Andreas Luszczak

Using Mic
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2nd Edition

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Using Microsoft Dynamics AX 2012

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Using Microsoft Dynamics AX 2012

2nd Edition

With 177 Figures

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Preface

When looking for a business management solution supporting business processes in mid-sized and large companies, Microsoft Dynamics AX is likely to be your favorite. Because of its deep functional and technological integration, it is also a good choice for universities teaching ERP systems.

Reading this Book

The primary purpose of this book is to provide you with a good knowledge of the standard application concept and functionality, enabling you to run business processes in Microsoft Dynamics AX 2012. This book applies to you, if you are an end user, student, or consultant interested in learning how to use Dynamics AX.

Going beyond the operations on the user interface, you will also learn how the different parts of the application work together. As a result, you will also take advantage from learning the end-to-end application concept, if you are a system administrator, developer, IT executive or experienced consultant not knowing the complete application already.

Actually working in an application is the best way to learn it. Therefore, this book includes exercises that build up on each other in a comprehensive case study. If you need support solving the exercises, you may access a free download of sample solutions.

This book focuses on Microsoft Dynamics AX 2012 and includes the core improvements of Dynamics AX in the current version. It is based on the previous edition "Using Microsoft Dynamics AX 2009" published in 2010.

Since Dynamics AX is a very comprehensive business solution, it is not possible to cover all parts of the application in a single book. In order to provide a profound understanding of the core application, this book addresses the primary functionality in supply chain (including trade, logistics and production control) and finance management. It shows the application, but does not cover tasks in system administration and development. If you are interested in the concepts and possibilities of Dynamics AX in supply chain and various industries, you may check the books of Scott Hamilton (including "Managing Food Products Manufacturing Using Microsoft Dynamics AX 2012").

Applicable Settings

In Dynamics AX, you can individually choose the language of your user interface. Descriptions and illustrations in this book refer to the language "EN-US". Whereas

it is obvious that the Dynamics AX client will display different labels when choosing languages like Spanish or Russian, you will also notice differences when selecting British English. For example, the label for the field "Sales tax" is "VAT" in British English. Other possible differences of your application to the descriptions in the book are applicable local features as well as specific modifications implemented in your Dynamics AX system.

In order to benefit from the explanations, it is useful to access a Dynamics AX application. A separate test application for doing the exercises minimizes the risk of affecting real company data.

This book is based on the initial version of Microsoft Dynamics AX 2012. The exercises and illustrations refer to a sample company "Anso Technologies Ltd.", which shows a simple setup limited to the functionality described. In order to grant flexibility for selecting the training environment, the tasks in the exercises are specified in a way that you can also choose the Microsoft standard demo environment ("Contoso") or any other test environment.

Available Support

In order to download the solutions to the exercises in this book and other applicable resources, please access the online service of the publisher or choose the following web site:

http://axbook.addyn.com

If you have any comments or questions regarding the book or the related exercises, please contact me through the web site mentioned above or via e-mail to *lua@addyn.com*.

Acknowledgements

Many people have been involved in finalizing this book, directly and indirectly, from the first edition in German to the current English edition. I want to thank all of them. In particular, I would like to mention:

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- Ingo Maresch (Head of Dynamics AX product management at FWI Information Technology)
- Keith Dunkinson (Owner at ERP advisers)

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Andreas Luszczak

Table of Contents

1 What is Microsoft Dynamics AX?

Dynamics AX is Microsoft's core business management solution, designed to meet the requirements of mid-sized companies and multinational organizations. Based on state-of-the-art architecture and deep integration, Dynamics AX shows comprehensive functionality while ensuring high usability at the same time.

In version AX 2012, Dynamics AX shows a vast number of new features and enhancements. Main innovations include the new user interface consequently implementing the role tailored user experience across the application, increased capabilities in administration, finance and product data management supporting enterprises with multiple legal entities and organizational hierarchies, and an enhanced industry foundation.

1.1 Axapta and the History of Dynamics AX

Dynamics AX in its origin has been developed under the name *Axapta* by Damgaard A/S, a Danish software company. The first version released to market has been published in March 1998. At that time, the founders of Damgaard – Erik and Preben Damgaard – have already had more than ten years of experience designing ERP systems. Among others, they have been co-founders of PC&C, where they joined the development of Navision (now Dynamics NAV).

Version 1.0 of Axapta has been available in Denmark and the USA only. Version 1.5, published in October 1998, included support for several European countries. Releasing version 2.0 in July 1999 and version 3.0 in October 2002, Axapta provided continuously increasing application functionality and support of additional countries. Until releasing Axapta under the new brand Dynamics AX in version 4.0, improvements have been deployed in a number of service packs.

After signing a merger agreement in November 2000, Damgaard A/S united with the local rival Navision A/S, a successor of PC&C. Finally, Microsoft acquired Navision-Damgaard in May 2002 and accepted their main products, Navision and Axapta, as the core business solutions of Microsoft. Whereas Dynamics NAV (Navision) in functional and technological aspect applies to small companies, Dynamics AX (Axapta) is the product for mid-sized and large companies.

When releasing version 4.0 in June 2006, Microsoft rebranded Axapta to Dynamics AX. Microsoft Dynamics AX 4.0 differs from previous versions not only by functional enhancements but also by a new user interface, showing a complete redesign with a Microsoft Office-like look and feel.

In June 2008, Dynamics AX 2009 has been published including role centers, workflow functionality and an improved user interface. Dynamics AX 2009 also

A. Luszczak, *Using Microsoft Dynamics AX 2012,*
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provided enhanced functionality, including the multisite foundation and additional modules ensuring an end-to-end support for the supply chain requirements of global organizations.

Dynamics AX 2012 has been published in August 2011, updating the user interface to match the current versions of Microsoft Windows and Microsoft Office. Role-based security, the new accounting framework including segmented account structures, the enhanced use of shared data structures and other features facilitate collaboration across legal entities and operating units within the application, also suitable to large multinational enterprises.

1.2 Dynamics AX 2012 Product Overview

Microsoft Dynamics AX is an adaptable business management solution, which is easy to adapt and nevertheless applies to installations of multinational companies. Another characteristic is the deep integration to Microsoft technologies and applications like Microsoft SQL Server, SharePoint Services and BizTalk Server.

Most people are familiar to Dynamics AX from the very first start, since the user interface is already known from Microsoft Windows and Microsoft Office. The intuitive user experience helps to start working in Dynamics AX easily and efficiently, supported by a tight integration to other Microsoft software. Role centers grant an easy and fast overview of information required by individuals.

1.2.1 Functional Capabilities

The end-to-end support of business processes across the whole organization allows integrating external business partners like customers and vendors on the one hand and internal organization units on the other hand.

Multi-language, multi-country and multi-currency support, the organization model for managing multiple hierarchies of operating units and legal entities, and the option to manage several sites within one legal entity make it possible to manage complex global organizations in a common database.

The basic ERP capabilities of Dynamics AX include following main areas:

- Sales and marketing
- Supply chain management
- Production
- Procurement and sourcing
- Service management
- Financial management
- Project management and accounting
- Human capital management
- Business intelligence and reporting

Supplementing the basic ERP solution, industry specific capabilities for manufacturing, distribution, retail, services and the public sector included in the core standard application provide a broad industry foundation.

High scalability and adaptability make it easy to manage changes in the organization and in business processes. As an example, you may limit deployment to functions like finance at the beginning and simply add new functional areas like production or warehouse management later. Enhancing Dynamics AX with additional users or legal entities is as well possible any time.

Local features are available to comply with country-specific requirements. You may activate local features applying appropriate parameter settings or configuration keys.

1.2.2 Business Intelligence

In order to access data for analysis, integrated functionality for reporting and business intelligence grants a fast and reliable presentation of business data. Business intelligence features are not only available for analysis in finance, but also for users in all other areas of Dynamics AX who need to analyze their data. Depending on the requirements, different types of reporting tools including structured and ad-hoc reports are required.

In Dynamics AX, business intelligence is based on the platform of the Microsoft SQL Server. The basis for structured Dynamics AX standard reports is provided by SQL Server Reporting Services (SSRS). Business intelligence components like Key Performance Indicators apply OLAP cubes, which are provided by SQL Server Analysis Services (SSAS).

1.2.3 Collaboration Features

Collaboration functionality to connect external partners is available in two ways:

- Enterprise Portal
- Application Integration Framework

The Enterprise Portal grants direct access to Dynamics AX through a regular Internet browser like Microsoft Internet Explorer. Limiting access to role-specific data, you may deploy the Enterprise Portal to internal employees as well as external customers and vendors.

The Application Integration Framework (AIF) on the other hand supports automatic data exchange with other business applications inside and outside your company. You may receive and send documents like invoices, packing slips or price lists in XML format. Applying an external converter, you may convert the documents to any other format like EDIFACT if necessary.

For legal entities within a common Dynamics AX database, Intercompany functionality enables automatic purchase and sales processes between companies.

1.2.4 Workflow

The workflow system in Dynamics AX (see section 9.4) provides configurable workflows to support routine procedures like the approval process for a purchase requisition. The workflow infrastructure in Dynamics AX is based on the Windows Workflow Foundation enabling workflow messages in Microsoft Outlook, the Enterprise Portal or the regular Dynamics AX client.

1.2.5 Implementation

Microsoft does not directly sell Dynamics AX to customers, but provides an indirect sales channel. Customers may purchase licenses from certified partners, which also offer their services to support the implementation of Dynamics AX. This support includes application training and consulting as well as system installation and the development of enhancements to the core functionality.

In order to assist the implementation of Dynamics applications, Microsoft provides a standardized implementation methodology for partners – Microsoft Dynamics Sure Step. The Microsoft Dynamics Sure Step Methodology is a comprehensive approach to implement Microsoft Dynamics solutions including project management principles and solution-specific guidelines and tools.

Additional resources including product information, customer stories and online demos are available in a global version on the Microsoft Dynamics AX web page http://www.microsoft.com/en-us/dynamics/erp-ax-overview.aspx as well as in a local version accessible through the Microsoft homepage of your country.

The Microsoft web pages also provide support to find an implementation partner and to access the Microsoft Dynamics Marketplace providing an overview of partner add-on solutions.

1.3 Technology and System Architecture

The development of Dynamics AX (formerly Axapta) from the very start aimed to support international implementations through multi-language, multi-currency and multi-company support as well as through a deep integration of components. Integration is not limited to components within Dynamics AX – it also includes the Microsoft software stack with Windows operating systems, SQL Server, SharePoint, Internet Information Server and other applications.

Three core technological characteristics are essential in Dynamics AX:

- Development environments
- Model driven layered technology
- Three-tier architecture

1.3.1 Development Environments

Dynamics AX 2012 stores the application objects (like tables and forms) within the SQL database. The Application Object Tree (AOT) shows a tree structure of these application objects.

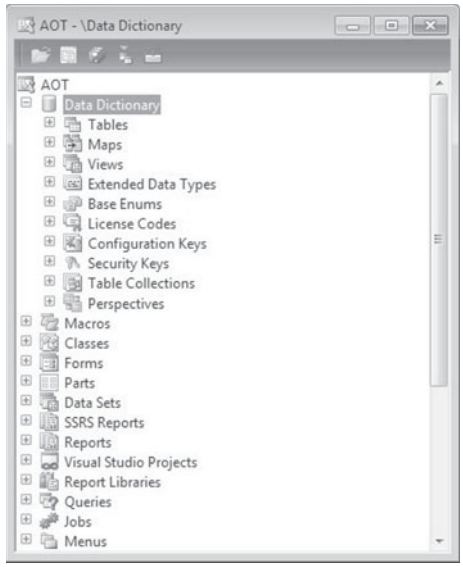

Figure 1-1: The Application Object Tree (AOT) containing programmable objects

For modifying application objects, you may choose between different development environments:

- Microsoft Visual Studio
- MorphX IDE – Integrated development environment in Dynamics AX

The MorphX IDE, which you may open in the developer workspace directly within the Dynamics AX client, provides access to the AOT for designing, editing, compiling and debugging code within the Dynamics AX client.

The Visual Studio development environment, which is closely integrated with MorphX, supports managed code and is required for some tasks like creating reports. Reports in Dynamics AX 2012 are only delivered by SQL Server Reporting Services (SSRS).

The programming language in the MorphX development environment is X++, an object-oriented, proprietary language similar to C# and Java. Since application objects in MorphX show an open source code, you may adjust and enhance Dynamics AX functionality in the development environment.

1.3.2 Layer Technology

Applying a layer structure, Dynamics AX provides a hierarchy of levels in the application source code separating the standard application from modifications. Different application object layers make sure that customer-specific modifications

do not interfere with standard objects stored in other layers. The layering system therefore facilitates release upgrades on the one hand and the implementation of industry or generic solutions on the other hand.

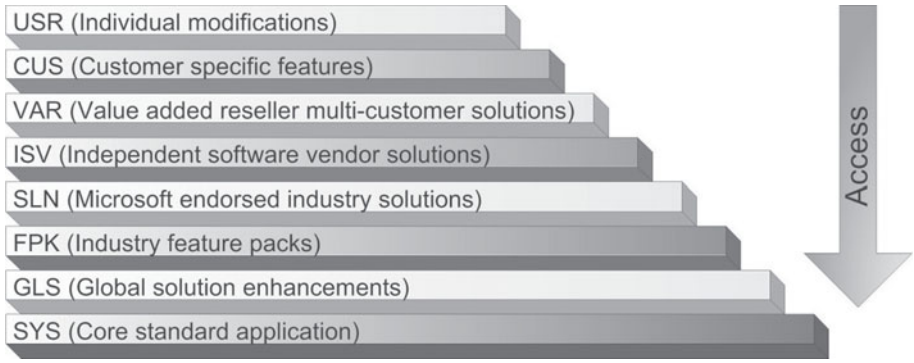

Figure 1-2: Hierarchy of application object layers in Dynamics AX 2012

The lowest object level in Dynamics AX is the SYS layer, which together with the GLS layer contains the core Dynamics AX standard objects. The FPK layer containing industry solutions and features is the third layer of the base solution reserved for Microsoft. The layers SLN, ISV and VAR are available for partners and independent software vendors (ISV) to provide industry, vertical or multi-customer solutions. The highest object level is the USR layer, which contains installation specific modifications.

In addition, every layer refers to a patch layer with a name ending with "P" (e.g. "USP" for the USR layer). The patch layers are reserved for application updates to the related regular layer.

When accessing the Dynamics AX application, the kernel looks for a version of every object required. The version search starts from the highest layer, the USR layer. If no object version is available in the USR layer, the kernel will go through the lower layers until finding the object – locating it in the SYS layer if no modifications apply.

If you have modified the vendor list page as an example, Dynamics AX will run the form *VendTableListPage* that you have modified in the USR layer and not the standard object with the same name in the SYS layer.

1.3.3 Three-Tier Architecture

In order to support large implementations with a high number of users, Dynamics AX consequently applies a three-tier architecture. The three-tier architecture is characterized by separating database, application and client.

Data managed in Dynamics AX 2012 are stored in a relational Microsoft SQL Server database. For large installations, you may use a database cluster.

The application tier contains the business logic of Dynamics AX, executing the code designed in the development environment. It may run on a single Application Object Server (AOS) or on a server cluster to support large implementations.

The client tier contains the graphical user interface, which is required to process data input and output. Apart from the regular Dynamics AX Windows client, web browsers (applying the Enterprise Portal), Microsoft Office (applying Office add-ins) and other applications (e.g. for mobile devices) are further options to access to relevant parts of the Dynamics AX application.

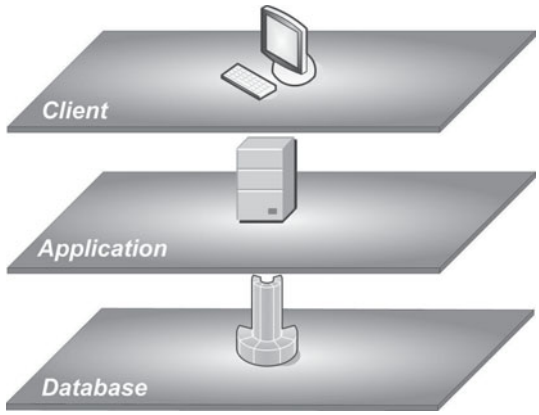

Figure 1-3: The three-tier architecture in Dynamics AX

Database, application (AOS) and client usually run on different computers. In case of small implementations, you may also install database and application together on a single server. For testing purposes, all three tiers may run on a common device.

1.3.4 Data Structure

When working in a module of Dynamics AX (or any other business software), you are accessing and creating data describing processes (e.g. item transactions). As a prerequisite for transactions, you need to manage data describing objects (e.g. customers).

In order to group the different kinds of data, you may distinguish three data types:

- Setup data
- Master data
- Transaction data

Setup data determine the way business processes work in Dynamics AX. As an example, you may choose to apply warehouse locations, pallets or serial numbers in the setup. Apart from modifying programmable objects, setup is the second way to adapt the application according to the requirements of an enterprise. Setup data

are entered when initially setting up the system. Later modifications of core setup data need to be checked carefully.

Master data describe objects like customers, ledger accounts or products. They do not change regularly, but only at the time related objects change – for example when a customer gets a new address. Master data are entered or imported initially before a company starts working in the application. Later on, you need to insert or edit master data occasionally depending on your business.

Transaction data are continuously created when processing business activities. Examples for transaction data are sales orders, invoices or item transactions. In Dynamics AX, the application generates transaction data for every business activity. Registration and posting of transaction data complies with the voucher principle.

1.3.5 Voucher Principle

Vouchers base on master data like ledger accounts, customers or products. If you want to post a transaction, you need to register a voucher containing a header and one or more lines first. It is not possible to post a voucher as long as it does not comply with the rules defined by setup data and the Dynamics AX-internal business logic. Once a voucher is posted, it is not possible to change it any more.

Some minor vouchers like quarantine transactions show exceptions regarding the voucher structure, however. They do not contain a separate header and lines part.

Examples for vouchers in Dynamics AX are orders in sales or purchasing as well as journals in finance or inventory management. After posting, the posted documents are available as packing slips, invoices, ledger transactions or inventory transactions.

2 Getting Started: Navigation and General Options

One of the core principles of Microsoft Dynamics AX is to grant a familiar look and feel to people, who are used to Microsoft software. However, business software has to adapt to business processes, which may be quite complex.

2.1 User Interface and Common Tasks

Before we start to go through business processes and case studies, we want to look at the general functionality in this chapter.

2.1.1 Logon and Authentication

Microsoft Dynamics AX logon is Active Directory based, applying Windows authentication. You do not need to log on to Dynamics AX with separate credentials as a result. After selecting the Dynamics AX icon on the PC desktop or in the start menu, you are automatically connecting to the Dynamics application using your Windows account.

The Dynamics AX user-ID, company (legal entity) and language derive from your user options, which you may change inside Dynamics AX.

Figure 2-1: Icon for Microsoft Dynamics AX on the PC desktop

Sometimes you need to use different user accounts within Dynamics AX – e.g., if you have to check user permissions. In this case, you have to make sure that the user you want to apply is set up in Active Directory administration. In order to start Dynamics AX with a user that is different from your current Windows account, you need to choose the option "*Run as different user*" in the pop-up menu (shown pressing the *Shift* key while doing a right-hand click) of the Dynamics AX-icon.

If you want to close your session and to logoff from Dynamics AX, you may do it in the same way as you do in any other Windows program: You may select the shortcut key *Alt+F4*, the menu option *File/Exit* or the button on the top right-hand corner of the Dynamics AX workspace. If you have opened several workspace windows, you will log off when you close the last workspace.

2.1.2 User Interface

When starting Microsoft Dynamics AX, the Dynamics AX workspace will be the first window you see. The content of the workspace depends on the system

A. Luszczak, *Using Microsoft Dynamics AX 2012*,
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configuration on the one hand, and on your permissions and individual settings on the other hand.

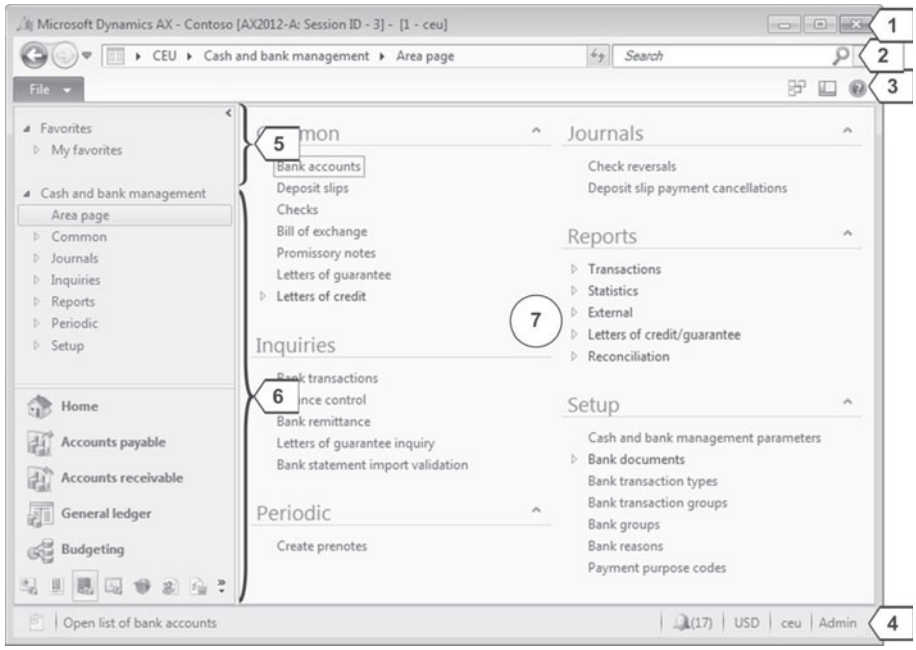

Figure 2-2: Dynamics AX workspace, showing an area page in the content pane

The workspace of Microsoft Dynamics AX 2012 consists of following areas as shown in Figure 2-2:

- Title bar [1]
- Address bar [2]
- Command bar and jewel menu[3]
- Status bar [4]
- Favorites [5]
- Navigation pane [6]
- Content pane [7]

2.1.2.1 Title Bar

The title bar shows the name of the application ("Microsoft Dynamics AX") as well as the name of the organization holding the Dynamics AX license, the server name, the session ID, and the current company.

2.1.2.2 Address Bar

The address bar (breadcrumb bar) provides navigation possibilities known from the Windows Explorer and present-day Internet browsers. It shows a "breadcrumb" trail of the pages that you have opened in the content pane, enabling you to go back and forward clicking the travel buttons *Forward* and *Back*.

The address field shows the path of the current page and allows navigation to other companies, modules and pages.

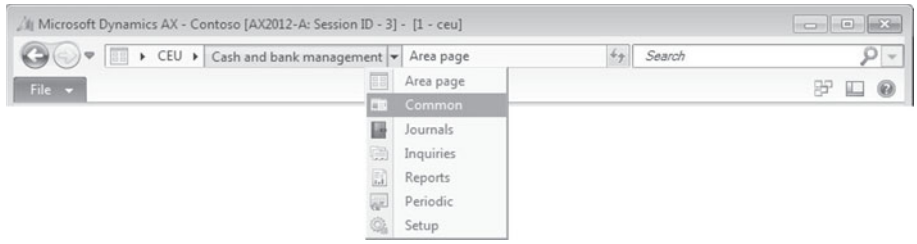

Figure 2-3: Navigating Dynamics AX in the address bar

In the right part of the address bar you will find the search box to access the enterprise search (see section 2.1.6). The search box, which is available if you have enterprise search enabled, provides access to Dynamics AX data as well as help topics.

2.1.2.3 Command Bar and Jewel Menu

The jewel menu contains commands that are globally available within Dynamics AX. This includes common Windows commands like *Copy* and *Paste* as well as specific Dynamics AX commands like *Filter* and *Document handling*. Depending on the content page, some commands are not active. If a certain command is as well accessible by a shortcut key, it will show on the right hand side of the particular command selection.

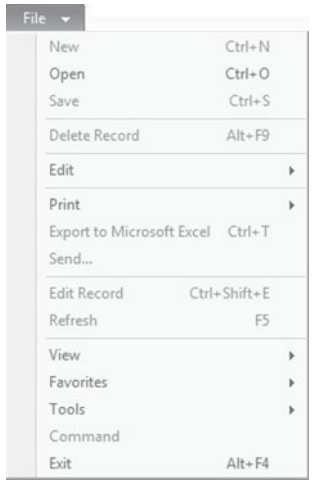

Figure 2-4: The jewel menu in Dynamics AX

In the right part of the command bar, you may find following buttons:

- Windows to switch between forms.
- View to change workspace settings.
- Help to show the online help.

The options to change workspace setting are not only available in the *View* button, you may access them in the jewel menu as well (command *File/View*.)

2.1.2.4 Status Bar

The status bar at the bottom of the Dynamics AX workspace consists of two different parts. On the left side of the status bar, you may see the document handling button and a short help text on the active element (field or menu item) of the workspace. On the right side, you may find information on the status of the session.

If you want to change the data shown in the status bar, you may choose appropriate settings in your user options (see section 2.3.1). If all elements are displayed in the status bar of the workspace window, you may see following fields:

- Document handling [1] – See section 9.5.1
- Help text [2]
- Notifications [3] – Alerts and workflow status
- Currency [4] – Controls currency of displayed amounts
- Application object model [5]
- Application object layer [6]
- Current company [7]
- Caps Lock status [8]
- Num Lock status [9]
- Current user [10]
- Session date [11]
- Session time [12]
- AOS name [13] – Server name
- Operation progress indicator [14] – Shows database activity

Figure 2-5: The status bar in the Dynamics AX workspace (all elements displayed)

The status bar not only displays information, it also offers additional functionality. You may start certain functions by double-clicking following fields in the status bar:

- Notifications – Opens the notifications form.
- Currency – Opens the currency converter, which gives you the possibility to show currency amounts in different currencies.
- Current company – Switch between companies (legal entities).
- Session date – Default for the posting date in the current session.

In detail forms, the status bar looks a little different from the way it looks in the Dynamics AX workspace. As shown in the section on master detail forms below,

the status bar in detail forms additionally provides the option to scroll between records and to switch between the view mode and the edit mode.

2.1.2.5 Navigation Pane

The navigation pane on the left hand side of the Dynamics AX workspace provides access to list pages and forms. List pages and detail forms are the place to work in the different modules of Dynamics AX as described in section 2.1.3 and 2.1.5 in more detail.

In order to hide the navigation pane completely, you may select the button *View / Navigation Pane* in the command bar. If you just want to prevent the navigation pane to show completely all the time, you may collapse the navigation pane automatically to a left-hand sidebar by choosing the button *View/Auto-Hide Navigation*, the shortcut key *Alt+Shift+F1* or the arrow (<) in the top right corner of the navigation pane. If Auto-Hide is enabled, the navigation pane will show completely whenever you move your mouse pointer to the navigation sidebar.

2.1.2.6 Favorites

Whereas the navigation pane grants access to all menu items in a uniform structure, the favorites pane (see section 2.1.3) allows arranging menu items the way you prefer for personal use. This way you can easily access list pages, forms, inquiries and reports you need frequently. The functionality of favorites in Dynamics AX is similar to the administration of favorites in Microsoft Outlook or Internet Explorer.

In order to adjust the workspace elements according to your needs, you may show and hide items like the favorites pane or the navigation pane by selecting the appropriate option in the button *View*  in the command bar.

2.1.2.7 Content Pane

The content pane shown in the center of the Dynamics AX workspace contains following types of pages:

- List pages – See description below
- Area pages – See section 2.1.3
- Role centers – See section 2.1.4

2.1.2.8 Workspace

If you need a second workspace to work in Dynamics AX, you may open a new workspace within your current session by choosing the shortcut key *Ctrl+W* or the button *Windows/New workspace* in the command bar. Another way to open a new workspace is to click the button *New Workspace* in the dialog box that displays when you want to change the company account.

2.1.2.9 List Page

A list page (like the customer page shown in Figure 2-6) provides a list of records of a particular table. You may use list pages to view and to select records as well as to complete daily tasks on those records.

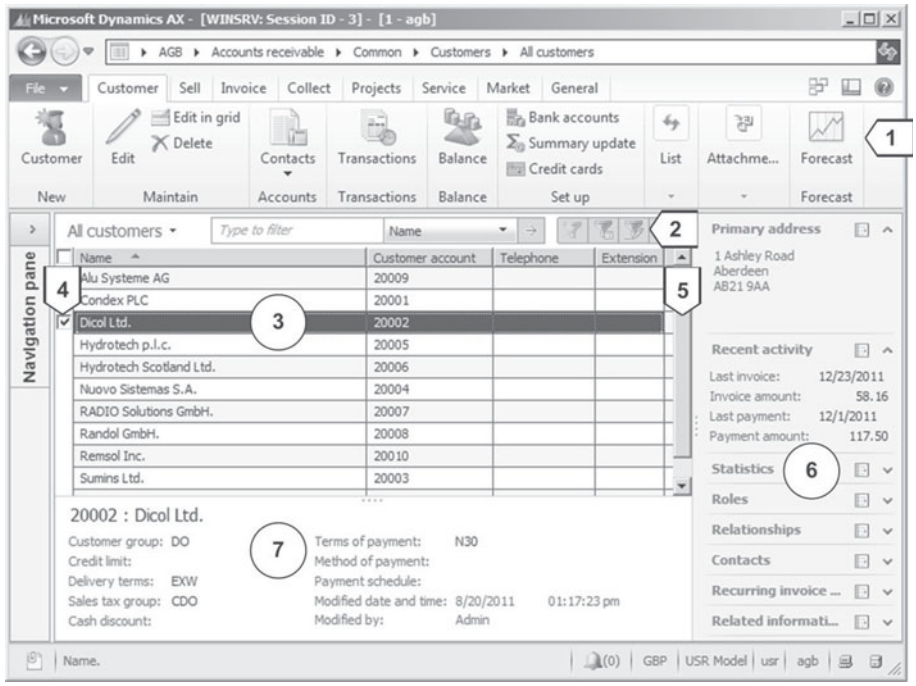

Figure 2-6: List page *Customers* (*Auto-Hide Navigation* enabled)

List pages show a common structure, with some elements and functions depending on the table displayed. The common structure in list pages includes the following basic elements:

- Action pane [1] – Contains the action buttons (similar to the Microsoft Office ribbon). You may distinguish action buttons to execute activities related to the selected record (like placing an order) on the one hand and action buttons to open related detail forms (displaying more information) on the other.
- The number and functionality of buttons is depending on the particular page. Depending on the number of available actions, they show on several tabs (e.g. the action pane tabs *Customer* or *Sell* in Figure 2-6).
- Filter pane [2] – Allows entering filter criteria (see section 2.1.6).
- Grid [3] – Displays the list of records
- Grid check boxes [4] – Allow selecting multiple or – if selecting the checkbox in the header line – all records.
- Scroll bar [5] – Available to scroll through the records. If you want to switch between records, you may select a pop-up menu which opens when doing a

right-hand click on the scroll bar. Alternatively, you may also choose to push the shortcut keys *PgUp*, *PgDn*, *Ctrl+Home* and *Ctrl+End*.

- Fact boxes [6] – Show a summary of additional information referring to the selected record (e.g. the primary address of a selected customer).
- Preview pane [7] – Below the grid shows more detailed information on the selected record (e.g. additional fields of the customer record).

If you do not want to show all information, you may hide fact boxes and preview pane choosing the appropriate option in the *View* button of the command bar.

A list page does not automatically refresh, if data displayed on the screen change in the database (e.g. if somebody is working on the records concerned). After editing a record in a detail form, you may want to refresh the related list page by choosing the button *Refresh* on the right-hand side of the breadcrumb bar or the keyboard shortcut *F5*.

2.1.2.10 Detail Form for Master Data

Unlike list pages, which are there to view a list of records, detail forms are there to insert and modify single records. If you choose to work on a record in a list page by double-clicking it, Dynamics AX will open the related detail form.

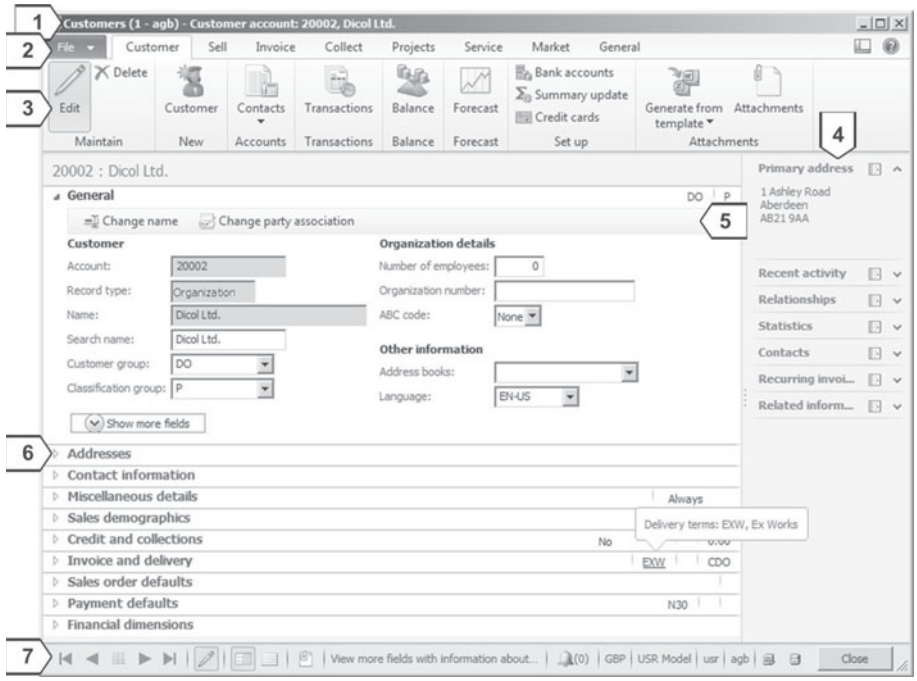

Figure 2-7: Elements of a detail form (customer detail form as an example)

Alternatively, you may access a detail form by clicking the button *Edit* on the first tab of the action pane in a list page.

Whereas list pages are shown within the Dynamics AX workspace, detail forms open separate windows, which you may move and resize on your PC desktop.

Detail forms got a common structure, which is similar to list pages. Some elements and functions depend on the particular form, however. Figure 2-7 shows the customer detail form (accessible through the list page *Accounts receivable> Common> Customers> All customers*) as an example for the structure of detail forms.

The common structure of detail forms includes the following basic elements:

- Title bar [1] – Shows the form name, the current company account (if chosen in the users options) and the identification of the selected line. For illustration, the example in Figure 2-7 shows the number and name of customer "20002" in the company account "AGB".
- Command bar [2] – Includes jewel menu, *View* and *Help* button.
- Action pane [3]
- Fact boxes [4]
- Action pane strips [5] – Provides access to actions in case there are only a few options available. On the one hand, you may find action pane strips on fast tabs as shown in Figure 2-7, and on the other hand they may replace the full action pane on the top of forms, which only contain a few actions – e.g. in the customer groups form (*Accounts receivable> Setup> Customers> Customer groups*).
- Fast tabs [6] – Groups fields according to their functional area. In comparison to regular tabs, fast tabs additionally show summary fields displaying core data directly on the tab. In Figure 2-7, the fast tab *Invoice and delivery* for example shows the delivery terms "EXW". You may expand fast tabs by clicking the particular tab. A right-hand click on a tab provides the option to expand or collapse all tabs at the same time.
- Status bar [7] – Shows additional options to move between records (depending on the status bar settings in your user options) in comparison to the status bar in the workspace. Apart from the buttons *Ctrl+PgUp*, *Ctrl+Home*, *Ctrl+PgDn*, *Ctrl+End* to change the selected record (e.g. moving to another customer in Figure 2-7), you may also choose to view a list of records by clicking the button *Grid View*.

Another option available in the status bar is to switch between the view mode and the edit mode clicking the button *Edit*.

Section 2.1.5 later in this book contains more information on editing records, working with fast tabs and other options available in list pages and detail forms.

2.1.2.11 Grid View

The grid view in detail forms is an option for viewing a list of records. If you select a record in the grid view and return to the details view clicking the button *Details View* in the status bar, you will see the details of the record selected.