766BC-B	CONTOSO Office System	1.787,60

#### Creating a Style Sheet for a Document

The following steps describe how to set up a new style sheet for a document, for example, the sales order.

- 1. In the Object Designer, select Style Sheet Card (form 680) and click <u>**Run**</u>.
- 2. In the **Code** field, provide a code for naming the style sheet, for example, SALES ORDER.
- 3. In the **Description** field, provide a description of the style sheet, for example, sales order.
- 4. In the Form No. field, click the AssistButton and in the Style Sheet Object List window, select the Sales Order form (form 42).
- 5. In the **Table No.** field, click the AssistButton and in the **Style Sheet Object List** window, select the **Sales Header** table (table 36), which will also be the base record.
- Click <u>Style Sheet</u>, <u>Select Fields</u> to open the Sales Header Style Sheet Fields Used List window.
- In the Field No. field, click the AssistButton and in the Style Sheet Field List window, select the fields you want on your sales order, for example Sell-to Customer Name, Sell-to Address, Sell-to City, Sell-to Post Code, Sell-to Country/Region Code. Clear the Captions check box for each field.
- 8. Close the Sales Header Style Sheet Fields Used List window.

A sales order has sales lines, so the next step is to create lines for the sales header.

- 9. In the **Table No.** field, click the AssistButton and in the **Style Sheet Object List** window, select the **Sales Line** table (table 37). This table is not a base record.
- 10. There are multiple sales lines associated with one sales header, therefore, select the **Multiple Line** check box.

- 11. Click **OK** to the notification that tells you that you must create a table in your Word template.
- 12. Click <u>Style Sheet</u>, <u>Select Fields</u> to open the Sales Line Style Sheet Fields Used List window.
- 13. In the Field No. field, click the AssistButton and in the Style Sheet Field List window, select the fields Type, No., Description, Quantity and Unit Price. Include the captions for these fields and close the window. Select the Currency check box for the Unit Price field, if you want the price displayed with two decimals in the final Word document.
- To set up a relationship between the sales header and the sales lines, click <u>Style</u> Sheet, <u>Assign Table Relationships</u> and the Sales Line -> Sales Header – Style Sheet Table Relations window appears.
- 15. In the Field No. field, select Document Type.
- 16. In the Related-to Field No. field, select Document Type.
- 17. On the second line, select **Document No.** and relate it to No.
- 18. Close the Sales Line -> Sales Header Style Sheet Table Relations window.

A relationship between the sales lines and the sales header has now been established.

Sales Line->	Sales Header - Style She	et Table Relations	-		×
Field No.	Field Name	Related-to Field No.	Related-to Field Name	Constant Value	
Þ	1 Document Type	1	Document Type		
	3 Document No.	3	No.		
_					
_					-
					-
•				- ·	
				Help	

Creating a Mail Merge with the Sales Order Style Sheet

- 1. On the SALES ORDER Style Sheet Card, select Style Sheet, Create Mail Merge.
- 2. In the Word document, create a simple sales order by inserting the merge fields. See the following example:

«Sales_Header_Sellto_Customer_Name» «Sales_Header_Sellto_Address» «Sales_Header_Sellto_City» «Sales_Header_Sellto_Post_Code» «Sales_Header_Sellto_CountryRegion_Code»				
«MULTILINE BEGIN	Sales Line»			
«CAPTION_Sales	«CAPTION_Sale	«CAPTION_Sales_Lin	«CAPTION_Sales_Li	«CAPTION_Sales_Li
_Line_Type»	s_Line_No»	e_Description»	ne_Quantity»	ne_Unit_Price»
«Sales_Line_Typ	«Sales_Line_No	«Sales_Line_Descript	«Sales_Line_Quanti	«Sales_Line_Unit_Pri
e))	))	ion»	ty»	Ce))
«MULTILINE_END_S	ales_Line»			

You now have a style sheet template.

3. Close Word.

You will now return to Microsoft Dynamics NAV.

- 4. Click **Yes** to import the mail merge document.
- 5. Click Yes to convert the mail merge document to a style sheet document.
- 6. Click **Yes** to update Manage Style Sheets for the Sales Order. The new style sheet will be added to Manage Style Sheets for the sales order.
- 7. In Microsoft Dynamics NAV, on the main menu, click **Sales & Marketing**, **Order Processing**, **Orders** to open a sales order.
- 8. On the Toolbar, click **Send Options**.
- In the Send Sales Order to Microsoft Word Program Selection window, select Microsoft Word. In the Style Sheet field, click the AssistButton and select the sales order style sheet that you have just created.

Name	Style Sheet	
Microsoft Excel	Default 📃 🔺	
Microsoft Word	Sales Order Confirma	
	Microsoft Word Style Sheets for Sales Order - Style Shee	ets 🗖 🗖
	Name	
	Sales Order Confirmation for Microsoft Word	
	Sales order	
	Default	
	Derbart	
Send		

10. Close the Microsoft Word Style Sheets for Sales Order - Style Sheets window and click Send.

The sales order now appears in Word.

- 11. To modify the style sheet, close Word and return to the SALES ORDER Style Sheet Card in Microsoft Dynamics NAV.
- 12. In the **Table No.** field, click the AssistButton and in the **Style Sheet Object List** window, select the **Company Information** table (table 79).
- 13. Click <u>Style Sheet</u>, <u>Select Fields</u> to open the Company Information Style Sheet Fields Used List window.
- 14. In the **Field No.** field, click the AssistButton and in the **Style Sheet Field List** window, select, for example, the fields **Name**, **Address**, **City**, **Post Code** and **Country/Region Code**. Clear the check box for each field.
- 15. In the **Table No.** field, click the AssistButton and in the **Style Sheet Object List** window, select the **Salesperson/Purchaser** table (table 13).
- Click <u>Style Sheet</u>, <u>Select Fields</u> to open the <u>Salesperson/Purchaser Style Sheet Fields</u> Used List window.
- 17. Click the AssistButton and in the Style Sheet Field List window, select the Name field.

A relationship with this table is necessary to see the salesperson for this order.

- To create a relationship between the salesperson and the sales header, click <u>Style</u> Sheet, <u>Assign Table Relationships</u> and the <u>Salesperson/Purchaser -> Sales Header -</u> Style Sheet Table Relations window opens.
- 19. On the **Salesperson** table, the **Code** field is related to **Salesperson Code** on the **Sales Header** table. Select those fields and close the window.
- 20. On the **Options** tab, select **Include Work Date**.
- 21. Click Style Sheet, Open Mail Merge.
- 22. In Word, click Mailings, Insert Merge Field and add the new fields.

		Company Information	«Company «Company_	y_Information_Name»
		«Cor	npany_Information_C	ountryRegion_Code»
				«WorkDate»
«Sales_Header_S «Sales_Header_S	ellto_Customer_Na ellto_Address»	ame»		
«Sales_Header_Se	ellto_City» «Sales_H ellto_CountryPegic	leader_Sellto_Post_Coc	de»	
lodies_heddel_s	ellio_coonirykegio	n_code»		
	1_Sales_Line»			
«MULTILINE_BEGIN «CAPTION_Sales _Line_Type»	N_Sales_Line» «CAPTION_Sale s_Line_No»	«CAPTION_Sales_Lin e_Description»	«CAPTION_Sales_Li ne_Quantity»	«CAPTION_Sales_Li ne_Unit_Price»
«MULTILINE_BEGIN «CAPTION_Sales _Line_Type» «Sales_Line_Typ	N_Sales_Line» «CAPTION_Sale s_Line_No» «Sales_Line_No	«CAPTION_Sales_Lin e_Description»	«CAPTION_Sales_Li ne_Quantity» «Sales_Line_Quanti	«CAPTION_\$ales_Li ne_Unit_Price» «Sales_Line_Unit_Pri
«MULTILINE_BEGIN «CAPTION_Sales _Line_Type» «Sales_Line_Typ e»	N_Sales_Line» «CAPTION_Sale s_Line_No» «Sales_Line_No »	«CAPTION_Sales_Lin e_Description» «Sales_Line_Descript ion»	<pre>«CAPTION_Sales_Li ne_Quantity» «Sales_Line_Quanti ty»</pre>	<pre>«CAPTION_Sales_Li ne_Unit_Price» «Sales_Line_Unit_Pri ce»</pre>
«MULTILINE_BEGIN «CAPTION_Sales _Line_Type» «Sales_Line_Typ e» «MULTILINE_END_	A_Sales_Line» (CAPTION_Sale s_Line_No» (Sales_Line_No ) Sales_Line»	<pre>«CAPTION_Sales_Lin e_Description» «Sales_Line_Descript ion»</pre>	<pre>«CAPTION_Sales_Li ne_Quantity» «Sales_Line_Quanti ty»</pre>	<pre>«CAPTION_Sales_Li ne_Unit_Price» «Sales_Line_Unit_Pri Ce»</pre>
«MULTILINE_BEGIN «CAPTION_Sales _Line_Type» «Sales_Line_Typ e» «MULTILINE_END_S	N_Sales_Line» (CAPTION_Sale s_Line_No» (Cales_Line_No ) Sales_Line»	«CAPTION_Sales_Lin e_Description» «Sales_Line_Descript ion»	<pre>«CAPTION_Sales_Li ne_Quantity» «Sales_Line_Quanti ty»</pre>	<pre>«CAPTION_\$ales_Li ne_Unit_Price» «Sales_Line_Unit_Pri ce»</pre>
«MULTILINE_BEGIN «CAPTION_Sales _Line_Type» «Sales_Line_Typ e» «MULTILINE_END_: Kind regards	N_Sales_Line» (CAPTION_Sale s_Line_No» (Sales_Line_No ) Sales_Line»	<pre>«CAPTION_Sales_Lin e_Description» «Sales_Line_Descript ion»</pre>	<pre>«CAPTION_Sales_Li ne_Quantity» «Sales_Line_Quanti ty»</pre>	<pre>«CAPTION_Sales_Li ne_Unit_Price» «Sales_Line_Unit_Pri Ce»</pre>
«MULTILINE_BEGIN «CAPTION_Sales _Line_Type» «Sales_Line_Typ e» «MULTILINE_END_ Kind regards	A_Sales_Line» (CAPTION_Sale s_Line_No» (Sales_Line_No ) Sales_Line»	<b>«CAPTION_Sales_Lin e_Description»</b> «Sales_Line_Descript ion»	<pre>«CAPTION_Sales_Li ne_Quantity»  «Sales_Line_Quanti ty»</pre>	<pre>«CAPTION_Sales_Li ne_Unit_Price» «Sales_Line_Unit_Pri Ce»)</pre>

23. Close Word.

You will now return to Microsoft Dynamics NAV.

- 24. Click Yes to overwrite the existing mail merge document.
- 25. Click Yes to convert the mail merge document to a style sheet document.
- 26. Click **Yes** to overwrite the existing style sheet document.
- 27. Click **Yes** to update Manage Style Sheets.
- 28. Open the sales order and click **Send Options** on the Toolbar.
- 29. In the **Send Sales Order to Microsoft Word Program Selection** window, select Microsoft Word. In the **Style Sheet** field, click the AssistButton and select the sales order style sheet that you have just created.
- 30. Close the Microsoft Word Style Sheets for Sales Order Style Sheets window and click Send.

Your merged Word document now looks like this:

			<b>Ci</b>	CRONUS International Ltd. 5 The Ring London W2 8HG GB
John Haddo	ck Insurance Co.			24. January 2008
10 High Towe Manchester GB	er Green MO2 4RT			
Туре	No.	Description	Quantity	Unit Price
Item	LS-150	Loudspeaker, Cherry, 150W	8,00	129,00
Kind regards				
Peter Saddo	w			

## **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

- 1. In the Object Designer, select Style Sheet Card (form 680) and click **<u>R</u>un**.
- 2. On the Style Sheet Card, in the **Code** field, select the style sheet you want to export to another installation.
- 3. Click Style Sheet, Manage, Definition, Export.



- 4. Name the definition, for example, sales order, and save the document in XML format.
- 5. Click Save.
- 6. Click Yes to export the mail merge document.
- 7. Name the document, for example, sales order.
- 8. Click **Save**.

You have now exported the style sheet. The next step is to import the style sheet to the new installation.

#### Importing the Style Sheet

#### Attention

In order for the style sheets to be available on another installation, you need to make sure that the Style Sheet Tool is installed. See more about installing the Style Sheet Tool in the chapter Installing the Style Sheet Tool in Microsoft Dynamics NAV.

- 1. In the Object Designer, select Style Sheet Card (form 680) and click **<u>R</u>un**.
- 2. On the Style Sheet Card, in the **Code** field, select the style sheet you want to import to another installation.

- 3. Click Style Sheet, Manage, Definition, Import.
- 4. Select the definition you created in the export called sales order.xml and click **Open**.
- 5. Click **Yes** to import a mail merge document for this style sheet definition.
- 6. Select sales order.doc and click Open.
- 7. Click **Yes** to convert the mail merge document.
- 8. Click Yes to update Manage Style Sheetss.

The style sheet has now been imported.

# Appendix I - Description of Field Names and Menu Buttons on the Style Sheet Card

Style Sheet Card

General tab

	ITEM CARD -	- St	yle Sheet Card					x
[	General Opti	ons	3					
	Code							
	Table No.		Table Name	Base Record	Multiple	Fields Selected	Relationships	
	:	27	Item	~		~		*
		79	Company Information			<b>,</b>		
								-
					5	tyle Sheet	▼ Help	

Description	Enter a value in this field to find the style sheet in the Manage Style Sheets list.
Form No.	Enter a value in this field for the form that you want to associate with the template.
Base Record	Select this field to indicate that this table will be used to relate to the other tables that are used for setting up table relationships. Not every table has to relate to this table. There must be one, and only one, base record on every style sheet. It is also used to determine the language setting for the field captions if the Multiple Lines captions are selected.
Multiple Lines	Select this field to indicate that you expect this record to have multiple lines associated with it. For Multiple Lines to work, when the mail merge document is either created or modified, you will need to create a table in Word and put the fields that you choose within this table. The table can have as many lines as you would like, but only the last line will be used to show the multiple lines. All previous lines of the table will be considered headers. This means that any formatting applied to the first row will apply to the headings and any formatting applied to the last line will be used for all the repeating rows.

Fields Selected	This field is selected automatically if you have selected any fields to use on the style sheet.
Relationships	Select this field if you have defined any relationship with the base record.

#### Style Sheet Menu Button

Select Fields	This command allows you to select the fields that you want to include in the style sheet by table. The field order does not matter. If the Include Captions check box is selected, then the field caption for that field will be included in the Mail Merge Field list. These values will be replaced at run time with the actual caption values based on the language code of the base record if applicable. If the Currency check box is selected (only for decimal type fields), then all prices will be displayed with two decimals.
	Field No.       Field Name       Include Caption       Currency         1       No.       ✓         3       Description       ✓         8       Base Unit of Measure       ✓         18       Unit Price       ✓         Help
Assign Table Relationship	This command allows you to define the table relationships back to the base record (i.e. Salesperson/Purchaser Code is related back to the Contact Salesperson Code).
	Field No.     Field Name     Related-to Field No.     Related-to Field Name Constant Value       1     Document Type     1     Document Type       3     Document No.     3     No.
Create Mail Merge	This command launches a mail merge in Word so that you can visually define what you want your document to look like. The fields that you selected are loaded in the Mail Merge fields. When you close Word, you will be asked if you want to import the mail merge document and if you want to convert the document to a style sheet.

Open Mail Merge	This command allows you to open the stored mail merge document. If you make changes, you can reconvert it to a style sheet with the next option.
Convert Mail Merge to Style Sheet	This command converts the mail merge document to a style sheet document.
Update Manage Style Sheets	This command creates a record in the Style Sheet table (2000000066) so that you can use the new style sheet in the rest of the Microsoft Dynamics NAV style sheet implementation. This option also updates the Style Sheet Link table (685).

Manage		
	Mail Merge Document	Import - Imports previous mail merge document.
		Export - Exports mail merge document.
		Remove - Clears mail merge document.
	Style Sheet Document	Import - Imports previous style sheet document.
		Export - Exports style sheet document.
		Remove - Clears style sheet document.
	Definition	Import - Allows you to import a style sheet definition and associated mail merge document.
		Export - Allows you to export a style sheet definition and associated mail merge document.
	The Style Sheet Setup dialog defines settings for the way the style sheet interface works.	Select the Show Process Dialogs check box to prompt the Style Sheet Tool to show you dialog boxes for everything that is happening. If this is not selected, then the user will only see the dialog boxes where user input is required.

General Show Process Dialogs Debug Location for XML Data File C:\Users\rmille\Documents\Temp\St	Select the Debug check box to Allow the user to trap the XML data file which can be used to help resolve issues that might crop up.
Help	

#### Options tab

ITEM CARD - S	tyle Sheet Card					
General Option	s					
Include Work Dat	e 🔽					
Include Data Link	🔽					
Use MS Default	Hyperli 🔽					
Use System Ger	nerated 📃					
Data Link Captio	on dick here					
Use Default Lang	uage					
		Base	Multiple	Fields		
Table No.	Table Name	Record	Lines	Selected	Relationships	
2/	Item	•				- 1
► /9	Company Information			•		
			G	The Charak		
				style Sheet	• нер	

Include Work Date	Select this check box to add this feature as a Mail Merge field that will be replaced at run time with the actual work date when placed in the Word document.	
Include Data Link	Select this check box to add this feature as a Mail Merge field that, when placed in the Word	

	document, will be replaced at run time with the actual link back to the original Microsoft Dynamics NAV form from where the style sheet was run.	
	Use MS Default Hyperlink Fmt.	Select this check box to apply the default MS Hyperlink format to the data link.
	Use System Generated Caption	Select this check box to display the phrase "Link to Microsoft Dynamics NAV" when the cursor hovers over the data link.
	Data Link Caption	Enter your own data link caption or use the default caption in this field.
Use Default Language Only	Select this check box if you want all documents to be created using the current language layer of the user. Otherwise, the documents are rendered in the following way:	
	Cards	When a style sheet is rendered for this type of form, the system will generate the captions in the language that the Language Code or Country Code specify. However, if that code is not part of the installed language layers it will use the language of the user by default.
	Documents	When a style sheet is rendered for this type of form, the system will generate the captions in the language that the Language Code or Country Code specify. However, if that code is not part of the installed language layers it will use the language of the user by default.
	Lists	When a style sheet is rendered for this type of form, the system will always generate the output in the current language of the user.

### Appendix II – Changes to Codeunit 403

Codeunit 403 Application Launch Management

You will need to make the following changes to Codeunit 403: In function LaunchApp add the following three local variables:

StylesheetData	Codeunit	Style Sheet Data Management
StylesheetSetup	Record	Style Sheet Setup
StylesheetLink	Record	Style Sheet Link

In function LaunchApp change the following code:

```
EVALUATE(id,GetAttributeValue(DataXML,'Object','id'));
CASE id OF
FORM::"Customer Card": AddCustomerLetter(DataXML);
FORM::"Vendor Card": AddVendorLetter(DataXML);
FORM::"Contact Card": AddContactLetter(DataXML);
FORM::"Sales Quote": AddSalesQuote(DataXML);
FORM::"Sales Order": AddSalesOrder(DataXML);
END;
```

```
to the following:
```

```
. . . . .
IF NOT StylesheetLink.GET(StylesheetID) THEN BEGIN
 EVALUATE (id, GetAttributeValue (DataXML, 'Object', 'id'));
 CASE id OF
    FORM::"Customer Card": AddCustomerLetter(DataXML);
    FORM::"Vendor Card": AddVendorLetter(DataXML);
    FORM::"Contact Card": AddContactLetter(DataXML);
    FORM::"Sales Quote": AddSalesQuote(DataXML);
    FORM::"Sales Order": AddSalesOrder(DataXML);
  END;
END ELSE
  StylesheetData.LoadStylesheetData(DataXML,StylesheetID,ApplicationXML);
AddLocaleInfo(DataXML);
IF StylesheetSetup.GET AND StylesheetSetup.Debug THEN
 DataXML.save(StylesheetSetup."Location for XML Data File");
. . . . .
```

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