



# MobileNAV Installation Guide

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2. Import MobileNAV Client App License codeunit (only for versions lower than 4.6) <b>Hiba! A könyvjelző nem létezik.</b>	
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## Preamble

This document describes the MobileNAV installation process. The installation of the MobileNAV solution starts with preparation. The preparation checklist contains certain pre-requisites and decisions which have to be made before the actual MobileNAV installation takes place. The installation process is described in details in the [Installing MobileNAV solution](#) chapter of this guide.

## Preparation checklist

### 1. Signed MobileNAV Partner Contract

In order to sell, install or configure the MobileNAV solution, you need to sign the MobileNAV Partner Contract. After MultiSoft receives the signed contract, we grant you access to the MobileNAV granule in VOICE.

### 2. Update NAV developer license with MobileNAV granule

Make sure that your NAV developer license contains the MobileNAV granule (42012830). When you become an official MobileNAV partner, you can update your developer license in the Partner Source.

For detailed instructions, see the *MobileNAV - How-to order MobileNAV granule* document.

### 3. Order MobileNAV granule into customer's NAV license

Order the MobileNAV granule into your customer's NAV license as follows:

1. Go to Microsoft Partner Source portal: <https://mbs.microsoft.com/partnersource/>
2. Search and select your customer
3. In the Order Catalog, find the MobileNAV granule (42012830).





Home >> Header >> Catalog

Microsoft Dynamics NAV 2009 | Business Ready Licensing - Business Essentials

Order Number: 4113153	Status: Saved / Line Item	Created Date: (yyyy.mm.dd) 2012.08.02. 10:21	Created By: Attila Kersner	Product Line: Microsoft Dynamics NAV Business Ready
Billing Company: 5190947 - MultiSoft Kft	Sold-To Company: 5190947 - MultiSoft Kft	Customer Company: 5277376 - Herlitz Hungaria Kft.	Currency: ? Billing - EUR	Exchange Rate: ? 1,0000 (EUR - EUR)

Microsoft Dynamics NAV Business Ready 2009 | Microsoft Dynamics CRM On-Premise 2011 | Installation | Errors

MobileNAV (1 match) Jump To: Industry Solutions

☒ Hide non-matching modules Order Total: 0,00€

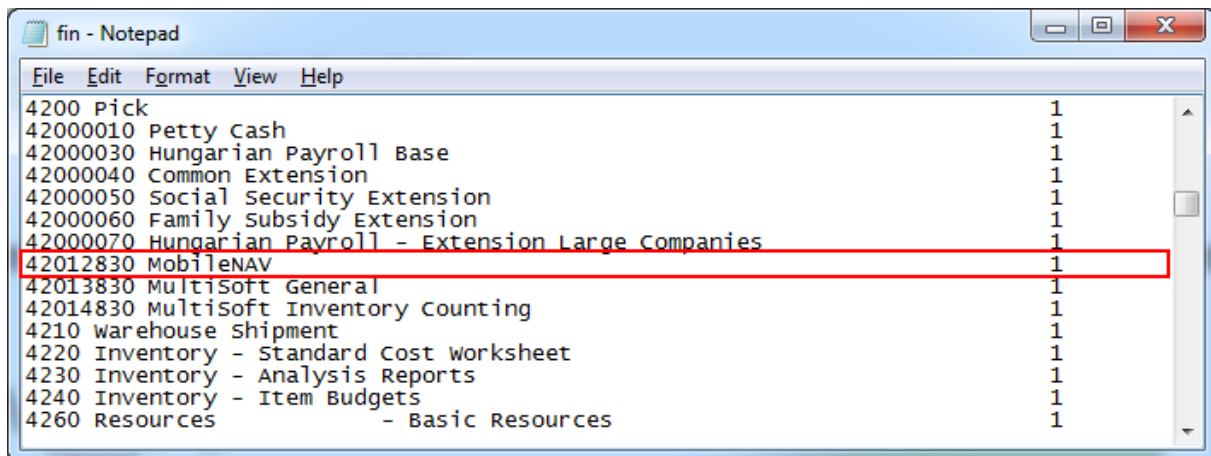
Note: To localize or translate Microsoft Dynamics software, please review the Microsoft Partner Localization and Translation Licensing Program on PartnerSource or contact your Partner Account Manager.

Back Next Price Save Delete

Item Number	Have	Add	Total	Detail	Extended
42012830 MobileNAV			213€		
					0,00€

Back Next Price Save Delete

4. Order this granule into your customer's NAV license.
5. Download the new customer NAV license.
6. Check whether it contains the MobileNAV granule:
  - a. open the license file in Notepad.
  - b. find 42012830 MobileNAV granule



7. Upload the new license into the NAV database.

For detailed instructions, check the "MobileNAV - How-to order MobileNAV granule" document.

## 4. Order MobileNAV Client App Licenses from MultiSoft

Order a proper MobileNAV Client App License from MultiSoft by providing the following information:



**Address:** 1112 Budapest 36 Kőérberki út  
**Postal address:** 1506 Budapest P.O. box: 5.  
**Tel:** +36 1 3101492 • **Fax:** +36 1 3101497  
**E-mail:** [contact@mobilenav.com](mailto:contact@mobilenav.com)  
[www.mobilenav.com](http://www.mobilenav.com)



- your Microsoft VOICE Account Number
- your customer's Microsoft VOICE Account Number
- how many device licenses you want to order
- type of the license
  - o **internal-use:** the partner would like to use this license for demo/development purposes
  - o **trial license for customer:** the customer would like to try out the MobileNAV solution for a limited time period (1 month)
  - o **normal license for customer:** a standard license for the customer. In this case MultiSoft will invoice the partner for the licenses (decreased by the margin of the partner)

MultiSoft generates and sends over the requested MobileNAV license.

## 5. Select a deployment scenario

Decide how the mobile device will access your NAV server. You need to make sure, that mobile users will be able to connect to the NAV server from external network not only from the intranet. If you do not have such an issue in your installation, because, for instance, you will use MobileNAV in a warehouse with intranet Wi-Fi, then you can skip this step of the installation.

The MobileNAV client needs access to the web services from the mobile device. Depending on the Dynamics NAV deployment scenario, the web service can be accessed in several ways. The most common methods are listed below:

### 5.1. Directly exposed web services

In this scenario the web service is directly exposed to the web, which means that the web service port of the Service Tier on the server can be accessed directly from the Internet. This also means that the server has a public IP address (not an internal one), predominantly when the NAV server is hosted somewhere.

### 5.2. Internal server, VPN

In this case the NAV Service Tier is installed in the domain, and it is only accessible on the company domain. To be able to access the web services outside of the domain, the device must establish VPN connection. When VPN connection is established, the MobileNAV client can access the internal web services without restrictions. This scenario is easy to do from IT administration point of view, because in most cases the companies already have VPN connection for their external/off-site employees. The disadvantage of this solution is that it is not really convenient for MobileNAV users, because they need to make sure that the VPN connection is established before they start working with MobileNAV.

### 5.3. Internal server, Port forwarding

In this case the NAV Service Tier is installed in the domain, and, as a result, it does not have a public IP address, but port forwarding is configured on the router or on the firewall. This means that the web service port of NAV is made available outside the domain, and it can be accessed directly from an external device. Port forwarding is a well-known practice for IT Administrators. Since the web service is XML based, and it uses SOAP over HTTP protocol, the port forwarding rule can be protected with an HTTP or a SOAP over





HTTP rule. Therefore the router or firewall will only forward those messages that match the filter rule, which depends on the capabilities of the router or firewall. In this scenario, the client does not have to establish VPN connection, but the external IP address (or friendly URL) has to be provided for the server.

## 6. Service Tier installation

The Service Tier of NAV provides web service access to NAV data and functionality. In this step you need to make sure that the Microsoft Dynamics NAV Web Server components installed on a computer that is running Internet Information Services (IIS) and configured properly for NAV.

Dynamics NAV version requirements:

- Dynamics NAV 2013: no Cumulative Updates needed. Compatible with base build, or above
- Dynamics NAV 2013 R2: no Cumulative Updates needed. Compatible with base build, or above
- Dynamics NAV 2015: no Cumulative Updates needed. Compatible with base build, or above
- Dynamics NAV 2016: no Cumulative Updates needed. Compatible with base build, or above
- Dynamics NAV 2017: no Cumulative Updates needed. Compatible with base build, or above
- Dynamics NAV 2018: no Cumulative Updates needed. Compatible with base build, or above
- Dynamics 365 Business Central: no Cumulative Updates needed. Compatible with base build, or above

## 7. Service Tier configuration

During the Service Tier setup you may already set certain configuration parameters, but you can also change them later on:

After you install Microsoft Dynamics NAV Server, you can change any of the settings you provided during Setup using either the Microsoft Dynamics NAV Server Administration tool or the Microsoft Dynamics NAV PowerShell cmdlets for Microsoft Dynamics NAV 2013.

You can configure by directly editing `CustomSettings.config`, the Microsoft Dynamics NAV Server configuration file. By default, this file is located in `C:\Program Files\Microsoft Dynamics NAV\<version>\Service\Instances\<instancename>`. In 64 bit operating systems, this component located separately in the 64bit program files folder. We recommend that you do not directly edit the configuration file, because if you mistype anything, you may not be able to start the instance.

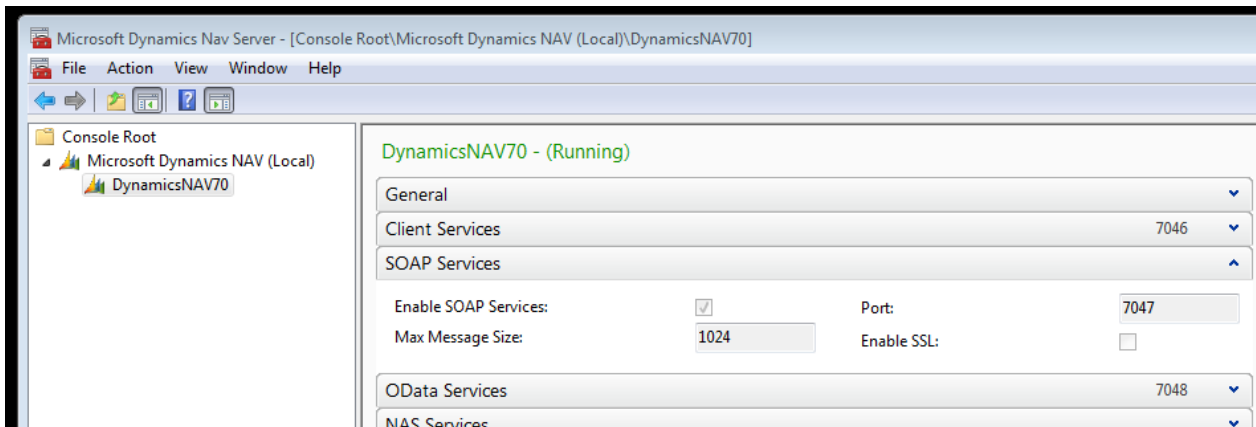
For detailed description about settings, see [Configuring Microsoft Dynamics NAV Server](#)

### 7.1. Web service port

By default the web service port is 7047, which you can modify. Find the "SOAP services/Port" key in the server administration tool, and change the value as necessary.







Setting the web service port is quite important, if you want to connect to your NAV server from different locations. Firewalls normally permit specific ports, such as 7047. By changing the web service port to a commonly used one, like: 80 or 8080, then you can make sure that your firewall will not cause connection problems.

## 7.2. SSL configuration

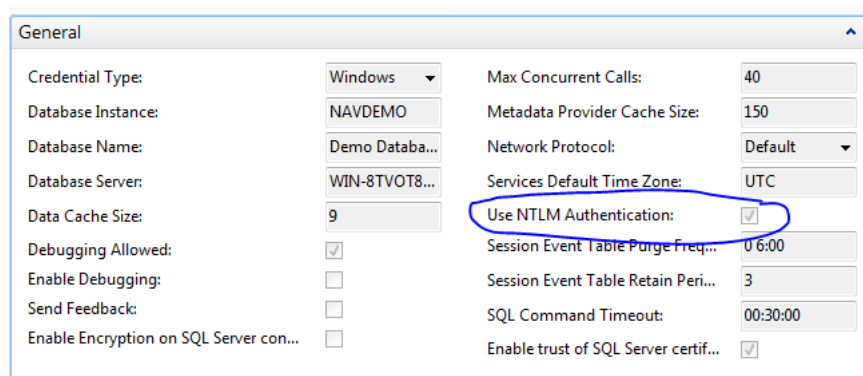
You can configure the Service Tier to use SSL encryption for the communication channel. Secure Sockets Layer (SSL) is a cryptographic protocol that provides security and data integrity for data communication over a network. By encrypting your Microsoft Dynamics NAV 2013 Web services with SSL, you make your data and your network more secure and more reliable.

For detailed instructions check [Walkthrough: Configuring Web Services to Use SSL \(SOAP and OData\)](#)

## 7.3. NTLM authentication

The web service is not configured to use NTLM authentication by default, therefore you have to modify it. Find the "WebServicesUseNTLMAuthentication" key in the server administration tool, and change the value to "true".

You must choose **Edit** in the Microsoft Dynamics NAV Server Administration tool before you can modify any values.





## 8. Creating Users inside NAV for MobileNAV users

Each MobileNAV user must be granted access in NAV. You can create Windows Accounts, you can also use NAVUserPassword users, or users with Office 355 Authentication inside NAV. In each case the proper rights should be applied for these users.

Although Automatic synchronization takes place when you insert, modify or delete a Windows login in Standard Security model. When you are running with the Enhanced Security model, there is no automatic synchronization.

Remember, if you use Windows Accounts as users, then the Service Tier to which you want to connect your MobileNAV users should have Credential Type = Windows or Username. If you use NAVUserPassword users for MobileNAV, then the Service Tier to which you want to connect your MobileNAV users should have Credential Type = NAVUserPassword accordingly.

This approach has several benefits:

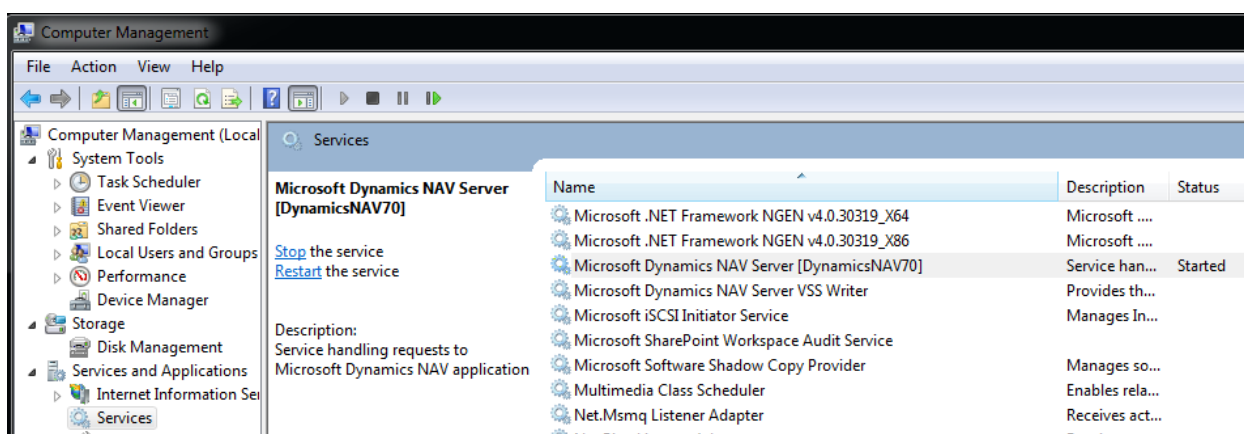
- the security system of NAV will be applied to MobileNAV users as well
- the MobileNAV users will be distinguishable in NAV (in C/AL code)
- NTLM authentication can be used with web services, which is an industry standard

For detailed instructions, see [How to: Create Microsoft Dynamics NAV Users](#) and [How to: Define Permissions for Users](#).

## 9. Check Service Tier and web services on the server computer

You must check, whether you installed and configured the Service Tier properly, so that the web service interface is working:

1. Go to Services, and find the Service Tier service. In NAV 2013 or above version there is only one service, which is called "Microsoft Dynamics NAV Server".



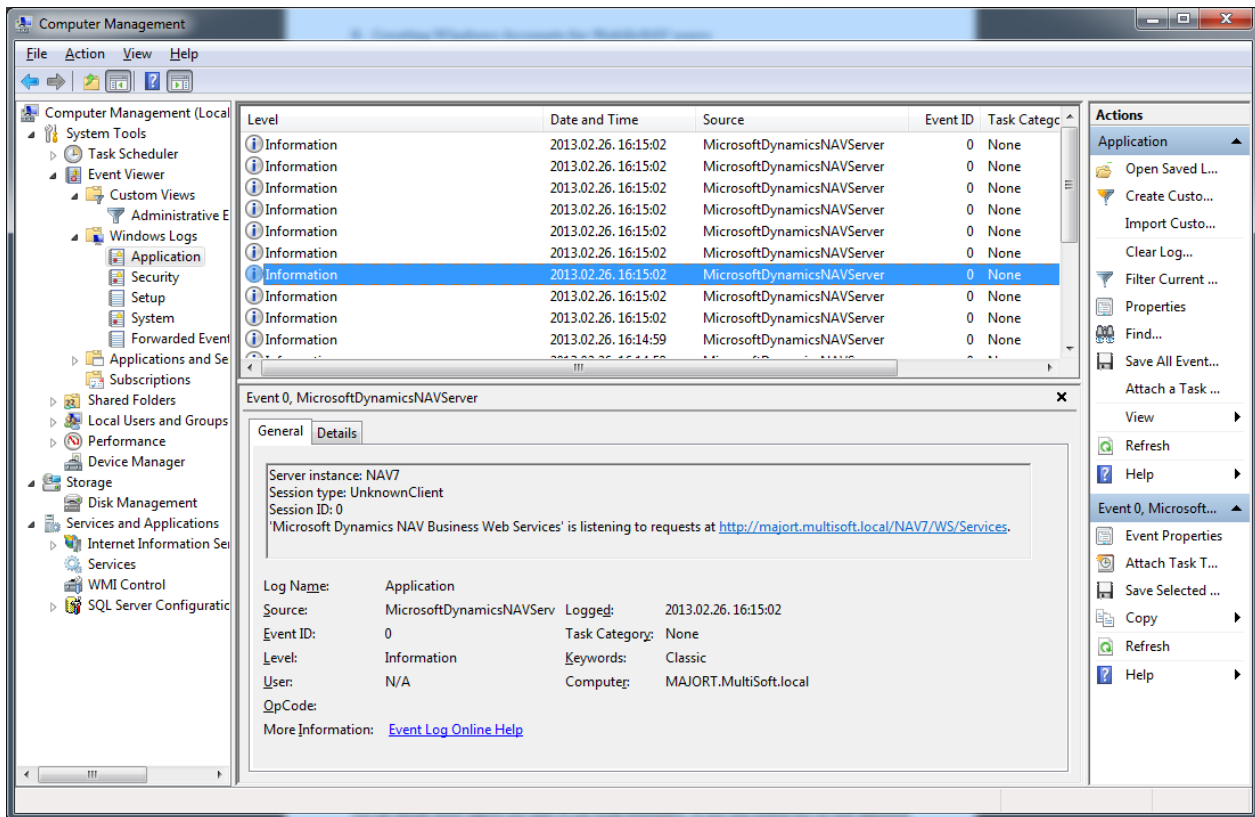
2. Restart the service.
3. Make sure the service is started properly.







- Go to Event Viewer, and check whether the service is properly started, and that there is no error as shown below:

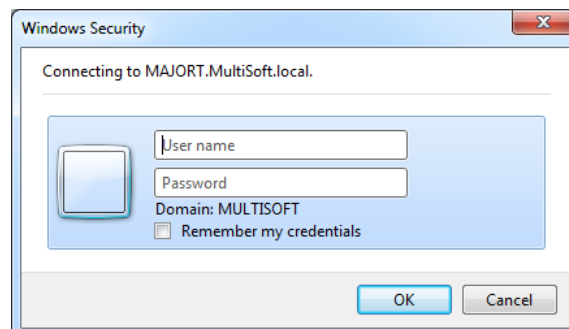


- Copy the http address from the event description, and paste it into a browser.

**Note:** The web service URL is put together like this:

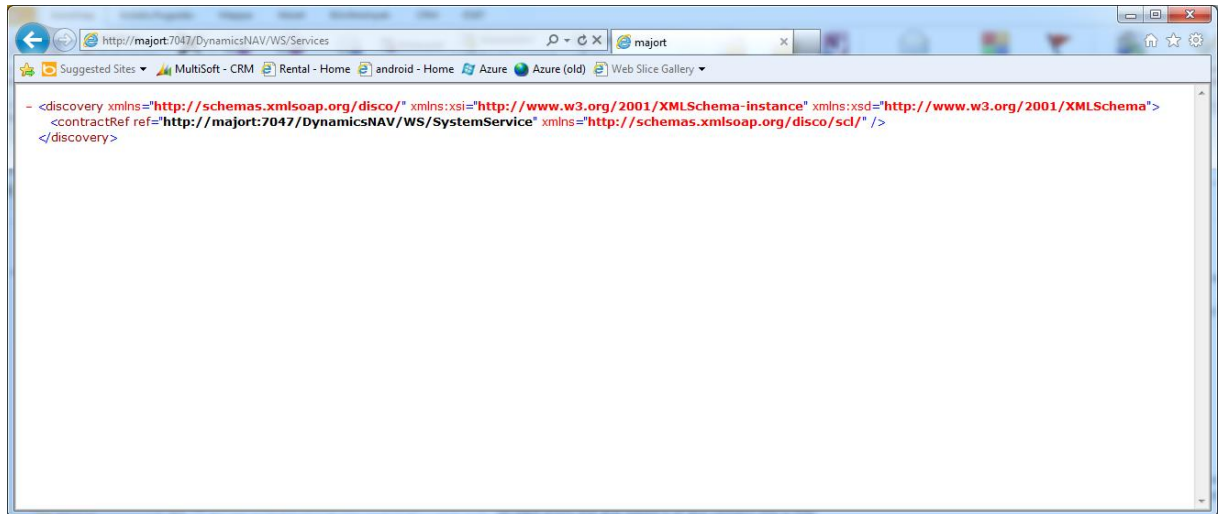
`http://{computer name}:{web service port}/{instance name}/WS/Services`

- If the web service is working properly, a Windows Security dialog is displayed.



- Enter one of the MobileNAV windows accounts, that you have configured previously, and click **OK**.
- The result in the browser is shown below:





**Note:** To ensure that all MobileNAV users can access the server, you may repeat the instructions starting from Step 5.

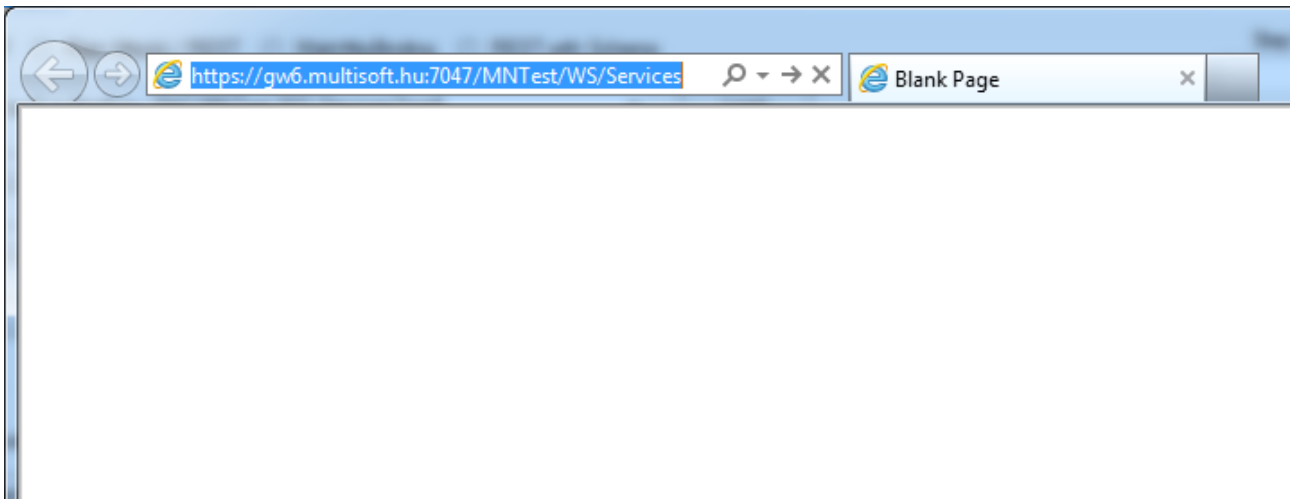
## 10. Check Service Tier and web services in a browser from an external network

You should test the accessibility of the previously defined URL address from an external network, such as a mobile network or an external Wi-Fi. In this way, you can make sure that web services are accessible through domain firewalls or routers. Depending on your deployment scenario, you may have to replace the computer name for the external address of the server PC. For example, if you decide to use an internal server with port forwarding, then you need to replace the computer name with the external IP address as follows:

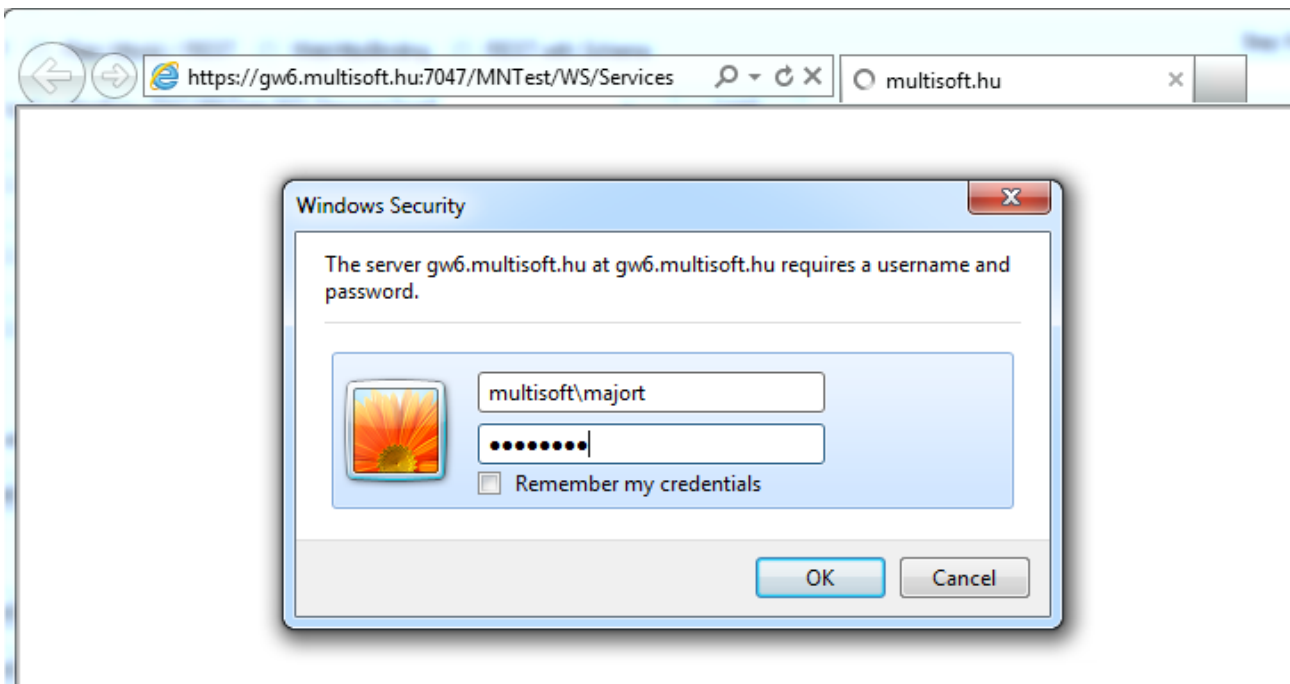
1. If you have chosen an internal server with VPN connection, then connect via VPN from the external computer.
2. Open a browser, and enter the URL of your server. In our test environment we have a gateway/firewall with the following friendly name: gw6.multisoft.hu. It is an SSL-enabled server, and our instance name is "MNTest", therefore the modified URL is:

<https://gw6.multisoft.hu:7047/MNTest/WS/Services>





3. Provide the windows login credentials of one of your MobileNAV users, you have set up.



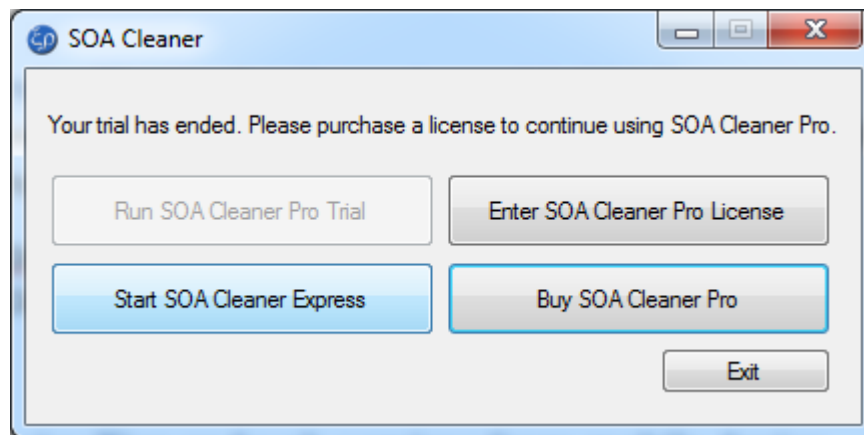
4. Verify that there are no errors, and that the services run as described above.
5. For peace of mind, you can repeat these steps for each MobileNAV user you have set up.

## 11. Check Service Tier and web services with SOACleaner

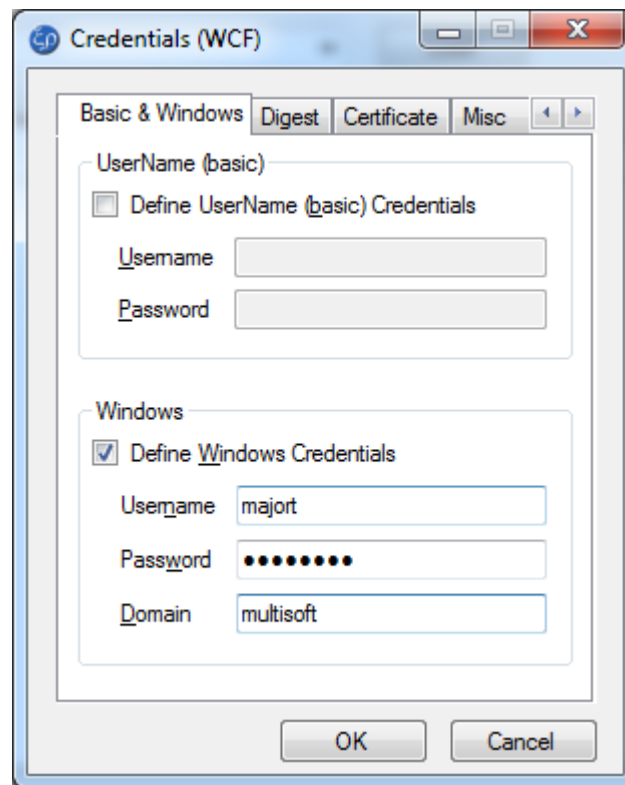
Use a web service testing tool that not only tests the WSDL of the web services, but can also try to retrieve data from the web services:

1. Download SOACleaner from <http://xyrow.com>.
2. Launch `SOACleaner.exe` and click **Start SOA Cleaner Express**.





3. Go to **Settings -> Credentials**, select the **Define Windows Credentials** option, and enter the proper username, password and domain.



4. Click **OK**.
5. Enter the previously used URL into the WSDL field, and at the end of the URL, change “/Services” to “/SystemService”. In our example the URL is the following:  
<https://gw6.multisoft.hu:7047/MNTest/WS/SystemService>





SOA Cleaner Express

Options Settings Tools Buy Now!

☒ Soap / WCF ☐ Plain Http(s) / REST ☐ WebHttpBinding ☐ REST with Schema

WSDL

Service

Port

Operation

Grid View XML View

6. Click **Load**.

SOA Cleaner Express

Options Settings Tools Buy Now!

☒ Soap / WCF ☐ Plain Http(s) / REST ☐ WebHttpBinding ☐ REST with Schema

WSDL

Service

Port

Operation

Grid View XML View

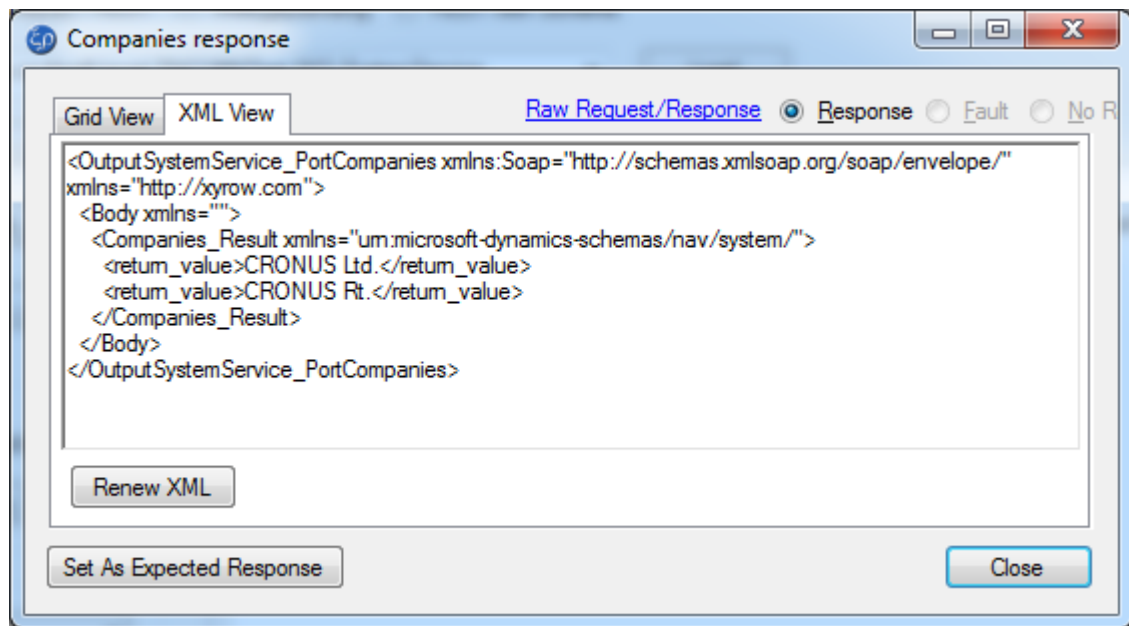
Header

☒ Body

The web service is loaded, and in the Operation drop-down list you should find “Companies”, which is a standard web service that returns the available company names from the database.

7. Click **Invoke** at the bottom of the window to invoke the web service. All available companies are listed in the response on the **XML View** tab.





**IMPORTANT**

Please do not continue until this test has been successfully executed. This test is not related to the MobileNAV solution, since it is using the built-in web service of NAV. IT Administrators should be able to resolve any problems, and with this tool they can gather sufficient information for the resolution.

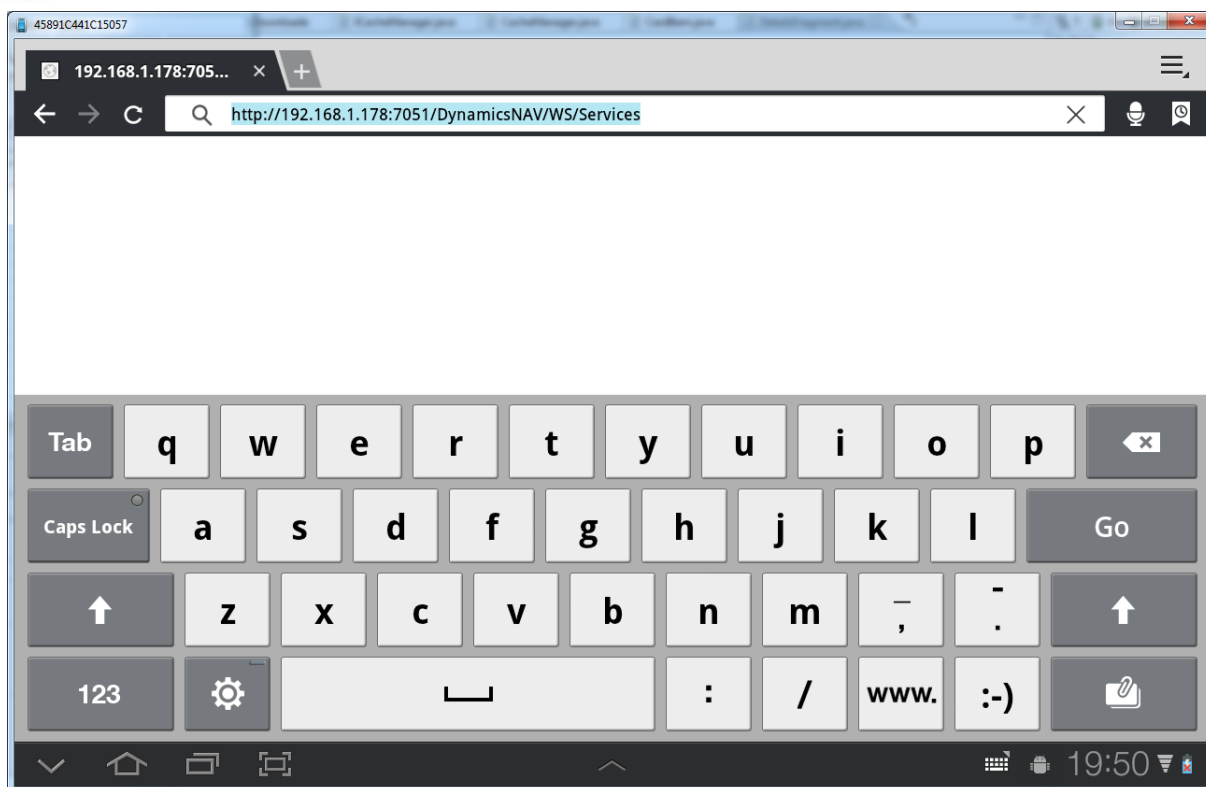
## 12. Check Service Tier and web services from mobile device

In this task you will validate the previous URL address from a mobile device, so that you can make sure that the mobile device is able to communicate with the web services. Depending on your deployment scenario, you may have to replace the computer name for the external address of the server PC. For example if you decide to use an internal server with port forwarding, then you have to replace the computer name with the external address as follows:

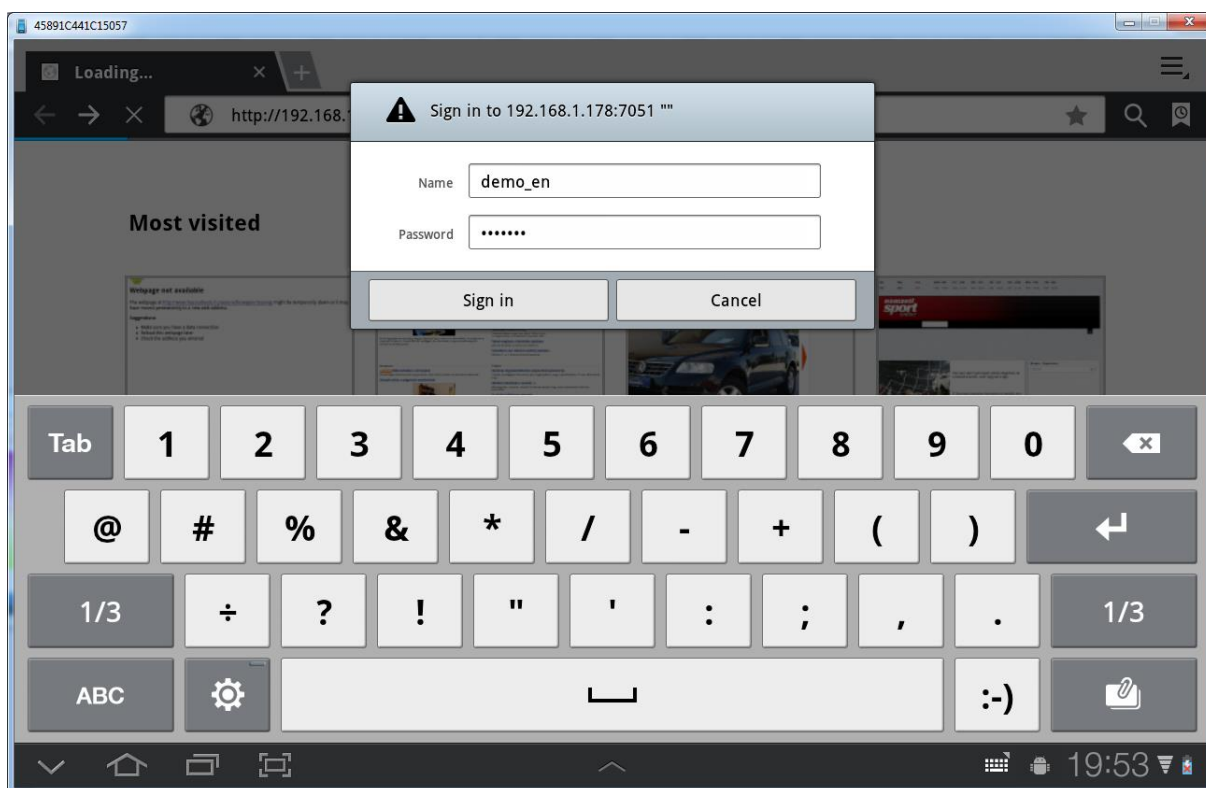
1. If you have chosen internal server with VPN connection, then connect via VPN from the mobile device.
2. Open a browser, and enter the URL address of your server.







3. Provide the windows login credentials of one of your MobileNAV users, you have set up





4. Verify that no error occurs
5. For peace of mind, you can repeat these steps for each MobileNAV user you have set up.

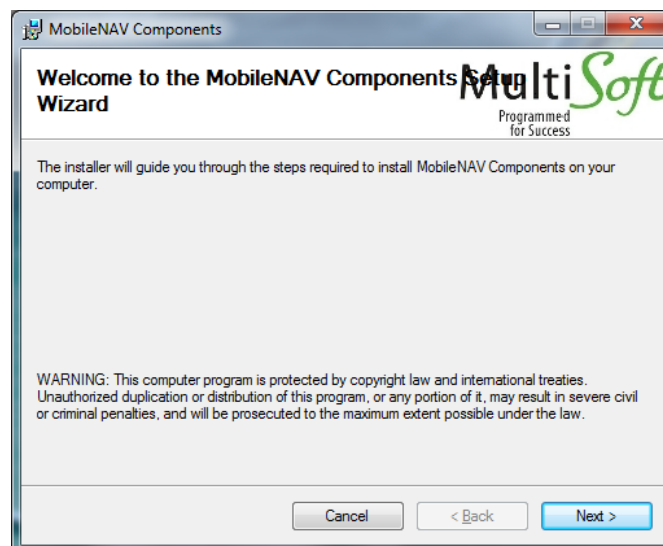
## Installing MobileNAV solution

### 1. Install MobileNAV Component setup

MobileNAV has a separate DLL component for licensing. This component must be installed on the PC where the Service Tier is installed and running. Furthermore, you need to install MobileNAV on the PCs, where you want to use Development Environment for compiling MobileNAV related Add-on objects.

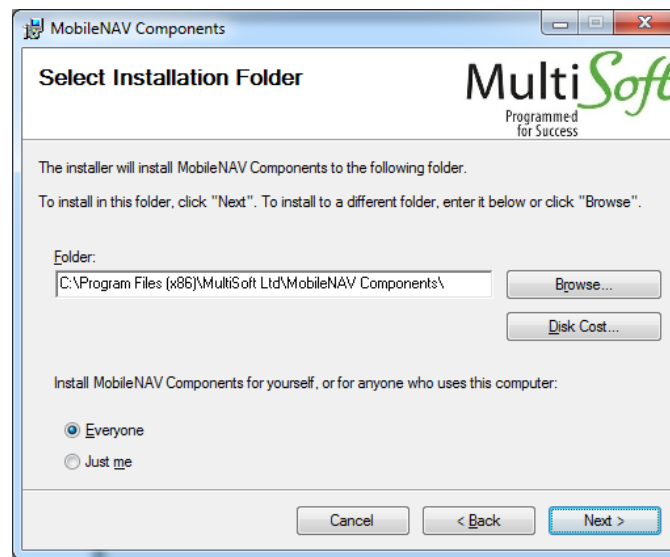
To install the MobileNAV component, follow the instructions below:

1. Run `setup.exe` or `DllSetup.msi` in the MobileNAV installation package.

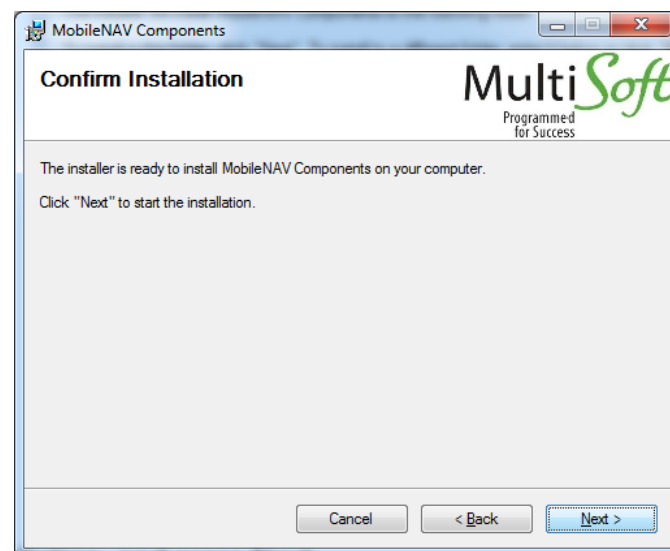


2. Click **Next**.
3. Choose the installation folder.



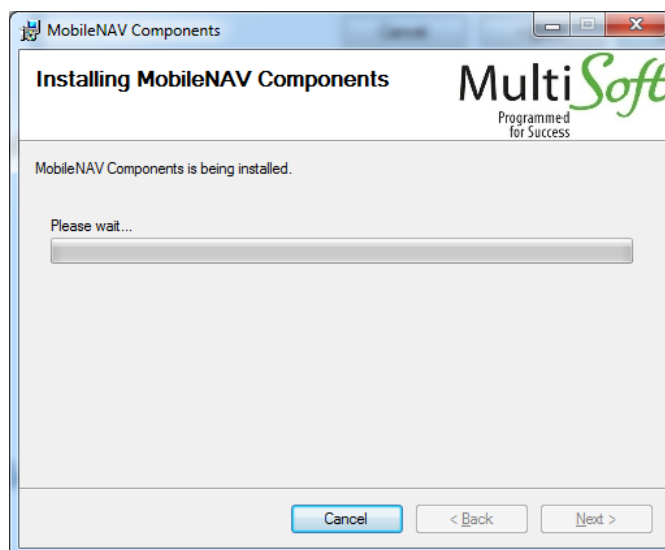


4. Click **Next**.



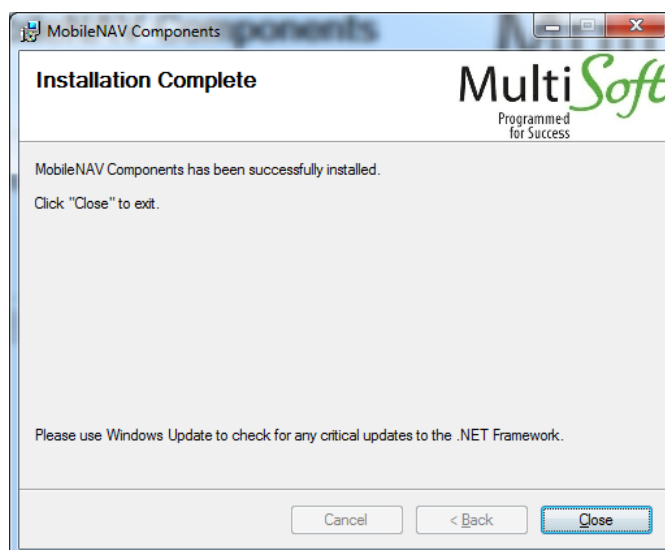
5. Confirm the installation, and click **Next**.  
6. If administrative rights (UAC) are necessary for the installation, then allow those as well.



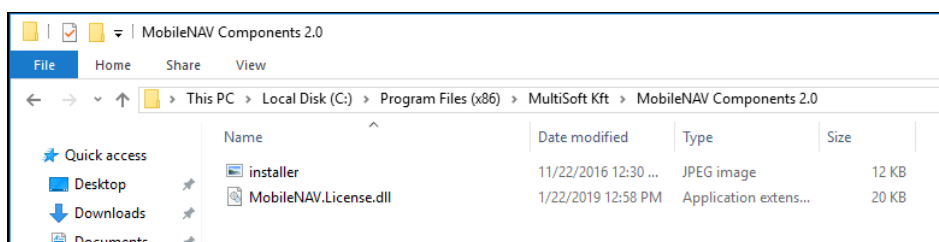


The installation starts

7. Make sure that it finished without errors.



8. Validate the installation by checking the installation destination folder content, which is "C:\Program Files (x86)\MultiSoft Kft\MobileNAV Components 2.0" by default. Its content is shown below:

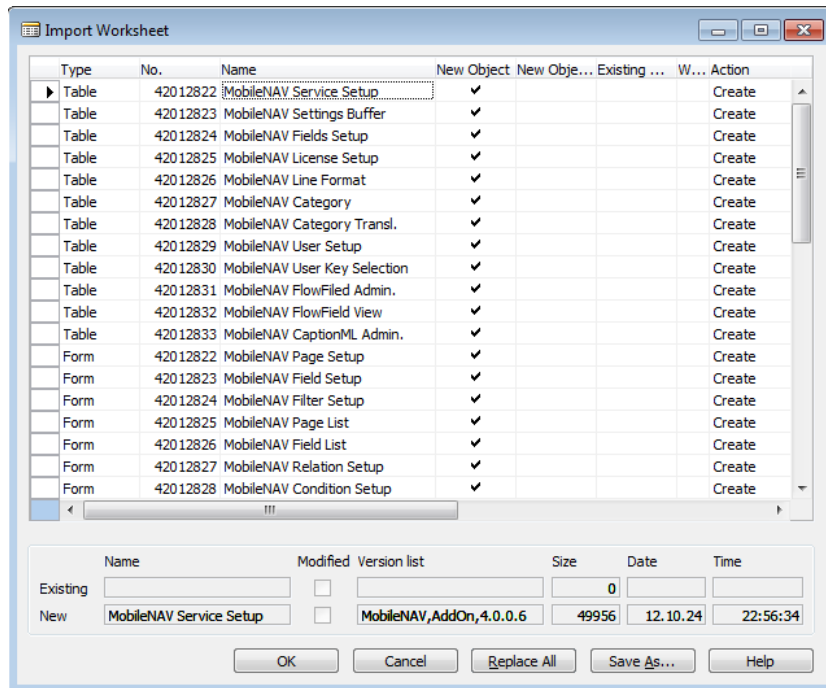




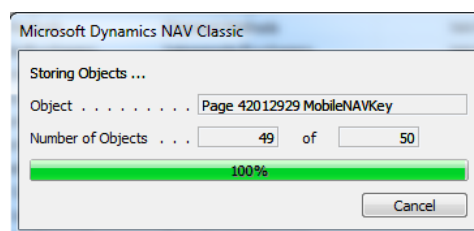
## 2. Import MobileNAV Add-on objects

In this step you will import the MobileNAV Add-on granule objects as follows:

1. Launch NAV Development Environment, and open the proper database and company.
2. Go to the **File -> Import...** menu.
3. Select the MobileNAV Add-on .lob from the installation package.
4. Choose **Yes** to import all objects, or choose **No** to launch the Import Worksheet where you can review the objects to be imported.

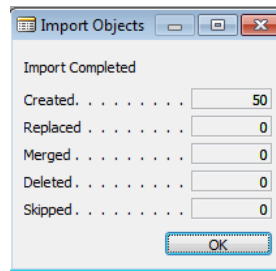


5. Click **OK**.  
The objects will be imported.



6. Click **OK** to confirm that all objects have been successfully created (there are 51) in version 4.





### 3. Apply MobileNAV standard object modifications for base configuration

There are a few modifications, or coding convention for the MobileNAV solution, which must be applied to use those objects in MobileNAV. These are mainly simple C/AL code modifications because of the web service usage. When a trigger or function is executed via web services, it is not possible to display messages, warnings, and so on. These UI interactions must be avoided when the C/AL code is executed via web services. The best way of doing this is to use the GUIALLOWED global property of NAV, which is set to TRUE if it is running on RTC client, and it is set to FALSE, if it is executed from a web service.

For more information about this topic, see [Handling UI Interaction When Working with Web Services](#)

These objects might need to be modified (depending what you are planning to use from the base configuration):

- **Table 37 – Sales Line:** If you use Reservation feature of Dynamics NAV, and you want to be able to use Sales Lines within MobileNAV, then you need to escape showing the standard Reservation window of NAV, because it is not possible to open it from web services. In order to use Sales Line with Reservation, we have to escape showing the Reservation windows with GUIALLOWED.
  - **Note:** If you are not planning to use **Sales Line with Reservation** in MobileNAV, you don't need to merge this.
- **Table 5080 – To-do:** When you create a new To-do in the mobile application, the Type validation will run after inserting a method. For example, if you want to use Meeting for to-do type, then the original code generates an error message since changing the type from blank to meeting is not permitted. Therefore a new function is necessary, which will set a boolean variable. This variable will tell the system not to validate the type on insert method, but it will be validated after insertion. You have to call the new function with the OnNewRecord and OnInsertRecord triggers on the MNToDoCard page.
  - **Note:** If you are not planning to use **To-do's** in MobileNAV, you don't need to merge this.
- **Table 5199 – Attendee:** When you create a new Attendee for a To-Do in a mobile application, the standard ValidateAttendee function runs on insert method. It generates a validation error, because the Attendee No. is missing on the insert method. A new function is necessary, which will set a boolean variable. This variable will tell the system not to run the ValidateAttendee function on insert method. Instead, ValidateAttendee will run on modify method. You have to call the new function with the OnNewRecord and OnInsertRecord triggers on the MNAttendeeCard page.
  - **Note:** If you are not planning to use **To-do's** in MobileNAV, you don't need to merge this.







- **Table 5767 – Warehouse Activity Line:** you need to make the "UpdateBreakbulkQtytoHandle" method to Public = Yes for MobileNAV usage. This is used on warehouse related documents, like Pick, Put-away or Movement.
  - **Note:** If you are not planning to use **Pick, Put-away or Movement** in MobileNAV, you don't need to merge this.
- **Table 5902 – Service Line:**
  - When using Component Replacement on a Service Line, there is a standard method (CheckIfServItemReplacement), what the base configuration needs to invoke, but it is LOCAL. We need to make it public.
    - **Note:** If you are not planning to use **Service Line with Component Replacement** in MobileNAV, you don't need to merge this.
  - If you use Reservation feature of Dynamics NAV, and you want to be able to use Service Lines within MobileNAV, then you need to escape showing the standard Reservation window of NAV, because it is not possible to open it from web services. In order to use Service Line with Reservation, we have to escape showing the Reservation windows with GUIALLOWED.
    - **Note:** If you are not planning to use **Service Line with Reservation** in MobileNAV, you don't need to merge this.
- **Codeunit 241 – Item Jnl.-Post:** When we post Item Journal Lines in Warehouse or Manufacturing module, then we use this standard codeunit. In order to invoke it from the web service we have to escape the CONFIRM or MESSAGE lines with GUIALLOWED.
  - **Note:** If you are not planning to post **Item Journals** in MobileNAV, you don't need to merge this.
- **Codeunit 1013 – Job Jnl.-Post Batch:** When we post Job Journal Lines in Job module, then we use this existing CU. In order to invoke it from the web service we have to escape the CONFIRM, Window.UPDATE or MESSAGE lines with GUIALLOWED.
  - **Note:** If you are not planning to post **Job Journals** in MobileNAV, you don't need to merge this.
- **Codeunit 5510 - Production Journal Mgt:** When using the Production Journal from MobileNAV, the DeleteJnlLines method is required, but it is a LOCAL method in this codeunit. We need to make it public.
  - **Note:** If you are not planning to use **Production Journal** in MobileNAV, you don't need to merge this.
- **Codeunit 6501 – Item Tracking Data Collection:** In order to utilize the Item Tracking in MobileNAV base configuration, you need to add/merge only one method (GetEntrySummary) to the codeunit.
  - **Note:** If you are not planning to use **Item Tracking** in MobileNAV, you don't need to merge this.
- **Page 6510 – Item Tracking Lines:** In order to utilize the Item Tracking in MobileNAV base configuration, you need to add/merge only two methods (GetTotalItemTrackingLine and SetTempItemTrackLineInsModDel) to the page code.

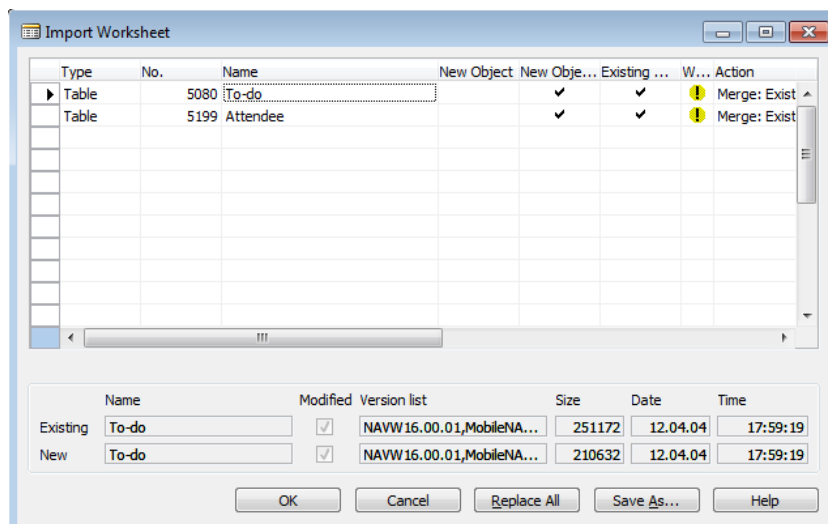




- **Note:** If you are not planning to use **Item Tracking** in MobileNAV, you don't need to merge this.
- **Report 204 – Sales - Quote:** when you print Sales Quote PDF, then NAV ask for creating follow-up To-Do, but confirmation messages should be escaped with GUIALLOWED flag.
  - **Note:** If you are not planning to print **Sales Quote PDF** in MobileNAV, you don't need to merge this.
- **Report 7305 - Whse.-Source - Create Document:** when you use Ad-hoc Movement feature of MobileNAV, it creates Warehouse Movement document with this standard codeunit. To immediately register the newly created Warehouse Movement, we need a new method called GetActivityNos to be able to query the newly created Warehouse document's No.
  - **Note:** If you are not planning to use the **Ad-hoc Movement** in MobileNAV, you don't need to merge this.

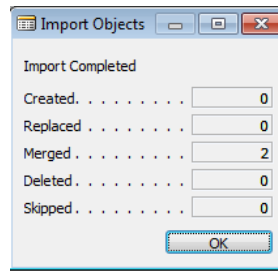
Apply these modifications as follows:

1. Launch Development Environment client, and open the proper database and company.
2. Open Object Designer (SHIFT + F12).
3. Go to the **File -> Import...** menu.
4. Browse the StandardObjectCustomizations . fob from the installation package.
5. Choose **Yes** to just import all objects, or choose **No** to launch the Import Worksheet where you can review the objects to be imported.



6. Click **OK**.  
The objects will be merged.
7. Confirm that each license object has been successfully merged.



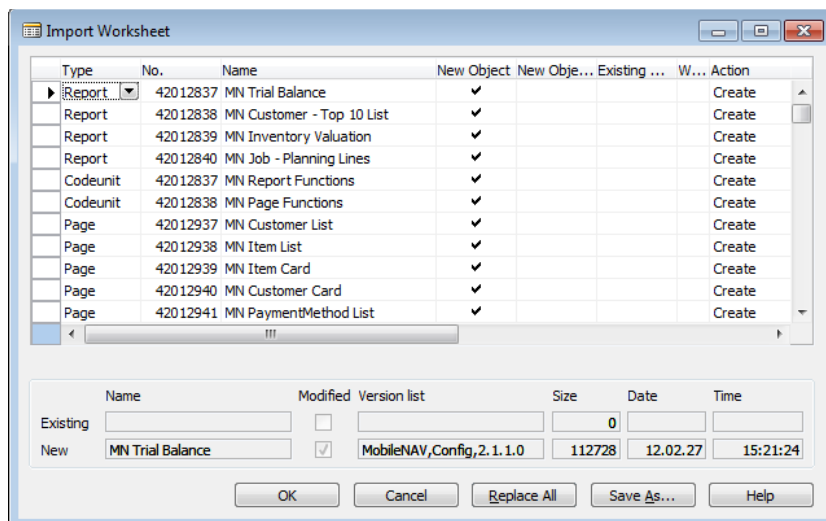


**Note:** if these objects have already been modified or customized, then you should apply these modifications manually.

#### 4. Import MobileNAV Configuration objects (pages, codeunits)

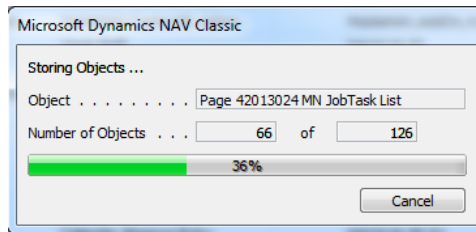
Import the configuration related objects, like pages and codeunits. You can either import your own/customized configuration objects, or import the base configuration provided by MultiSoft. Either way, the procedure is similar as described below:

1. Launch Development Environment client, and open the proper database and company.
2. Open Object Designer (SHIFT + F12).
3. Go to the **File -> Import...** menu.
4. Browse the MobileNAV Configuration Objects .fob from the installation package.
5. Choose **Yes** to just import all objects, or choose **No** to launch the Import Worksheet where you can review the objects to be imported.

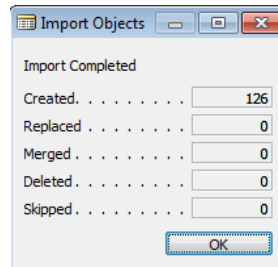


6. Click **OK**.  
The objects will be imported.

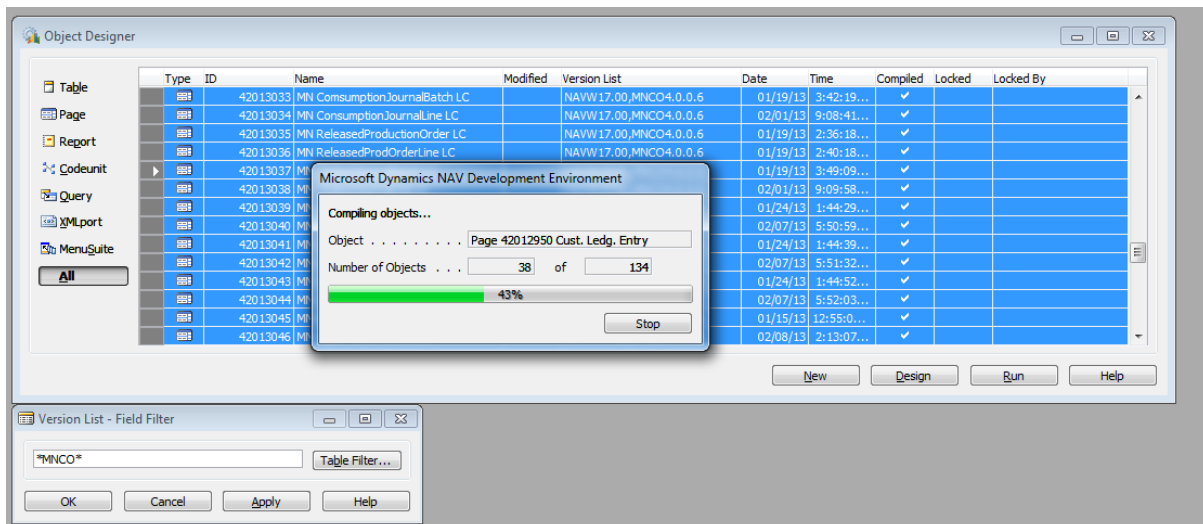




7. Confirm that all objects have been successfully created.



8. Recompile every MobileNAV Configuration objects.
  - a. In Object Designer, select All category on the left panel.
  - b. Apply **Table Filter** for **Version List** field, and set “\*MNCO\*” as filter.
  - c. Select all objects in the list.
  - d. Re-compile the selected objects (F11).



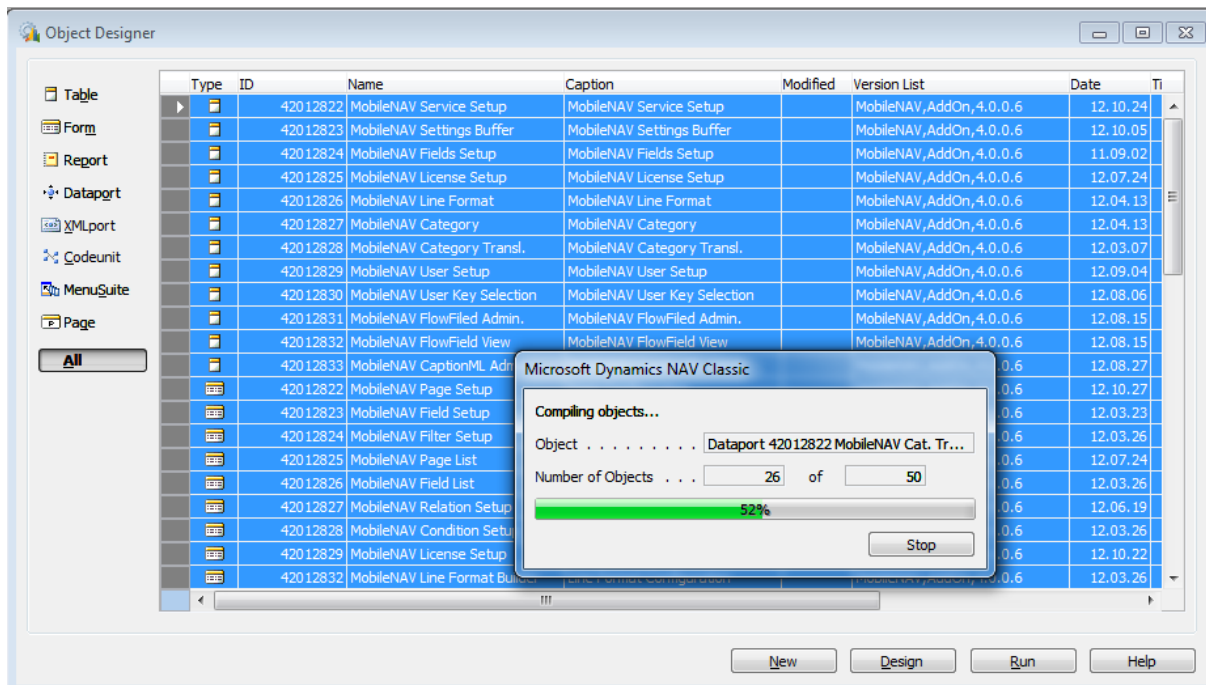
## 5. Compile MobileNAV objects

1. Recompile every MobileNAV objects:
  - a. In Object Designer select the **All** category on the left panel.





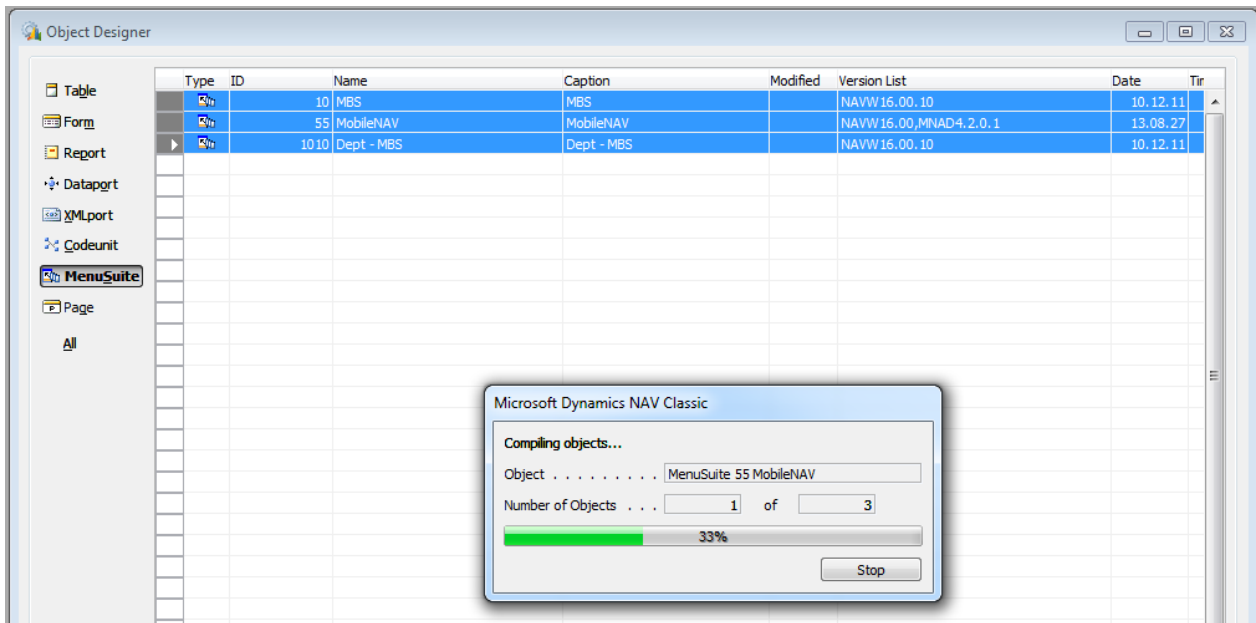
- b. Apply **Table Filter** for the **Version List** field, and set “\*MN\*” as filter.
- c. Select all objects in the list.
- d. Re-compile the selected objects (F11).



2. Recompile every MenuSuite objects:

- a. In Object Designer, select the **MenuSuite** category on the left panel.
- b. Do not apply any filter.
- c. Select all objects in the list.
- d. Re-compile the selected objects (F11).



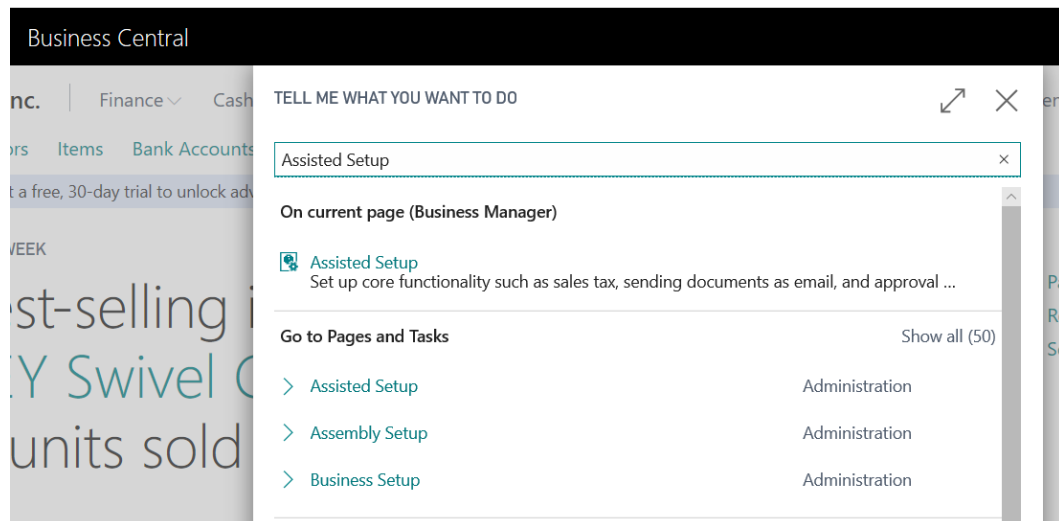


## 6. Set up MobileNAV with Assisted Setup

You can set up MobileNAV with an Assisted Setup, which drives you thru the necessary steps, or you can execute the necessary steps individually.

In this step you will execute the Assisted Setup for MobileNAV.

1. Launch Dynamics 365 Business Central SaaS, and log in with your account
2. Press **ALT + Q** for quick search **Assisted Setup**



3. Select the **“Set up MobileNAV”** Assisted Setup







Dynamics 365 Business Central Assisted Setup		
Assisted Setup		
Search Open in Excel More options		
NAME	STATUS	
Set up cash flow forecast	Not Completed	
Set up approval workflows	Completed	
Set up a customer approval workflow	Not Completed	
Set up email	Not Completed	
Set up email logging	Not Completed	
Set up your Business Inbox in Outlook	Not Completed	
Set up reporting data	Not Completed	
Set up an item approval workflow	Not Completed	
Set up Azure Active Directory	Not Completed	
Set up a payment approval workflow	Not Completed	
Set up Dynamics 365 for Sales connection	Not Completed	
Set up VAT	Not Completed	
Set up consolidation reporting	Not Completed	
Set up Intelligent Cloud	Not Completed	
Set up MobileNAV	Not Completed	

#### 4. Welcome screen: Press Next

MOBILENAV SETUP WIZARD

WELCOME TO MOBILENAV SETUP

To connect your system with MobileNAV client application, you must import your license, your configuration and you must setup a MobileNAV user first.

LET'S GO!

Choose Next so you can set up MobileNAV.

Back

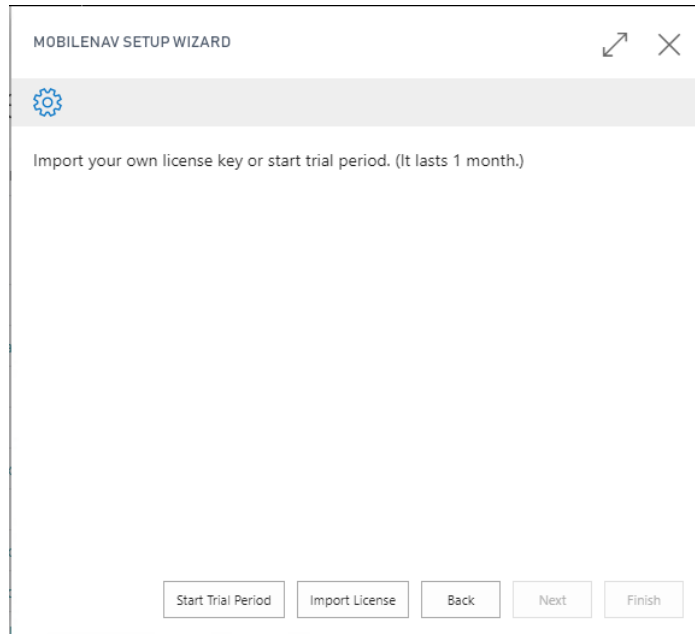
Next

Finish





5. **MobileNAV License:** Press **Start Trial Period** to start a trial period for 30 days with 5 devices or press **Import License** to import your MobileNAV License String you got from your Dynamics 365 Business Central partner or from MobileNAV Sales Team.



6. **MobileNAV Configuration:** Press **Import Config** and decide whether you want to import the Base Configuration of MobileNAV, or you would like to import a customized MobileNAV Configuration XML. In the second case, you need to browse the custom configuration XML file, and then the import will be started.





MOBILENAV SETUP WIZARD

Import your personalized configuration or our base configuration with button "Import Config".

Import Config Back Next Finish

MOBILENAV EDIT - CONFIGURATION HANDLING REPORT

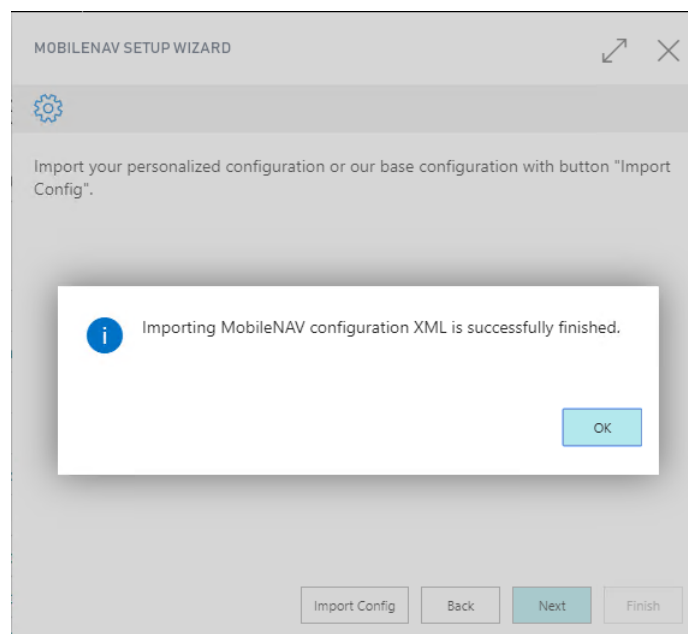
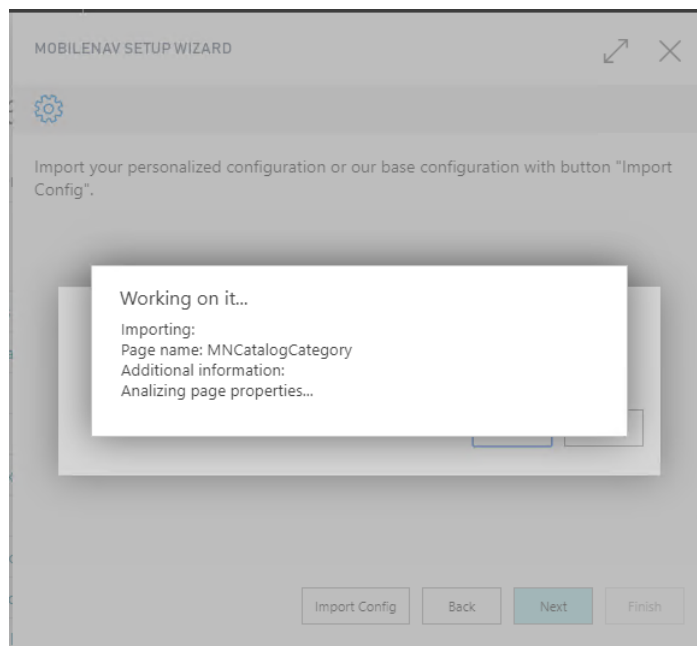
Processing Method

- Import Base Configuration
- Import Base Configuration
- Import Custom Configuration

OK Cancel

Import Config Back Next Finish





7. **MobileNAV Users:** in this step you can set up users for MobileNAV. First you need to choose an already existing user in Dynamics 365 Business Central. Please note that setting up the users in Dynamics 365 Business Central should be done prior this step.





MOBILENAV SETUP WIZARD

Add new MobileNAV user.

User ID ..... \*

Back Next Finish

After selecting the user, you need to assign a MobileNAV profile to the user.

In case you have imported the base configuration, you will see a “simplified” profile selector, where you need to select a profile (like Sales, Service, etc.), and a Login Mode (like Online, Offline or Auto Online/Offline).

MOBILENAV SETUP WIZARD

Add new MobileNAV user.

User ID ..... DEMO

Profile ..... Sales

Salesperson Code ..... \*

Login Mode ..... Online

Back Next Finish

In case you have imported a custom configuration, then you will see a slightly different screen,





where you need to assign at least one Profile, and after that you can press the **Set up User** where you can do the rest of the User Setup, like select Login Mode, etc.

The screenshot shows the 'MOBILENAV SETUP WIZARD' window. At the top, there is a gear icon and a close button. The main text says 'Add new MobileNAV user.' Below this, there are two input fields: 'User ID' with the value 'DEMO\_EN' and 'Profiles' with the value '0'. At the bottom, there are four buttons: 'Set up User', 'Back', 'Next', and 'Finish'.

8. If you want to set up additional users, press **New User**, or press **Finish** to finish the Assisted Setup.

The screenshot shows the 'MOBILENAV SETUP WIZARD' window. At the top, there is a checkmark icon and a close button. The main text says 'Add one more MobileNAV User or choose Finish to finalize MobileNAV setup.' At the bottom, there are four buttons: 'New User', 'Back', 'Next', and 'Finish'.

## 7. Set up MobileNAV “manually”

You can set up MobileNAV with an Assisted Setup, which drives you thru the necessary steps, or you can







execute the necessary steps individually.

These steps are the following:

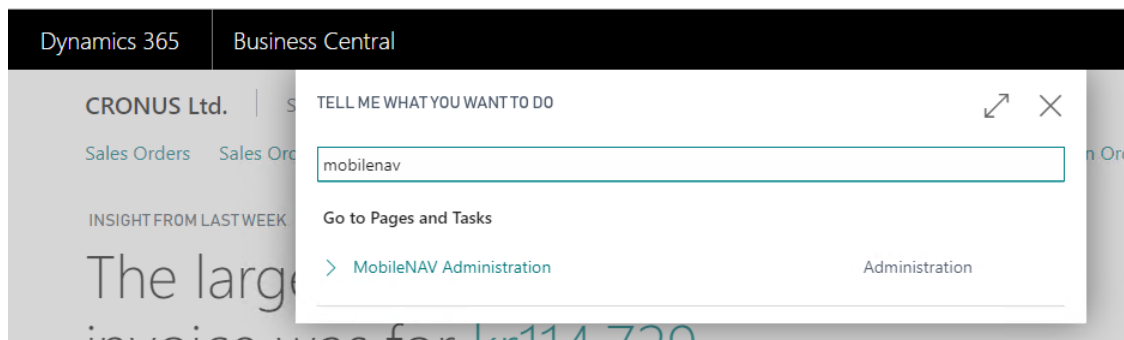
- Import MobileNAV License String
- Import MobileNAV Configuration
- Set up MobileNAV Users

### 7.1. Import MobileNAV License String

In this step you will import the MobileNAV License String. The MobileNAV License String can be ordered from your Dynamics 365 Business Central partner or from MultiSoft Ltd.

To import the MobileNAV License String, do the following:

1. Launch Dynamics 365 Business Central SaaS, and log in with your account
2. Press **ALT + Q** for quick search **MobileNAV Administration**





Dynamics 365 Business Central MobileNAV Administration

## MobileNAV Administration

Configuration Periodic Activities Setup Report More options

**CONFIGURATION**

162 Configured Pages

**OFFLINE COCKPIT**

0 Offline Modifications

**DEVICES**

0 All Devices 0 Active Devices 0 Standby Devices 0 Rejected Devices

**SETUP**

1 Users 0 Portal Users 20 Profiles 25 Categories

### 3. Select "All Devices"

DEVICE MANAGEMENT

Manage Process Report More options

STATUS	COMPANY	USER ID	DEVICE ID	DESCRIPTION	CREATION DATE	LAST LOGIN DATE
(There is nothing to show in this view)						

### 4. Select "Process" -> "Change License"

DEVICE MANAGEMENT

Manage Process Report

Refresh Change License

STATUS	COMPANY
--------	---------

### 5. After confirming the message, a window opens where you can enter your MobileNAV License String





EDIT - CHANGE MOBILENAV LICENSE

Type or paste text below

Description .....

Copy and paste the MobileNAV License String you received via email.

Input text .....

OK

Cancel

6. Enter your MobileNAV License String, and press **OK**
7. Check the information section on the Device Management window, which shows information about your license

LICENSE INFORMATION

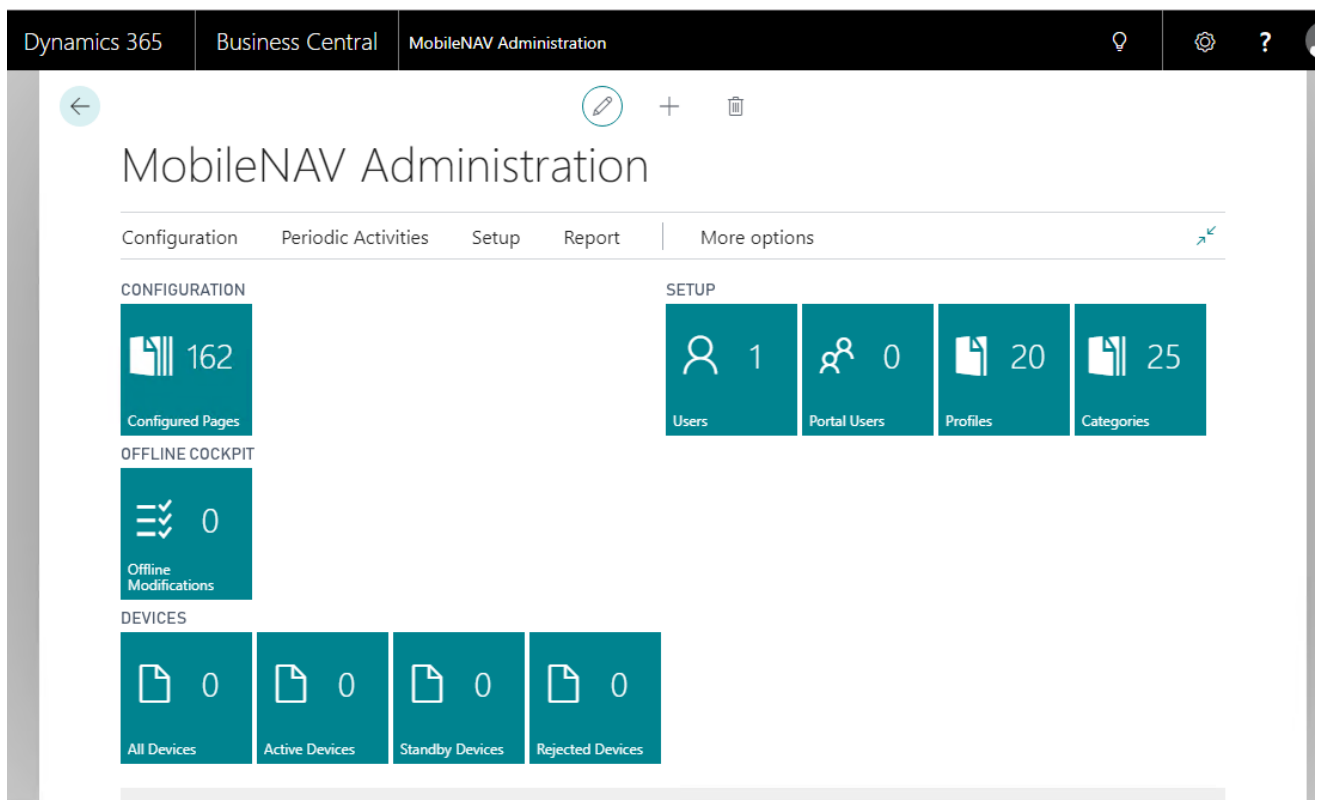
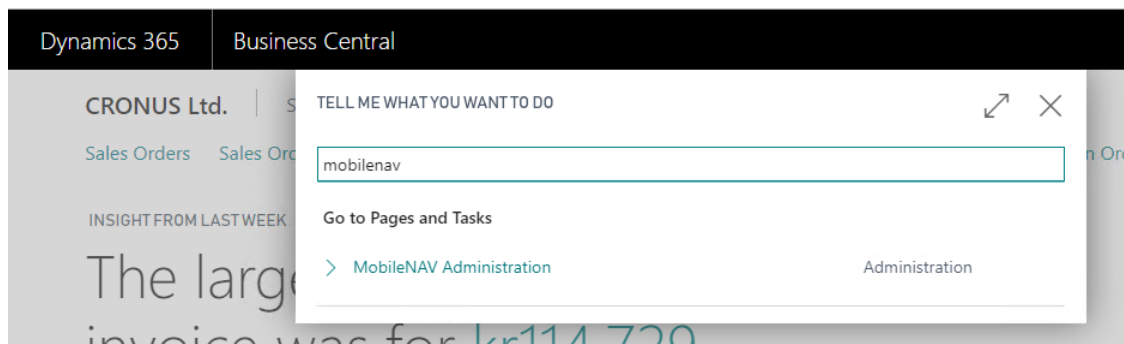
Available .....	1	Actual VOICE ID .....	5190947
Assigned .....	0	License Owner VOICE ID .....	5190947
Remaining .....	1	WarningMessage .....	
Schema Version .....	4		

## 7.2. Import MobileNAV Configuration

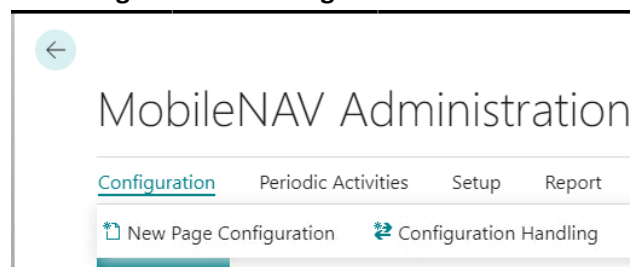
In this step you will import the MobileNAV Configuration. You can import a custom configuration, which has been customized and exported in another environment (like dev or test system), or you can import the base configuration.

1. Launch Dynamics 365 Business Central SaaS, and log in with your account
2. Press **ALT + Q** for quick search **MobileNAV Administration**





3. Select **"Configuration"** -> **"Configuration Handling"**



4. Select whether you want to import the base configuration, or you want to import a custom configuration

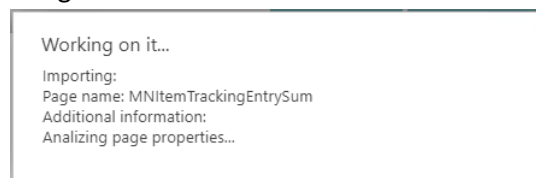




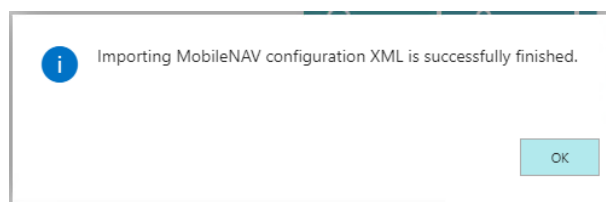
5. In case you have selected importing custom configuration, then you need to browse the configuration XML file



6. The import of MobileNAV configuration will start



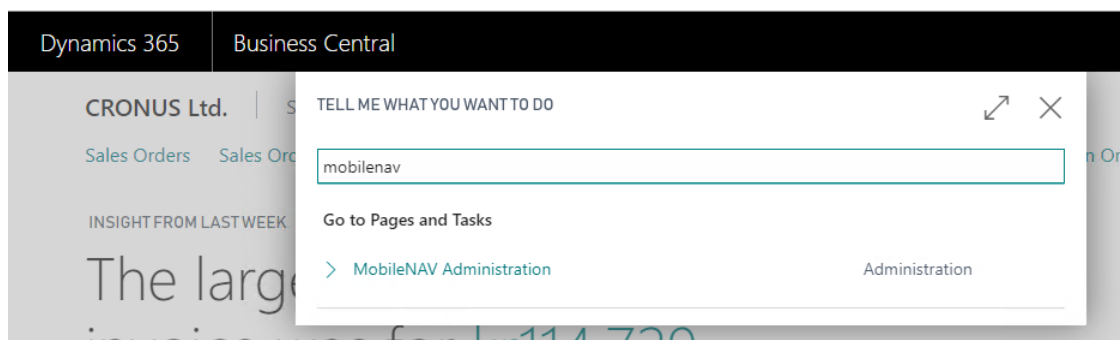
7. Wait until the import finishes



### 7.3. Set up MobileNAV users

In this step you set up MobileNAV users.

1. Launch Dynamics 365 Business Central SaaS, and log in with your account
2. Press **ALT + Q** for quick search **MobileNAV Administration**





Dynamics 365 Business Central MobileNAV Administration

MobileNAV Administration

Configuration Periodic Activities Setup Report More options

**CONFIGURATION**

162 Configured Pages

**OFFLINE COCKPIT**

0 Offline Modifications

**DEVICES**

0 All Devices 0 Active Devices 0 Standby Devices 0 Rejected Devices

**SETUP**

1 Users 0 Portal Users 20 Profiles 25 Categories

3. Select “Users”

User Setup

Search + New Edit List Delete Process Report Show Attached Open in Excel

USER ID	WEB SERVICES ACCESS KEY	SALESPER... CODE	SALESPERSON NAME	SERVICE RESOURCE FILTER	LOCATION CODE	NO. SERIES	PROFILES	DEFAULT LANGUAGE CODE
(There is nothing to show in this view)								

4. Press “New”







5. Select the already existing Dynamics 365 Business Central user for User ID column
6. Select at least one profile for the user. MobileNAV base configuration contains thematic profiles separately for sales, service, warehouse, purchase, production, project, marketing and finance. For each profile, we have created an “online” and an “offline” version. The “online” version does not cache or download offline data (only certain lookup pages), so if the device loses the connection, then you cannot work. The “offline” version does download most of the offline data, but you need to optimize and filter the offline pages if necessary, otherwise the client app would download too much data.

PROFILES + New	
CODE	DESCRIPTION
MARKETING OFFLINE	Marketing Offline
MARKETING ONLINE	Marketing Online
PRODUCTION OFFLINE	Production Offline
PRODUCTION ONLINE	Production Online
PURCHASE OFFLINE	Purchasing Offline
PURCHASE ONLINE	Purchasing Online
SALES OFFLINE	Sales Offline
SALES ONLINE	Sales Online
SERVICE OFFLINE	Service Offline
SERVICE ONLINE	Service Online
WHS_ADV OFFLINE	Warehouse Advanced Offline
WHS_ADV ONLINE	Warehouse Advanced Online
WHS_BASIC OFFLINE	Warehouse Basic Offline
WHS_BASIC ONLINE	Warehouse Basic Online

7. Fill out those columns which makes sense for the type of user you have selected
  - a. Salesperson Code: for sales and marketing users
  - b. Service Resource Filter: for field service users
  - c. Location Code: for warehouse users
  - d. GPS Tracking Enabled: for users whose GPS position should be reported to the server
  - e. Movement Worksheet Name and Movement Journal Name: for warehouse users who are willing to use Ad-hoc Movement





- f. Job Journal Template and Job Journal Batch: for project users
8. Turn **On** or **Off** the Background Synchronization of MobileNAV for the user, or leave it on “**By Client**”, the mobile user can device it
9. Select Login Mode for the user:

BACKGR... SYNCHR...	LOGIN MODE	CONNEC... STATUS MONITOR... INTERVAL	J J T
By Client	By Client ▼	By Client	
	By Client		
	Online		
	Offline		
	Online/Offline		
	Auto Online/Offline		
	Strict Auto Online/Offline		

- a. **By Client:** the user can decide
  - b. **Online:** the user will be forced to log into online mode always
  - c. **Offline:** the user will be forced to log in offline mode always
  - d. **Online/Offline:** the user can use both online and offline mode via using the Go Online or Go Offline in MobileNAV
  - e. **Auto Online/Offline:** the user will be forced to use Auto Online-Offline mode, he cannot change these settings on his device.
  - f. **Strict Auto Online/Offline:** the user will be forced to use Auto Online-Offline mode in strict mode, he cannot change these settings on his device. Strict mode means, that if the user has pending offline changes, which are not uploaded yet, then he is not allowed to execute any online feature.
10. If you have selected Online or Auto Online/Offline as Login Mode, then you can also select **Connection Status Monitoring Interval**, which specifies how frequently should the MobileNAV app check the connection to the server, or you can leave it as “By Client”, so the user can set the value on the device.

eport		Show Attached	Open in Excel
BACKGR... SYNCHR...	LOGIN MODE	CONNEC... STATUS MONITOR... INTERVAL	JOB JOURNAL TEMPLA1
On	Auto Online/C	10 sec ▼	
		By Client	
		5 sec	
		10 sec	
		30 sec	
		60 sec	

## 8. Import MobileNAV Configuration translations

Import the translations of the configuration object. MultiSoft provides translations for the base configuration objects in many languages. If you imported the base configuration in the previous step you can import the translation for other languages.



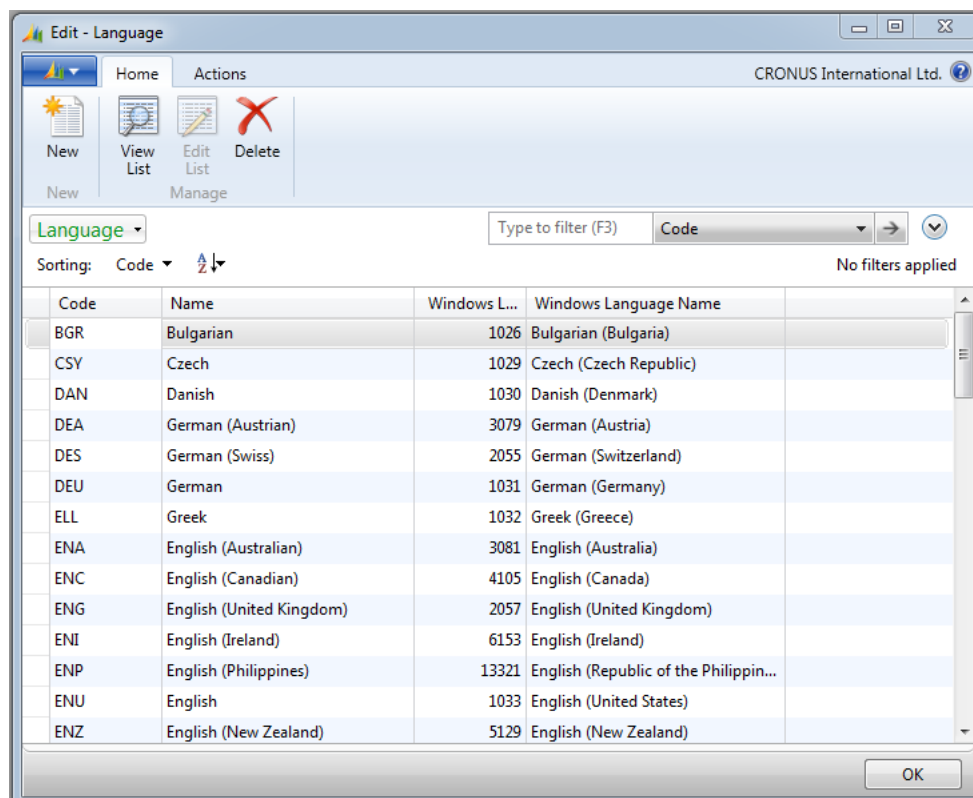


## 8.1. Check installed languages

As a preparation, check what installed language modules are available in your NAV system. Go to the **Tools** -> **Language...** menu in Development Environment to see the Application Languages list.



For these languages you need to know the Language Code and the Windows Language ID. To check these codes, run the Language (8) table.



If the installation package already contains the translations for your installed languages, then you can skip the next step.



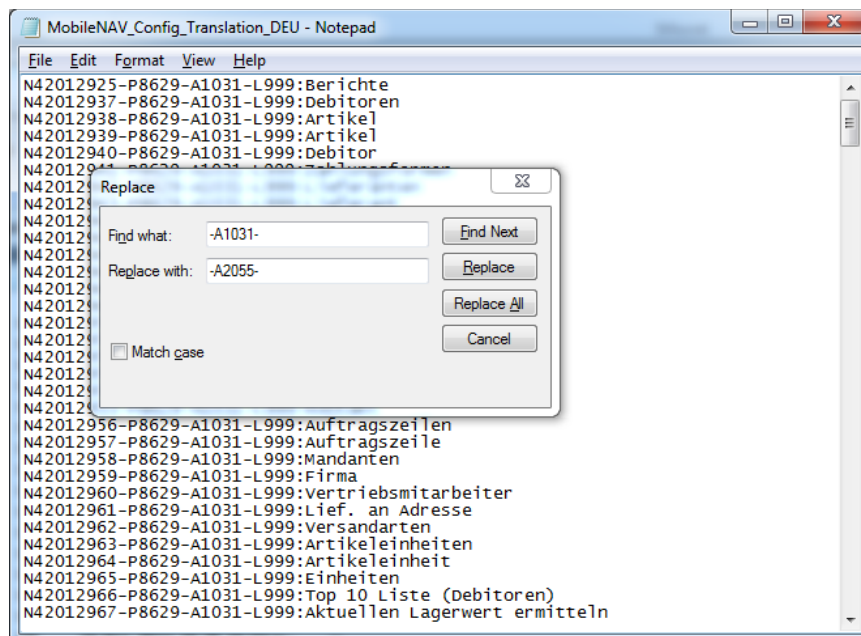


## 8.2. Prepare translation files

For example if you are having German (Swiss) language installed in your NAV system, then the Language Code will be DES, and the Windows Language ID is 2055.

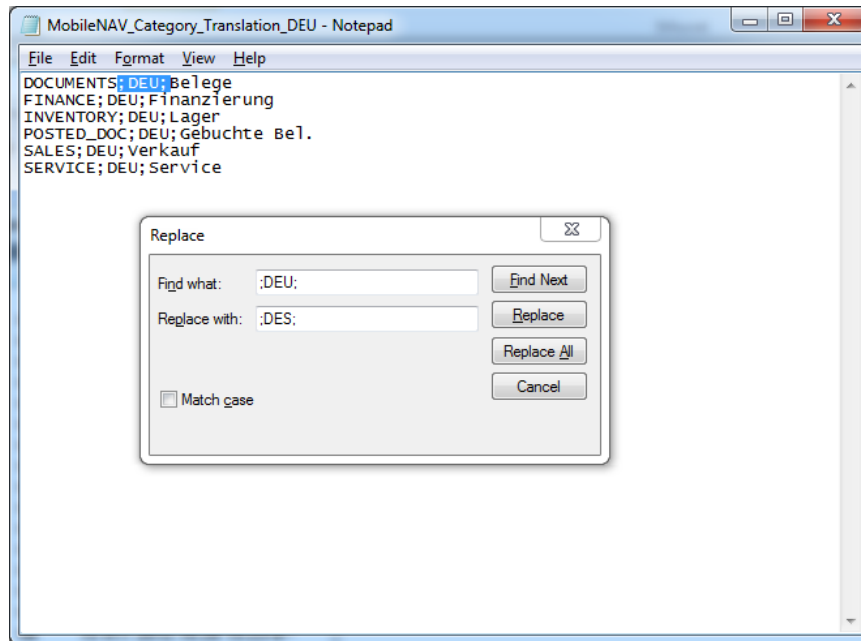
Since MultiSoft provides the translation for German language (DEU, 1031), you must adjust the translation text files before you try to import it for German (Swiss). Here are the steps for that:

1. Find MobileNAV Config Translation file for DEU in the MobileNAV installation package. The filename is MobileNAV\_Config\_Translation\_DEU.txt
2. Open the file in Notepad.
3. Click CTRL + H for Replace.
4. For "Find what" enter "-A1031-". This is the Windows Language ID of German.
5. For "Replace with" enter "-A2055-". This is the Windows Language ID of German (Swiss).



6. Click **Replace All**.
7. Go to **File -> Save As...**
8. For filename set e.g.: MobileNAV\_Config\_Translation\_DES.txt
9. Find MobileNAV Category Translation file for DEU in the MobileNAV installation package. The filename is MobileNAV\_Category\_Translation\_DEU.txt
10. Open the file in Notepad.
11. Press CTRL + H for Replace.
12. For "Find what" enter ";DEU;". This is the Language Code of German.
13. For "Replace with" enter ";DES;". This is the Language Code of German (Swiss).





14. Click **Replace All**.
15. Go to **File -> Save As...**
16. For filename, type `MobileNAV_Category_Translation_DES.txt`

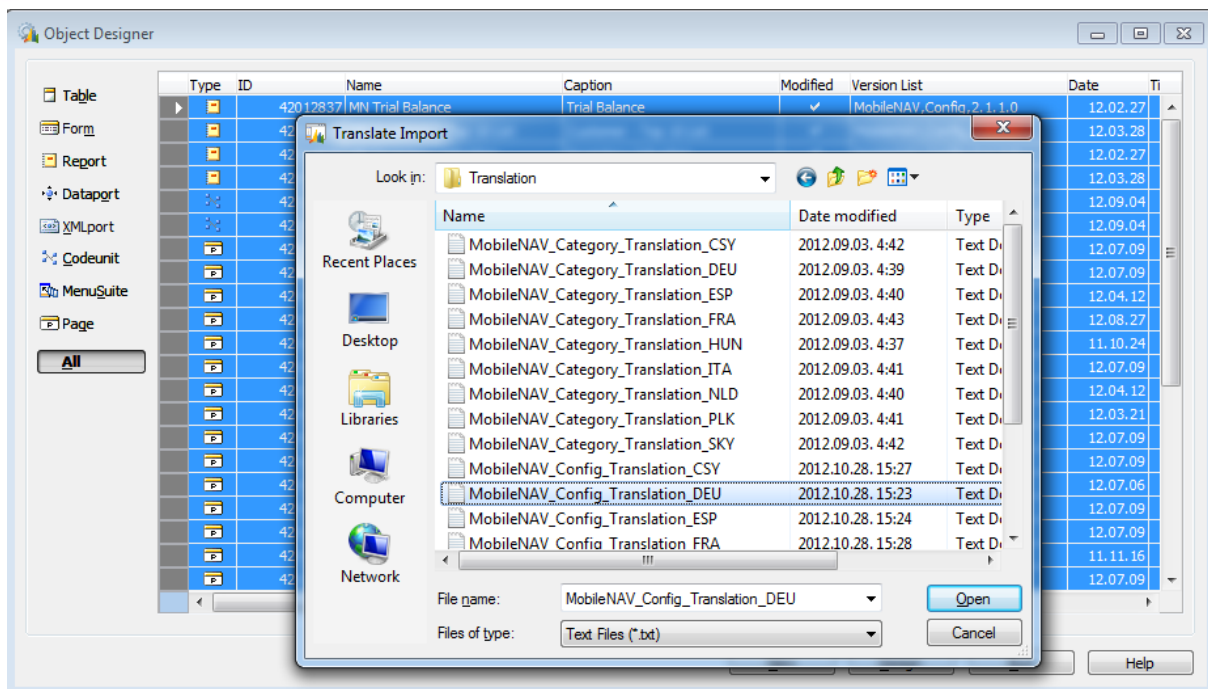
If you have prepared the translation files for all of your installed languages, you can start importing them.

### 8.3. Import configuration translations

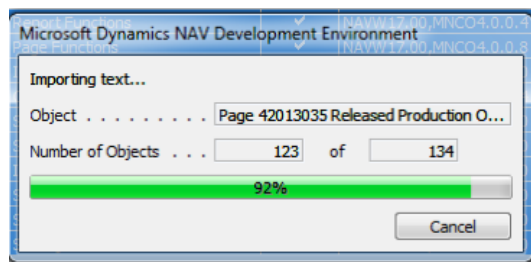
For importing the configuration translations, do the following:

1. Launch Development Environment client, and open the proper database and company.
2. Open Object Designer (SHIFT + F12)
3. Select the **All** category on the left panel.
4. Apply **Table Filter** for the **Version List** field, and set “\*MNCO\*” as filter.
5. Select all objects in the list.
6. Go to the **Tools -> Translate -> Import...** menu.
7. Browse to the configuration translation file and click **Open**.

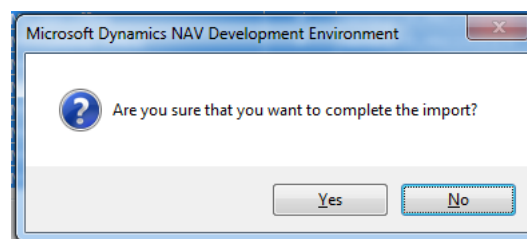




The translation file will be imported.



8. Click **Yes** to apply the translation.

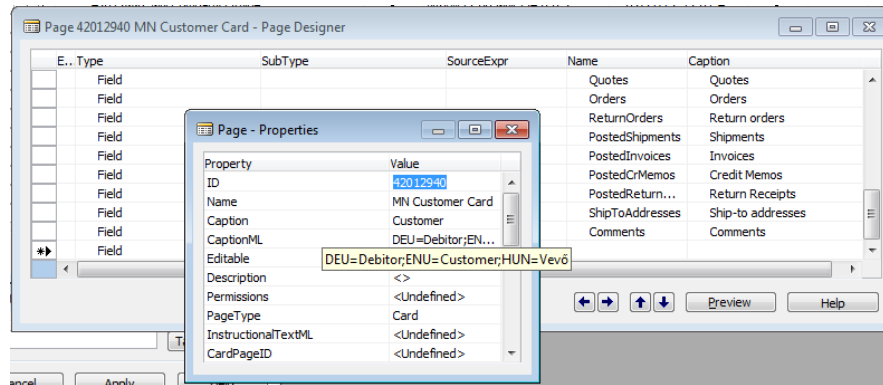


9. Check whether the translation has been successfully imported.

- Select for example, MN Customer Card (page: 42012940).
- Click **Design**.
- Find the **Orders** field name.
- Press **SHIFT + F4** for properties.
- Verify that the field has the proper translation in the CaptionML property.





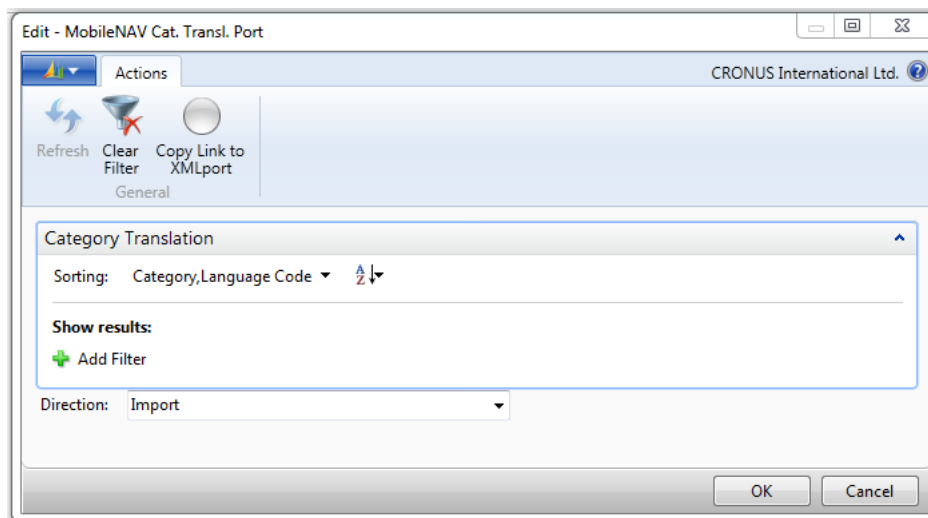


Repeat these steps for each installed languages that you have, except for English (United States), because the ENU translation is included in the configuration objects.

#### 8.4. Import category translations

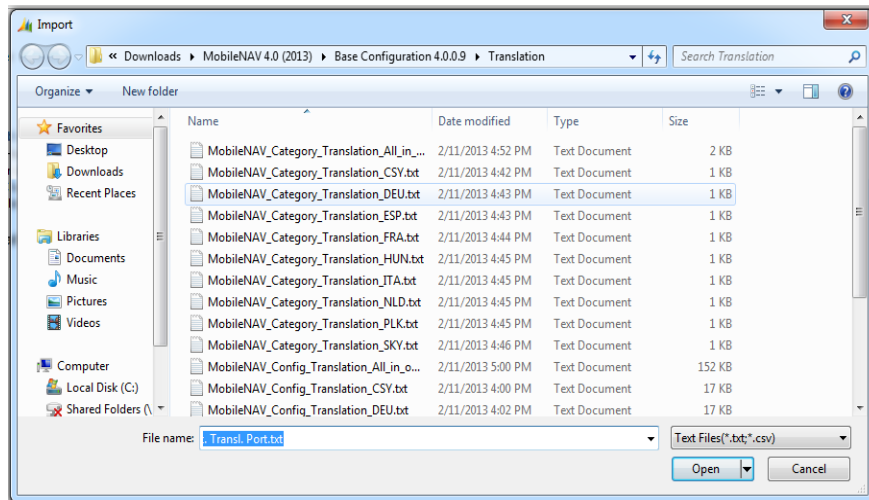
To import the configuration translations, do the following:

1. Launch RTC client, and open the proper database and company.
2. Go to **Departments** → **MobileNAV**.
3. Under Tasks/Periodic activities, select Category Translation Import.

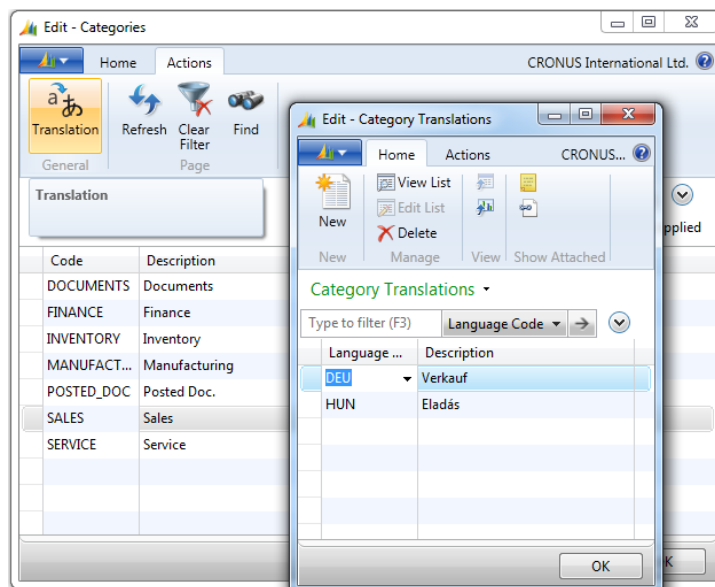


4. Leave **Import** selected.
5. Browse to the MobileNAV Category Translation TXT file in the installation package, or what you have previously prepared.





6. Click **Open**.
7. Verify that the translation of the categories have been successfully imported
  - a. Go to **Departments -> MobileNAV**.
  - b. Under Administration/Setup, select Categories.
  - c. Select for example, SALES.
  - d. Click **Translation**.
  - e. The translation for Sales has to be there for the language you have imported previously.



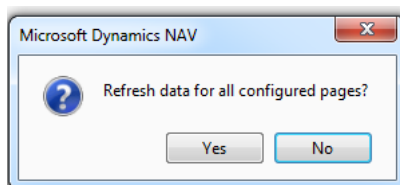
### 8.5. Refresh configuration

After importing all translations, you must refresh the configuration, because the underlying pages have been updated previously. Here are the steps for this:

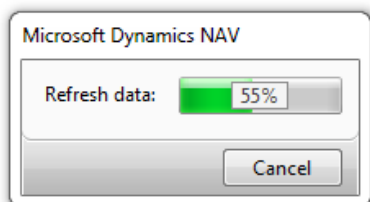




1. Launch RTC client, and open the proper database and company.
2. Go to **Departments -> MobileNAV**.
3. Under Tasks/Periodic activities, select Refresh all data for all configured pages.
4. Confirm that warning message by clicking **Yes**.



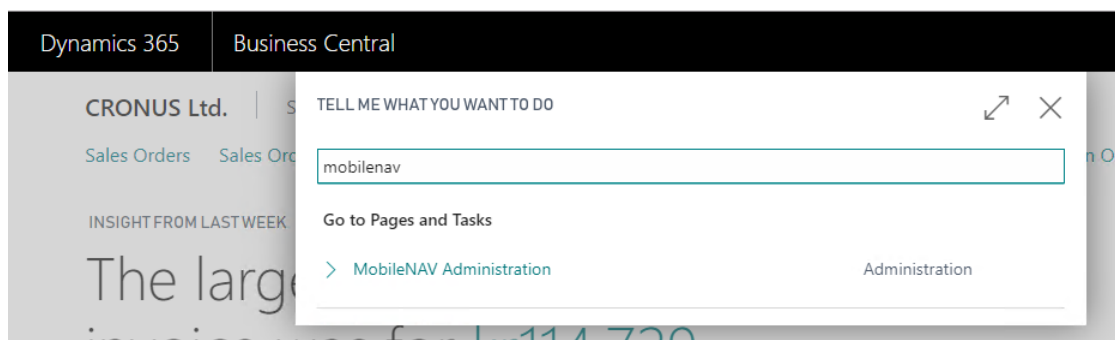
All pages will be refreshed.



## 9. Generate Login Configuration XML for MobileNAV client (optional)

Optionally, you can generate Login Configuration XML from the MobileNAV User Setup, and send that file to the client devices, so that the users can import it, and it will fill out most of the login parameters.

1. Launch Dynamics NAV or Dynamics 365 Business Central, and log in with your account
2. Press **ALT + Q** for quick search **MobileNAV Administration**





Dynamics 365 Business Central MobileNAV Administration

## MobileNAV Administration

Configuration Periodic Activities Setup Report More options

**CONFIGURATION**

162 Configured Pages

**OFFLINE COCKPIT**

0 Offline Modifications

**DEVICES**

0 All Devices 0 Active Devices 0 Standby Devices 0 Rejected Devices

**SETUP**

1 Users 0 Portal Users 20 Profiles 25 Categories

### 3. Select "Users"

USER SETUP

Search + New Edit List Delete Process Report Page More options

USER ID	WEB SERVICES ACCESS KEY	SALESPER... CODE	SALESPERSON NAME	SERVICE RESOURCE FILTER	LOCATION CODE	NO. SERIES	PROFILES	DEFAULT LANGUAGE CODE	FIRST LOC
TESTUSER	:	PS	Peter Sadow			-	1		4/12/2015

### 4. Press "Process" -> "Generate Login Configuration"

USER SETUP

Search + New Edit List Delete Process Report Page More options

Generate Login Configuration Rapid Refresh f...ackground Sync. No. Series Profiles

USER ID	WEB SERVICES ACCESS KEY	SALESPER... CODE	SALESPERSON NAME	RESOURCE FILTER	LOCATION CODE	NO. SERIES	PROFILES	LANGUAGE CODE	FIRST LOC
TESTUSER	:	PS	Peter Sadow			-	1		-

### 5. Select the "Authentication Type", and fill and correct the fields for the Login Configuration



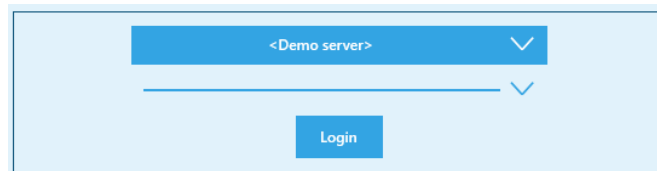


6. Press **“Generate Login Configuration File”** button to generate the XML file
7. If necessary, change the file extension to **“.mnlc”**
8. Send the file to the mobile device

## 10. Login with MobileNAV client application

Verify that everything is properly installed and configured. You will log in from the MobileNAV application to your Dynamics 365 Business Central server.

1. If you have chosen internal server with VPN connection, then first connect via VPN on the mobile device.
2. Launch the MobileNAV client application. By default, the login configuration selector will show **“<Demo server>”** which you will connect to the MobileNAV demo servers, where you can check the latest base configuration of MobileNAV.



3. Press the Login Configuration selector, which opens the Login Configuration list
4. Press **“Import”** to import the Login Configuration XML you have generated in MobileNAV User Setup, or Press **“New”** to create a new Login Configuration





5. Depending on the Authentication Type of your Dynamics 365 Business Central, you can choose “User/Pw” or “O365”.
- In case of “User/Pw” you need to enter the following
    - Enter the user name to one of the configured MobileNAV user’s login name.
    - Enter the password to one of the configured MobileNAV user’s password.
    - Enter the domain to your domain name. Leave it empty if you are using Business Central Authentication.
  - In case of “O365” you need to enter the following:
    - Enter the Tenant ID**, which is the URL friendly name or the GUID of the Azure Active Directory.

You can find this under

- Azure Active Directory -> Properties -> Name (like: mobilenavtest2.onmicrosoft.com) or
- Azure Active Directory -> Properties -> Directory ID (like: 351e143e-a0d2-45c8-87a4-66c4aac5a966)

- Enter the App ID**, which is the Application ID (GUID) of the Native App registration of the Azure Active Directory. It is important that the App registration’s Application Type is Native, and not “Web app / API”. You can find this under Active Directory -> App registrations.







Home > mobilenavtest2 - App registrations

### mobilenavtest2 - App registrations

Azure Active Directory

Search (Ctrl+/)

- Roles and administrators
- Enterprise applications
- Devices
- App registrations**
- App registrations (Preview)

+ New application registration   Endpoints   Troubleshoot

The preview experience for App registrations is available. Click this banner to launch the preview experience. →

Search by name or AppID   All apps

DISPLAY NAME	APPLICATION TYPE	APPLICATION ID
MO mobilenavtest2	Native	0ce2ae0-e5c7-460c-a386-ad2540312df4

In case of Business Central SaaS, this App registration needs to have permission to “Dynamics 365 Business Central”. You can find this under Active Directory -> App registrations -> {Native App registration} -> Settings -> Required permissions.

Home > mobilenavtest2 - App registrations > mobilenavtest2 > Settings > Required permissions > Enable Access

### Settings

Filter settings

- GENERAL
  - Properties >
  - Redirect URIs >
  - Owners >
- API ACCESS
  - Required permissions** >

### Required permissions

+ Add   Grant permissions

API	APPLICATION PERM...	DELEGATED PERMIS...
Dynamics 365 Business Central	0	2
Windows Azure Active Directory	0	1

### Enable Access

Dynamics 365 Business Central

Save   Delete

☐ APPLICATION PERMISSIONS   REQUIRES ADMIN

No application permissions available.

☒ DELEGATED PERMISSIONS   REQUIRES ADMIN

- ☒ Access as the signed-in user   No
- ☒ Access as the signed-in user   No

In any other case, this App registration needs to have permission to a “Web app / API” type App registration. You can find this under Active Directory -> App registrations -> {Native App registration} -> Settings -> Required permissions.

Home > mobilenavtest - App registrations > O365\_Native > Settings > Required permissions > Enable Access

### Settings

Filter settings

- GENERAL
  - Properties >
  - Redirect URIs >
  - Owners >
- API ACCESS
  - Required permissions** >

### Required permissions

+ Add   Grant permissions

API	APPLICATION PERM...	DELEGATED PERMIS...
O365	0	1
Windows Azure Active Directory	0	1

### Enable Access

O365

Save   Delete

☐ APPLICATION PERMISSIONS   REQUIRES ADMIN

No application permissions available.

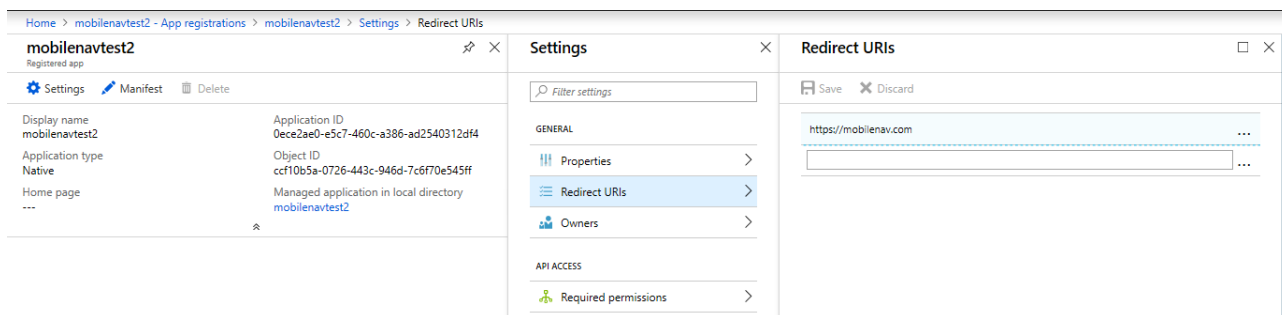
☒ DELEGATED PERMISSIONS   REQUIRES ADMIN

- ☒ Access O365   No

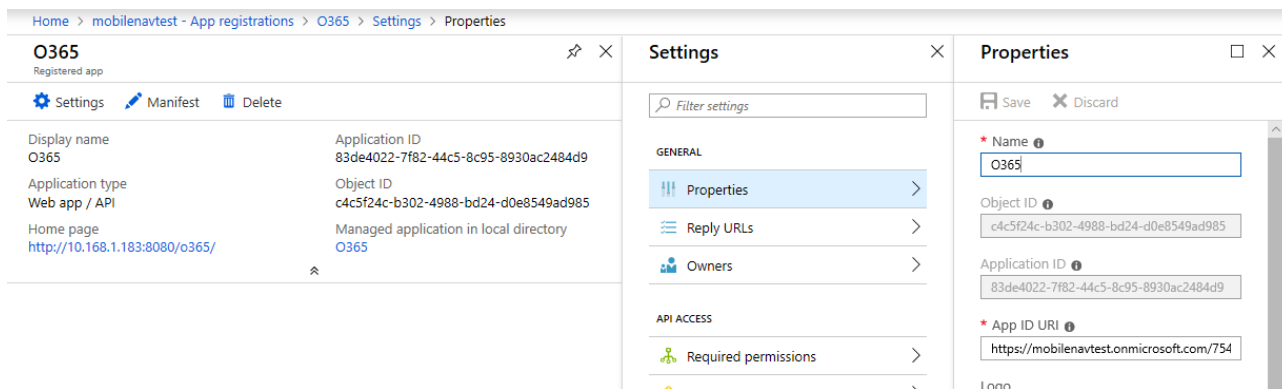




- iii. **Enter Redirect Uri**, which is (one of) the Redirect URI of the Native App registration specified in App ID. You can find this under Active Directory -> App registrations -> {Native App registration} -> Settings -> Redirect URIs. The Redirect URI can be anything, like “https://mobilenav.com”.



- iv. **Enter App ID Uri**, which is the App ID Uri of the “Web app / API” type App registration.
- In case of Business Central SaaS, there is a built-in “Web app / API” App registration, and you need to enter: “https://api.businesscentral.dynamics.com”
  - In case of any other type of NAV, you have a “Web app / API” type App registration, and you can find this information under: Active Directory -> App registrations -> {Web app /API App registration} -> Settings -> Properties -> App ID Uri.



6. Check the **Use SSL** option if you have configured the server’s SOAP web services with SSL encryption.
7. Enter the server and the port address of your server’s SOAP web service. Please note that if you





choose to use internal server with port forwarding, then you need to replace the computer name with the external address.

8. Enter the instance to the instance name you have set for server.
9. Enter the company to the company name that you want to connect to.

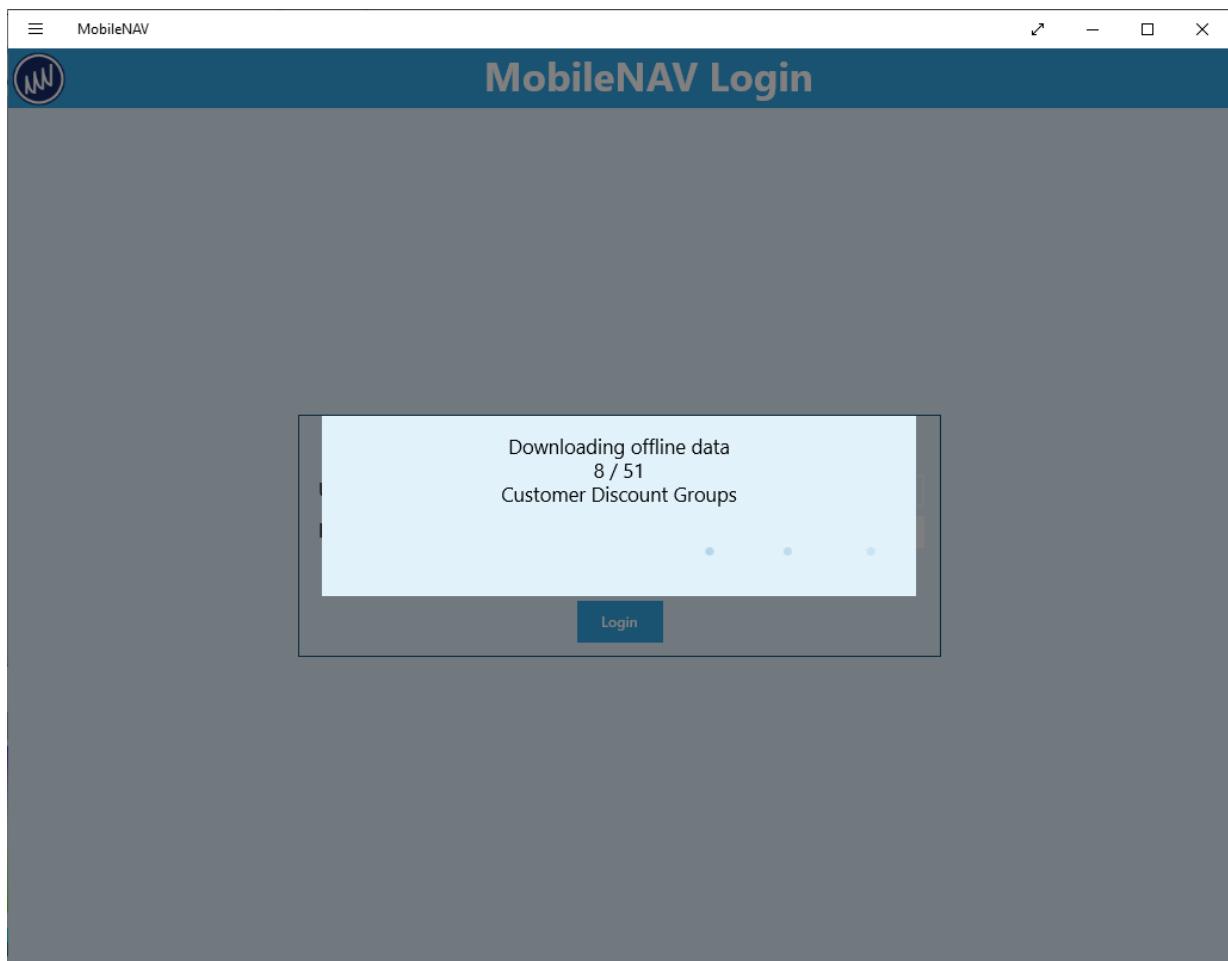
The image shows two side-by-side screenshots of the 'Login config' form. The left form is for 'My server - sales' and the right form is for 'BC Saas - testuser'. Both forms have fields for Name, Auth type (User/Pw or O365), User name, Password, Domain, Use SSL, Server, Instance, Tenant, and Company. The left form has a 'Save password' checkbox and 'Copy', 'Help', 'Save', 'Delete', and 'Cancel' buttons. The right form has 'Copy' and 'Help' buttons and 'Save' and 'Cancel' buttons.

10. Press **Save** to save the Login Configuration. At this point MobileNAV will test the connection to the server. If the credentials you have provided are proper, then the new Login configuration will be stored and selected, and you will go back to the Login screen automatically.

The image shows a screenshot of the Login screen. At the top, there is a dropdown menu showing 'My server - sales'. Below it are fields for 'User name:' (sales) and 'Password:' (masked with dots). At the bottom, there is a 'Login' button.

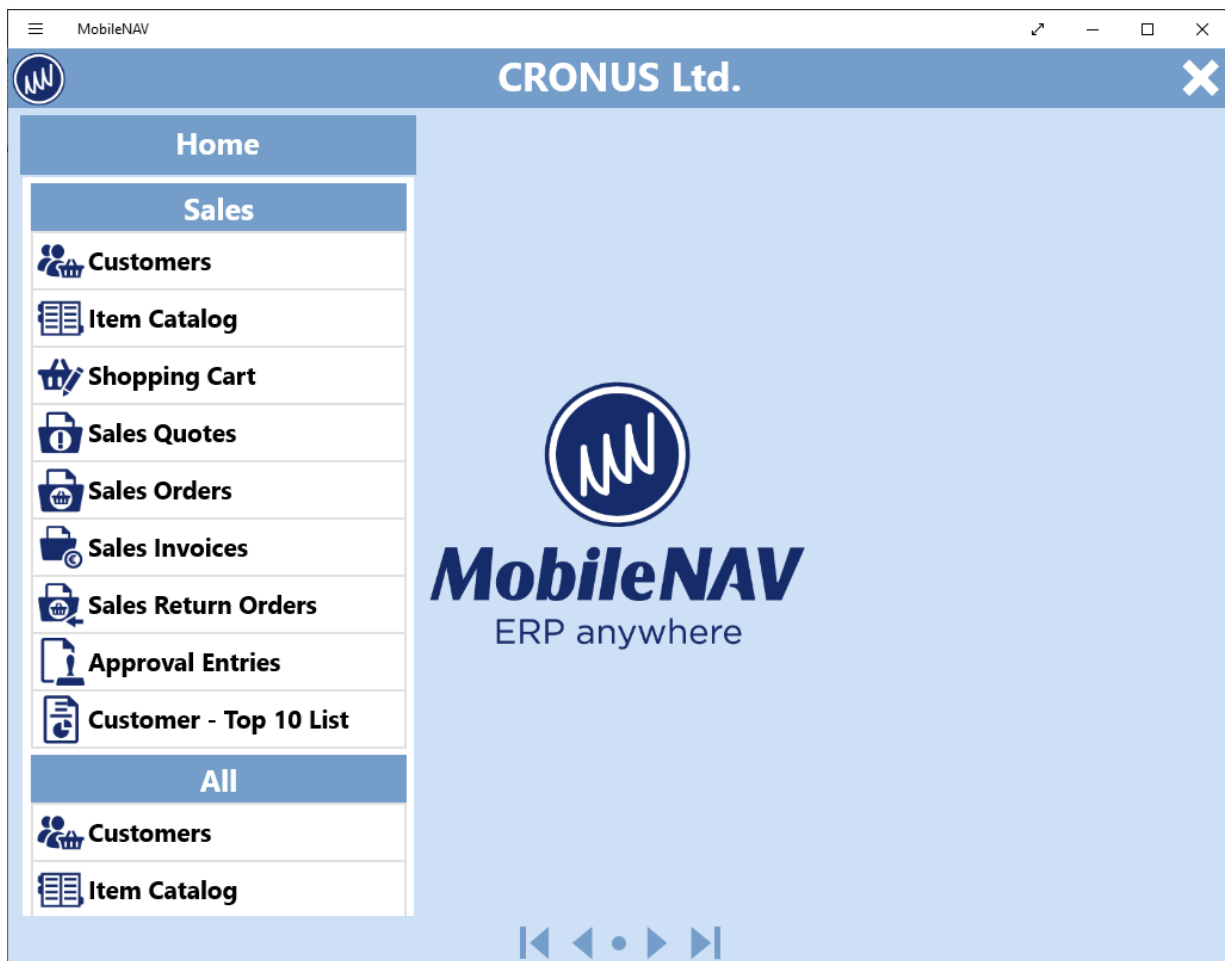
11. Click **Login**.
12. Wait until the login takes place.





13. Verify that you have successfully logged in.





Typical errors during log in include the following:

- Invalid credentials: the user name, password or the domain that you have entered is invalid.
- Connection to the server failed: the SSL, server, or port that you have entered is invalid.
- Invalid instance name: the instance name that you have entered is invalid.
- Invalid company name or the server is not MobileNAV compatible: the company name that you have entered is invalid or the MobileNAV solution is not properly installed and configured.

## Uninstalling MobileNAV solution

### 1. Uninstall MobileNAV Component setup

MobileNAV has a separate DLL component for licensing. This component must be uninstalled from the PC where the Service Tier is installed and running. Furthermore, you also need to uninstall from the PCs where

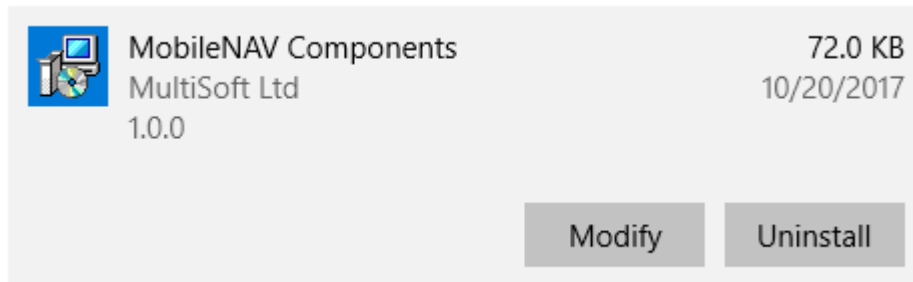




you have installed the MobileNAV component DLL for the Development Environment.

To uninstall the MobileNAV component, follow the instructions below:

1. Go to Add or remove programs
2. Find the “MobileNAV Components”, and press Uninstall



3. Wait until the uninstall finishes

### 1. Delete MobileNAV objects

In order to successfully remove the MobileNAV Add-on objects, you need to delete all objects within the MobileNAV object range 42012822..42013162.

To delete all MobileNAV Add-on range objects, follow the instructions below:

1. Open the Development Environment
2. Open Object Designer
3. Filter for objects, where ID = 42012822..42013162
4. press Delete with Force option

### 2. Un-merge or restore original standard objects

All standard objects modifications do not require any MobileNAV related objects. They will continue to compile even without any single MobileNAV objects. These modifications are only in order to use a certain functionality from NAV web service. So it is not necessary to remove these changes, but if you still want to do so, then either restore the original standard object modification, or remove the changes manually according to the comments.

## Backup and Restore

MobileNAV does not have any external configuration file or data, so the standard Dynamics NAV backup and restore is enough.

## Hardware requirements







Since MobileNAV does not have any separate server side component, and it is just a light-weight Add-on of Dynamics NAV, its hardware requirements matches with the hardware requirement of the Microsoft Dynamics NAV product.

