What's New in Microsoft Dynamics NAV

2015 to 2017

New Functionality Name	NAV version in which it was introduced	New Functionality Description
Integration between NAV and CRM	2016	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.
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 recieved 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.
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.

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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 aplicable 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.

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Client enhancements for end users: Web 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 Web 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. - 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	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: - 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)

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Client enhancements for end users: Phone 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 Phone 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. - 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	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. 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. Payment reconciliation matches customer, vendor, and bank transactions. To more easily view incomplete work, you can choose to display unapplied lines.
Financial reports	2017	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: Balance Sheet. Income Statement. Cash Flow Statement. Retained Earnings Statement.
Account categories	2017	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. You can automatically update account schedules when you update your account category mapping.
Simplified Jobs	2017	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. 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. A new Job Quote report enables you to quickly email a customer the price for a project.
Simplified relationship management	2017	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.
Item attributes	2017	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. 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. 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.
Item categories	2017	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. 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.
Payment services and PayPal standards payment link	2017	You can insert hyperlinks to online payment services into your invoices, providing your customers with a more efficient way to pay an invoice online. 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.

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OCR line support	2017	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. 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.
Cortana Intelligence	2017	You can use the Sales and Inventory Forecast extension to get deep insights about potential sales and a clear overview of expected stock-outs. 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. 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.
Power Apps & Microsoft Flow: Connector	2017	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.
Extensions	2017	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. 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.