THE ULTIMATE DEMO GUIDE

OF THE NETRONIC VISUAL SCHEDULING SUITE BUILT EXCLUSIVELY FOR MICROSOFT DYNAMICS NAV

BY JAKE HOSTETLER

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Introduction

What this EBook is about and who should read it.

I'm approached quite often with the request from Dynamics NAV partners and consultants to help them prepare a demo for a prospect.

Of course I'm happy to do this but hundreds of demos with dozens of NAV partners and end customer all over the world have granted me a look at the situation with different eyes. A new perspective on a well-worn practice.

Ideally, I want to enable my partners to the fullest degree to be independent in their roles. Enabling can take many forms but chiefly it means that my partners require me less and less to successfully sell the NETRONIC Visual Scheduling Suite to their customers.

My goal isn't to leave my partners stranded, trying to learn my products plus the smorgasbord of other add-ins/ons they already sell with standard NAV. My goal is to show my partners how easy it is to use NETRONIC with NAV, creating an experience as though these visual scheduling add-ins are part of the standard NAV offering.

This sounds great when you read it but the fact is that giving a good demo is hard and giving an excellent demo even harder. Therefore, it's critical to find ways to not only give a good demonstration but an excellent one. This means going beyond the standard. It means guiding prospects to their own solutions. You can do this by reflecting the prospect's situation in the software.

I'm not talking about huge investments of time, tailoring every last table of NAV down to the last field. I'm talking about a small concentrated effort that yields results.

In this guide you will **learn everything you need to know about creating outstanding demos** with the NETRONIC Visual Scheduling Suite Add-ins.

**About the author of this EBook**

Jake is a business development and marketing manager at NETRONIC – The Gantt Solution Company. He strives to create outstanding customer experiences and bring his partners to the next level of presentations and customer satisfaction via value-added add-ins.
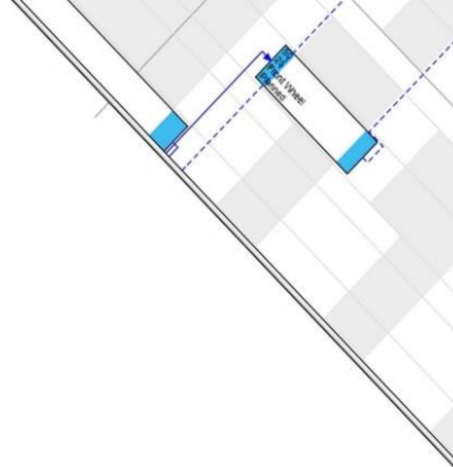
Part I: The Relevant Demo

"A goal without a plan is just a wish." – Antoine de Saint-Exupéry

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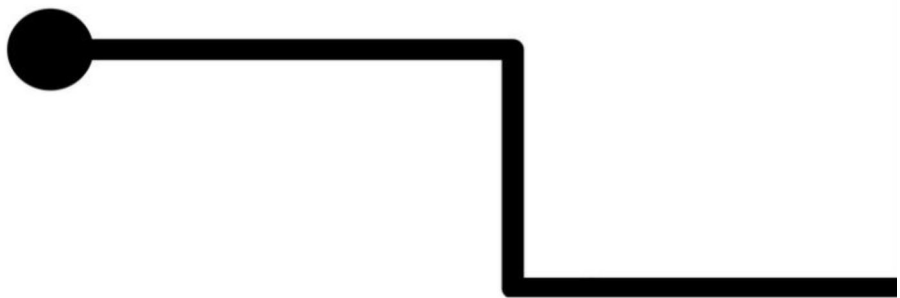
Diane and André are on their way to their prospect for a demo of Microsoft Dynamics NAV 2017. Diane has called André and the following conversation takes place.

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Diane: "Did you bring the giveaways?"

André: "Yes."

Diane: "And the handouts for after?"

André: "Yes."

Diane: "And the visual scheduling guys? Did you talk to them?"

-Silence-

Diane: "André? Hello? You still there?"

André: "Yeah, I'm still here."

Diane: "So the visual scheduling guys, NETRONIC, did you talk to them?"

André: "No, I forgot."

Diane: "What?! Forgot! That was the one thing Paramount had to see. The ONE freakin thing!"

André: "I know…"

Diane: "Well do you know how to present NETRONIC at least? I know Paramount definitely wants to see production and jobs and services might be interesting for them as well."

André: "The guy from NETRONIC sent me a bunch of material but I haven't look at it. Can't say that I feel comfortable demoing their stuff…"

Diane: "Great, excellent, we might as well turn around. And while we're at it we can call SAP Business One/Epicor/NetSuite and congratulate them on their new customer."
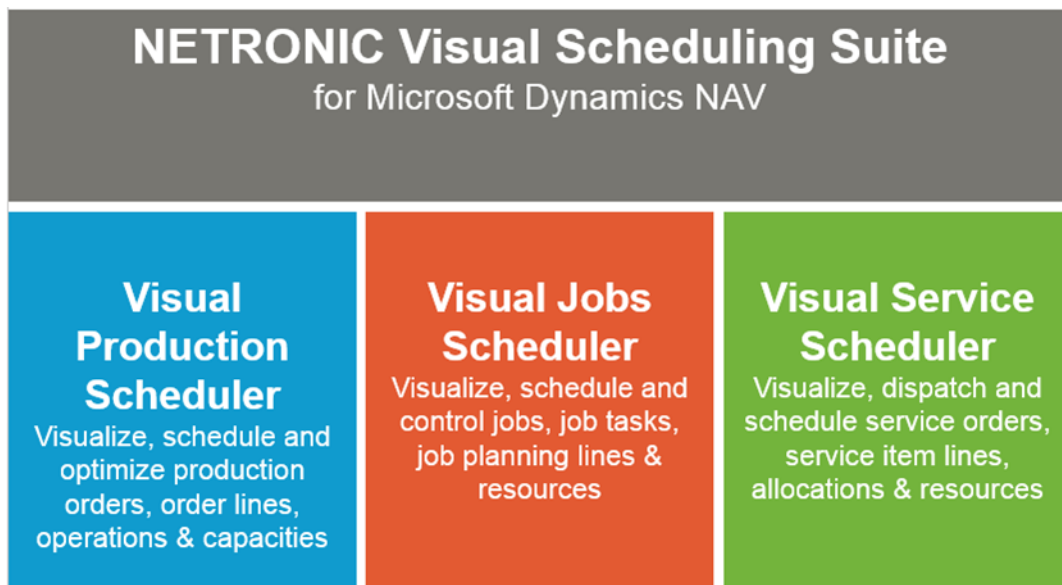
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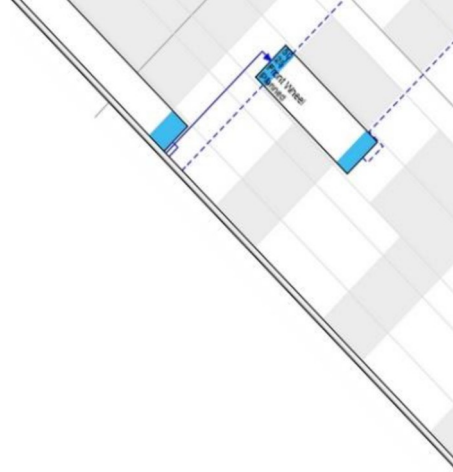
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Part II: 6 Easy Steps to a Better NAV Demo with the
NETRONIC Visual Scheduling Suite

"Appetite often comes while eating and visual scheduling is no different. The more you show, the more they want."
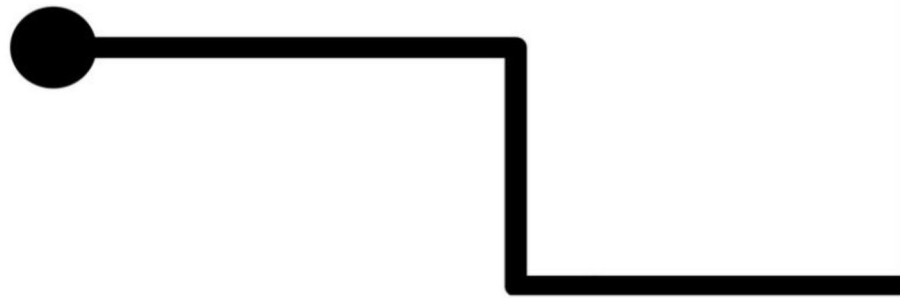
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The Visual Scheduling Suite is a family of graphical planning boards which visualize data directly from Microsoft Dynamics NAV.

This suite is powerful and it's critical that as a Dynamics NAV reseller and NETRONIC partner you know when it is appropriate to propose the NETRONIC Visual Scheduling Suite to your prospects and customers.

What is the situation and the challenge?

The situation:

There are many different types of companies across varying industries using NAV. The key in qualifying a prospect for NETRONIC is first determined by confirming that they are, or will be, using one of Microsoft Dynamics' manufacturing, jobs, or services modules.

The challenge:

Once qualified as a viable for NETRONIC Visual Scheduling it's critical to understand the prospect or customer's unique challenges as it relates to visual scheduling. In the case of this EBook, we will say that a clear need has been articulated by the client, or observed by the partner for the client, for a visual scheduling board in order to better manage resources, jobs, tasks, production orders, etc.

Typically, ideal clients for our add-ins are small to mid-sized Dynamic NAV customers which

- Complain about a lack of visibility within their time and resource-oriented data
- Consistently struggle with meeting deliver dates or milestones
- Spend too much time maintaining and searching for information rather than managing it

Now, let's jump into the steps.

# Step 1) Show Seamless Integration

In the world of enterprise resource planning software, prospects and customers will express the concern that they do not wish to have another add-on which is running alongside their NAV system. They complain that they do not wish to learn yet another software and system and understandably so. After a certain point, it can become excessive not to mention cumbersome with so many different applications performing so many different functions. The goal of an ERP System after all is to help centralize data processing.

It is exactly for this reason that the NETRONIC Visual Scheduling Suite was built not as an add-on but as an add-in which is fully integrated into Dynamics NAV. The visual schedulers are truly living and breathing inside of NAV - so show that!
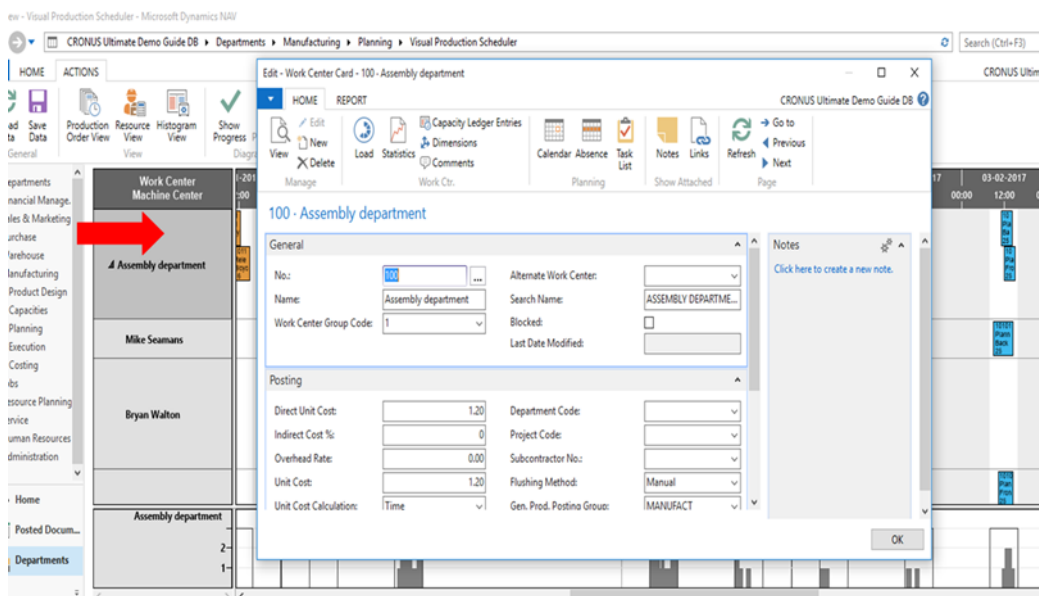
➡️ Show that the schedulers are living inside Dynamics NAV
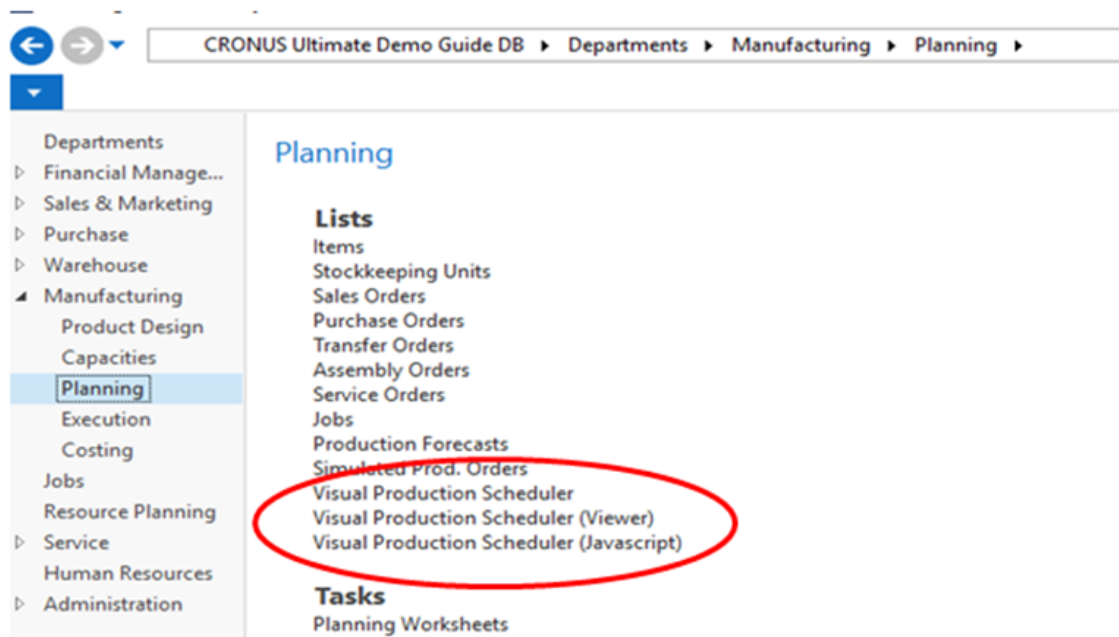
▶ Double-clicking on an operation opens the corresponding card in NAV.
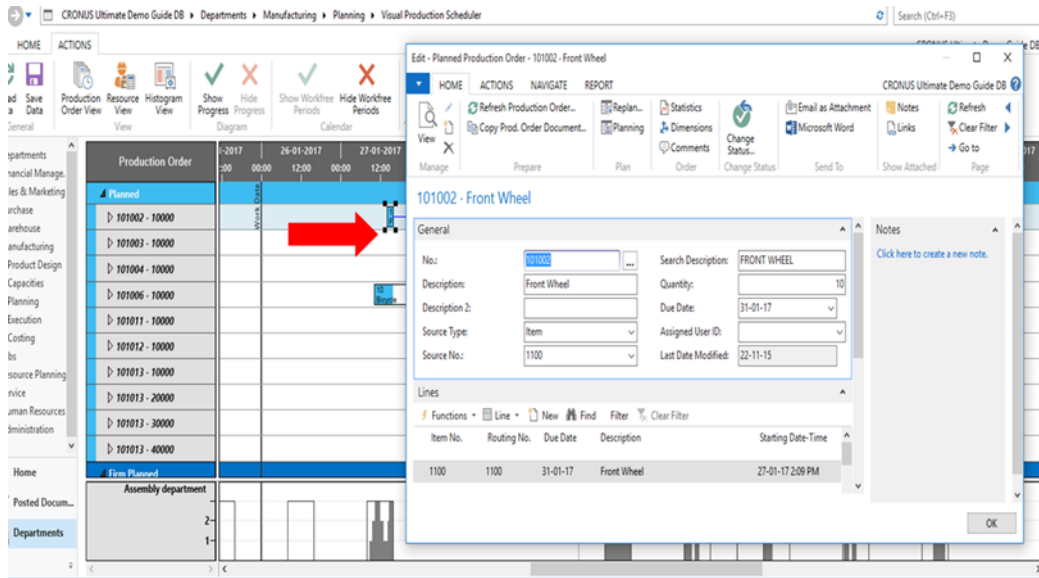
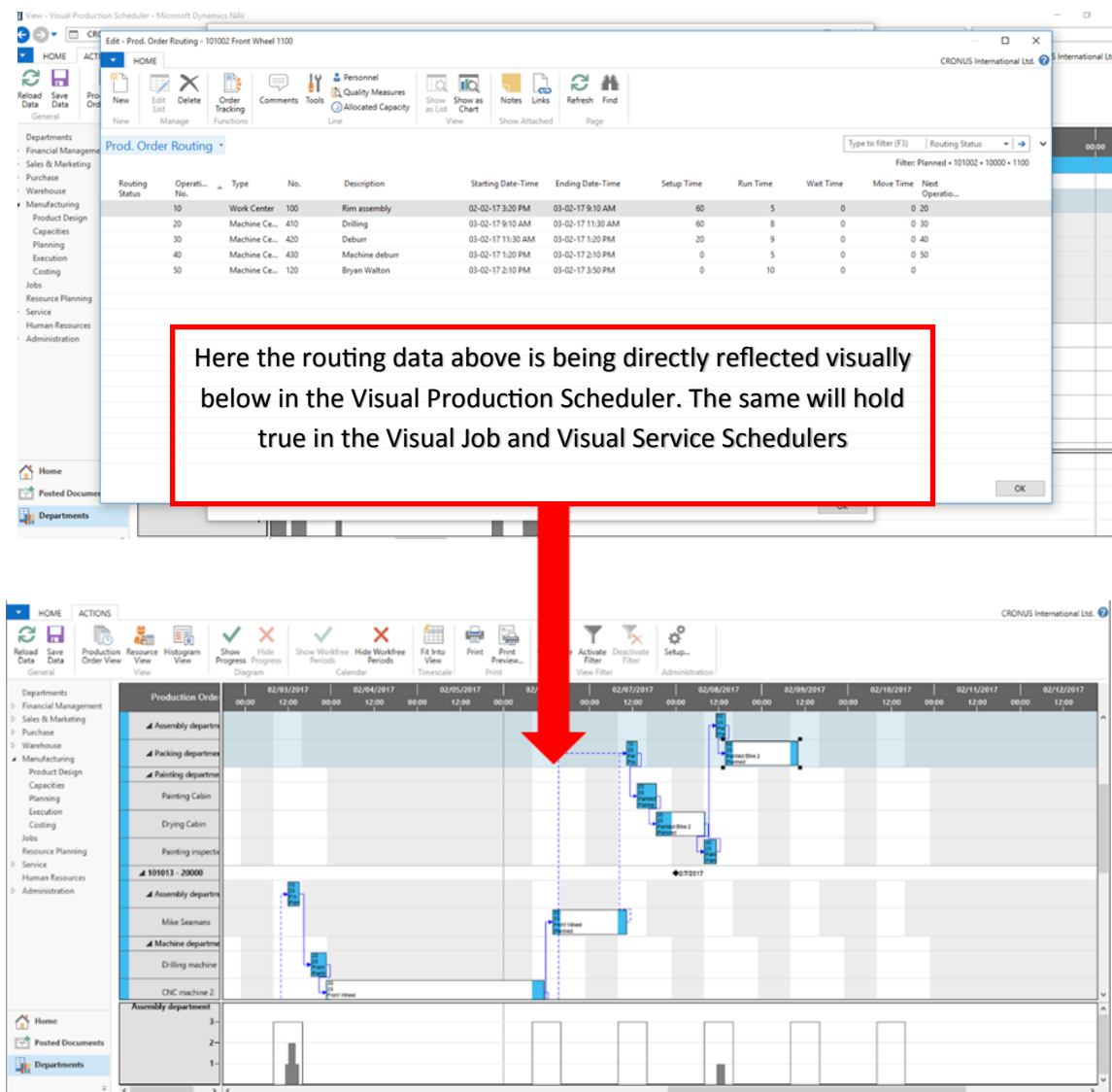▶ The same is true for work centers and machine centers!

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Step 2) A Visual Face [No altering, just bolstering]

As we said above the Visual Scheduling Suite schedulers are providing a visual front-end for your data living in NAV. This means routings, due dates, work and machine centers, run times, etc. will all be shown on the screen according to the information in NAV.

Here is a chance to highlight the difference between a visual scheduler and an advanced planning system (APS). A visual scheduler such as NETRONIC displays the data as is, allowing the planner a transparent look across their data and the ability to agilely make changes where necessary. A visual scheduler will not change data without the consent of the planner.

An APS on the other hand, looks to optimize the data which it's given and will often try to bring its own algorithmic logic into the changes that it makes automatically. This can be okay for manufacturing firms working in a stable, non-changing environment but rarely is such an environment the case.

Here the routing data above is being directly reflected visually below in the Visual Production Scheduler. The same will hold true in the Visual Job and Visual Service Schedulers

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Step 3) Simulated Until Saved

Moving operations or making changes in any of our Visual Schedulers will result in a red border appearing around said changed objects. This red border tells you that changes have been made in the Visual Production Scheduler, but have not yet been saved back to NAV.


Saving the data will see the red border disappear. The data can alternatively be reloaded to reset the scheduler back to its original state. This will being either the state in which you opened the scheduler or back to the most previous save.

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Step 4) Flexible Timescale

A timespan, based off of the working date is defined in the setup menu of the scheduler menu ribbon. The first field, starting date is how many days, weeks, months, or even backward from the current working date the schedule will go. The second field, the ending, is the same in other directions. An easy way to remember this is that anything to the left of the work date line is in the past and anything to the right in the future.
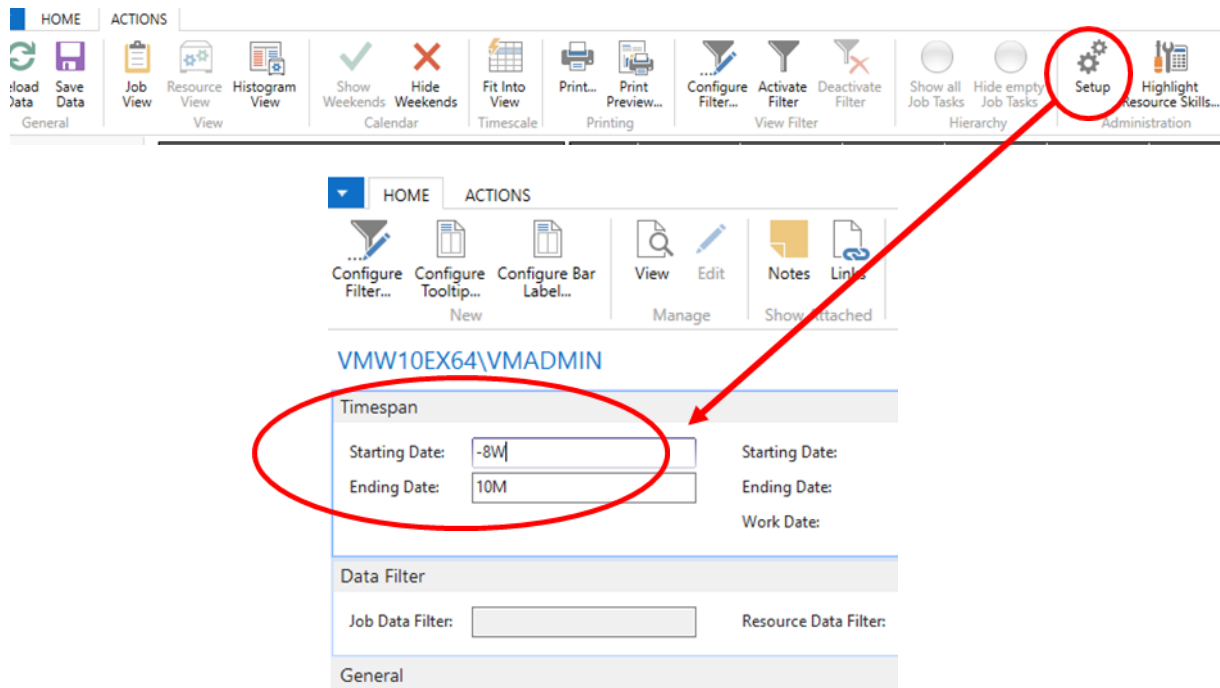
Here the schedule is shown in its most broad form of months.

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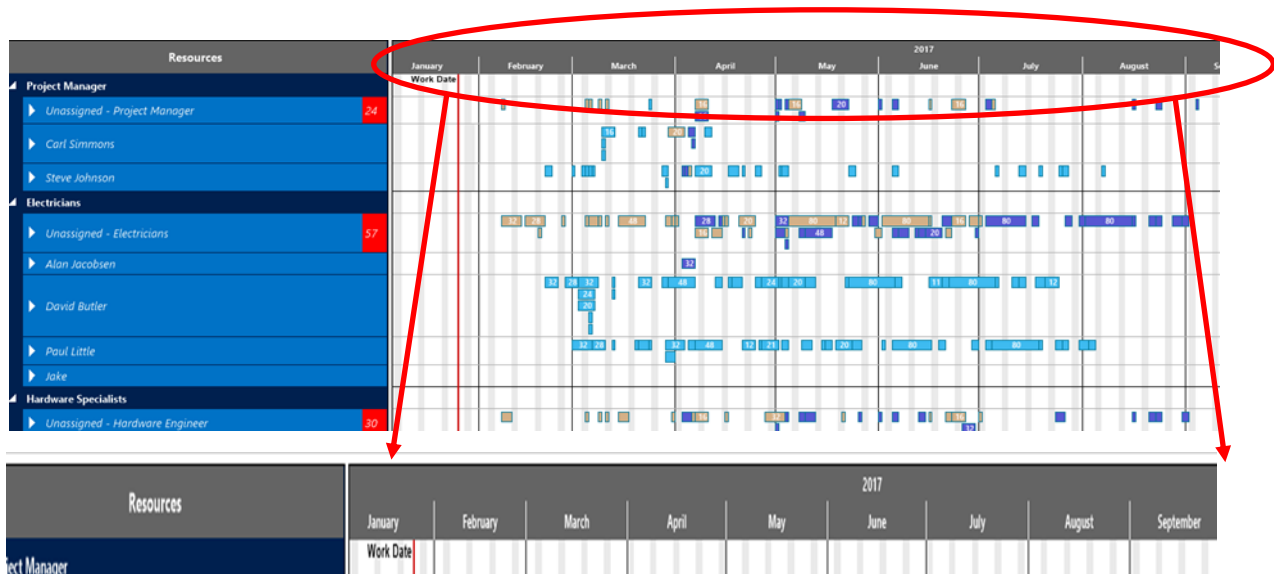
Here we zoom in to gain increased granularity on the schedule by scrolling inward over the timescale with the wheel of the mouse.
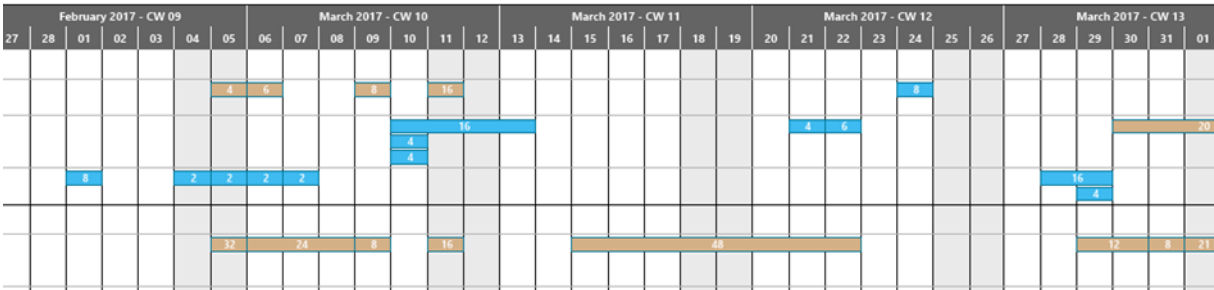
Zooming in further by scrolling will increase the granularity. Here we are in to individual days and even hours within the day.
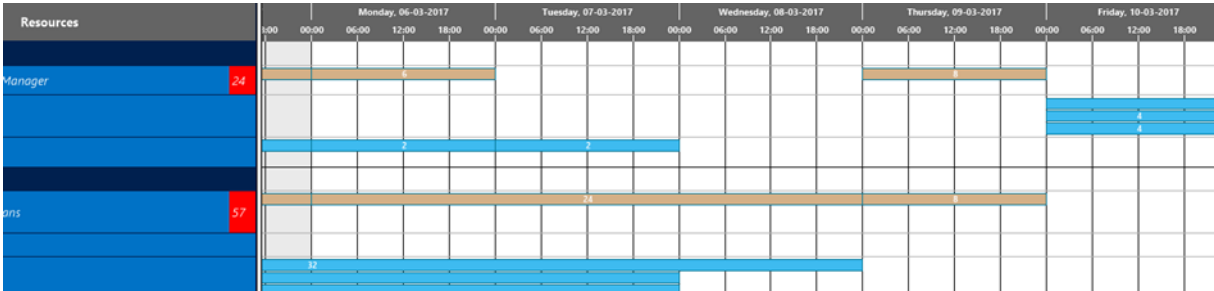
Step 5) Dragging and Dropping

Naturally a huge benefit of a visual scheduler is the ability to quickly and effectively move data around.

This can mean moving individual operation of a production order or multiple tasks in a project. It can mean choosing to move allocation independent of linked predecessors or successors or dependently, automatically scheduling preceding or succeeding tasks with it.

Scheduling across multiple link job tasks in the Visual Jobs Scheduler
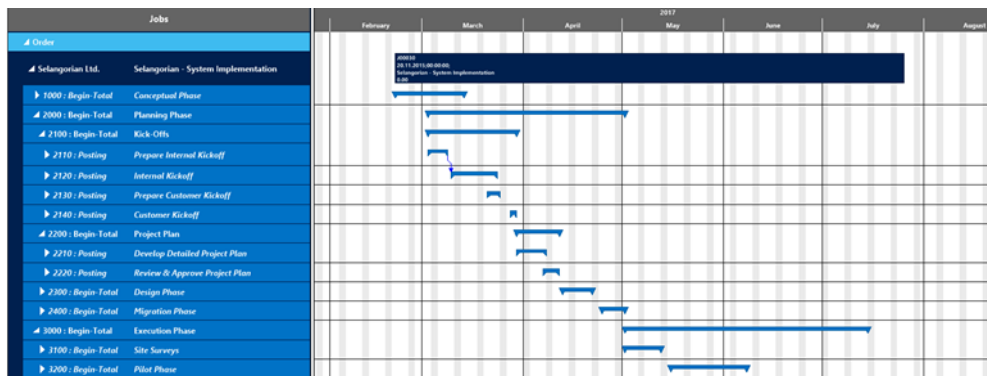
Dragging across multiple production order lines in the Visual Production Scheduler
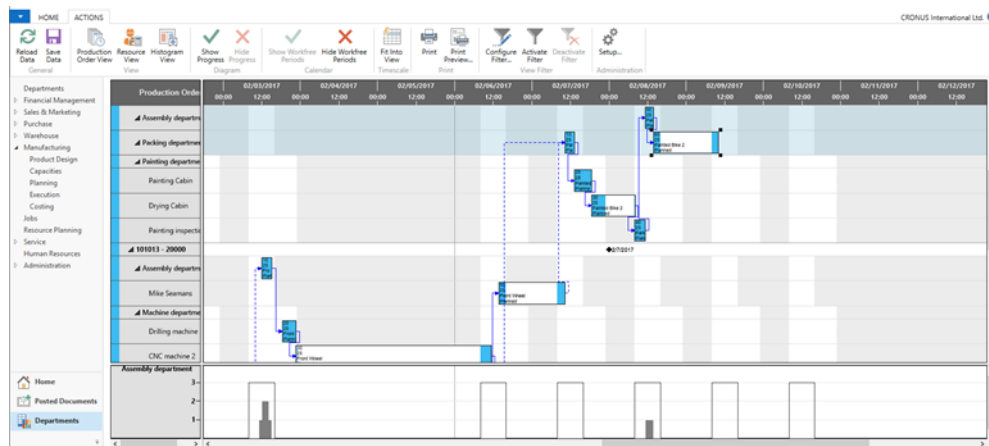
Allocating Service Order Lines out to specific resources in the Visual Service Scheduler

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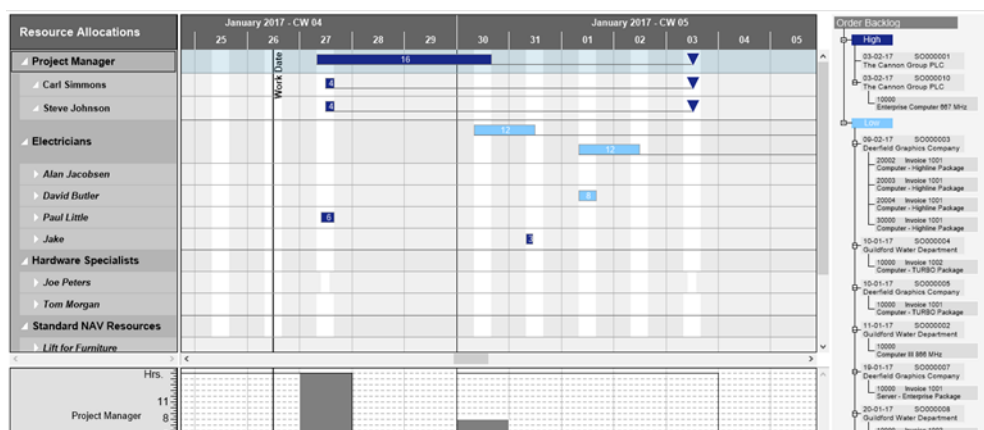
Step 6) Listen, don't just talk

Beyond running through the list of specific features a final point, asking, needs to be addressed.

Entering into a discussion with a client about what their problems to date are and what they are looking to achieve can provide massive background and give you as the presenter a much needed glimpse into the life and difficulties of your client or prospect. This can hugely benefit when confronted with which the question of which features of the Visual Scheduling Suite versus others to show. Presenting more client-relevant features can in turn take your demo from generic and good to thorough and exceptional.

Here are some good probing questions to get you started as you walk through the initial features of the Visual Scheduling Suite.

> 1) Are you currently scheduling and planning?
> > a. If yes, how?
> 2) What is it you want to achieve with visual scheduling?
> 3) How many production order, jobs, or service order are you scheduling on average and in what time frame? (Ex. We schedule 3,000 production orders every month or we usually run 5 jobs at a time each lasting anywhere from 6 months to two years)
> 4) What are typical processes within your organization as they pertain to scheduling?
> > a. What are these processes trying to achieve?
> > b. What are these processes lacking and why?
> 5) What are specific elements of your scheduling process that need to be visualized and why?

These questions and their subsequent answers give a look at the customer's situation.

They will benefit you the partner by:

> 1) Using the Visual Scheduling Suite to reveal scheduling challenges
> 2) Create a dialogue with your customers and prospects which gets directly to the issues and subsequent solutions
> 3) Articulating the underlying value of NAV

The following chapters will diver deeper into the NETRONIC Visual Scheduling Suite family. They will highlight the three most client-loved features of each add-in and provide tips on when to show certain features at which times.

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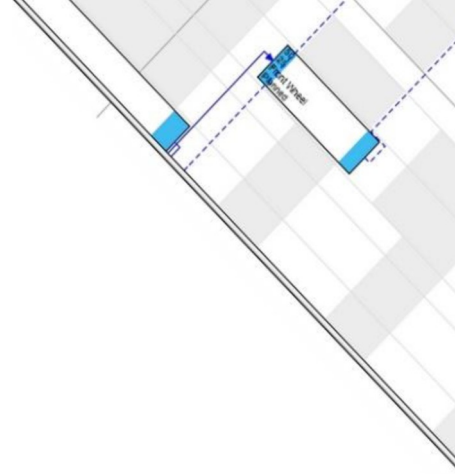
Part III: The Visual Scheduling Suite Family

"It's no secret that humans are visual creatures. While tables and fields are invaluable for holding large quantities of data, a simple yet transparent visual representation of your data can work wonders in creating a lasting impression long after your demo has ended."

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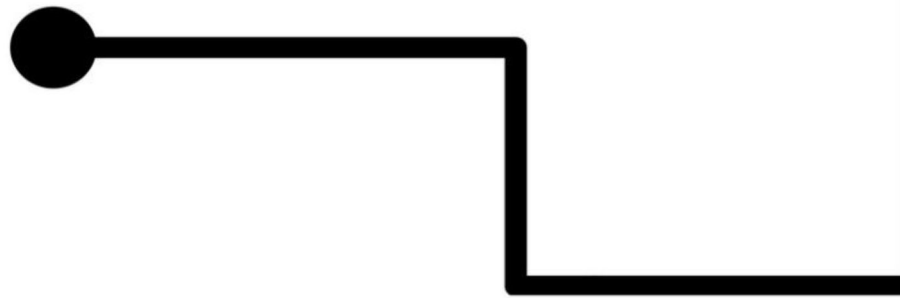
If you talk to enough people within a certain industry, do enough presentations, read enough blogs, you begin to draw certain conclusions of the time. My conclusion of the time since joining NETRONIC two years ago has been this: the visual scheduling add-ins we build for Microsoft Dynamics NAV are no longer a 'nice-to-have' for customers, they are a 'must-have.'

The general consensus is this: it's not the case anymore that a prospect or customer is wowed just by seeing a visual representation, namely a visual schedule in the form of a Gantt chart, of their data. It's an **expectation**.

This means two things.

First, it means that a visual proponent of your demo is a must else you risk immediate loss of position against competition who come prepared with visualization.

Second, it means that to beat out the competition you need to not only have a visual proponent, but a good one.

Thus, the Visual Scheduling Suite built by NETRONIC, specifically for Microsoft Dynamics NAV. A complete suite of Add-ins providing a visual frontend to your NAV data.

To quote Microsoft CEO, Satya Nadella, "We are moving from a world where computing power was scarce to a place where it now is almost limitless, and where the true scarce commodity is increasingly **human attention**."

So you have less time to do more with the ever-shrinking attention spans of your customers! Let's go!

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The 3 Most Loved Features of the Visual Production Scheduler

The oldest member of the Visual Scheduling Suite family is the Visual Production Scheduler. This .NET Add -in visualizes production orders, production order lines, operations, and capacities from Dynamics NAV.
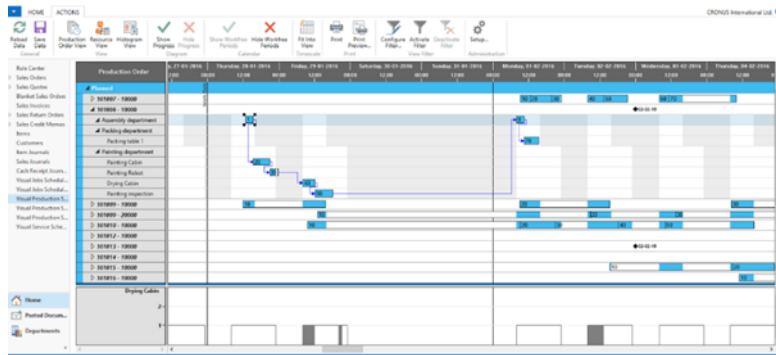

Feature 1 - Seamless Integration: double-clicking anywhere in the schedule takes you to the corresponding tables and cards in NAV.

Okay, this starts off our list because this gets all the heads in the room nodding. Any initial inhibitions from those who are hesitant to "learn something new" can be addressed by showing the ease with which one can jump from the visual schedule back into NAV. In essence, your customers and prospects should never feel like what you are showing them is even an add-on.

For the Visual Production Scheduler this means showing the **NAV cards of the Production Order Routings**. This will emphasize that the routings in NAV are being visualized as is in the Visual Production Scheduler.

The same can be achieved by selecting a work or machine center as the corresponding resource card will be opened.

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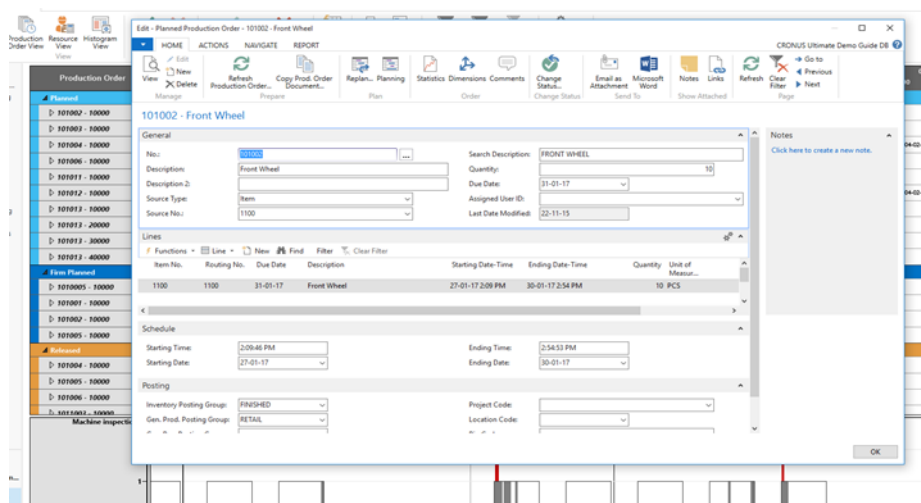
Feature 2 - Semi-Automatic Scheduling: auto-schedule predecessors and successors with zero buffer time.

Seems intuitive once you see it but this feature is not to be taken for granted. This is a semi-automated feature which allows you to move single operations and then see the results on either the preceding or succeeding operations, or both. This is direct planner decision support inside the add-in - it's as easy as turning a light switch on or off.
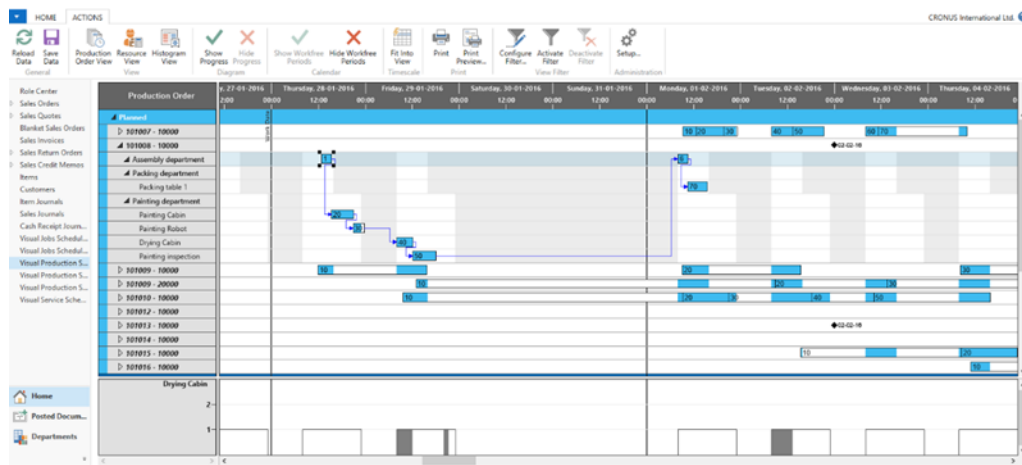
Feature 3 - Dragging & Dropping across Machine and Work Centers: move operations horizontally or vertically across the screen to adjust timing or routing.

This is the big one. It shows one of the true strengths of a visual schedule of your data, namely the ability to quickly move data around that would otherwise be cumbersome. Here we see how easy it is to shift work from an overloaded resource onto other available resource in that group.

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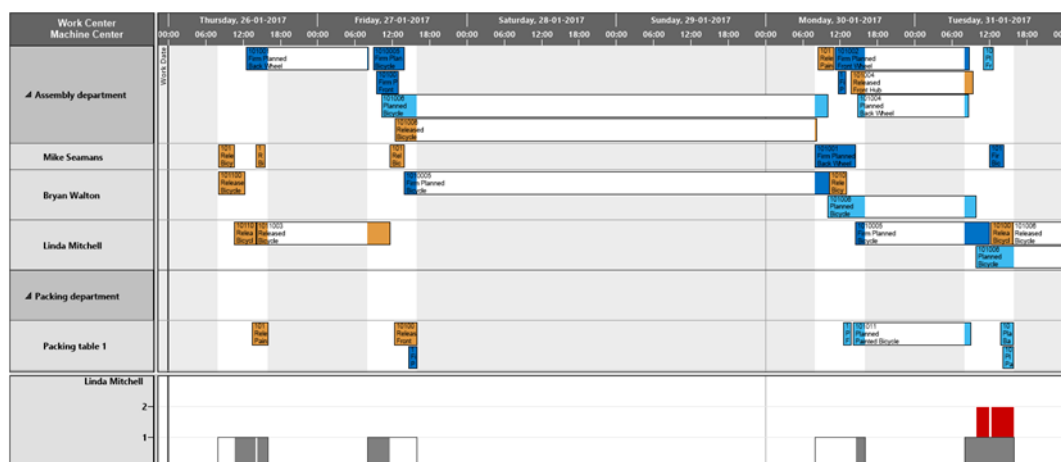
The 3 Most Loved Features of the Visual Jobs Scheduler

The middle child of the family is the Visual Job Scheduler. This .NET Add-in visualizes jobs, job tasks, job planning lines, and resources from Dynamics NAV.
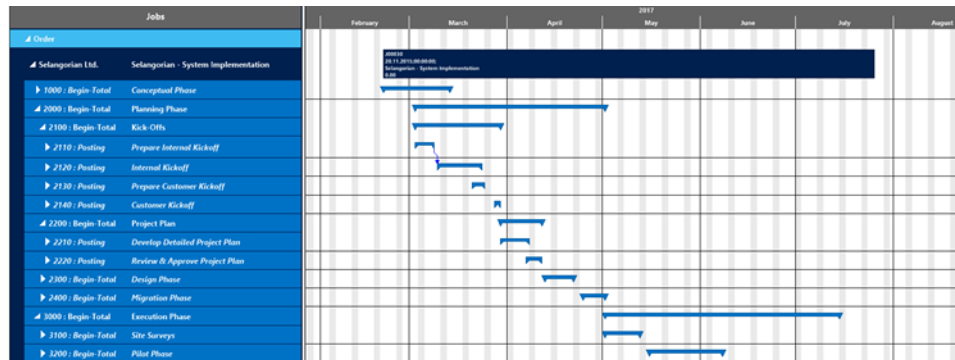
Feature 1: Seamless Integration: double-clicking anywhere in the schedule takes you to the corresponding tables and cards in NAV.

The integration is expected and needs to be shown. It is often great here to show a job, expanded out, in the Visual Jobs Scheduler and then double click on it in NAV. You can then see the hierarchy in NAV directly reflected in the VJS.


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Feature 2: Scheduling Support via Links: creating links between job tasks.

This is a functionality built into the VJS which doesn't exist in standard NAV. As in the video below, you can link a job task to another job task therefore **creating a finish-start relationship**. This means that as you move the first or preceding job task, the second or succeeding job task will **move out automatically** as it cannot start until its predecessor has finished. The ability to link will work on all levels throughout your job hierarchy.
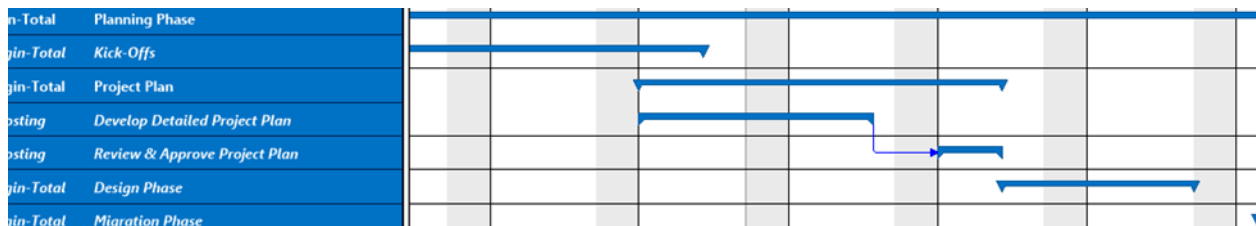
Feature 3: Unassigned Resources: assigning first to the group and then to the individual(s).

Here is an additional feature which will make planning much easier in NAV. Though it does not show up in standard NAV, it can be easily utilized in the VJS. Simply adding the prefix $VJSRG$ to a resource's name will make the resource an "unassigned" resource. This means that the scheduler will recognize differently from your other resource living in resource planning.

This functionality allows a planner **to plan first at the resource group level,** a function not available in standard NAV jobs, and then go in and assign group level tasks to individual resources at a later time. The major benefit being that the planner can first allocate work to the group level as it is often unclear early on in the job scheduling which specific resource will be complete the task(s).

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The 3 Most Loved Features of the Visual Service Scheduler

The youngest of the suite children is the Visual Service Scheduler. This .NET Add-in visualizes service orders, service order item lines, allocations, and resources.
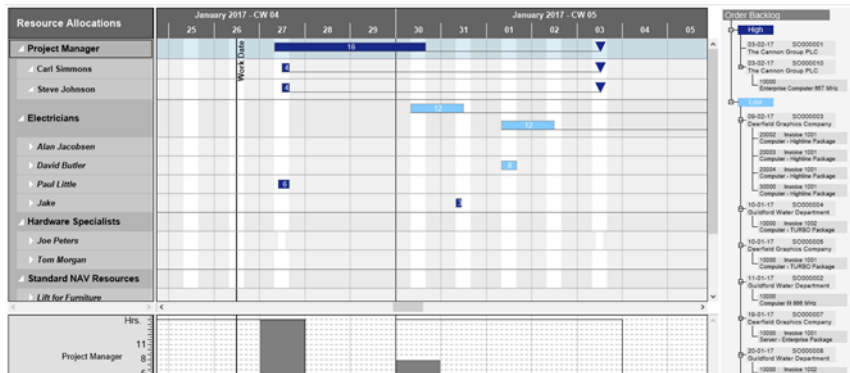
Feature 1: Seamless Integration: double-clicking anywhere in the schedule takes you to the corresponding tables and cards in NAV.

The integration is expected and needs to be shown. This can be shown effortlessly by utilizing the data already found in NAV. **Double-clicking on a resource, allocation, or not yet allocated service order** will automatically open the corresponding card in NAV.

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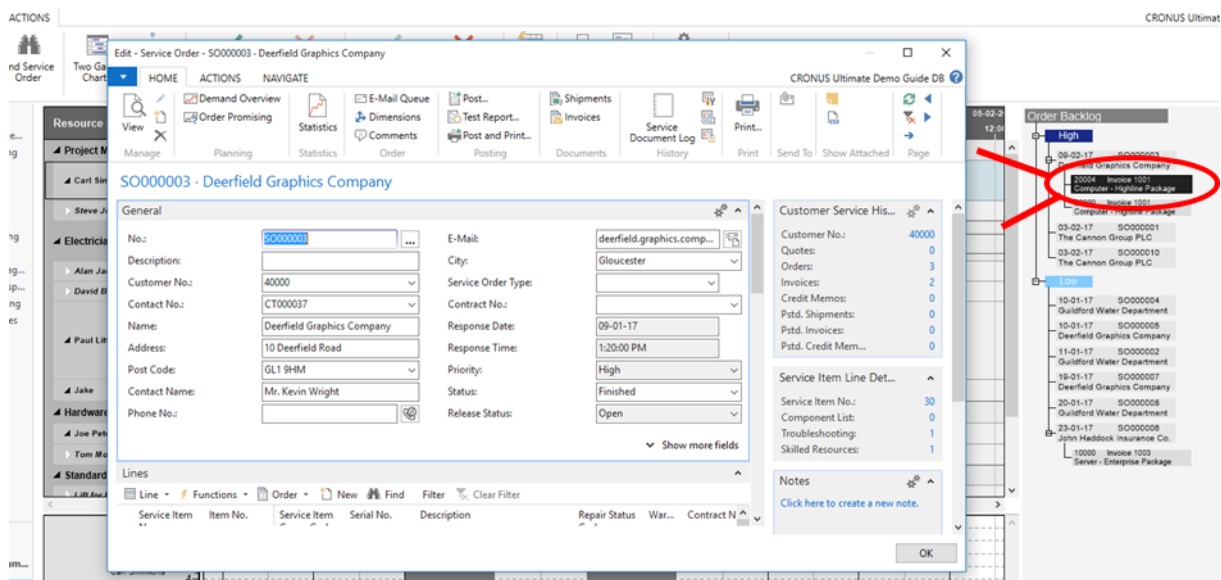
# Feature 2: Easy Allocation: dragging from the order backlog into the Gantt chart

This is your visual dispatch board at its finest. The main portion of the screen is taken up by the Gantt chart where you can see your **resources, their working and non-working time, and which order or tasks have already been allocated to which resource**. The Gantt chart represents your service schedule. To the right you have your **order backlog**. This is all service order lines which have not yet been allocated to a resource. Below you can see how simple dispatching a service order is as a service order line is taken from the right order backlog and **dragged and dropped** onto an available resource in the Gantt chart. It will then disappear from the backlog on the right as it's now allocated.

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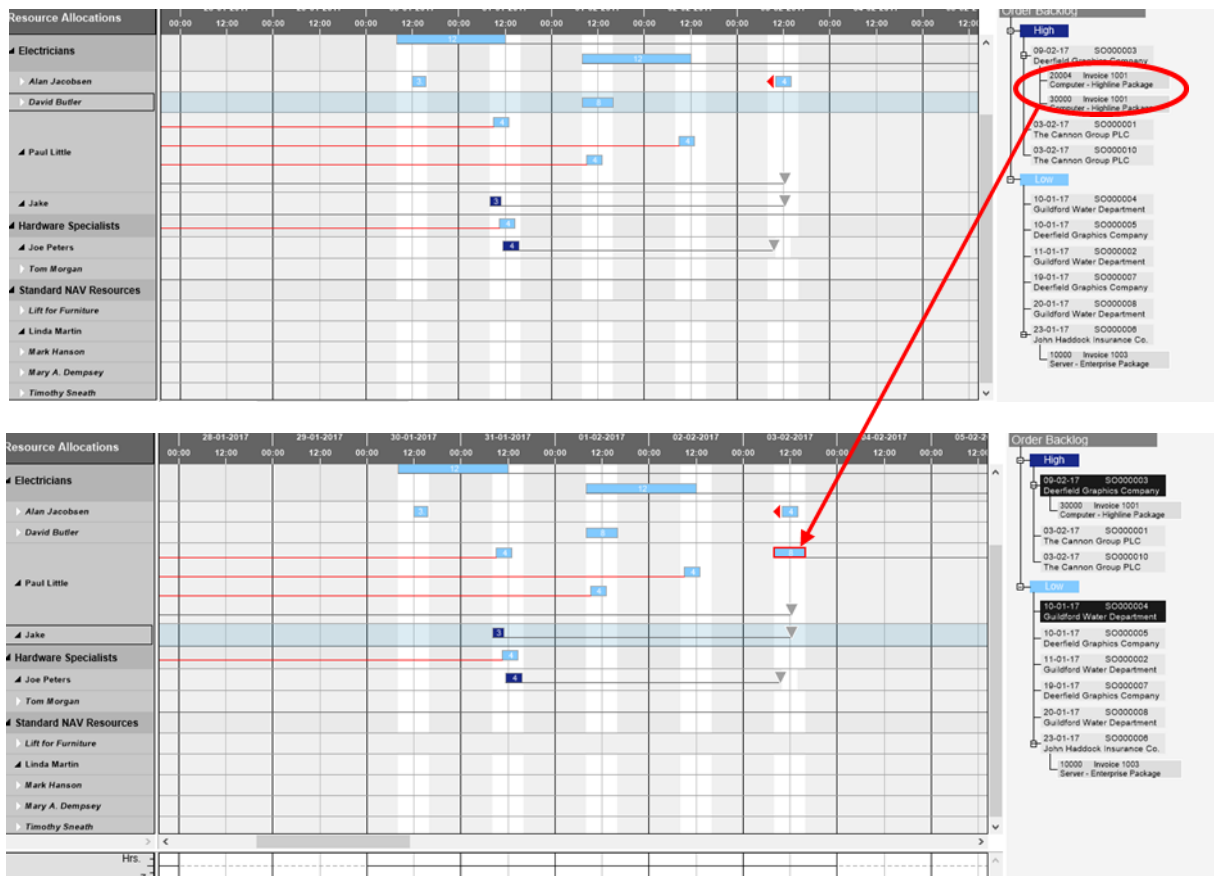
Feature 3: Task Splitting: Breaking down tasks across multiple resources

Here is an additional feature which will make planning much easier in NAV. In the standard NAV service module you are able to assign a service order line to a group. You can therefore in the Visual Service Scheduler also **take an allocation either on the group or individual level and split that allocation into two.** This would allow you, such as in the example below, to **allocate a bulk sum of hours to the group level and go in at a later time a split that bulk amount** (as many time as you want) across the individual resources of that resource group. Note that every time you split you are creating an additional service order line belonging to the parent service order.

In the example below I'll take a 12 hour task assigned to the Electricians group and split it across two resources (Alan Jacobson and David Butler) who both have free capacity at that time.
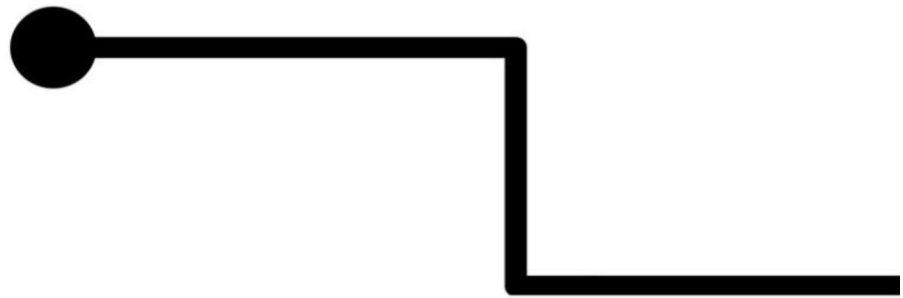
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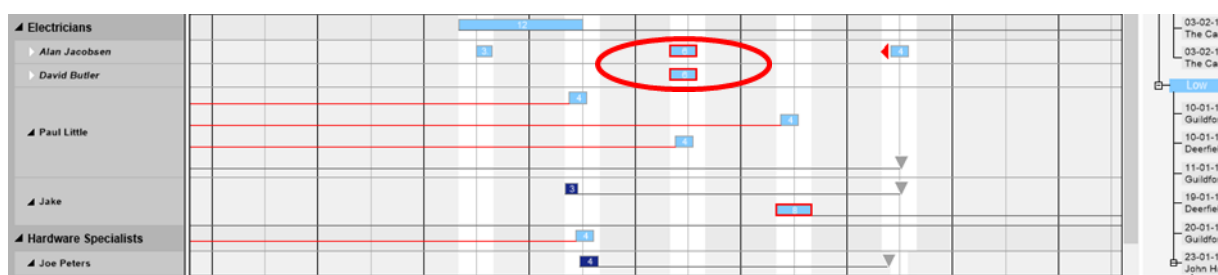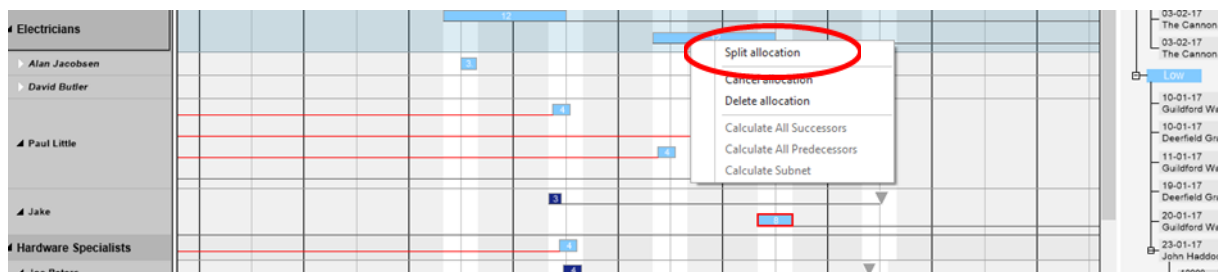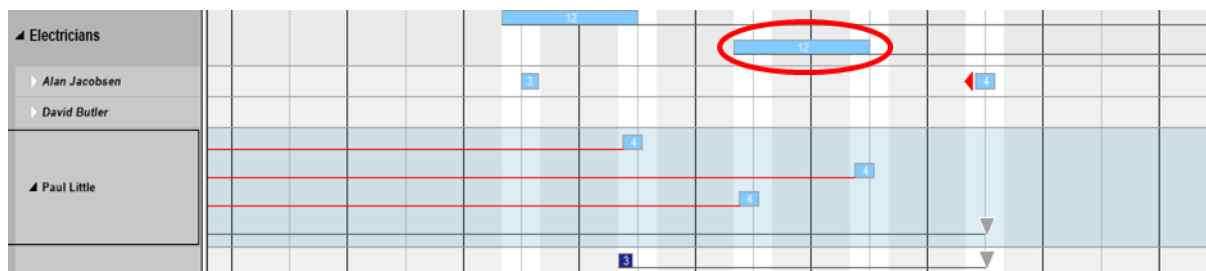
Conclusion and further reading

"People will forget what you said. They will forget what you did. But they will never forget how you made them feel." – Maya Angelou

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This EBook has covered the basis of giving a great NAV demo with NETRONIC highlighting suite-wide "must-show" functionalities of the Visual Scheduling Suite such as:

- Seamless Integration
- A Visual Face
- Simulated Until Saved
- Flexible Timescale
- Dragging & Dropping
  Creating valuable (customer-focused) dialogues

Further, it has covered the three products of the Visual Scheduling Suite. The Visual Production Scheduler, Visual Jobs Scheduler, and Visual Service Scheduler and driven down further into the 3 most beloved features of each.

So, what's the takeaway?

Visualization of time and resource orientated data of Dynamics NAV is not only a nice-to-have but a must-have for customers and prospects today.

Therefore, it is in their best interest, as well as the interests of their partners, to work with visualization tools which can support their underlying NAV system fully and seamlessly.

Implementing the Visual Scheduling Suite into your demo routine will bring a necessary value to your overall NAV offering. The sooner you implement it, the better.

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Further Reading & Learning?

Download our EBook: Introduction to Visual Scheduling
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