



What's New in Microsoft Dynamics NAV 4.0 to 2017

| New Functionality Name | NAV version in which it was introduced | NAV Module Name | New Functionality Description |
|--|--|--|--|
| Excel Integration | 2013 | Business Analytics Base Functionality (7020) | You can now integrate with Microsoft Excel to produce Excel-based reports that use Microsoft Dynamics NAV pages as data sources |
| Generic Chart and Specific Chart | 2013 | Business Analytics Base Functionality (7020) | Generic Chart and Specific Chart are offered in Microsoft Dynamics NAV. To view business data graphically, you can easily create or edit generic charts and then add them to Role Centers and FactBoxes with the Customize feature, or you can view data in list places as charts by choosing Show as Chart You can choose to design the layout of your report objects in Microsoft SQL Server Reporting Services Report Builder 3.0. With Report Builder, you can quickly change the layout of a report, such as adding or removing controls. The default editor for report layout is still Visual Studio Report Designer, but you can change this by changing the configuration in the Options window in the development environment. Microsoft Dynamics NAV 2013 R2 Setup installs Report Builder when you install the Microsoft Dynamics NAV Development Environment. |
| Report Development | 2013 R2 | Report Designer (100 Reports) (7115) | |
| XMLport Development | 2013 R2 | XML Port (100 XMLPorts) (7140) | You can run XMLports directly from Object Designer. The XMLport runs on Microsoft Dynamics NAV Server. Some XMLport properties can now be set programmatically in C/AL code. For example, if your XMLport can import or export different formats based on certain conditions, you can change these properties on the fly depending on the conditions. This applies to the FieldSeparator, RecordSeparator, TableSeparator, and TextEncoding properties. A new property and a new function have been added to handle XMLports that must export files with an unknown number of columns per record. As a result, you can mark an element as unbound and then use the new BREAKUNBOUND function to return to the rest of the export. |
| Page Development | 2013 R2 | Page Designer (100 Pages) (7125) | Curr.Page Editable The CurrPage.Editable system variable reflects the run-time value of the editable property, which can be changed at design time, programmatically, or by the user when switching view modes on a page. |
| Adding FactBoxes that Contain Charts | 2013 | Core | On a page in the RoleTailored client, you can add FactBoxes that display charts |
| ADO.NET instead of ODBC | 2013 | Core | ADO.NET instead of ODBC |
| Analysis Display in the RoleTailored client | 2013 | Core | You can display data as charts from list places on the Analysis Display |
| ClickOnce deployment via link | 2013 | Core | The ClickOnce deployment technology lets you deploy web applications by choosing a link on a webpage |
| Connect a Microsoft Dynamics NAV Web Part to other Web Parts | 2013 | Core | Connect a Microsoft Dynamics NAV Web Part to other Web Parts |
| Customizing Charts in the RoleTailored client | 2013 | Core | From a menu on a chart, you can decide to change the chart definition, the chart type, show the chart in three dimensions, flip the x-axis and y-axis, and more |
| Easier Deployment | 2013 | Core | You are no longer required to manually configure delegation or to manually create SPNs to enable the RoleTailored client to communicate with SQL Server |
| Four credential authorization | 2013 | Core | NAV 2013 supports four credential authorization mechanisms for Microsoft Dynamics NAV users |
| MS NAV Web client supported on major web browsers and mobile devices | 2013 | Core | Microsoft Dynamics NAV Web client supports different Internet browsers, including Internet Explorer, Mozilla Firefox, Google Chrome, and Safari. Microsoft Dynamics NAV Web client supports browsers on various mobile devices, such as Windows Phone 7.5, Android, and iOS for iPhone and iPad |
| Multiple datasets queries to simple exports. | 2013 | Core | You can create a query object that combines data from multiple database tables into a single dataset. You can use the resulting dataset as the basis for charts and KPIs, ad hoc reporting exposed through OData, PowerPivot, or SSRs reports. You can save the dataset as an XML or comma separated values (CSV) file that can be read by other systems or software |
| NAS compliance with NAV maintained | 2013 | Core | If you have applications that used NAS with earlier versions of Microsoft Dynamics NAV, you can now use these applications together with Microsoft Dynamics NAV 2013 |
| New server administration tool | 2013 | Core | NAV 2013 includes a new Server Administration tool for administering Microsoft Dynamics NAV Server |
| No user license needed for light/casual users | 2013 | Core | Display Microsoft Dynamics NAV pages and reports on SharePoint sites using a URL |
| Page Field Arrangement in a Grid | 2013 | Core | With the new GridLayout page control, you can lay out fields in rows and columns. You use the GridLayout control to span a field over rows or columns and show or hide field labels |
| Personalization disablement | 2013 | Core | You can disable personalization for users by modifying the profile that is assigned to the RoleTailored client |
| Publishing as OData web service | 2013 | Core | You can now publish Microsoft Dynamics NAV data as OData web services, in addition to SOAP web services |
| QuickEntry Property | 2013 | Core | The new QuickEntry property specifies if the page control should have input focus. You can apply the property to page controls that can be skipped for faster data entry |
| Record-level security and security filtering | 2013 | Core | Record-level security lets you limit the access that a user has to the data in a table. You can resolve conflicts with security filters and specify the behavior that you want by setting a new SecurityFiltering property on record objects, which include both explicit record variables and implicit records on pages, reports, or XMLports. The SecurityFiltering property specifies how security filters are applied |
| Report and dataset viewing without NAV installed | 2013 | Core | You can view a report and view the dataset and layout on a computer that does not have Microsoft Dynamics NAV installed |
| Request export to .pdf, .xls, .doc | 2013 | Core | From a request page, you can save a report as an Adobe PDF file, a Microsoft Excel (.xls) file, or a Word document |
| RoleTailored client to create and set permissions for Users. | 2013 | Core | You now use the RoleTailored client to add users, to associate each user who has one or more permission sets, which determine access to specific objects, and to create and modify permission sets |
| Standard Dialog Page Type | 2013 | Core | You can use the Standard Dialog page type to create a simple page for entering data. The Standard Dialog page does not include a ribbon, and you cannot customize this page in the RoleTailored client |
| Unicode support for Text and Code data types | 2013 | Core | Unicode is supported for data that you store in the database and for the Text and Code data types |
| Work with standard cost updates in a similar way as they would do in, for example, an Excel spreadsheet, but within the framework of the application | 2013 | Core | The Microsoft Dynamics NAV Web client enables users to access Microsoft Dynamics NAV data over the Internet |



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| Write notes for online Help topics | 2013 | Core | The Microsoft Dynamics NAV Web client enables users to access Microsoft Dynamics NAV data over the Internet |
| Renumber document No. in all journals | 2013 R2 | Core | In all journals that are based on the general journal, the Document No. field is editable so that you can specify different document numbers for different journal lines or the same document number for related journal lines. If the No. Series field on the journal batch is filled, then the posting function in general journals requires that the document number on individual or grouped journal lines be in sequential order. To make sure that you do not receive posting errors because of the document number order, you can use the Renumber Document Numbers function before you post the journal. If related journal lines were grouped by document number before you used the function, they will remain grouped but may be assigned a different document number. |
| Multitenant deployments | 2013 R2 | Core | Both if you are currently using multi-instance or multi-company environments, you can transition your existing customers into a more cost-effective multitenant deployment that preserves their business data and ensures a reliable and secure separation between the tenants that share the application. Microsoft Dynamics NAV 2013 R2 provides management cmdlets and sample Windows PowerShell scripts to help you in this transition. Your customers are free to decide if they want to be a part of the multitenant deployment or not. They can benefit both economically and functionally from being a part of a deployment architecture where they share the same platform resources and application functionality and updates with similar businesses. At the same time, they can safely transition back to a single-tenant mode if their business demands that. |
| Provisioning on Windows Azure Virtual Machines | 2013 R2 | Core | Single-instance Scenario For demo and small production scenarios, the recommended setup is a single, small VM with the Microsoft Dynamics NAV Server, Web Server, and SQL Server installed. Using SQL Express is also an option. Multi-instance Scenario To limit the cost of ownership, installing multiple independent customers on the same VM may be favorable. The scripts fully support this. Multi-VM Scenario To exploit SQL Server capabilities, the recommended setup is a large, separate VM with SQL Server shared among several smaller VMs with customer NAV Servers. Script for this topology is provided. Having the IIS on a separate VM is also a possibility. Important: Any combination of the above scenarios is supported. |
| Simplified Pages and Features | 2013 R2 | Core | To target users in smaller businesses, a number of pages in Microsoft Dynamics NAV have been simplified, and selected features are redesigned to align with simpler business processes. You can only navigate to the simplified pages from the Small Business Role Center. Every simplified page has tooltips that appear when you use the mouse to point to fields on the pages and actions on the ribbons. |
| Microsoft Dynamics NAV Server Monitoring Enhancements: New Performance Counters | 2013 R2 | Core | Performance counters provide information about how well Microsoft Dynamics NAV Server is operating. In addition to the performance counters that were available with Microsoft Dynamics NAV 2013, Microsoft Dynamics NAV 2013 R2 includes the following performance counters: # Active sessions, # Mounted tenants, Server operations/sec, Server operation time (ms). |
| Microsoft Dynamics NAV Server Monitoring Enhancements: Microsoft Dynamics NAV Data Collector Set Template | 2013 R2 | Core | A Data Collector Set organizes data collection points, such as performance counters, into a single collection for viewing in Windows Performance Monitor. Microsoft Dynamics NAV provides a Data Collector Set template that includes the Microsoft Dynamics NAV performance counters and additional performance counters for monitoring Microsoft Dynamics NAV other components including SQL Server and IIS. You use the template to create user-defined data collection sets. |
| Microsoft Dynamics NAV Server Monitoring Enhancements: Event Tracing for Windows | 2013 R2 | Core | Microsoft Dynamics NAV 2013 R2 uses Event Tracing for Windows (ETW) for recording events that occur on Microsoft Dynamics NAV Server. ETW is a subsystem of the Windows operating system that provides a tracing mechanism for events that are raised by an application. You can use event tracing to collect data on service calls, SQL traces, C/AL method calls, and Windows event log entries. ETW enables you to dynamically monitor and debug the Microsoft Dynamics NAV Server without having to restart the server or Microsoft Dynamics NAV clients. By using standard tools such as Windows Performance Monitor and PerfView, you can start and stop event tracing sessions, and view the trace event data in real-time or from a stored log file. |
| Microsoft Dynamics NAV Server Monitoring Enhancements: Enhanced Windows Event Logging | 2013 R2 | Core | With the implementation of ETW, Microsoft Dynamics NAV 2013 R2 improves the Windows event logging for Microsoft Dynamics NAV Server. Events that are generated by Microsoft Dynamics NAV Server now include a unique event ID and task category. In Windows Event Viewer, you can use the ID and task category to filter on specific events. |
| Microsoft Dynamics NAV for tablets | 2015 | Core | Dynamics NAV for tablets has a modern, fast and fluid interface built exclusively for touch. The app can be got from the store, just like all other apps. Tablets running Apple iOS, Microsoft Windows, or Android are supported only. Devices with screen size 7" and upwards are supported and optimized for 10" tablets. It empower remote workers, improve accuracy, reduce end-to-end time, engage with customers. |
| Enhanced Cues | 2015 | Core | Enhanced Cues are special cue tiles that apply custom formatting to any computed numerical value such as the number of open sales invoices and a custom tile icon (or no icon). Enhanced Cues can also show an indicator that changes color based on the data values that the tile reflects. This provides a visual signal of the status of the data based on conditions for favorable and unfavorable thresholds. |
| Mandatory fields | 2015 | Core | Data in pages can be overviewed and processed easier. Red asterisk marks which fields are mandatory. Users get a better overview of their process, especially users that use a page infrequently. |
| Auto-fill the No. Field | 2015 | Core | Document No. will be hidden if Document No could be retrieved (from No. Series), it's default and, manual entrance is not allowed. As well, since, it's not possible to change No field (rename is not allowed), No field will be hidden on all already created and posted documents. |
| Total section on document pages | 2015 | Core | Sales and purchase documents now have totals displayed at the bottom of the Lines FastTab. Statistic could be hidden from user – contains a lot of sensitive information. Not implemented for NA. |
| UI Elements Removal | 2015 | Core | The system removes UI elements that are not in the user's license or permissions set. The UI is automatically simplified by only showing elements that the user can access. |
| Simplified UX (User Experience) | 2015 | Core | It is a set of simplified pages and related objects under the name of Simplified UX. Simplified UX contains simplifications with focus on basic sales and purchase scenarios for smaller businesses. It consists of a set of around 100 objects, including 60+ pages that have been simplified plus one Rolecenter for small businesses. The pages have been localized for each supported market. Simplified UX uses the standard NAV tables as the underlying tables. |



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| OAuth support on Microsoft Dynamics NAV web services (OData and SOAP) | 2015 | Core | It supports integration with Power BI and enables the sharing of BI content using refreshable Microsoft Dynamics NAV data feeds in O365. OAuth support also improves the O365 and Microsoft Dynamics NAV single sign-on experience by extending it to the Power BI toolset so that a single set of O365 credentials can be used in all contexts (Microsoft Dynamics NAV, Power BI and O365). |
| Microsoft Word Document Reports | 2015 | Core | Microsoft Word layout is additional layout editing option for document reports. A single report can now have many layouts, either RDLC, Word, or both. |
| Report scheduling | 2015 | Core | Any report can be scheduled to run on the server, now or scheduled later. Reports will be bundled in an inbox in user's Role center. |
| Copy/Paste Rows | 2013 | Employee Portal (2450) | You can copy and paste rows from Microsoft Dynamics NAV by using the shortcut menu. For example, you can copy lines from Microsoft Dynamics NAV and then paste the lines into Microsoft Excel |
| Link Sharing | 2013 | Employee Portal (2450) | You can share a link to any page with another user who has Microsoft Dynamics NAV installed. That user can open the link in Microsoft Word, Outlook, or OneNote. |
| One Note Integration | 2013 | Employee Portal (2450) | Microsoft Dynamics NAV includes integration with Microsoft OneNote. You can enable OneNote integration on a per-role basis in profiles. You can set up notes for records and pages |
| Microsoft Dynamics CRM integration | 2013 | External Connector (2510) | If you have a customer relationship solution that is based on Microsoft Dynamics CRM, then you can integrate it with Microsoft Dynamics NAV with the Connector for Microsoft Dynamics. The Connector for Microsoft Dynamics enables simple integration and data synchronization between Microsoft Dynamics NAV and Microsoft Dynamics CRM |
| Microsoft Dynamics CRM integration (2009 R2) | 2009 | External Connector (2510) | Today's fast-paced business environment demands instant access to customers and vendors. Microsoft is providing built-in integration with Microsoft Dynamics CRM. Benefits of customer relationship management (CRM) integration include eliminating redundant data entries, keeping information up to date in both ERP and CRM solutions, and providing salespeople with the ability to quickly access detailed business information about contracts, pricing and product availability. Customers can choose between integration to on-premises Microsoft Dynamics CRM or Microsoft Dynamics CRM Online with the option to migrate to either option over time. |
| Find searches on all types of pages that have data | 2013 | Menu personalization | You can search in data by using Find in RoleTailored client. Find searches on all types of pages that have data, except in charts. The Action Pane has been redesigned and is now referred to as the ribbon. The redesign optimizes the use of the actions and commands by providing easier access to them. With Microsoft Dynamics NAV, you can customize the ribbon to suit your needs. For example, you can add, remove, and rename actions, menus, and tabs All ledger entries are added to History on department pages to let you create custom views on role centers You can use filters on lines of any page. For example, in a Sales Order document, on a sales line, press Shift+F3, or choose Add Filter, select the field that you want to filter, and then type a value to filter in the Type to filter box You can select all lines in a grid and use the options in the shortcut menu on all lines You will always find error messages and warnings at the top of a page that you are working on regardless of where on the page the error occurred. Select the message to go directly to the error The following technical whitepapers are now integrated into the product Help to provide detailed design information within Microsoft Dynamics NAV: - Warehouse Management Systems - Inventory Costing - Supply Planning |
| The Action Pane has been redesigned and is now referred to as the ribbon | 2013 | Menu personalization | With the introduction of the ribbon, 6 new keyboard shortcuts have been added |
| Call-to Options | 2013 | Mobile | Microsoft Dynamics NAV now uses the telephone client that is the default provider on the computer that is running the RoleTailored client. |
| Mobile sales from a mobile device | 2009 | Mobile | Mobile (mentioned in FEATURE ENHANCEMENTS MICROSOFT DYNAMICS NAV 4.0 TO MICROSOFT DYNAMICS NAV 2009) Functionality in Microsoft Dynamics NAV Microsoft Dynamics NAV 2009 includes mobile functionality so mobile users can interact with Microsoft Dynamics NAV using Microsoft Dynamics Mobile 2008—Mobile Sales from a mobile device. Microsoft Dynamics Mobile 2008 provides customers, while away from the office, with mobile access to the same line of business applications that they rely upon in the office. Microsoft Dynamics Mobile 2008 consists of a Mobile Sales application and Mobile Development Tools that include Server Components and Framework Components to enable customers and partners to create and run mobile solutions. Microsoft Dynamics NAV 2009 contains the integration components for Mobile Sales and Mobile Development Tools—Server Components to support the Mobile Sales scenario. The mobile functionality is described in a Help file, mobile.chm, which is available in English (US) only. The mobile.chm file provides guidance about how to set up mobile functionality in Microsoft Dynamics NAV. Note, to take advantage of this functionality you need to have Microsoft Dynamics Mobile 2008. |



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| Microsoft Dynamics NAV 2013 R2 Help Server | 2013 R2 | Online help | You can modify the Microsoft-provided Help content without decompiling anything, and you can add and remove Help content whenever you want to. You can add links to existing Word documents or PDF documents to the navigation pane of the Help Server website, so that you users have a single point of entry for Help. With the Microsoft Dynamics NAV 2013 R2 Help Server, you can provide the Help content that is relevant for your users, and you can update Help without modifying each client computer. |
| Microsoft Application Virtualization support (2009 R2) | 2009 | Role Tailored Client (9000) | The Microsoft Dynamics NAV 2009 R2 RoleTailored interface can be deployed using Microsoft Application Virtualization (App-V) technology, which is relevant for both on-premise and hosted solutions. This provides a better experience for the end user as all integration with local applications is done on the desktop. It also cuts IT costs by centrally managing Microsoft Dynamics NAV client installations with automatic deployment to the desktop after an update. |
| Role Center | 2009 | Role Tailored Client (9000) | 40% increase in task completion success rate, Microsoft Dynamics NAV 2009 UX Benchmark Research |
| RoleTailored interface access for remote or roaming users (2009 R2) | 2009 | Role Tailored Client (9000) | Microsoft Dynamics NAV 2009 R2 supports direct access from the Microsoft Dynamics RoleTailored experience over the Internet. This allows for remote or roaming users to take advantage of the richness and Microsoft Office integration of the RoleTailored interface and the many integration features connected to local resources, such as the operating system and Microsoft Office. This reduces the complexity and overhead compared with using other applications such as Citrix Systems and Terminal Services, especially for hosting partners offering cloud-based Microsoft Dynamics NAV deployments. |
| Treemap visualization | 2009 | Role Tailored Client (9000) | Microsoft Dynamics NAV 2009 R2 showcases the possibilities around business data visualizations abilities in Microsoft Dynamics NAV through rich ad hoc data visualization. It provides treemap analysis that enables the comparison of any two values, for example sales and profits, which increases business productivity and business insight. The innovative client extensibility framework used allows partners to extend the user experience of Microsoft Dynamics NAV to integrate visualizations into any end-user scenario. |
| Windows 7 user experience improvements (2009 R2) | 2009 | Role Tailored Client (9000) | Through Microsoft Dynamics NAV 2009 R2, jumplists can be used to open recently accessed customers and vendors for increased business productivity and efficiency, and the icon overlay functionality provides information on system events and status streamlined with the Windows 7 user experience. |
| Three-tier architecture | 2009 | Three-tier architecture | With Microsoft Dynamics NAV 2009, the architecture has changed from a two- to three-tier architecture, enabling the new Role Tailored client and Web services. |
| Web services | 2009 | Three-tier architecture | With Microsoft Dynamics NAV 2009, the architecture has changed from a two- to three-tier architecture, enabling the new Role Tailored client and Web services. Web services in Microsoft Dynamics NAV 2009 make data and business logic available to other applications, simplifying information exchange and integration with other IT systems (e.g. working with a call center on telemarketing campaign: by creating a Web service, you can make Customer data from Microsoft Dynamics NAV available to the Call center's employees without giving them full access to the Microsoft Dynamics NAV application). |
| New Microsoft Dynamics NAV Web client accessibility | 2013 R2 | Web Client | The accessibility functionality for the Microsoft Dynamics NAV Web client now includes support for high contrast mode in Internet Explorer if the user enables this in their Windows settings. Also, all user interface elements can be accessed from screen readers and from the keyboard using basic keyboard navigation. |
| New Microsoft Dynamics NAV Web client Enhancements | 2013 R2 | Web Client | The Microsoft Dynamics NAV Web client has been restyled to a modern style look and feel. The ribbon can be hidden in just one double-click. Parts of the navigation pane: Home, Posted Documents, and Search for Page or Report have moved to the top of the page. The Microsoft Dynamics NAV Web client now includes a disclaimer bar found at the bottom of the Role Center page and on the About Microsoft Dynamics NAV page. The disclaimer includes links to Terms of Use, Trademarks, Privacy & Cookies, and Accessibility. It is now possible to create a new record from a lookup. Filtering on worksheets is now working. The Microsoft Dynamics NAV Web client now shows tooltips for all fields, when you hover over a field. If you choose the tooltip, the Help for the field opens in a new browser tab for the Microsoft Dynamics NAV Help Server. Error handling is improved. The error message will stay at the top of the page, even if you scroll on the page. |
| Extensibility for Microsoft Dynamics NAV Web client | 2013 R2 | Web Client | Microsoft Dynamics NAV supports the framework for creating client control add-ins. A client control add-in enables you to add custom functionality to the Microsoft Dynamics NAV Windows client and Microsoft Dynamics NAV Web client by creating a control add-in that can run on both client platforms. |
| 'Embedding Microsoft Dynamics NAV Web Client Pages in other Websites | 2013 R2 | Web Client | In Microsoft Dynamics NAV the Microsoft Dynamics NAV Web client can be deployed as an independent website. In some cases it is useful to embed parts of the Microsoft Dynamics NAV Web client in other websites and this is now possible by adding an iframe element on the embedding website. |
| Microsoft Dynamics NAV Web Server Installation Supports Multiple Instances of the Microsoft Dynamics NAV Web client | 2013 R2 | Web Client | The installation of the Microsoft Dynamics NAV Web Server components by Microsoft Dynamics NAV Setup has been improved to accommodate the addition of multiple web server instances. Previously, if you wanted to add an additional web server instance for the Microsoft Dynamics NAV Web client, for example, to connect to another company or database, then you had to manually add the instance on IIS. With the changes in Microsoft Dynamics NAV Setup, after you initially install the Microsoft Dynamics NAV Web Server components, you can add new web server instances by running the New-NAVWebServerInstance cmdlet. |



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| NAV Portal Framework for SharePoint. | 2013 R2 | SharePoint Client | <p>Applies only for customers using SharePoint. NPF contains all Web client functionality, with the following exceptions:</p> <ul style="list-style-type: none"> - Navigation pane is not added by default to master page - Regional settings and time zone are taken from SharePoint <p>SharePoint-specific Functionality in NPF:</p> <ol style="list-style-type: none"> NAV Web Parts <ul style="list-style-type: none"> - Show NAV pages, no reports - Get filter values from other Web Parts - Send data rows to other Web Parts SharePoint branding <ul style="list-style-type: none"> - CSS, themeing Scalability <ul style="list-style-type: none"> - SharePoint farm SharePoint integration <ul style="list-style-type: none"> - Authentication, timezone, regional settings, extranet, etc. <p>Use NPF when:</p> <ul style="list-style-type: none"> - The customer has invested in SharePoint - Integration of SharePoint functionality with Microsoft Dynamics NAV is needed. |
| Outlook client integration enhanced: improved sales visibility | 5.00 | Outlook Client Integration (5195) | <p>Integration with Microsoft Office Integration with Microsoft Office consists of the following features: Export Using Office XML – A generic solution that allows the user to export data from any form in Microsoft Dynamics NAV using the new Office XML format. Additional style sheets can be defined by the partner or customer. Record Links - A generic solution that allows the user to add links to documents to any record in Microsoft Dynamics NAV. The documents can be stored in SharePoint or on a file server.</p> |
| Using Office 365 in Microsoft Dynamics NAV | 2013 R2 | Outlook Client Integration (5195) | <p>Microsoft Dynamics NAV 2013 R2 adds the ability to integrate with Office 365 to open or save Excel documents using the Office 365 applications and Office Web Apps. Office integration in Microsoft Dynamics NAV 2013 R2 is the same as in Microsoft Dynamics NAV 2013. You can either open in an installed Office client application or download the file, if Office 365 integration is not enabled. You can define an Office 365 user account, a SharePoint Online document library, and a folder to use when opening Office documents using Office 365 from within Microsoft Dynamics NAV. Furthermore you can utilize personal folders on Office 365 for ad hoc export to excel.</p> <p>Enable Microsoft Office 365: Low entry cost, always up-to-date, subscription-based Office 365 offering</p> <p>Integration based on usage scenarios: Mix and match Microsoft Dynamics NAV and Office clients to match the individual customer requirements.</p> <p>Access anywhere: Use Microsoft Dynamics NAV Web client and Office Web apps for working from any device.</p> <ul style="list-style-type: none"> • Handling of inventory consumption for outbound service. Improvements have been made to: predefinition of consumption, handling of actual consumption (inventory) and how to determine what is to be invoiced to the customer and what is consumption. • Posting of a service order (sales of spare parts and service order closing and invoicing) with the following shipping options: ship, consume, invoice, and ship and invoice. |
| Handling of inventory consumption for outbound service | 5.00 | Service Order Management (5911) | |
| Time Sheets enhancements | 2013 | Service Order Management (5911) | <p>In earlier versions of Microsoft Dynamics NAV, you could collect and post this information in journals, which you can still do, but the addition of time sheets makes it easier and simpler to collect this basic information. Resource managers and project managers can review and approve time allocation using time sheets and then follow up with posting with journals. In addition, you can expose your time sheets to users who work with Microsoft Dynamics NAV through SharePoint.</p> |
| Online Payment Service for Microsoft Dynamics NAV (2009 R2) | 2009 | Bank Management (5010) | <p>Online Payment Service for Microsoft Dynamics NAV enables customers to process payment transactions from the Microsoft Dynamics NAV interface across multiple channels, including e-commerce, point of sale and call center transactions. The Payment Service works with leading payment processing services and all major credit cards.</p> |
| Bank statement import and payment export | 2013 R2 | Bank Management (5010) | <p>A data exchange framework to enable the import of delimited (CSV) bank statement files and the export of data to bank payment files in delimited and fixed-width formats. Based on the description of a specific bank file format, a partner can add or modify the file's format definition and how the file's elements map to fields in NAV. When such a data exchange setup is created in the framework, users can import the bank statement file or export the bank payment file in question.</p> <p>Simplicity: The data-driven model allows partners to simply describe the bank file format and which elements map to NAV fields. No code writing is required. The "heavy lifting" is handled by the framework.</p> <p>Ease of Deployment: Because a bank file format is described as data and not as code, it is easy to create and distribute a data exchange setup to support a new bank file format. A data exchange setup is shipped as an xml file that the customer can import directly without changing code.</p> |



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| Export Payment Data – SEPA Credit Transfer | 2013 R2 | Bank Management (5010) | <p>SEPA - Single Euro Payments Area. A new feature that enables a user to export payment data to an electronic bank file in SEPA-compliant format. This lets the user integrate electronically with any bank in the Single European Payments Area and get higher efficiency in the end-to-end payment process.</p> <p>You can create the correct payment proposal easier and faster through functions available in the Payment Journal.</p> <p>You save money by getting access to more banks in the SEPA zone when better conditions are available due to more bank competition.</p> <p>You get help avoiding paying vendors twice as the Microsoft Dynamics NAV provides an alert if a payment has been exported previously.</p> <p>You can easily investigate what has been exported and by whom over time by using the Credit Transfer Register.</p> <p>Higher speed in the process of entering payment data into the system as bank payment data can automatically be imported into mapped fields in the General Journal.</p> <p>Fewer errors in payment registrations because data entry is electronic instead of manual.</p> <p>Minimizes the time needed to search for the right, open documents as bank payments are automatically applied to open customer and vendor documents.</p> <p>You save time by being able to create files for upload instead of having to key in all payments instructions in the bank application.</p> <p>Styling gives the user an intuitive overview of the application process.</p> |
| Export Payment Data to an Electronic Bank File | 2013 R2 | Bank Management (5010) | <p>A new feature that enables the user to export payment data to an electronic bank file. This gives the user the ability to integrate electronically with a bank and gain high efficiency in the payment process end-to-end. When payment instructions to the bank are managed directly in Microsoft Dynamics NAV, the user gets better control over the payment process.</p> <p>You can create the correct payment proposal easier and faster through functions available in the Payment Journal.</p> <p>You save time and reduces errors by creating an electronic file with payment instructions instead of keying in payment data from Microsoft Dynamics NAV in the netbank.</p> <p>You get help to avoid paying vendors twice as the system provides an alert if a payment has been exported previously.</p> <p>You can easily investigate what has been exported and by whom over time by using the Credit Transfer Register.</p> |
| SEPA Direct Debit Collections | 2013 R2 | Bank Management (5010) | <p>A new feature called SEPA Direct Debit Collections, which provides an efficient way to handle customer's payment collections through your preferred bank in the Single European Payments Area (SEPA) with less manual entry of data and effective mandate handling. The feature allows users to collect money from their customers in a seamless connected way with the invoicing process, minimizing the order to cash lead time and increasing cash management efficiency.</p> <p>Simplicity: All collections displayed on one page for easy overview and handling. Ability to handle SEPA Core Direct Debits and B2B Direct Debits without code changes.</p> <p>Productivity: Filtering capabilities to get the correct open customer entries. Integrated with standard sales codes for recurrent invoicing. Validation of the information before bank submission, so that fewer files are rejected. Less data entry.</p> <p>Ease of Use: One page that shows only the necessary information. Meaningful information displayed to validate the payment data. Users can apply payments according to their preferred workflow.</p> |
| Electronic Payments | 2015 | Bank Management (5010) | <p>The process of creating and managing electronic payments was improved by enhancing the Payment Journal and Credit Transfer Register features and integrating them more. The improvements enable users to better manage the payment creation process based on detailed information about previous payment exports. Users that do not want to post payments until they have actually been processed at the bank can more efficiently control which open vendor documents to pay and avoid paying vendors wrongly or paying duplicate amounts. Also, the information about previous payment exports makes partial-payment scenarios easy to manage. Finally, more information about the payment history is now being stored, which provides better control of the payment process and makes it possible to re-export payment data to electronic files.</p> |
| Automated bank reconciliation | 2013 R2 | Bank Account Reconciliation (5030) | <p>Import of bank statement data combined with automatic matching against posted bank ledger entries eliminates trivial, repetitive, and time-consuming tasks. Combined with a new and more intuitive user interface, the feature makes bank reconciliation both fast and easy to do.</p> <p>The user is able to reconcile two sets of data in a more intuitive way with a redesigned interface that displays two lists side-by-side instead of just one.</p> <p>High speed bank data entry as bank statement data is automatically imported into mapped fields in the reconciliation window.</p> <p>Great reduction in the time needed to match posted bank ledger entries with bank statement lines because an automatic matching engine does the bulk of the work.</p> <p>Flexible user experience with data via manual tools that are available as needed to match and unmatch data.</p> <p>Visual design provides the user with an overview of the matching process, for example, showing which lines have been matched and which lines have not.</p> <p>The user is able to reconcile two sets of data in a more intuitive way with a redesigned interface that displays two lists side-by-side instead of just one.</p> |
| Automatic Payment Reconciliation | 2015 | Bank Account Reconciliation (5030) | <p>A new feature called Payment Reconciliation Journal has been created, which enables the user to import bank statement data into a new UI and automatically apply payments made to the bank account to their related open entries representing unpaid customer and vendor documents. The new feature makes payment processing easier and more efficient, and it helps the customer keep data about the cash situation in the company continuously updated. With good and accurate control of applied and posted payments, the periodic bank account reconciliation process becomes easier.</p> |
| Administers and analyze the effective costs | 5.00 | Cost Accounting (3220) | <p>This module is used for cost accounting. It administers and analyze the effective cost/s of a company/enterprise. Partners and customers appreciate this module because of its fully integration, ease use and setup. Most of local ERP software (competitors) offer a cost accounting module as an integrated part.</p> <p>The main functionalities are: Cost types, cost centers and cost objects can be taken over from the General Ledger or defined independently Cost Center and Cost Object accounting Automatic transfers from General Ledger to cost accounting Manual posting for internal Invoices and allocations Reoccurring postings Static and dynamic allocations with static and many dynamic allocations based on percentage or according to amount per share Account Schedules similar to General Ledger Detailed reporting structure which allows the user to define scope Compare figures to budget</p> <p>New for Dynamics NAV 5.00 (only available in AU, CH, ES, ID, MY, NO, NZ, PH, PT, SG, TH licenses when released)</p> |



What's New in Microsoft Dynamics NAV 4.0 to 2017

| New Functionality Name | NAV version in which it was introduced | NAV Module Name | New Functionality Description |
|--|--|-----------------------------|--|
| SQL 2000 & SQL 2005, very complex calculations can be stored in cubes | 5.00 | Cost Accounting (3220) | <p>Business Analytics has been updated as follows:</p> <ul style="list-style-type: none"> • A new version of BA Basic <ul style="list-style-type: none"> o Runs on SQL 2000 and SQL 2005 • A new version of BA Advanced <ul style="list-style-type: none"> o Runs on SQL 2000 and SQL 2005 • Filters that allow customers with large volumes of data to run on subsets of data. Filtering can be done on any of the dimensions used in a cube: <ul style="list-style-type: none"> o A date/time interval o A set of accounts o A set of customers • Calculations between virtual cubes that allow for cross-cube calculations to be handled by BA Basic. Given a cube with actual sales and budgeted sales, Business Analytics can calculate budget deviations, forecasts, and deviations between them. • Multiple active configurations that allow us to have configurations that need to be updated with different frequencies. Budgets tend to change less frequently than actual sales • Support for Instances of SQL Server and Analysis Services that allows for more complex server topologies at customers and maybe even hosted scenarios • Freehand MDX with multidimensional expressions (MDX). MDX is the query and calculation language of Analysis Services that allows for very complex calculations to be stored in cubes created by BA for <ul style="list-style-type: none"> o Calculating Commission o KPIs for Scorecards or Dashboards o Calculations across multiple dimensions where navigating multidimensional data is key |
| 365-days depreciation | 2009 | Basic Fixed Assets (5260) | <p>Basic Fixed Assets Fixed Assets Depreciation It is now possible to use a calendar year of 365 days, where each month has the same number of days as in the calendar. The only exception is February in leap years, which is 28 days and not 29. Because of that, all years, also leap years, are considered to have 365 days. This new feature, '365-days depreciation,' cannot be used in combination with 'Custom 1 Depreciation'.</p> |
| Automated document approval process | 5.00 | Basic General Ledger (3010) | <p>Document Approval This feature introduces an approval process for sales and purchase documents which includes:</p> <ul style="list-style-type: none"> • Ability to approve and reject documents with comments • Ability to delegate approval to another • SMTP mail notification to approvers and overdue-approval notifications |
| Automated prepayment handling | 5.00 | Basic General Ledger (3010) | <p>Prepayments allow the user to create one or more prepayment invoices based on a sales or purchase order. The prepayment can be either a set amount or a percentage of the total invoice. The system keeps track of created prepayment invoices until the order is fully invoiced.</p> |
| Document archiving | 2009 | Basic General Ledger (3010) | <p>Document Archiving Functionality The user can define a setup option to automatically archive sales and purchase quotes when they are turned into orders and archive orders when they are fully shipped or received. Return orders may now be manually archived the same way as other documents. Note, return orders are also included in the automatic archiving. Archived quotes, orders, and return orders may be printed from the archive forms. Comments are maintained when documents are posted. Both header and line comments are posted to non-editable forms.</p> |
| G/L Entry Table Locking Redesign | 2013 | Basic General Ledger (3010) | <p>The G/L Entry table is not locked at the start of sales, purchase, and service posting. The table remains unlocked until a lock is needed. This can improve performance in multiuser environments</p> |
| Importing of opening balances into journals and active documents with dimensions | 2013 | Basic General Ledger (3010) | <p>Microsoft Dynamics NAV 2013 also allows streamlined importing of opening balances into journals and active documents with dimensions. These enhancements help partners implement their solutions faster, with fewer resources by preserving customer legacy data</p> |
| More possibilities of VAT Reports setup | 2013 | Basic General Ledger (3010) | <p>In addition to the periodic VAT statements that you submit in order to settle VAT, the tax authorities can require that you submit periodic reports of transactions that include VAT. In Microsoft Dynamics NAV, in the VAT Report window, you can define these reports just like you create documents such as orders, invoices, and credit memos. You can fill in the lines based on VAT entries, and then export the VAT report to the appropriate authorities. Depending on your country/region and the type of VAT report that you have set up, the report can be exported in different formats.</p> |



What's New in Microsoft Dynamics NAV 4.0 to 2017

| New Functionality Name | NAV version in which it was introduced | NAV Module Name | New Functionality Description |
|--|--|-----------------------------|--|
| Rapid Implementation Methodology (RIM) | 5.00 | Basic General Ledger (3010) | <p>Rapid Implementation Methodology Rapid Implementation Methodology (RIM) is primarily designed for new customers, but it can also be useful to an existing customer who is adding modules to their installation. RIM reduces the implementation workload by streamlining the repetitive tasks that an implementation requires. RIM contains the following components:</p> <ul style="list-style-type: none"> Industry-Specific Information Implementation Questionnaire <ul style="list-style-type: none"> o The Implementation Questionnaire is a collection of industry-specific questions and suggested answers which can be used to update the contents of Microsoft Dynamics NAV setup tables (for example, tables 79, 98, 311, 312, 313, and so on.) The questionnaire guides the user and the implementation consultant through the Microsoft Dynamics NAV setup requirements from a business perspective, to ensure that the setup reflects the customer's business rules. o The Implementation Questionnaire (in XML or Microsoft Office Excel® format) serves as a valuable document for making setup decisions. Setup Data o RIM contains standard, industry-specific setup data that has been created by industry specialists with experience from many implementation projects. Reusing common data saves implementation time and makes a more industry-specific setup possible. Master Data Templates o To optimally use Microsoft Dynamics NAV, you need valid information in the master data records. RIM includes industry-specific master data templates. o RIM contains predefined templates for five industry segments. For each industry segment, there is a template for the following master data types: Contacts, Customers, Vendors, and Items. o Master data templates can also be used in daily operations. For example, if you enter the item description and then apply the appropriate template, the required fields will be copied from the template to the master data record. o Partners can easily apply the master data template functionality to any master data table in Microsoft Dynamics NAV. Batch Creation of Journal Lines The Batch Creation of Journal Lines functionality allows you to create journal lines with predefined information, so the user only has to enter a few pieces of information (for example, amounts). Predefined User Permissions (covers only the Microsoft Dynamics NAV core solution) The predefined Microsoft Dynamics NAV user permissions cover the permission necessary to carry out work for seven archetypes of users in Microsoft Dynamics NAV. The selected archetypes are: <ul style="list-style-type: none"> o Production Manager o Shipping & Receiving Clerk o Order Entry Clerk o Purchasing Agent o Accountant o Accounts Receivables Clerk o Accounts Payable Clerk |
| Translated payment terms | 5.00 | Basic General Ledger (3010) | <p>Payment Terms Translation Payment terms and shipment methods have been enhanced so that the customer can now define translations for payment terms and shipment methods. For customers with Multilanguage, this means they can ensure that the shipment method and payment terms on an invoice will appear in the correct language.</p> |
| Translated payment terms (shipment method and payment terms on an invoice will appear in the correct language) | 5.00 | Basic General Ledger (3010) | <p>Payment Terms Translation Payment terms and shipment methods have been enhanced so that the customer can now define translations for payment terms and shipment methods. For customers with Multilanguage, this means they can ensure that the shipment method and payment terms on an invoice will appear in the correct language.</p> |
| VAT Rate Change Tool | 2013 | Basic General Ledger (3010) | <p>You use the VAT Rate Change Tool to perform VAT and general posting group conversions. You can easily change VAT rates to maintain accurate VAT reporting</p> |
| VAT Clauses | 2013 R2 | Basic General Ledger (3010) | <p>VAT Clauses are used to provide additional descriptive information about the VAT that is being reported on a sales document. The VAT Clause information is displayed on a printed document alongside the VAT identifier or VAT rate. In some cases, a country or region may require that you include descriptive information about the VAT that you are reporting. You may also want to provide the description in translation, to match the language of your customer.</p> |
| Administers and sets up the effective costs budget | 5.00 | Cost Budget (3230)e | <p>This module is used for cost accounting. It administers and analyze the effective cost/s of a company/enterprise. Partners and customers appreciate this module because of its fully integration, ease use and setup. Most of local ERP software (competitors) offer a cost accounting module as an integrated part. The main functionalities are: Cost types, cost centers and cost objects can be taken over from the General Ledger or defined independently Cost Center and Cost Object accounting Automatic transfers from General Ledger to cost accounting Manual posting for internal Invoices and allocations Reoccurring postings Static and dynamic allocations with static an many dynamic allocations based on percentage or according to amount per share Account Schedules similar to General Ledger Detailed reporting structure which allows the user to define scope Compare figures to budget New for Dynamics NAV 5.00 (only available in AU, CH, ES, ID, MY, NO, NZ, PH, PT, SG, TH licenses when released)</p> |
| Cost Accounting improvements | 2013 | Cost Budget (3230)e | <p>Cost accounting has the following main components:</p> <ul style="list-style-type: none"> - You define cost types, cost centers, and cost objects to analyze what the costs are, where the costs come from, and who should bear the costs - You can transfer the general ledger entries to cost entries with each posting or use a batch job to transfer the general ledger entries based on daily or monthly summary posting - Cost budgets work similarly as general ledger budgets - Allocations move costs and revenues between cost types, cost centers, and cost objects - Most reports and statistics are based on the posted cost entries. You can set the sorting of the results and define with filters which data must be displayed |



What's New in Microsoft Dynamics NAV 4.0 to 2017

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|--|--|---|--|
| Intercompany purchase cost distribution & the tool to consolidate accounts receivable (A/R) and accounts payable (A/P) processes across the organization | 5.00 | Inter-company Postings (3090) | <p>Intercompany Purchase Cost Distribution</p> <p>Intercompany Postings has been enhanced with functionality for distribution of purchase invoice costs to partner companies. It is not unusual within the mid-market for holding companies to be formed to create a greater synergy amongst like companies. These holding companies consolidate accounts receivable (A/R) and accounts payable (A/P) processes across the organization resulting in savings in overall costs. Bills received from vendors are distributed for all subsidiaries across the organization.</p> <p>Secondly, spokes within the Hub'n Spoke structure are invoiced by vendors and recorded costs need to be spread across the organization.</p> |
| Cash Flow enhancements | 2013 | Liquidity Forecast - Analysis Views (3210)e | NAV 2013 provides tools to make measurement of cash flow easier. You create a periodic calculation of the forecasted operational revenues and expenses to calculate the cash surplus or the cash deficit. In your forecast, you can incorporate values from the General Ledger, Sales and Marketing, Purchasing, and Service |
| Define analysis views to analyze cash-flow accounts per dimension | 5.00 | Liquidity Forecast - Analysis Views (3210)e | <p>You are able to define analysis views to analyze liquidity accounts per dimension. The analysis views can be updated automatically with each transaction or manually by the user if necessary. The data can be made available in compressed form. Analysis views can be exported to Microsoft Excel as pivot table New for Dynamics NAV 5.00 (only available in AT, AU, CH, DE, ES, GB, ID, IE, MY, NZ, PH, PT, RU, SG, TH licenses when released)</p> <p>Information from the planning engine is now available in the following areas:</p> <ul style="list-style-type: none"> - Jobs - Service Management - Sales - Production |
| Demand Overview is available in four new areas | 2013 | Basic Supply Planning (5810) | The calculations are performed only on a specific item and not all items, so that calculation performance is responsive. In the Demand Overview window, you can see whether an item that you want to fulfill an order is in stock and available for your use |
| New option Combine Transfer Orders on the Planning Worksheet window | 2013 | Basic Supply Planning (5810) | When you perform multiple transfer orders from the Planning Worksheet window that have the same transfer-from and transfer-to codes, then you can select the Combine Transfer Orders option to create only one transfer order |
| New Planning Parameters on Item card | 2013 | Basic Supply Planning (5810) | <p>Five new reorder period fields have been added to the item card planning parameters to help optimize when and how much to reorder:</p> <ul style="list-style-type: none"> - Time Bucket - Rescheduling Period - Lot Accumulation Period - Dampener Period - Overflow Level <p>One new reorder quantity field has been added to the item card planning parameters to help optimize how much to reorder (Dampener Quantity)</p> <p>Two new global setup fields have been added to the Manufacturing Setup window to determine how to reorder when item cards do not have a specific planning parameter:</p> <ul style="list-style-type: none"> - Default Dampener Quantity - Blank Overflow Level <p>Items on planning lines with warnings typically do not respect the planning parameters. Now, you can define on the Calculate Plan request pages on the planning worksheet and the requisition worksheet that you want certain planning parameters to apply even though the planning line has an exception warning</p> |
| New Planning Parameters on Item card and Manufacturing Setup window | 2013 | Basic Supply Planning (5810) | <p>Five new reorder period fields have been added to the item card planning parameters to help optimize when and how much to reorder:</p> <ul style="list-style-type: none"> - Time Bucket - Rescheduling Period - Lot Accumulation Period - Dampener Period - Overflow Level <p>One new reorder quantity field has been added to the item card planning parameters to help optimize how much to reorder (Dampener Quantity)</p> <p>Two new global setup fields have been added to the Manufacturing Setup window to determine how to reorder when item cards do not have a specific planning parameter:</p> <ul style="list-style-type: none"> - Default Dampener Quantity - Blank Overflow Level |
| Setup Best Practices: Supply Planning | 2013 | Basic Supply Planning (5810) | Whether you use RapidStart Services for Microsoft Dynamics NAV to implement the setup values or you manually enter them in the new company, setup best practices topics in Microsoft Dynamics NAV can support your setup decisions with general recommendations for selected setup fields that are known to potentially cause the solution to be inefficient if defined incorrectly |
| Three new Item Availability Views | 2013 | Basic Supply Planning (5810) | To supplement the existing views of item availability, three new availability windows have been added: <ul style="list-style-type: none"> - Item Availability by Event - Item Availability by Timeline - Item Availability by BOM Level |
| Dimension Entry Storing and Posting Redesign | 2013 | Advanced Dimensions (4780) | New Dimension Set Entry table has been added. Instead of explicitly storing each dimension value in the database, a dimension set ID is assigned to the journal line, document header, or document line to specify the dimension set. By storing dimension sets once in the database, database space is preserved, and overall performance is improved |



What's New in Microsoft Dynamics NAV 4.0 to 2017

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|---|--|----------------------------|--|
| Five new WIP calculations based on IAS standards have been added, which can be recalculated and reposted for part or all of a job | 5.00 | Jobs (4510)e | <ul style="list-style-type: none"> • Handling of fixed price projects by separation of amounts into schedule (budget), usage and contract (sales), which can be selected in the job planning lines. • Five new WIP calculations based on IAS standards have been added, which can be recalculated and reposted for part or all of a job. • Better integration to item ledger and item tracking. • Job-based pricing for items, resources and G/L accounts. • Foreign currency functionality that gives users the option to plan in their local currency and bill in a customer's foreign currency or Plan and bill in a customer's foreign currency. • Copy job functionality. • Two new reports have been created. |
| Project management, planning and tracking improvement | 5.00 | Jobs (4510)e | <ul style="list-style-type: none"> • Handling of fixed price projects by separation of amounts into schedule (budget), usage and contract (sales), which can be selected in the job planning lines. • Five new WIP calculations based on IAS standards have been added, which can be recalculated and reposted for part or all of a job. • Better integration to item ledger and item tracking. • Job-based pricing for items, resources and G/L accounts. • Foreign currency functionality that gives users the option to plan in their local currency and bill in a customer's foreign currency or Plan and bill in a customer's foreign currency. • Copy job functionality. • Two new reports have been created. |
| Service Usage Tracking | 2013 | Jobs (4510)e | There is improved alignment in how jobs and services track usage and consumption related to jobs and services. This makes it makes it easier for a project manager to have accurate insight into what work remains to be done to complete a service task or a job. A key update is adding a field that indicates whether you want to create and maintain a relationship in usage between job planning lines and the job ledger |
| Work in Process enhancements | 2013 | Jobs (4510)e | To make monitoring this process easier and to improve the interaction with financial reporting, Microsoft Dynamics NAV has the following enhancements: <ul style="list-style-type: none"> - You can create and define a job WIP method, to supplement the five system-defined choices. - Jobs setup has been expanded to include options to control the treatment of WIP in all jobs - Users can now track and perform WIP calculations in a new location. |
| Assemble to Order | 2013 | Assembly Management (4060) | To support a just-in-time inventory strategy and the ability to customize products to customer requests, assembly orders may be automatically created and linked as soon as the sales order line is created. The link between the sales demand and the assembly supply enables sales order processors to customize the assembly item on the fly, promise delivery dates according to component availability, and to post output and shipment of the assembled item directly from their sales order interface |
| Assembly BOMs | 2013 | Assembly Management (4060) | An assembly item is defined as a sellable item that contains an assembly BOM |
| Assembly Orders added to Warehouse Handling | 2013 | Assembly Management (4060) | On one sales order line, you can sell a quantity that is available and must be picked from stock together with a quantity that must be assembled to the order. Certain rules exist to govern the distribution of such quantities to ensure that assemble-to-order quantities take priority over inventory quantities in partial shipping. When an assemble-to-order quantity is ready to be shipped in basic warehouse installations, the warehouse worker in charge posts an inventory pick for the sales order line or lines in question. This creates an inventory movement for the components and posts the assembly output and the sales order shipment |
| Assembly Orders storno | 2013 | Assembly Management (4060) | If an assembly order was posted incorrectly, then you can open the posted assembly order and undo the posting |
| New order type - Assembly Orders | 2013 | Assembly Management (4060) | Like production orders, assembly orders are internal orders that are used to manage the assembly process and to connect the sales requirements with the involved warehouse activities. Assembly orders differ from other order types because they involve both output and consumption when you post |
| Posting Structure for Assembly Orders | 2013 | Assembly Management (4060) | The posting principles are combined in that assembly orders have their own posting UI, such as that for sales orders, while the actual entry posting occurs in the background as direct item and resource journal postings, such as that for production consumption, output, and capacity |
| KPI web services | 2013 R2 | Analysis Reports (4230) | <p>It is possible to create KPI web services based on account schedules. You can use a KPI web service to integrate with applications such as Excel, so that the user can work with continuously updated KPI numbers outside of Microsoft Dynamics NAV.</p> <p>Easy for the system implementer to set up a KPI integration solution between Microsoft Dynamics NAV and Excel or SharePoint.</p> <p>You can create a KPI web service for as many account schedules as you want.</p> <p>Enables easy access to view and analyze continuously updated data outside of Microsoft Dynamics NAV.</p> |



What's New in Microsoft Dynamics NAV 4.0 to 2017

| New Functionality Name | NAV version in which it was introduced | NAV Module Name | New Functionality Description |
|---|--|------------------------|--|
| Costing, Traceability, Usability, Periodic average costing method | 5.00 | Basic Inventory (4010) | <p>Costing Features: Costing Data Trustworthiness</p> <ul style="list-style-type: none"> • Cost update on the sales/customer statistics • Inventory Period Closing feature • Corrected principles behind cost adjustment batch job <p>Traceability</p> <ul style="list-style-type: none"> • Re-visited principles behind posting inventory value entries to G/L • New reporting tool for G/L Inventory reconciliation • New reporting tool for item value dynamics <p>Simplicity and Usability</p> <ul style="list-style-type: none"> • Improved cost reversal (returns) process-support • Resilient costing-related batch jobs • Possibility to un-do item entry application • Simplified costing setup on the item card <p>New</p> <ul style="list-style-type: none"> • Periodic average costing method <p>This granule offers the basis for setting up a liquidity prognosis of your company. By the means of liquidity cards you can save any liquidity prognosis you made to achieve a complete history. The structuring of your liquidity plan takes place on the basis of an individual chart of accounts, so structure can e.g. be developed on the basis of bank accounts. Reports can be built up on this structure. In the liquidity prognosis data from financial accounting, sales & receivables, payable & purchase and fixed assets can be considered. The transfer of open entries, orders, liquid funds, budgets and planned investments of fixed assets into the liquidity prognosis takes place by function. Additionally neutral incomes and costs can be defined. The paying habits of customers and vendors can be determined and considered for the computation in the liquidity prognosis. Over an integrated document search you can access the original documents. Reports and windows for liquidity development and liquidity trends top the module off. The account schedules make alternative preparation of your data easy. These can be internally used evaluations (e.g. a liquidity plan) or individual reports (e.g. computation of liquid level). In order to receive your desired evaluations you can sum up and combine individual accounts of the liquidity chart of accounts in an account schedule. Unlimited schedules can be designed and saved. By previewing or printing a schedule all balances, account groups and sums are actually calculated. You can even work with formulas. The setting of filters on date and dimensions is possible. Furthermore you can specify which columns should be printed and what they should contain. The schedule can be exported to Microsoft Excel. New for Dynamics NAV 5.00 (only available in AT, AU, CH, DE, ES, GB, ID, IE, MY, NZ, PH, PT, RU, SG, TH licenses when released)</p> |
| The basis for setting up a cash flow prognosis | 5.00 | Basic Inventory (4010) | <p>This granule offers the basis for setting up a liquidity prognosis of your company. By the means of liquidity cards you can save any liquidity prognosis you made to achieve a complete history. The structuring of your liquidity plan takes place on the basis of an individual chart of accounts, so structure can e.g. be developed on the basis of bank accounts. Reports can be built up on this structure. In the liquidity prognosis data from financial accounting, sales & receivables, payable & purchase and fixed assets can be considered. The transfer of open entries, orders, liquid funds, budgets and planned investments of fixed assets into the liquidity prognosis takes place by function. Additionally neutral incomes and costs can be defined. The paying habits of customers and vendors can be determined and considered for the computation in the liquidity prognosis. Over an integrated document search you can access the original documents. Reports and windows for liquidity development and liquidity trends top the module off. The account schedules make alternative preparation of your data easy. These can be internally used evaluations (e.g. a liquidity plan) or individual reports (e.g. computation of liquid level). In order to receive your desired evaluations you can sum up and combine individual accounts of the liquidity chart of accounts in an account schedule. Unlimited schedules can be designed and saved. By previewing or printing a schedule all balances, account groups and sums are actually calculated. You can even work with formulas. The setting of filters on date and dimensions is possible. Furthermore you can specify which columns should be printed and what they should contain. The schedule can be exported to Microsoft Excel.</p> <p>Provides an efficient way to manually register incoming payments, with less manual entry of data and faster access to overview information about accounts receivable. This feature allows users to register incoming payments in the way that payments are handled in their businesses, and helps them gain greater control of their business through increased efficiency in cash registrations and better overview.</p> <p>Simplicity: All processes brought together on one page to efficiently handle registration of incoming payments. Ability to accommodate various ways of doing payment registration.</p> <p>Productivity: Easy overview of open entries. Easy sorting and filtering across open entries. Less data entry.</p> <p>Ease of Use: One page that shows only the necessary information. In common scenarios, the user only has to mark entries and post, and then is done. Totals to show that all registrations are made. Users can define payment registration setup according to responsibilities and processes.</p> |
| Payment registration | 2013 R2 | Basic Payables (3510) | <p>The result is increased efficiency in the payment registration process, which in turn makes it easy to keep data about the cash situation in the company continuously updated. Further, with good and accurate control of the payment registrations, the periodic bank reconciliation process also becomes easier. Higher speed in the process of entering payment data into the system as bank payment data can automatically be imported into mapped fields in the General Journal. Fewer errors in payment registrations because data entry is electronic instead of manual.</p> <p>Minimizes the time needed to search for the right, open documents as bank payments are automatically applied to open customer and vendor documents. The user defines mapping rules to adjust and optimize the automatic application process to fit specific scenarios.</p> <p>Visual design provides the user with an intuitive overview of the application process.</p> |
| Automated payment registration | 2013 R2 | Basic Payables (3510) | <p>The result is increased efficiency in the payment registration process, which in turn makes it easy to keep data about the cash situation in the company continuously updated. Further, with good and accurate control of the payment registrations, the periodic bank reconciliation process also becomes easier. Higher speed in the process of entering payment data into the system as bank payment data can automatically be imported into mapped fields in the General Journal. Fewer errors in payment registrations because data entry is electronic instead of manual.</p> <p>Minimizes the time needed to search for the right, open documents as bank payments are automatically applied to open customer and vendor documents. The user defines mapping rules to adjust and optimize the automatic application process to fit specific scenarios.</p> <p>Visual design provides the user with an intuitive overview of the application process.</p> |



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|---|--|---|---|
| Online Credit cards payments | 2013 | Basic Receivables (3260) | Receiving and processing online credit card payments for online and retail business provides flexibility and faster payments. The online credit card payment feature automates authorizing credit card amounts at the time of the order and processing the actual charge when the order is shipped and invoiced |
| Inventory movement is a new warehouse activity document | 2013 | Internal Picks and Put Aways (4630) | Inventory movement is a new warehouse activity document that is used to move items to and from internal departments, such as production and service departments, where posting of the items occurs as consumption, shipment, or other. |
| FEFO and reports | 5.00 | Item Tracking (4140) | <ul style="list-style-type: none"> A First Expired First Out (FEFO) criterion for the flow of goods has been implemented throughout the system. Several reports have been created or enhanced. |
| Add kits to sales orders and the shipping process | 5.00 | Kitting (4065) | You use this granule to add kits to sales orders and the shipping process. Kits are individual items that are grouped or packaged together to create a special, single item. In addition to the Kitting features included in the Bill of Materials granule (4060), kits can be defined in sales orders, managed using item tracking, reserved, and created using instant production. Orders, pick tickets, packing slips, and invoices can display kits details if selected. Additional reporting is also provided for kit margins and availability calculations |
| Latest prices are included in the kit by configuring it to automatically roll up component prices. | 5.00 | Kitting (4065) | You use this granule to add kits to sales orders and the shipping process. Kits are individual items that are grouped or packaged together to create a special, single item. In addition to the Kitting features included in the Bill of Materials granule (4060), kits can be defined in sales orders, managed using item tracking, reserved, and created using instant production. Orders, pick tickets, packing slips, and invoices can display kits details if selected. Additional reporting is also provided for kit margins and availability calculations |
| Integration to Service Orders | 2013 | Planning & Execution | Service lines, just like other outbound document lines, can function as source document lines for picking to shipment. After a service line is released to shipment, the warehouse handling involved in picking and then shipment posting the service order follows the same flow as for other source documents |
| Information Pane on the Purchase Invoice, Vendor Purchase History | 2009 | Purchase Invoicing (3520) | <p>Purchase Invoicing Information Pane on the Purchase Invoice A new pane on the purchase invoice contains: Instant access to and an overview of the vendor's purchase history, shipping information, and contacts information. Information about item availability, prices, and discounts. Purchase Quote Number Maintained in Documents The purchase quote number is maintained in all posted documents which started with a quote. Vendor Purchase History The purchase history for a vendor may be invoked from the vendor card based on either the Pay-to or Buy-from role for a vendor. (In the Role Tailored client, this information appears in a Fact Box on the vendor card.)</p> |
| Incoming documents in an electronic form. | 2013 R2 | Purchase Invoicing (3520) | <p>It is possible to create a link to an incoming document in an electronic form in the workflow for incoming documents. Having the link strengthens the user's ability to manage the approval, registration, and investigation processes around incoming documents in both small and mid-size companies. No need to shuffle physical paper around as the management of incoming documents is supported by links to the underlying documents. Reduces the need to manually key in details as the original incoming document is available via link all through the workflow. Easy and fast to investigate details for posted entries using links to documents to go back in time. Implementation makes it easy to get started.</p> |
| Sales Quote Number Maintained in Documents, Customer Sales History | 2009 | Sales Invoicing (3270) | <p>Sales Quote Number Maintained in Documents The sales quote number is maintained in all posted documents which started with a quote. Customer Sales History The sales history for a customer may be invoked from the customer card based on either the Bill-to or Sell-to role for a customer. (In the Role Tailored client, this information appears in a Fact Box on the customer card.)</p> |
| Create Recurring Sales Invoices | 2013 R2 | Sales Invoicing (3270) | You can use the Create Recurring Sales Inv. batch job to create multiple sales invoices according to a standard sales code that is assigned to the customers and with posting dates within a valid period defined on the standard sales code. You can also specify a direct-debit payment method and a direct-debit mandate on the standard sales code. The sales invoices that are created with the Create Recurring Sales Inv. batch job will then include information required to collect payment for the sales invoices with SEPA direct debit. |
| Information Pane on the Purchase Order, Purchase Quote Number Maintained in Documents | 2009 | Sales Order Management (3280) | <p>Purchase Order Management Information Pane on the Purchase Order A new pane on the purchase order contains: Instant access to and an overview of the vendor's purchase history, shipping information, and contacts information. Information about item availability, prices, and discounts. Purchase Quote Number Maintained in Documents The purchase quote number is maintained in all posted documents which started with a quote.</p> |
| Handling of inventory consumption for outbound service Automated Data Capture System is available in the RoleTailored client | 5.00 2013 | Sales Order Management (3280) Automated Data Capture System (4640) | <ul style="list-style-type: none"> Handling of inventory consumption for outbound service. Improvements have been made to: predefinition of consumption, handling of actual consumption (inventory) and how to determine what is to be invoiced to the customer and what is consumption. Posting of a service order (sales of spare parts and service order closing and invoicing) with the following shipping options: ship, consume, invoice, and ship and invoice. <p>The implementation of Automated Data Capture System is now based on web services and is available in the RoleTailored client</p> |



What's New in Microsoft Dynamics NAV 4.0 to 2017

| New Functionality Name | NAV version in which it was introduced | NAV Module Name | New Functionality Description |
|--|--|-------------------|--|
| Dedicated Bins | 2013 | Bin Set-Up (4660) | To secure bin content for the particular machine center where they have been placed, such as avoiding that they are consumed by another internal resource, you can set the bin to Dedicated, which makes it unavailable to other resources When using Microsoft Dynamics CRM for customer engagement and Microsoft Dynamics NAV for order processing and financials, a direct CRM connection enables an optimal and seamless experience in the lead-to-cash process. Users can work in the product they prefer, enabling a more effective lead-to-cash process and facilitating informed decision-making, without switching products. Shared information and functionality between the applications provides easy access to relevant data from within either product, without duplicating the business logic. The integration is simple to install, set up, and enable – and it works with a default setup in Microsoft Dynamics NAV. |
| Integration between NAV and CRM | 2016 | | |
| Working natively with Azure SQL | 2016 | | Microsoft Dynamics NAV Server instance can be configured to securely connect to a Microsoft Dynamics NAV database running within a managed relational SQL database-as-a-service, or Azure SQL Database. The Azure SQL Database is a relational database service in the cloud, based on the Microsoft SQL Server engine, with built-in, mission-critical capabilities. |
| Extensions | 2016 | | A new feature called Extensions enables partners, ISVs, and customers to customize and extend Microsoft Dynamics NAV 2016, without directly altering the source code. Distributed via a Extensions "Package" file, Extensions can easily be installed or uninstalled, giving customers complete control over the additional functionality that they need. A full suite of new cmdlets to manage Extensions is provided in the Administrative Shell. Because the source code is not directly modified, Extensions are also easily upgraded, eliminating code merging. |
| Universal App on all devices | 2016 | | The Universal App delivers a familiar role-tailored experience on all devices, from tablets, notebooks, and 2-in-1s, to desktop computers and smartphones, making it a truly universal app. Customers run dynamic businesses and an app performing a set of fixed tasks cannot possibly satisfy every customer's unique and changing needs. We therefore provide the building blocks so that partners can easily craft beautiful, role-tailored experiences across devices. Developing new content is simple, without the maintenance headache of different devices or platforms. In fact, the app is entirely powered by your Microsoft Dynamics NAV server, including the tables, pages, and business logic you already use today. Because this is all built on the same technology as the Microsoft Dynamics NAV Web client, you install, configure, secure, license, and extend in the same, familiar way. |
| Web client enhancements | 2016 | | Over 60 enhancements are implemented to the Web client related to cross-column search, collapsible Fast Tabs, freeze pane, search-as-you-type, language selection, change company etc. |
| Reports enhancements | 2016 | | W1 report updates include changing the 25 report to Landscape orientation and adding the Vendor Pre-Payment Journal, so you can view which invoices will be paid for each vendor payment . North American report updates include updating the paper size on all reports to Letter size when printing. |
| Document management | 2016 | | Incoming documents can be stored, for example, PDFs from vendors, or scanned or captured images of paper versions, and can be used to create corresponding purchase documents or journal lines. The original document from draft and posted purchase documents, as well as from ledger entries, can be tracked. Once in Microsoft Dynamics NAV 2016, to capture invoices an external optical character recognition (Lexmark ICS) service can be used. Similar to electronic documents, the Lexmark ICS integration means that unstructured PDFs or scanned invoices or credit memos can be extracted into structured data, allowing further automatic processing without any need to retype. Workflows can be added for both approval flows and automated processing, for example, based on vendor or amount data. |
| Workflows can be created or modified with steps related to approval, notification, or automation | 2016 | | More than 20 workflow templates can be used to connect business processes according to best practices or industry-standard practices. Anyone can design a workflow by creating or modifying workflow steps and selecting from lists of events and responses. A workflow designer can build sophisticated workflows, without the need of adding application code. |
| Electronic invoices | 2016 | | Electronic invoices and credit memos can be sent and received in the Pan-European Public Procurement (PEPPOL), B2G format, through the freemium document exchange service Tradeshift. Received electronic documents are integrated into the document management features, for example, they are stored in Incoming Documents, along with PDF or scanned paper invoices. From here, users can create purchase invoices and purchase credit memos, or general journal lines. |
| Power BI | 2016 | | PowerBI Content Pack makes the capability for Microsoft Dynamics NAV end users to connect a correctly configured Microsoft Dynamics NAV instance to PowerBI.com and see a full business performance insights dashboard. The dashboard gives users KPIs and charts on their sales and finance data. |
| Posting preview functionality | 2016 | | Posting Preview functionality allows the user to, prior to posting, view the impact that posting the document will have against all affected ledgers. |
| Deferrals functionality | 2016 | | Deferral functionality allows the user to automate the process of deferring revenues and expenses over a pre-defined schedule. The functionality is available for Sales and Purchasing Documents and General Journals. |
| Word Forms and Email Enhancements | 2016 | | Word format defaults for customer statement and North America vendor remittance. There is possibility to assign Word format and email address by document type for each customer or vendor. Processing customer statements or vendor remittances will use the assigned format and email to send the document. |
| North America Positive Pay | 2016 | | A positive pay file can be created with payment information to send to your bank. Default formats available for Citibank and Bank of America. Positive pay history is maintained to view summary and detail for later reference. |
| North America Document Totals | 2016 | | Document totals are displayed in North America for Invoice Discount, Total Excl. Tax, Total Tax, Total Incl. Tax. The totals are added for sales order processing documents and purchase order processing documents. |
| Outlook Add-in: Contact Synchronization | 2017 | | Use Contact Synchronization to integrate your contacts from Microsoft Dynamics NAV 2017 with your People Hub in Office 365 or Microsoft Outlook. Keep your contacts synchronized between Microsoft Dynamics NAV 2017 and Office 365 or Microsoft Outlook, and automatically run a background synchronization at scheduled times. Use filters to synchronize only the Microsoft Dynamics NAV 2017 contacts that you want to see in Office 365 or Microsoft Outlook. |



What's New in Microsoft Dynamics NAV 4.0 to 2017

| New Functionality Name | NAV version in which it was introduced | NAV Module Name | New Functionality Description |
|---|--|-----------------|--|
| Excel Add-in | 2017 | | Dynamics NAV users can work with data in Excel, get fresh data from Dynamics NAV and update the Data in Dynamics NAV based on their work in Excel. This requires you to configure the Microsoft Dynamics NAV Server instance in your deployment first. |
| E-mail cover pages | 2017 | | You can create beautiful, professional-looking email cover-letter templates that include images and invoice information, such as totals, due dates, and payment terms, to use when sending emails to customers. The cover letters are created using the RDLC or Microsoft Word report layout customization features, providing visual consistency with any attached PDF documents. |
| Integration with Power BI | 2017 | | You can use embedded Power BI to easily create insightful charts and reports using Power BI, and make them available within your Microsoft Dynamics NAV 2017 role center. Leverage the Microsoft Dynamics NAV 2017 Power BI Content Pack to get started, and utilize existing Power BI security to manage reports. |
| Simplified setup | 2017 | | You can use the assisted setup feature to guide you through setup scenarios, simplifying and streamlining the set up of selected areas. For example, you can: Launch the application with as little user interaction as possible. Use a predefined set of data to quickly set up main features. Use the new Assisted Company Setup wizard to enhance first-time experiences. |
| Cashflow simplifications | 2017 | | You can understand your cash flow and can look ahead to predict the highs and lows in your cash balance, helping to improve margins and ensure profitability. Easily create a basic cash flow forecasting set up, which can be extended as required, and is quick to adjust. Use a wizard to help you complete most of your tasks, and take advantage of automatic daily or weekly data updates. In addition, more data sources are supported, including jobs and tax data. |
| Reporting data setup | 2017 | | This new feature enables users to easily create insightful reporting data sets without requiring them to have in-depth SQL knowledge: - Existing list pages may be used as a data source. - Existing queries may be used as a data source. - Enables users to choose the fields from the data source they want in the data set. - Enables users to place filters on the data that appears in the data set. - SQL knowledge is not required to create data sets. |
| In-context Notification | 2017 | | You can take advantage of non-intrusive, intelligent in-application notifications, which guide you through relevant processes according to the context you are working in. The new type of notifications help even untrained users carry out advanced tasks, while the unobtrusive design does not prevent you from carrying on with your work. You can also use Microsoft Word templates to create the layout for email notifications, ensuring all messages look consistent and coherent. For Partners, notifications provides the option of avoiding the modal nature of dialogs, which is often counterproductive for end users. Contextual notifications are shown at the top of pages and provide subtle guidance towards completing a task. You can take action directly from that notification. This is applicable for Windows, Web, Tablet and Phone client. |
| Web client improvements | 2017 | | You can take advantage of improvements to the Web Client, a first-class interface for desktop users. The Web Client suits the needs of most users across an organization, whether they are using a PC or Mac. Microsoft Dynamics NAV 2017 simplifies the experience even further, in particular for novice users. You can switch views to see and identify your list of records, including seeing picture thumbnails in different sizes, and use wizards to learn new concepts or simplify data entry. You can also use popular shortcuts; for example press escape to instantly exit page, or F5 to refresh the latest data in your browser, without fully reloading the page. Supported browsers for the Dynamics NAV 2017 Web Client are: - Microsoft Edge - Internet Explorer - Google Chrome for Windows - Mozilla Firefox for Windows - Safari on OSX Note that Microsoft Dynamics NAV 2017 no longer supports the Web Client running on Safari for iOS. Earlier releases of Microsoft Dynamics NAV allowed a touch-enabled flavor of the Web Client to run on iPads; this has now been replaced by the Tablet client via the Microsoft Dynamics NAV Universal App for iPad and iPhone. Note also that the minimum supported version of each browser has been updated to reflect the state and technology of browsers at the time of release. For the list of specific versions, consult the System Requirements at: https://go.microsoft.com/fwlink?linkid=252236 |
| Client enhancements for end users: Windows client | 2017 | | There is a number of enhancements implemented to the Microsoft Dynamics NAV 2017 Web client, Tablet client, Phone client, and Windows client. Here is the list of changes for Windows client: - Contextual notifications are shown at the top of pages and provide subtle guidance towards completing a task. You can take action directly from that notification; - Screen readers such as JAWS improved accessibility, with reading of dialogs, validation errors, mandatory indicators, empty lists, and navigation pane. |



What's New in Microsoft Dynamics NAV 4.0 to 2017

| New Functionality Name | NAV version in which it was introduced | NAV Module Name | New Functionality Description |
|--|--|-----------------|--|
| Client enhancements for end users: Web client | 2017 | | <p>There is a number of enhancements implemented to the Microsoft Dynamics NAV 2017 Web client, Tablet client, Phone client, and Windows client. Here is the list of changes for Web client:</p> <ul style="list-style-type: none"> - Contextual notifications are shown at the top of pages and provide subtle guidance towards completing a task. You can take action directly from that notification. - Bricks provide an alternative display to classic rows in all lists. Bricks flow naturally to fill the available space and are a more compact representation of a record. - Wizards (also known as NavigatePage) are now supported on all clients and assist users with sequentially stepping through a task. - Lists can be displayed as a series of picture thumbnails, each representing a record. You can toggle between wide and tall bricks, displaying small or larger thumbnails. - Factboxes can now include pictures, such as on the Item card page. - Clicking or tapping a field caption now displays an inline Tooltip and you can click Learn More to navigate to Help documentation. Applies to fields/columns all page types. - Toggle View or Edit Mode using a single button, consistently across clients. - Previous and Next Record system actions are only shown on pages which display or can display multiple records. - The default button, such as the OK button, is visually highlighted in blue on all dialogs. - When viewing a page for the first time, the ribbon will be expanded if that ribbon contains any promoted actions. - The ellipsis line menu is no longer displayed on draft lines on all editable lists, until that draft line is saved. This allows users to focus on entering data in the draft line. - Hovering over an action in the ribbon will show an inline Tooltip. - You can single-click on a row in simple lookups to instantly select that row. You are no longer forced to click the hyperlinked first column. - On collapsed FastTabs, clicking a summary field will expand the FastTab and set focus on that field so that you can begin typing immediately. - The F5 key can be used to refresh the data on any page in the browser or Universal App. - The ESC key replaces backspace as the keyboard shortcut to cancel or exit a page in the browser or Universal App. - Improved performance on high-latency networks where you will notice pages loading up to twice as fast. |
| Client enhancements for end users: Tablet client | 2017 | | <p>There is a number of enhancements implemented to the Microsoft Dynamics NAV 2017 Web client, Tablet client, Phone client, and Windows client. Here is the list of changes for Tablet client:</p> <ul style="list-style-type: none"> - Contextual notifications are shown at the top of pages and provide subtle guidance towards completing a task. You can take action directly from that notification. - Bricks provide an alternative display to classic rows in all lists. Bricks flow naturally to fill the available space and are a more compact representation of a record. - Wizards (also known as NavigatePage) are now supported on all clients and assist users with sequentially stepping through a task. - Lists can be displayed as a series of picture thumbnails, each representing a record. You can toggle between wide and tall bricks, displaying small or larger thumbnails. - Factboxes can now include pictures, such as on the Item card page. - Clicking or tapping a field caption now displays an inline Tooltip and you can click Learn More to navigate to Help documentation. Applies to fields/columns all page types. - The Tap and Hold gesture is available when a list is displayed as bricks. This gesture displays the menu for the selected record. - The Delete system action is given less prominence by moving it further down the Action Pane. - Previous and Next Record system actions are only shown on pages which display or can display multiple records. - The ellipsis line menu is no longer displayed on draft lines on all editable lists, until that draft line is saved. This allows users to focus on entering data in the draft line. - On collapsed FastTabs, clicking a summary field will expand the FastTab and set focus on that field so that you can begin typing immediately. - Improved performance on high-latency networks where you will notice pages loading up to twice as fast - Added support for iPad Pro (Only available with the latest version of the Dynamics NAV Universal App) - Added support for iOS 9 and iOS 10 (Only available with the latest version of the Dynamics NAV Universal App) - Added support for Android 6 'Marshmallow' (Only available with the latest version of the Dynamics NAV Universal App) |



What's New in Microsoft Dynamics NAV 4.0 to 2017

| New Functionality Name | NAV version in which it was introduced | NAV Module Name | New Functionality Description |
|--|--|-----------------|---|
| Client enhancements for end users: Phone client | 2017 | | <p>There is a number of enhancements implemented to the Microsoft Dynamics NAV 2017 Web client, Tablet client, Phone client, and Windows client. Here is the list of changes for Phone client:</p> <ul style="list-style-type: none"> - Contextual notifications are shown at the top of pages and provide subtle guidance towards completing a task. You can take action directly from that notification. - Wizards (also known as NavigatePage) are now supported on all clients and assist users with sequentially stepping through a task. - Lists can be displayed as a series of picture thumbnails, each representing a record. You can toggle between wide and tall bricks, displaying small or larger thumbnails. - Factboxes can now include pictures, such as on the Item card page. - Clicking or tapping a field caption now displays an inline Tooltip and you can click Learn More to navigate to Help documentation. Applies to fields/columns all page types. - On smartphones, the app bar on the role center has moved to the bottom of the screen, making it more reachable from your thumbs. - The Tap and Hold gesture is available when a list is displayed as bricks. This gesture displays the menu for the selected record. - Buttons to instantly search or create a new record have been added to List parts. After creating a new record, you are returned to the List part instead of an intermediate list. - The Delete system action is given less prominence by moving it further down the Action Pane. - Swipe-Left or Swipe-Right on a brick to immediately take action on that record. - Improved performance on high-latency networks where you will notice pages loading up to twice as fast - Added support for iOS 9 and iOS 10 - Added support for Android 6 'Marshmallow' - Added support for Windows 10 Mobile |
| Reconciling bank payments | 2017 | | <p>You can reconcile your bank payments in the Payment Reconciliation Journal, completing payments and reconciliation in one place and in one step. Now you can match customer payments, vendor payments, and bank transactions all in the Payment Reconciliation journal. You can also filter the statement information to view only the transactions that need attention, hiding those that do not.</p> <p>You can see a summary of outstanding bank information and drill-down to see the detail in payment reconciliation. To verify before posting the reconciliation, you can print the outstanding bank information on a test report.</p> <p>Payment reconciliation matches customer, vendor, and bank transactions. To more easily view incomplete work, you can choose to display unapplied lines.</p> |
| Financial reports | 2017 | | <p>You can use Financial Reports to quickly view financial performance. The new default Account Schedules means that no set up is required, making it quick and intuitive to produce the financial reports that you need, including:</p> <ul style="list-style-type: none"> Balance Sheet. Income Statement. Cash Flow Statement. Retained Earnings Statement. |
| Account categories | 2017 | | <p>You can use account categories to map your chart of accounts to a set of predefined categories. Easy to use and easy to understand, account categories support financial reports. Use the default set of account categories, and create categories to fit your business needs.</p> <p>You can automatically update account schedules when you update your account category mapping.</p> |
| Simplified Jobs | 2017 | | <p>You can enjoy a streamlined experience in Jobs, to help you manage your projects better. Use the new Jobs setup wizard to set up jobs, enter time sheets, and Job Journals more easily, and use the updated Project Manager role center to quickly access common tasks, new charts, and a new My Jobs list.</p> <p>On the Job Card, you can see tasks, use the new Project Manager field, and get better visibility into the costs and billings for your jobs.</p> <p>A new Job Quote report enables you to quickly email a customer the price for a project.</p> |
| Simplified relationship management | 2017 | | <p>You can work more effectively with Relationship Management from your phone, taking advantage of enhancements to the Sales and Relationship Management Role Center. A simplified CRM includes contact management, interactions, and sales opportunities. You can also use improved interactions logging from your phone, logging email messages using Office 365.</p> |
| Item attributes | 2017 | | <p>You can use item attributes to add custom data, such as color, country of manufacture, size, or product dimensions, to applicable items, supplementing built-in global item fields.</p> <p>You can define your own type of attribute options, including list, text, integer, and decimal, along with unit of measure for the two latter numeric types. Attribute names and option list entries can also be translated to support multiple language requirements. You can also block attributes or attribute option values from being used in the future, for example, if they are no longer applicable.</p> <p>When you add items to sales and purchase documents, or just organize your items, you can view and filter on the attribute values to limit the list of items to choose from or take action on.</p> |
| Item categories | 2017 | | <p>You can use item categories to group items into a hierarchical structure and you can define your own custom categories, assigning attributes to each category.</p> <p>When you add items to a category, the items inherit the attributes of the category, ensuring a common set of attributes on items in the same category, and saving you time. If required, you can still assign item specific attributes to particular items.</p> |
| Payment services and PayPal standards payment link | 2017 | | <p>You can insert hyperlinks to online payment services into your invoices, providing your customers with a more efficient way to pay an invoice online.</p> <p>You can also install the PayPal integration extension. This creates links in invoices to PayPal Standards online payment. PayPal offers a trustworthy global payment service with multiple ways of accepting payments, including credit card processing and PayPal accounts.</p> |



What's New in Microsoft Dynamics NAV 4.0 to 2017

| New Functionality Name | NAV version in which it was introduced | NAV Module Name | New Functionality Description |
|--|--|-----------------|--|
| OCR line support | 2017 | | <p>You can extract lines of an invoice as part of OCR and you can visually verify the information, training the OCR system online, using the Lexmark invoice capture service.</p> <p>OCR is very valuable for repeated invoices and helps you track the items that you get in. If you call items something different in your system, Microsoft Dynamics NAV enables you to cross-reference for items, according to vendors, so you can create the correct lines in your system, knowing what the items should be. You can map to an existing vendor or create a new vendor, using as much of the captured information as possible.</p> |
| Cortana Intelligence | 2017 | | <p>You can use the Sales and Inventory Forecast extension to get deep insights about potential sales and a clear overview of expected stock-outs.</p> <p>The built-in Cortana Intelligence leverages historical data and helps you manage your stock and respond to your customers. Based on the forecast, the Sales and Inventory extension helps create replenishment requests for vendors and saves you time.</p> <p>Furthermore, Partners can help customers find business-critical information hidden in their database using the Time Series Library generic API, which enables Microsoft Dynamics NAV developers to create their own functionality and bring machine learning to their solutions.</p> |
| Power Apps & Microsoft Flow: Connector | 2017 | | <p>You can use the Microsoft Dynamics NAV 2017 Connector to easily connect with your data that is in other applications, such as Power BI, Microsoft Excel, Microsoft Flow, and PowerApps. You simply sign in to the connector and then you can use the tool of your choice.</p> |
| Extensions | 2017 | | <p>You can use many more features to build extensions. There are additional object types and support for .NET add-ins and you can now include starting table data, published web services, custom report layouts, and language files. You can take advantage of several new upgrade functions and use debugging and code coverage on extension objects.</p> <p>An extension can be published to an environment using an Azure SQL Database, and you can use the new Extension Management page to easily view, install and uninstall published extensions.</p> |