

MODULE 3: USER PERSONALIZATION

Module Overview

This module introduces the general concepts of the user interface design in Microsoft Dynamics® NAV 2013. New users learn how to move from the Role Center and navigation panes, and also how to perform simple customizations of their windows and personal menu.

It is helpful for users to become familiar with how to perform simple customizations of their windows and personal menus. For anyone learning to use Microsoft Dynamics NAV 2013, it is a natural first step to learn the basic functions and how to move between windows to make the processes within the ERP system smoother.

Objectives


The objectives are:

- Explain how to Customize Microsoft Dynamics NAV 2013 user interface (UI).
- Browse and customize the list places.
- Change the look of windows in the program.

Personalization and Configuration

End-users perform *personalization* when they resize columns, customize the navigation pane, and add or remove FactBoxes.

An administrator, SUPER user, or Microsoft Certified Partner performs *configuration* tasks. This person configures the Role Center for a specific role and then assigns users to the Role Center. For example, when Susan, an order processor, uses the Windows client, she sees the Order Processor Role Center. This is customized to help her perform her daily tasks. In configuring Susan's Role Center, the administrator has added or removed UI elements, including items in the navigation pane, page parts, and FactBoxes.

 **Note:** Because the configuration of the Role Center is an administrator's task, it is covered in detail in the course Installation and Configuration in Microsoft Dynamics NAV 2013.


Customize the Ribbon

The actions shown in the ribbon depend on the page that is currently active. You can add, delete, or move actions on the ribbon.

You can customize the ribbons on all pages to fit the user's needs.

To create new tabs and groups in the ribbon, follow these steps:

1. Click the Microsoft Dynamics NAV **Application** menu > **Customize > Customize Ribbon**. You can also right-click the ribbon, and select **Customize Ribbon**.
2. Click **Create Tab**, and then type "Customize" as the new tab name.
3. Click **Create Group**, and then type "Personalization".
4. Click **OK**.

 **Note:** You must create at least one group before you can add actions to a tab on the ribbon. **If there are no actions in a group, the group is not shown.**

You can also personalize the ribbon by using the following options in the **Customize Ribbon** page:

- **Add** – add available actions to the ribbon actions.
- **Move Up / Move Down** – change the order of actions in the ribbon.



Note: You can add actions to the Role Center ribbon by right-clicking tasks or reports in the **Departments** menu, and then selecting **Add to Actions on Role Center Ribbon**.

Customize the Navigation Pane

You use the navigation pane to open list places that are designed for your user role.

From a list place, you can open individual cards or documents. The navigation pane displays one menu at a time. You use the activity buttons at the bottom of the pane to change from one menu to another.

The list places are grouped by the activity to which they belong. **Home** is the group of list places you use most frequently. You can create a new group, and place the relevant list places in that group.

Add and Arrange a Navigation Pane Button

To add and arrange a navigation pane button, follow these steps:

1. Click the **Application** menu, click **Customize**, and then click **Customize Navigation Pane**.
2. Click **New**.
3. In the **Name** field, enter Favorites.

4. Select an icon from the list.
5. Click **OK**.

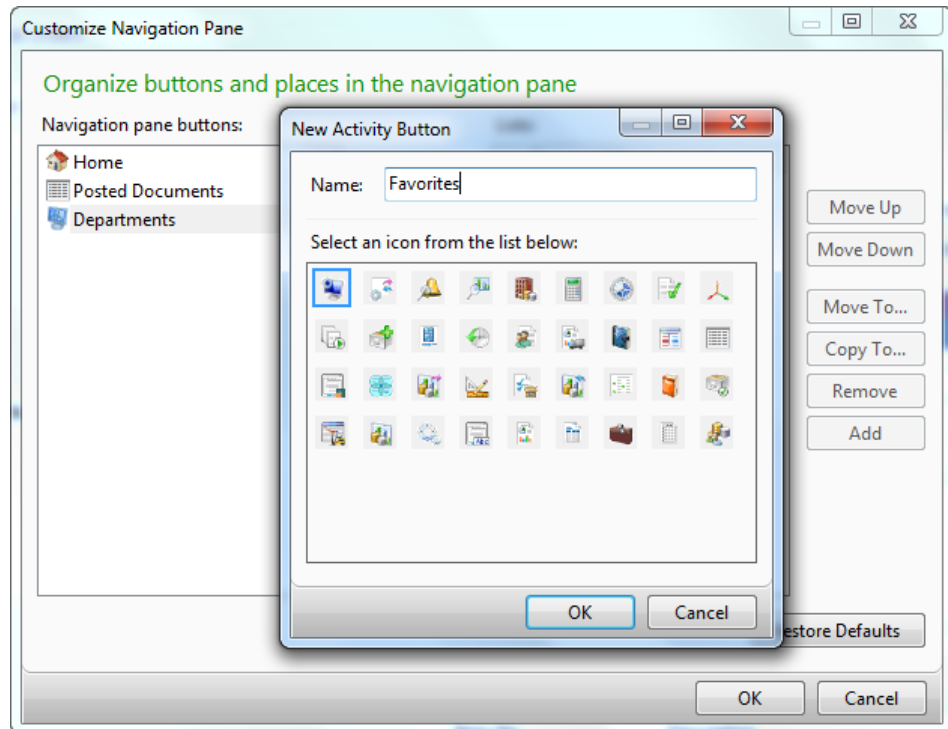




FIGURE 3.1: CUSTOMIZE NAVIGATION PANE – ADD BUTTON

6. Click **OK**.
7. Click the **Move Down** button.
8. To add a list place, click **Add**.
9. Expand **Financial Management**, and then expand **General Ledger**.
10. Select **Chart of Accounts**, and then click **OK**.
11. Click **OK**.
12. Restart the program by clicking **Yes**.

 **Note:** The new navigation pane button is not visible until at least one list is added.

 **Note:** You cannot rename, move, or remove the **Home** buttons.

Remove a Navigation Pane Button

To remove the **Favorites** navigation pane button, follow these steps:

1. Click the **Application** menu > **Customize** > **Customize Navigation Pane**.
2. Select the Favorites icon.
3. Click **Remove**.
4. Click **OK**.
5. Restart the program by clicking **Yes**.

Restore Defaults

You use the **Restore Defaults** function to delete all personalization settings. If you use this function on a configured page, your personalization settings are deleted, and the page is reverted to the configured version.

You can use the **Restore Defaults** function from every customize page.



Note: *If you want to restore a configured page of a specific profile to the default page object, you must open that profile in configuration mode and then use the **Restore Defaults** function for that page.*

To reinstate the default settings, follow these steps:

1. Click the **Application** menu > **Customize** > **Customize Navigation Pane**.
2. Click **Restore Defaults**.
3. Click **OK**.
4. Restart the program by clicking **Yes**.

Lab 3.1: Add a List Place to the Navigation Pane

Scenario

As the order processor at CRONUS International Ltd., you generally perform tasks in the sales order processes. Your profile has provided you with the corresponding available activity buttons in the navigation pane.

However, sometimes you have to perform some tasks outside your usual job description. You want to perform the following tasks from the navigation pane:

- Send out mailing lists, by using the **Segments** and **Contacts** of the Marketing application area.
- Process a **Purchase Order**, for the supply of office material or a specific order related to a sales order.
- Process and follow up on Approval Request Entries and Approval Entries.

High Level Steps

1. Open the **Customize Navigation Pane** page, and add the required list places to the **Home** group.

Detailed Steps

1. Open the **Customize Navigation Pane** page, and add the required list places to the **Home** group.
 - a. Click the **Application** menu > **Customize** > **Customize Navigation Pane**.
 - b. In the navigation pane, click **Home**.
 - c. Click **Add**.
 - d. Click **Sales Marketing** > **Marketing** > **Segments**, and then click **OK**.
 - e. Click **Add**.
 - f. Click **Sales Marketing** > **Marketing** > **Contacts**, and then click **OK**.
 - g. Click **Add**.
 - h. Click **Purchase** > **Order Processing** > **Purchase Orders**, and then click **OK**.
 - i. Click **Add**.

- j. Select **Sales Marketing > Order Processing > Approval Entries**, and then click **OK**.
- k. Click **Add**.
- l. **Sales Marketing > Order Processing > Approval Request Entries**, and then click **OK**.
- m. Click **OK** to close the **Customize Navigation Pane** page.
- n. Click **Yes** to restart the client.

When the client has restarted, you see the new list places available on the **Home** navigation pane button.

Customize This Page

Depending on the type of page from which the **Customize This Page** function was accessed, the following options are available:

- Starting from the **Role Center** page:
 - Add and remove parts on the Role Center.
 - Customize a part on the Role Center.

- Starting from a list page:
 - Display options
 - Arrange by
 - Choose columns
 - Add and remove FactBoxes
 - Customize a FactBox
 - Customize the ribbon

- Starting from a card page:
 - Display options
 - Add and remove FastTabs
 - Customize a FastTab
 - Add and remove FactBoxes
 - Customize a FactBox
 - Customize the ribbon

Display Options

To access the **Customize This Page** functionality from the **Customers** page, follow these steps:

1. On the navigation pane, click **Home** and then click **Customers**.
2. Click the **Application** menu > **Customize** > **Customize This Page**.
3. Click **Display Options**.

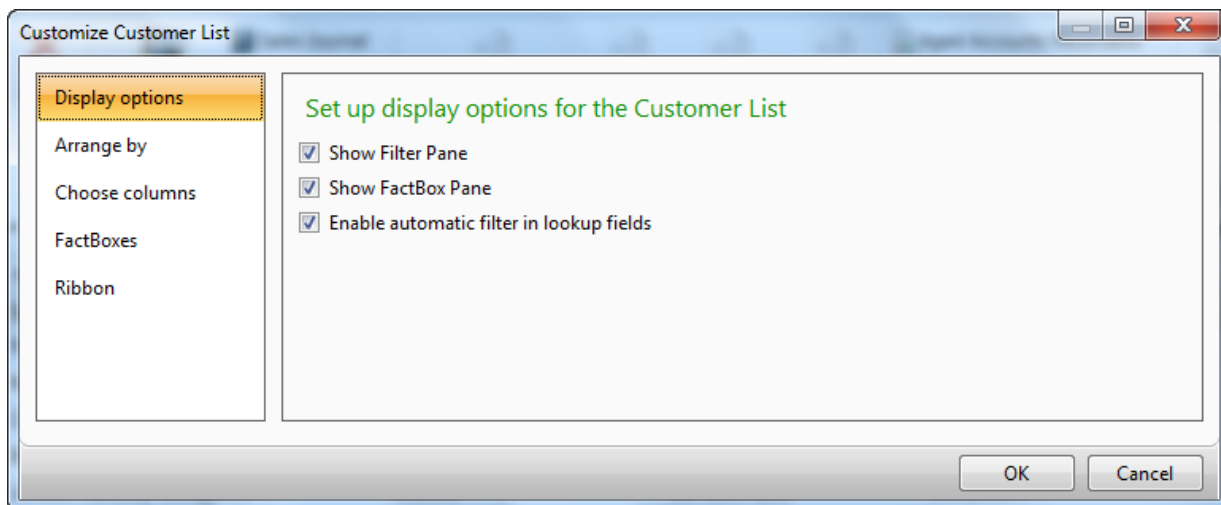


FIGURE 3.2: CUSTOMIZE THIS PAGE – DISPLAY OPTIONS

The following display options can be set up:

- **Show Filter Pane** – When this is selected, the Filter pane is available at the top of the page.
 - On list pages, the **Filter** pane shows the **Customer** button, a filter option, and sorting option. When you expand it, the advanced filter options are available.



FIGURE 3.3: CUSTOMERS PAGE – FILTER PANE

- On card pages the **Filter** pane shows the **Limit Totals To** filter option.

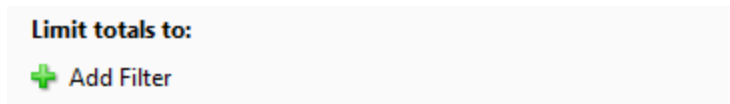


FIGURE 3.4: CUSTOMER CARD PAGE – FILTER PANE



Note: The module "Basic Functionalities" of this course discusses how to filter.

- **Show FactBox Pane** – When this is selected, the **FactBox** pane is available on the right side of the page. To determine which FactBoxes and to customize them, use the **FactBoxes** option of the **Customize This Page** function.
- **Enable automatic filter in lookup fields** – When this is selected, the lookup fields provide a list based on only the information already typed by the user. For example, when you enter a post code on the customer card and the user types "US", the lookup field shows only a list of post codes starting with US.

The screenshot shows the 'Customer Card' for 'Spotsmeyer's Furnishings' (Customer No. 01121212). The 'Post Code' field is set to 'US', and a dropdown menu is open showing a list of US cities and their corresponding post codes. The list includes Birmingham, Miami, Atlanta, Chicago, New York, and Columbia. The right-hand pane shows various statistics for the customer, including Sales and Service metrics.

Code	City	Search City	Country/...	County
US-AL 35242	Birmingham	BIRMINGH...	US	
US-FL 37125	Miami	MIAMI	US	
US-GA 31772	Atlanta	ATLANTA	US	
US-IL 61236	Chicago	CHICAGO	US	
US-NY 11010	New York	NEW YORK	US	
US-SC 27136	Columbia	COLUMBIA	US	

FIGURE 3.5: CUSTOMER CARD PAGE – POST CODE LOOKUP FIELD WITH AUTOMATIC FILTER

4. Click **OK** to apply the changes and to close the **Customize This Page** page.

Choose Columns on List Pages

You can select which columns are displayed in a list page. To access the **Choose Columns** functionality from the **Customers** page, follow these steps:

1. On the navigation pane, click **Home** and then click **Customers**.
2. Click the **Application** menu > **Customize** > **Customize This Page**.
3. Click **Choose columns**.

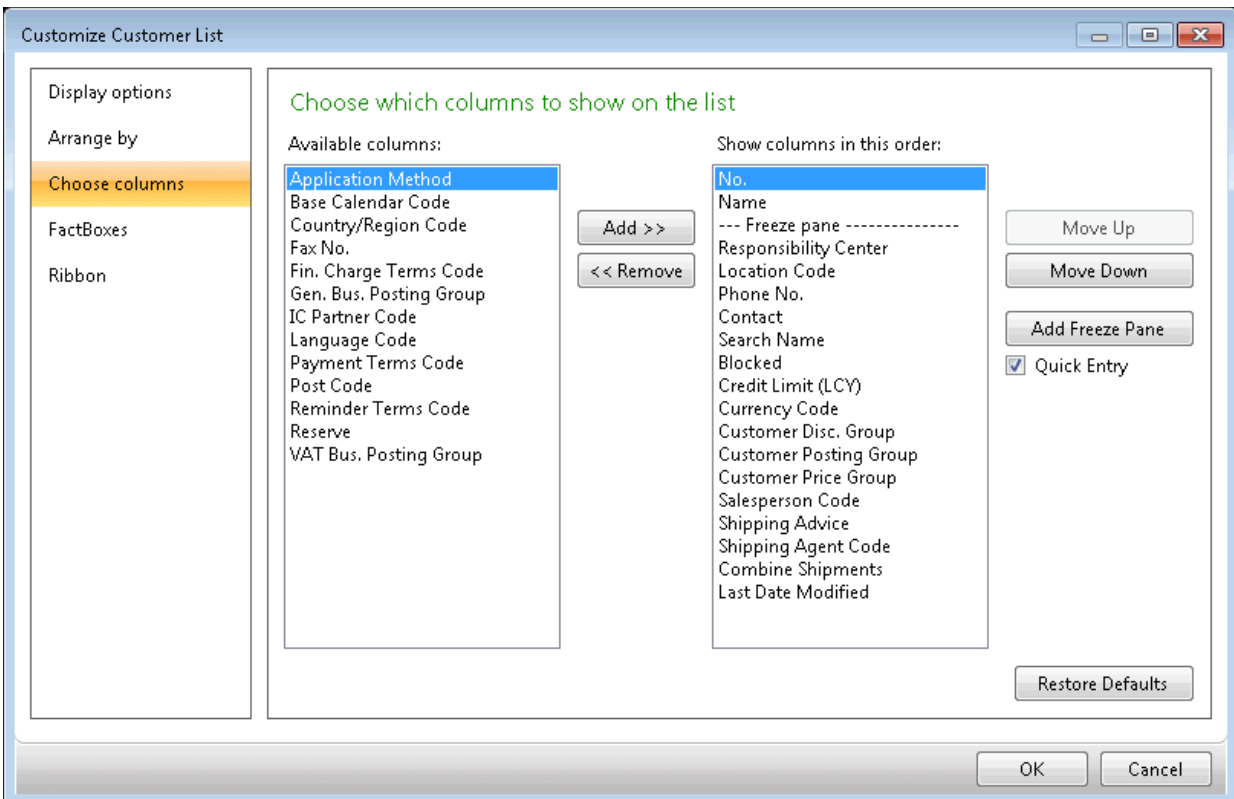


FIGURE 3.6: CUSTOMIZE THIS PAGE – CHOOSE COLUMNS

4. Select **Country/Region Code** from the **Available columns** list.
5. Click **Add**.
6. Use the **Move Up** and **Move Down** buttons to place the column in the correct position.
7. Select **Country/Region Code** from the **Show columns in this order** list.
8. Click **Add Freeze Pane**. When scrolling from left to right on the List page, the columns before the **Freeze** pane remain fixed.
9. Select **Quick Entry** on columns that you want to be part of the enter sequence, when you enter data. Clear **Quick Entry** for those columns that you want to skip in the enter sequence.

- Click **OK** to apply the changes and to close the **Customize This Page** page.

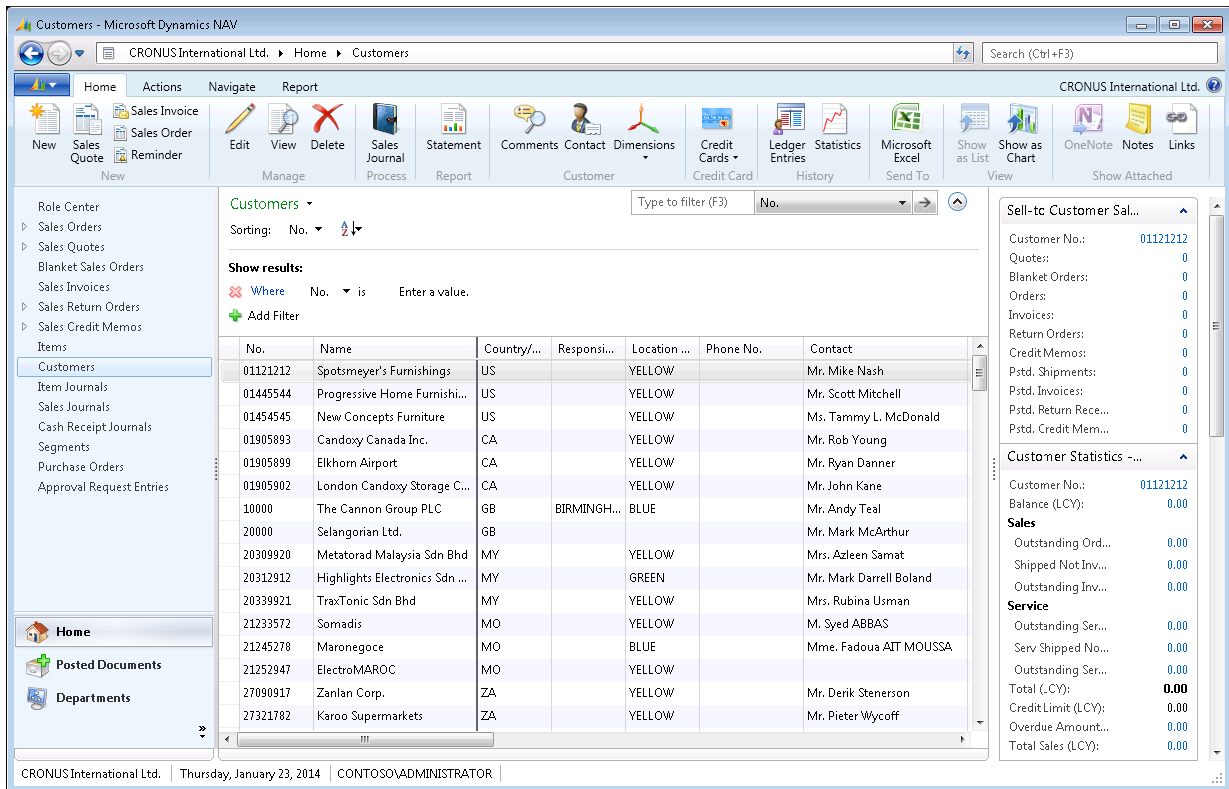


FIGURE 3.7: CUSTOMERS PAGE – NEW COLUMN LAYOUT

In addition to determining which columns are viewed, the user can also determine the width of a column and the height of the header.

To change the width of a column, for example on the **Customers** page, follow these steps:

- On the navigation pane, click **Home** and then click **Customers**.
- Place the pointer on the vertical line separating the columns **No.** and **Name** in the column header. (The pointer is displayed as a vertical line with an arrow through it.)
- Hold the left mouse button and drag the column separator to the desired width.
- Release the mouse button when satisfied with the width.

To change the header height, for example, on the **Customers** page, follow these steps:

1. On the navigation pane, click **Home** and then click **Customers**.
2. Place the pointer in the column header and then right-click the mouse button.
3. Click **Choose Header Height**.
4. Select between one, two, or three lines in the header. The change appears immediately on the current page.
5. If you want this header height on all List pages, repeat steps 2-3 and then click **Apply To All Lists**.
6. Click **Yes**.

Add and Remove a FactBox from the FactBox Pane

To access the **Customize This Page** functionality from the **Customers** page, follow these steps:

1. On the navigation pane, click **Home** and then click **Customers**.
2. Click the **Application** menu > **Customize** > **Customize This Page**.
3. Click **FactBoxes**.

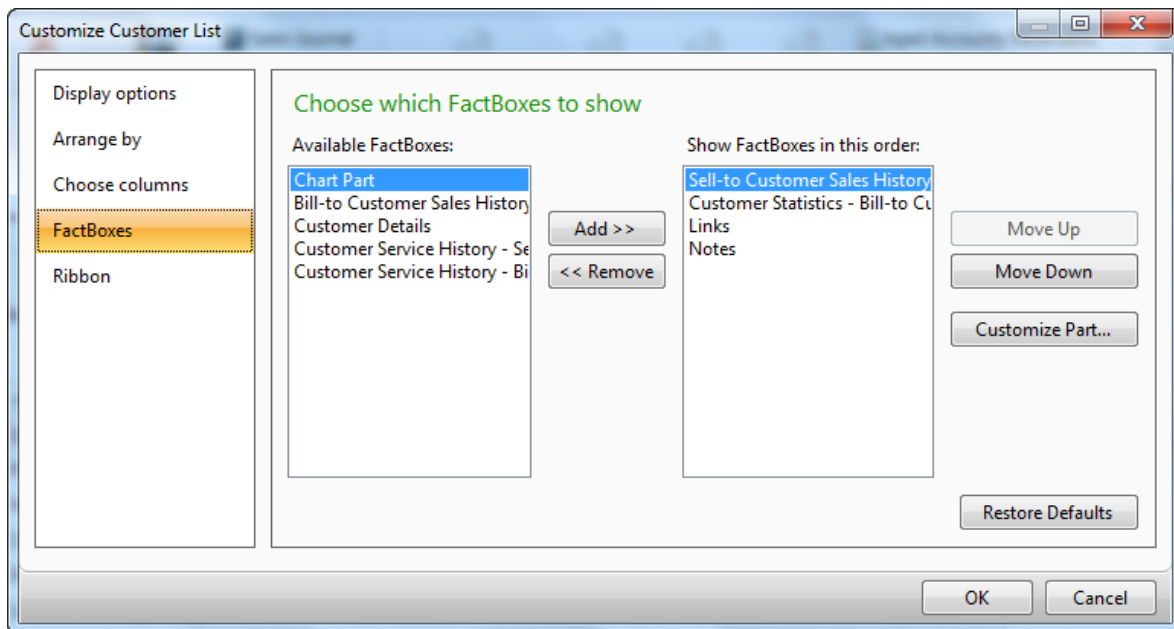


FIGURE 3.8: CUSTOMIZE THIS PAGE - FACTBOXES

4. Select a FactBox from the **Available FastBoxes** list, and then click **Add**.
5. By selecting a FastBox from the **Show FastBoxes in this order** list, you can remove a FastBox, by clicking **Remove**, or you can change the order of the FastBoxes, by clicking **Move Up** and **Move Down**.

- Click **OK** to apply the changes, and close the **Customize This Page** page.

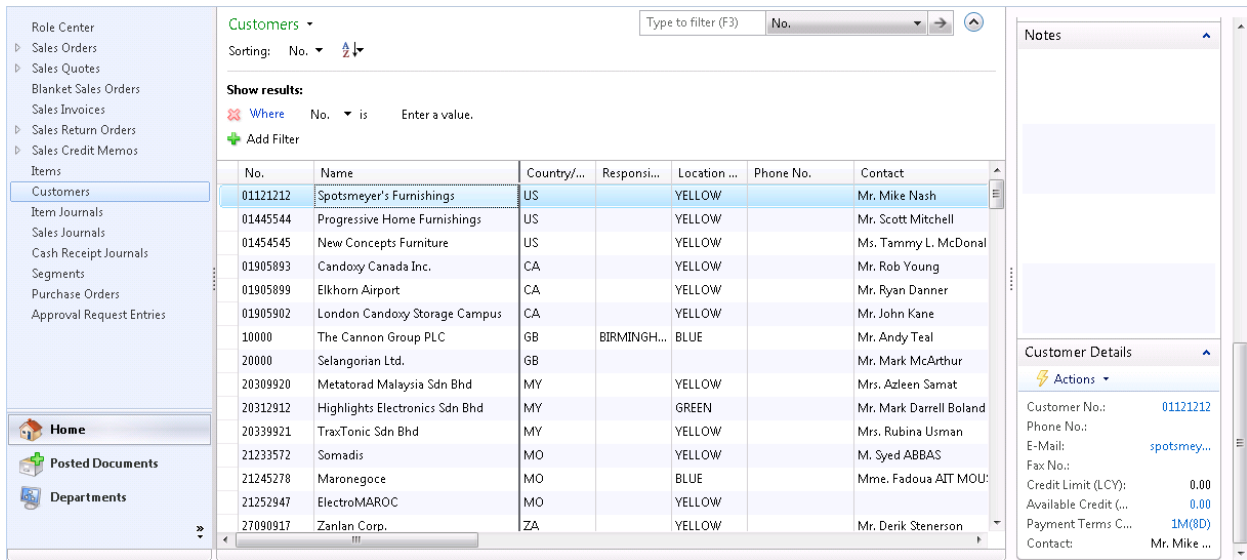


FIGURE 3.9: CUSTOMERS PAGE – NEW FACTBOX

Add and Remove a FastTab on Card Pages

To access the **Customize This Page** functionality from the **Customer Card** page, follow these steps:

- On the navigation pane, click **Home**, and then click **Customers**.
- Select any customer, and then click **Edit**.
- Click the **Application** menu > **Customize** > **Customize This Page**.

4. Click **FastTabs**.

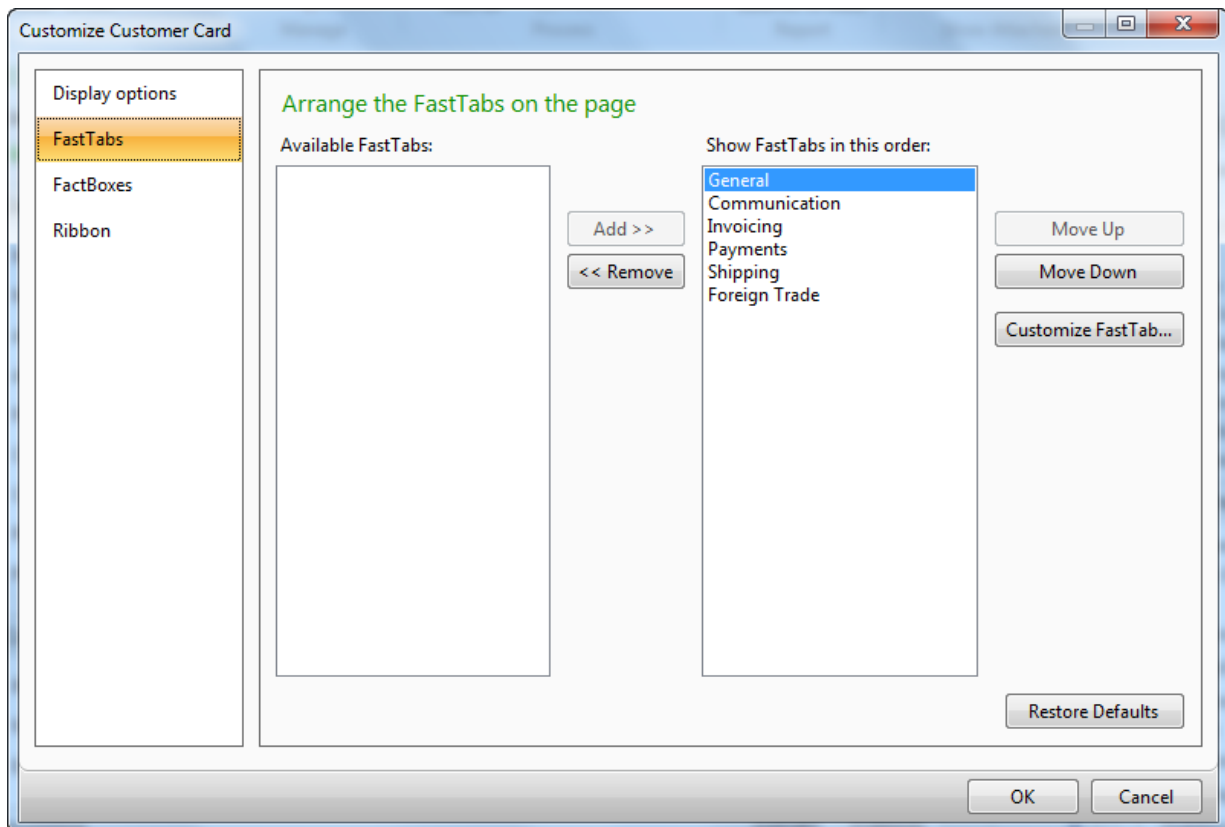


FIGURE 3.10: CUSTOMIZE THIS PAGE - FASTTABS

5. By selecting a FastTab from the **Available FastTabs** list, you can add a FastTab, by clicking **Add**.
6. By selecting a FastTab from the **Show FastTabs in this order** list, you can remove a FastTab, by clicking **Remove**, or you can change the order of the FastTabs, by clicking **Move Up** and **Move Down**.
7. Click **OK** to apply the changes and close the **Customize This Page** page.
8. Click **OK** to close the **Customer Card** page.

Customize a FactBox

To customize a FactBox on a List page, for example, the **Customers** page, follow these steps:

1. On the navigation pane, click **Home** and then click **Customers**.
2. Click the **Application** menu > **Customize** > **Customize This Page**.
3. Click **FactBoxes**.
4. Select the **Sell-To Customer Sales History** FactBox from the **Show FactBoxes in this order** list.

5. Click **Customize Part**.

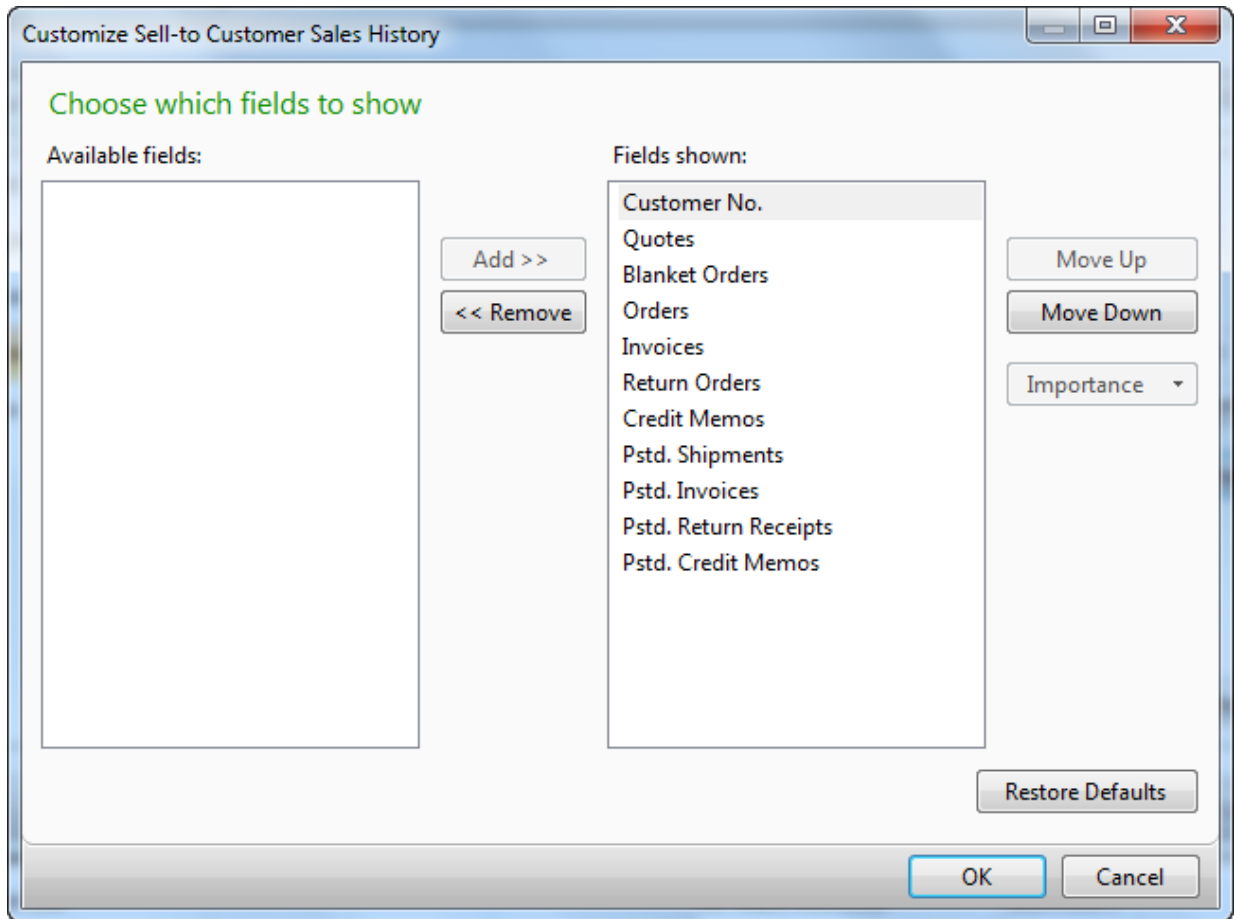
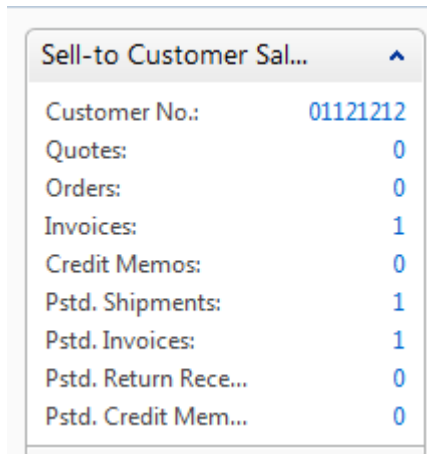


FIGURE 3.11: CUSTOMERS PAGE – CUSTOMIZED SELL-TO CUSTOMER SALES HISTORY FACTBOX

6. By selecting a field from the **Available fields** list, you can add a field, by clicking **Add**.
7. By selecting a field from the Fields shown list, you can remove a field, by clicking **Remove**, or you can change the order of the fields, by clicking **Move Up** and **Move Down**.
8. Click **OK** to apply the changes and close the **Customize FastTab** page.

9. Click **OK** to close the **Customize This Page** page.



Sell-to Customer Sal...	
Customer No.:	01121212
Quotes:	0
Orders:	0
Invoices:	1
Credit Memos:	0
Pstd. Shipments:	1
Pstd. Invoices:	1
Pstd. Return Rece...	0
Pstd. Credit Mem...	0

FIGURE 3.12: CUSTOMERS PAGE – CUSTOMIZED SELL-TO CUSTOMER SALES HISTORY FACTBOX

Customize a FastTab

To access the **Customize This Page** functionality from the **Customers** page, follow these steps:

1. On the navigation pane, click **Home** and then click **Customers**.
2. Select any customer and then click **Edit**.
3. Click the **Application** menu > **Customize** > **Customize This Page**.
4. Click **FastTabs**.
5. Select the **General** FastTab (or any other FastTab), from the **Show FastTabs in this order** list.

6. Click **Customize FastTab**.

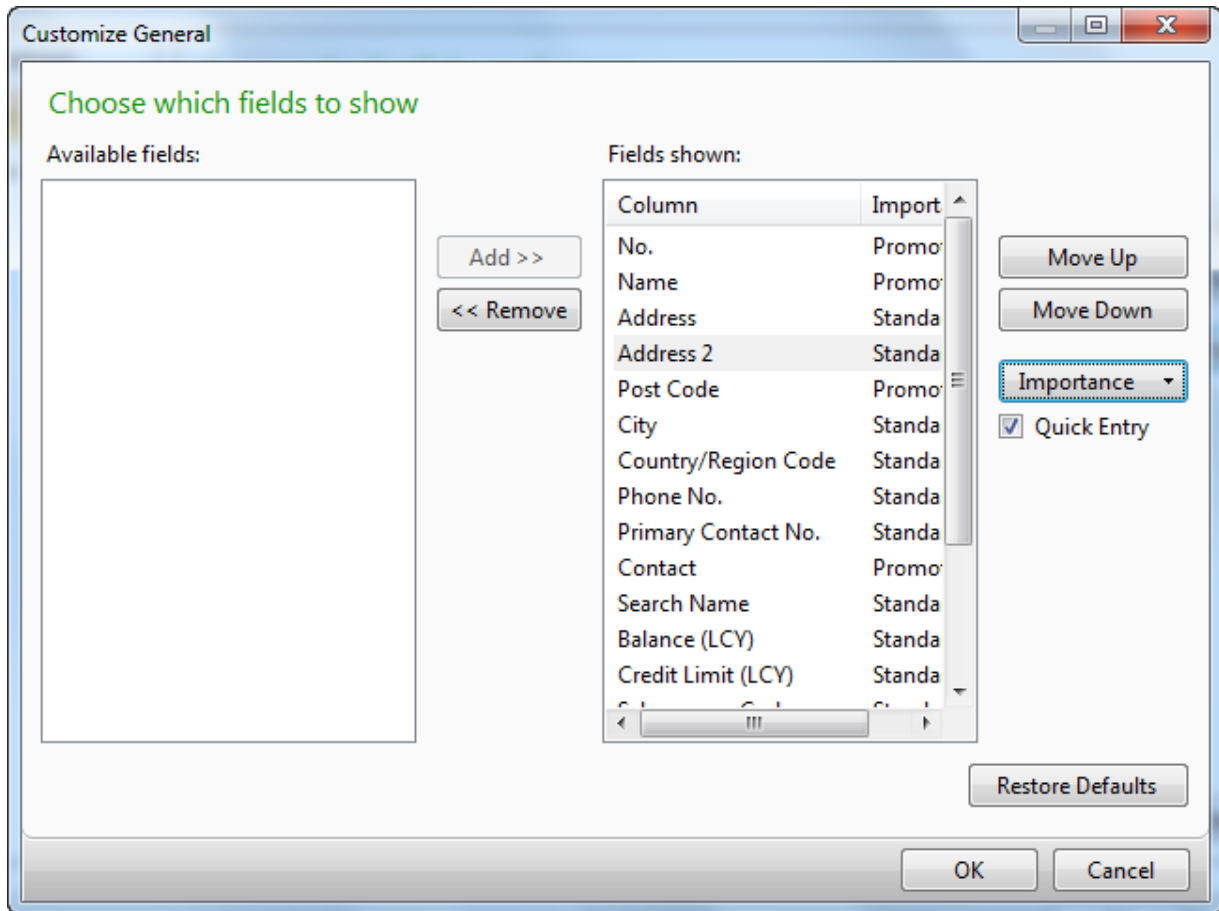


FIGURE 3.13: CUSTOMIZE FASTTAB

7. By selecting a field from the **Available fields** list, you can add a field, by clicking **Add**.
8. By selecting a field from the **Fields shown** list, you can remove a field, by clicking **Remove**, or you can change the order of the fields, by clicking **Move Up** and **Move Down**.

For each field shown, you can specify its **Importance** with the following options:

- **Standard** – When the FastTab is expanded, the field is shown.
 - **Promoted** – When the FastTab is collapsed, the value of the field is shown in the FastTab’s header.
 - **Additional** – When the FastTab is expanded, the field is only shown when you click **Show more fields**. By clicking **Show fewer fields**, the additional fields are hidden.
9. Set the **Importance** of the following fields to **Additional**: **Address 2**, **Primary Contact No.**, **Responsibility Center**, and **Service Zone Code**.

10. Select **Quick Entry** to determine whether a field should be part of the data entry sequence. The cursor will move to the next field that has **Quick Entry** selected when you enter data.
11. Click **OK** to apply the changes and close the **Customize FastTab** page.
12. Click **OK** to close the **Customize This Page** page.

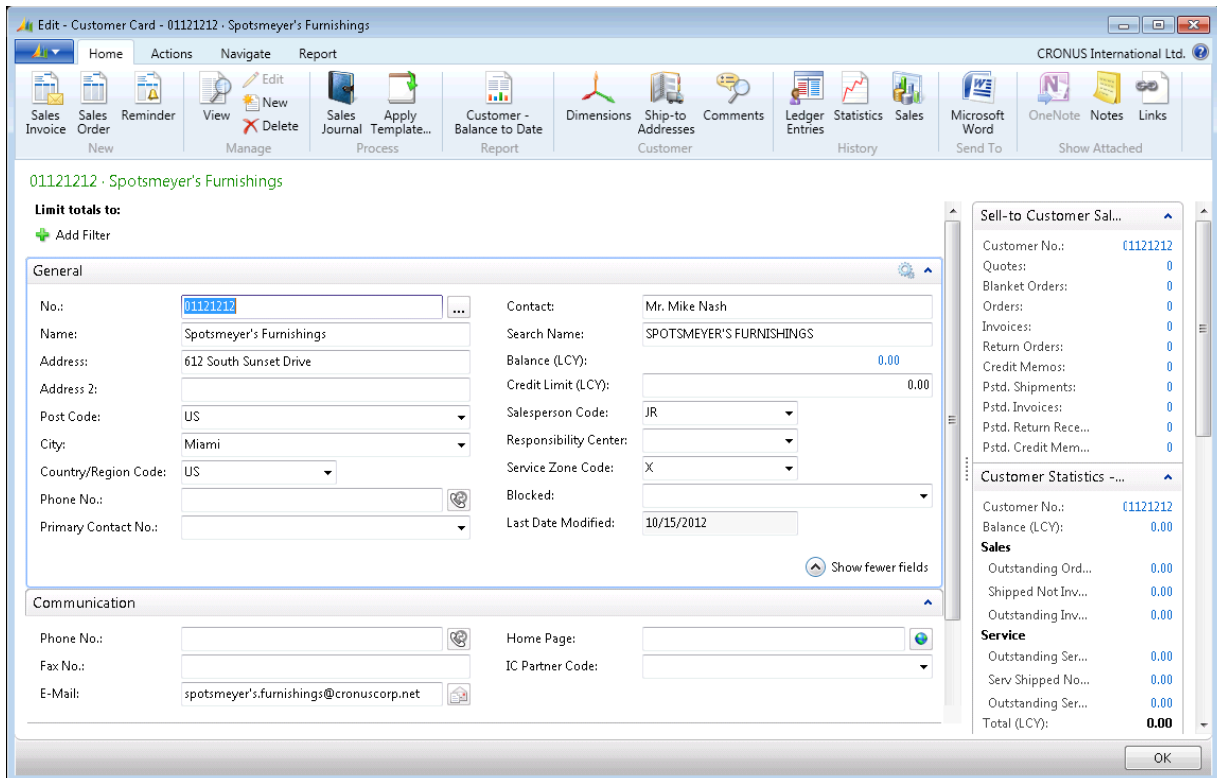


FIGURE 3.14: CUSTOMER CARD PAGE – NEW GENERAL FASTTAB

13. Click **OK** to close the **Customer Card** page.

Customize a Chart

Pages, such as the **Customers**, **Items**, and **Vendors** pages, have the action called **Show as Chart** available. This chart can be set up according to your specific reporting needs, through the **Customize Chart** function. According to the requirements, the X-, Y- and Z-axes of the chart can be selected, in addition to the graph type (for example, pie, columns, lines, or points).

You can open the **Customize Chart** page from the **Application** menu, or from the shortcut menu on the content section of the chart (right-click in the chart area).

Demonstration: Customize a Chart on the Customers Page

As the order processor you want an overview of customers' open balance per country.

Demonstration Steps

1. Set up the chart on the **Customers** page.
 - a. On the navigation pane, click **Home**, and then click **Customers**.
 - b. Click **Show as Chart** on the **Home** tab in the ribbon.
 - c. Click the Application menu > **Customize** > **Customize Chart**.
 - d. Expand the **Measures (Y-Axis)** FastTab.
 - e. For the **Required Measure**, enter **Balance (LCY)** in the **Data Column** field, enter **Sum** in the **Aggregation** field, and enter **Balance (LCY)** in the **Caption** field.
 - f. Expand the **Dimensions (X- and Z-axes)** FastTab.
 - g. In the **X-Axis** field, enter **Country/Region Code**.
 - h. In the **Z-Axis** field, enter **No**.
 - i. The **Preview Part** FastTab shows an example of the chart that results as you fill in the fields in the **Generic Chart Customization** page.

Customize Parts on the Role Center Page

When you access the **Customize This Page** functionality from the **Role Center** page, the following options are available:

- Add and remove parts on the Role Center.
- Customize a part on the Role Center.

To add and remove parts from the **Role Center** page, follow these steps:

1. On the navigation pane, click **Home** and then click **Role Center**.
2. Click the **Application** menu > **Customize** > **Customize This Page**.

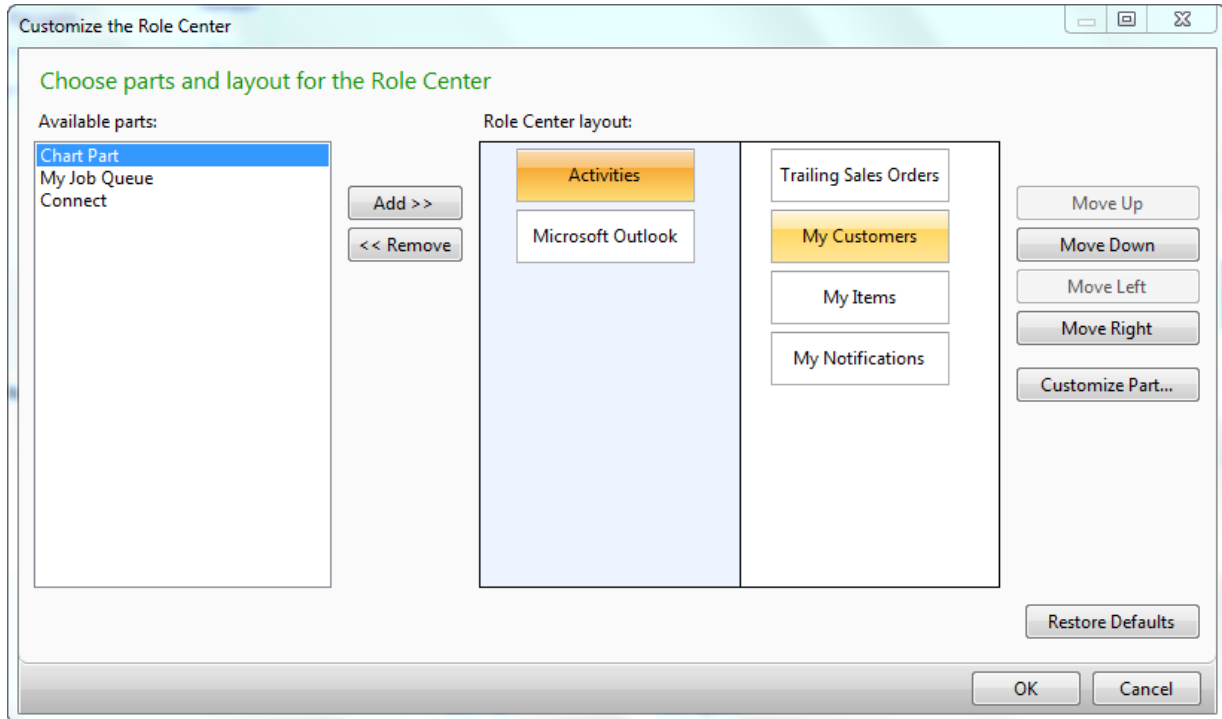


FIGURE 3.15: CUSTOMIZE ROLE CENTER PAGE

3. By selecting a part from the **Available Parts** list, you can add a part by clicking **Add**.
4. Select the **Chart Part** part, and then click **Add**.
5. By selecting a part from the **Role Center layout** list, you can remove a part by clicking **Remove**, or you can change the position of the part by clicking **Move Up**, **Move Down**, **Move Left**, and **Move Right**.

- Click **OK** to apply the changes and close the **Customize This Page** page.

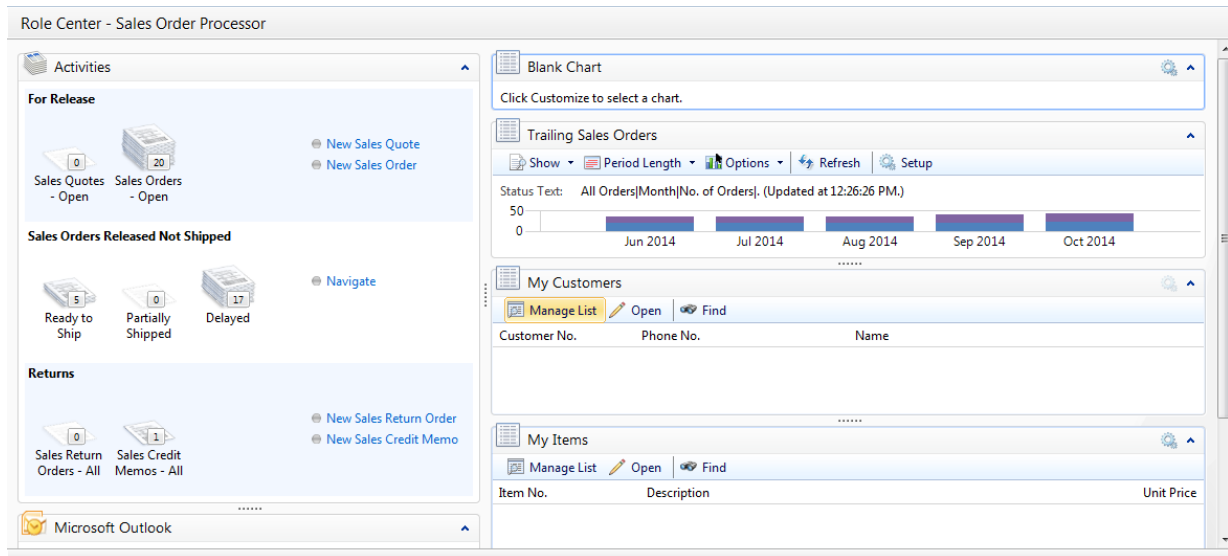


FIGURE 3.16: NEW ROLE CENTER PAGE LAYOUT

Customize the Activities Part

To customize the **Activities** part, follow these steps:

- On the navigation pane, click **Home** and then click **Role Center**.
- Click the **Application** menu > **Customize** > **Customize This Page**.
- Select the **Activities** part from the **Role Center layout** list.

4. Click **Customize Part**.

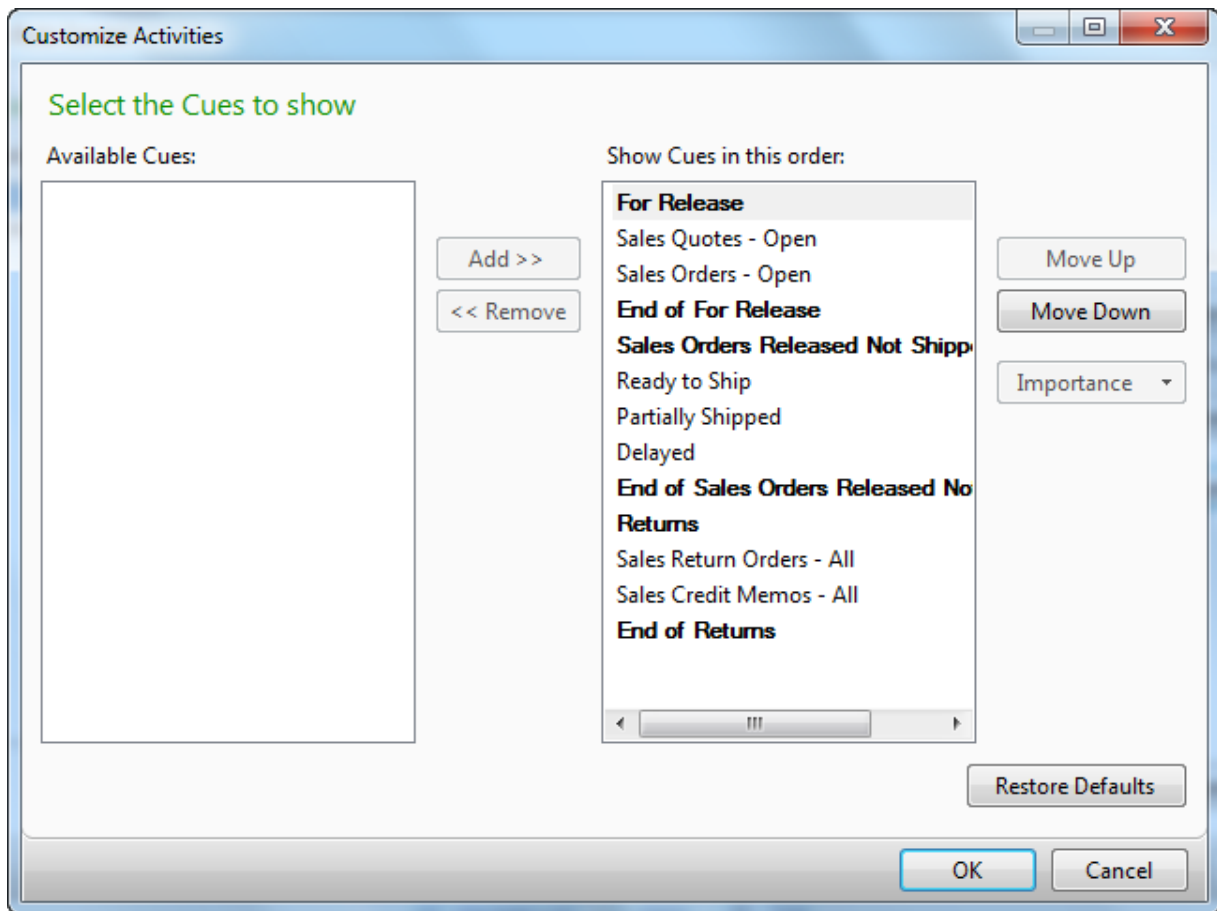


FIGURE 3.17: CUSTOMIZE ACTIVITIES PART

5. By selecting a Cue from the **Available Cues** list, you can add a Cue, by clicking **Add**.
6. By selecting a Cue from the **Show Cues in this order** list, you can remove a Cue, by clicking **Remove**, or you can change the order of the Cues, by clicking **Move Up** and **Move Down**.
7. Remove the Sales Return Orders – All cue.
8. Click **OK** to apply the changes and close the **Customize Part Page** page.

9. Click **OK** to close the **Customize This Page** page.

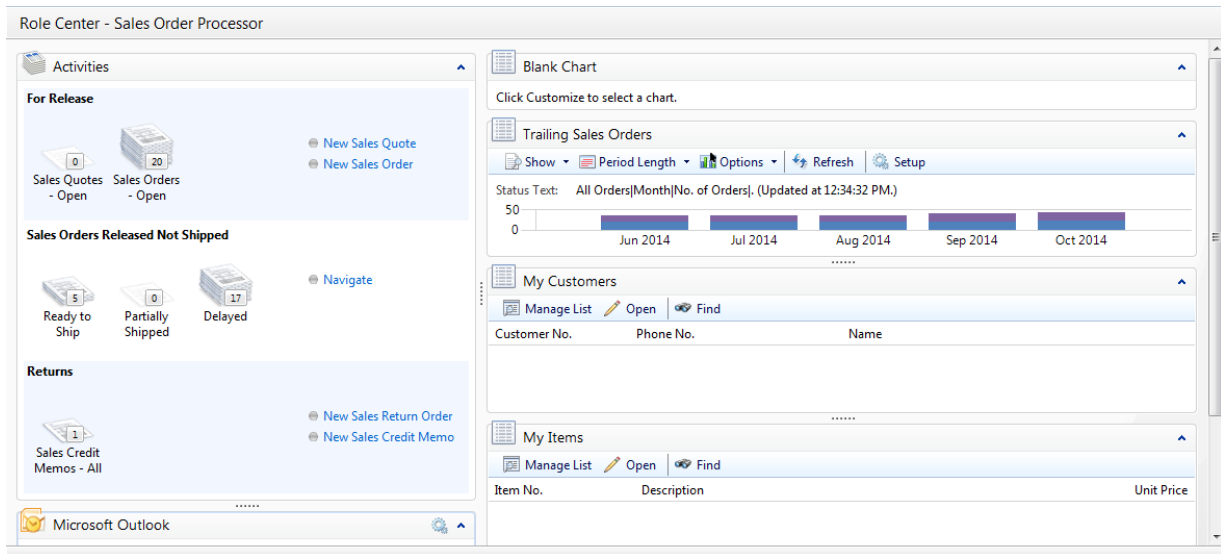


FIGURE 3.18: CUSTOMIZE ACTIVITIES PANE

Customize the Microsoft Outlook Part

To customize the **Microsoft Outlook** part, follow these steps:

1. On the navigation pane, click **Home** and then click **Role Center**.
2. Click the **Application** menu > **Customize** > **Customize This Page**.
3. Select the **Microsoft Outlook** part from the **Role Center layout** list.

4. Click **Customize Part**.

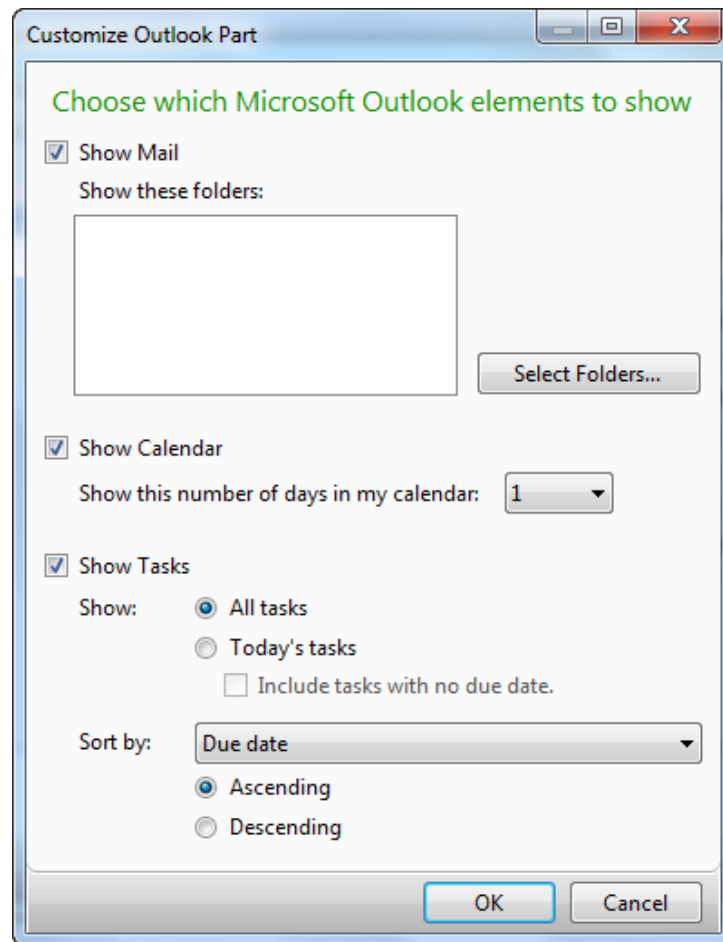


FIGURE 3.19: CUSTOMIZE MICROSOFT OUTLOOK PART

5. Select the **Show Mail** check box, if you want the **Microsoft Outlook** part to show the folders and corresponding number of new messages.
6. Click **Select Folders** to specify which Microsoft Outlook folders to show, select the desired folders, and then click **OK**.
7. Select the **Show Calendar** check box, if you want the **Microsoft Outlook** part to show your appointments.
8. Click the **Show this number of days in my calendar** field to select the number of days to be presented by the **Microsoft Outlook** part.
9. Select the **Show Tasks** check box, if you want the **Microsoft Outlook** part to show your tasks.
10. Specify whether to show **All tasks** or **Today's tasks**, and select or clear the **Include tasks with no due date** check box.
11. Specify how the tasks should be sorted – **None**, **Importance**, or **Due Date** – and how it should be organized – **Ascending** or **Descending**.
12. Click **OK** to apply the changes and to close the **Customize Outlook Part** page.

Customize My Customers Part

You can assemble a list of your most important customers. To manage this list, follow these steps:

1. On the navigation pane, click **Home** and then click **Role Center**.
2. On the **My Customers** part, click **Manage List**.
3. In the **Customer No.** field, enter the customer that you want to add to the list, by either entering the number or clicking the lookup arrow.
4. Add as many customers as you want.
5. Click **OK** to close the **Edit – My Customers** page.

Customize My Notifications Part

In Microsoft Dynamics NAV 2013, you can enter notifications to other users or yourself, through the **Notes** FactBox which can be viewed or added to many pages. The **My Notifications** part on the **Role Center** page provides an overview of all notifications that are addressed to you and lets you open the corresponding page and read and remove the notification.

To enter a notification on the **Customer Card** page, follow these steps:

1. On the navigation pane, click **Home** and then click **Customers**.
2. Select any customer, and then click **Edit**.
3. On the **Notes** FactBox, click **Actions**, and then click **New**.
4. Enter a new note.
5. In the **To** field, select the user for whom the note is intended.
6. Select the **Notify** check box if you want the note to appear in the **My Notifications** part of the selected user.

To access the **My Notifications** part, follow these steps:

1. On the navigation pane, click **Home** and then click **Role Center**.
2. On the **My Notifications** part, click **Actions**. The options are as follows:
 - **Open Page** – This action opens the page on which to note was entered.
 - **View Notification** – This action opens the note.
 - **Remove Notification** – This action removes the notification, but not the corresponding note.

Customize a Blank Chart

Several predefined charts were created to be shown on the **Role Center** page. After you add the **Chart** part to the **Role Center** page, you must select which chart you want to see.

Follow these steps:

1. On the navigation pane, click **Home** and then click **Role Center**.
2. Click the **Application** menu > **Customize** > **Customize This Page**.
3. In the available parts section, select **Chart Part**, and click **Add**.
4. Select the **Blank Chart** part from the **Role Center layout** list.
5. Click **Customize Part**.

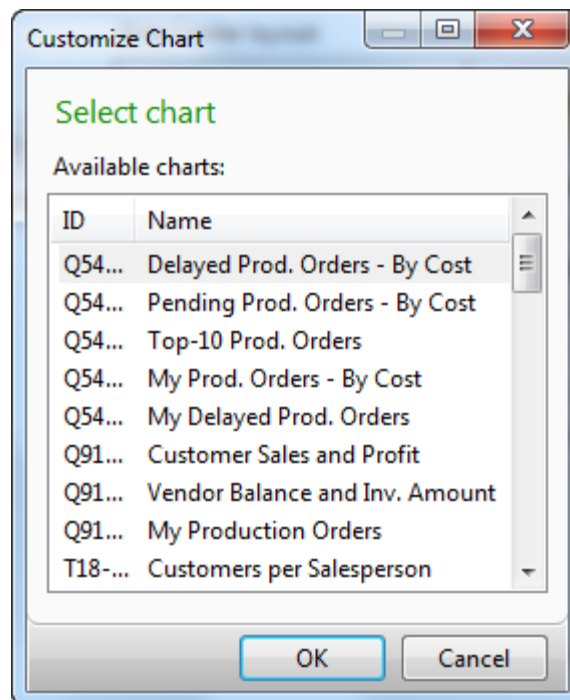




FIGURE 3.20: CUSTOMIZE BLANK CHART PART

6. Select Customers per Salesperson.
7. Click **OK** to close the **Customize Chart** page.
8. Click **OK** to close the **Customize This Page** page.

 **Note:** These predefined generic charts can be customized (type "Charts" in the **Search** box and then open the **Generic Chart Setup** card page) similar to the steps explained in the "Customize a Chart" lesson of this module.

 **Note:** In addition to generic charts, Microsoft Dynamics NAV includes several specific charts that you cannot create from scratch, but that you can edit to varying degrees.

*Some specific charts, such as **Trailing Sales Orders**, offer only options to change how the predefined source data is displayed in the chart.*

*In more advanced specific charts, such as **Finance Performance**, you can edit existing charts or set up new variations by combining account schedule lines and columns in multiple ways to provide many different financial performance indicators. This is discussed in more detail in the Finance Advanced in Microsoft Dynamics NAV 2013 course.*

*These specific charts are available only through some Role Center pages connected to profiles such as the **PRESIDENT-SMALL BUSINESS** profile.*

Change the Profile and Role Center

The Role Center is like your personal home page in Microsoft Dynamics NAV. For the Windows client, Microsoft Dynamics NAV 2013 includes predefined Role Centers and profiles to fit many of the fundamental roles in companies. Creating or modifying Role Centers is a development task, but the creation and assignment of profiles is a setup task that is performed by an administrator. Typically profiles are created and then the appropriate Role Center is assigned. As soon as users are set up, they are assigned to a Role Center through the profile. Then, you can make additional adjustments to make the UI fit your work habits.

For example, when Alicia the purchasing agent opens the Windows client, she sees the Purchasing Agent Role Center, which is configured to help her perform her daily tasks. This Role Center was assigned to her logon through the Purchasing Agent profile.



Note: *When assigning profiles, users first must be set up with the correct security access to the corresponding Role Center page and to the list places that can be found in the Home section on the navigation pane.*

Users who are not individually assigned to a profile, and therefore to a Role Center, receive the default Role Center. An administrator can change their Role Center in two ways:

- Change the profile assigned to their user ID.
- Change the default Role Center.

Change the User Profile

To change the user's profile, follow these steps:

1. On the navigation pane, click **Departments**.
2. Click **Administration**, and then click **Application Setup**.
3. On the **Application Setup** page, click **Role Tailored Client**, and then click **User Personalization**.
4. Select your user ID, and then click **Edit**.
5. In the **Profile ID** field, enter the desired profile.
6. Click **OK** to close the **User Personalization Card** page.
7. Restart Microsoft Dynamics NAV 2013 by closing and opening it. The selected profile is now applied.



Note: *Different profiles for different companies cannot be set up within one database. If it is necessary, the user must switch profiles manually when switching companies.*

Change the Default Role Center

To change the **Default Role Center**, follow these steps:

1. On the navigation pane, click **Departments**.
2. Click **Administration**, and then click **Application Setup**.
3. On the **Application Setup** page, click **Role Tailored Client**, and then click **Profiles**. The **Default Role Center** is currently set to Sales Order Processor.
4. Select the profile that you want to use, and then click **Edit**.
5. Select the **Default Role Center** check box.
6. Click **OK** to close the **Profile Card** page. This automatically clears the **Default Role Center** check box of the Sales Order Processor profile.
7. Restart Microsoft Dynamics NAV 2013 by closing and opening it. The selected profile appears.



Note: *Any change to the default Role Center affects all users who do not have an individually assigned user profile.*

Lab 3.2: Add a Chart to the Role Center

Scenario

As the sales order (SO) processor you want to adjust your Role Center by adding the following charts:

- Customer Sales and Profit (generic)
- SO per location (generic)

High Level Steps

1. Customize the Role Center page according to the scenario.

Detailed Steps

1. Customize the Role Center page according to the scenario.
 - a. On the navigation pane, click **Home** and then click **Role Center**.
 - b. Click the **Application** menu > **Customize** > **Customize This Page**.
 - c. Select **Chart Part** from the **Available parts** list.
 - d. Click **Add**.
 - e. Select the **Blank Chart** part from the Role Center layout list.
 - f. Click **Customize Part**.
 - g. Select **Customer Sales and Profit**.
 - h. Click **OK** to close the **Customize Chart** page.
 - i. Select **Chart Part** from the **Available parts** list.
 - j. Click **Add**.
 - k. Select the **Blank Chart** part from the Role Center layout list.
 - l. Click **Customize Part**.
 - m. Select **SO per location**.
 - n. Click **OK** to close the **Customize Chart** page.
 - o. Click **OK** to close the **Customize the Role Center** page.

Module Review

Module Review and Takeaways

A general overview of the personalization options in Microsoft Dynamics NAV 2013 helps you work efficiently with the system.

You can customize the Microsoft Dynamics NAV 2013 user interface with user personalization functions such as **Customize This Page**, **Choose Columns**, and **Customize Ribbon**. This lets you customize the user experience to your daily tasks and operations.

You can visualize key figures by adding charts in your Role Center, or by showing list places as a chart.