What's New in Microsoft Dynamics NAV

3.01 to 2017

New Functionality Name	NAV version in which it was introduced	NAV Module Name	New Functionality Description
Front-end solution designed specifically for core small businesses and lower mid-market companies	4.00	Business Analytics Advanced (7021)	The Advanced offering includes all the features of the basic offering plus is a front-end solution designed specifically for core small businesses and lower mid-market companies to enable targeted analysis of detailed information generated from Microsoft Business Solutions–Navision. Microsoft Navision Business Analytics makes it possible to gain a 360-degree view of your business performance. Microsoft Navision Business Analytics not only generates a quick overview of your core business data the way you want it presented, it also ensures that everyone in your organization is using the same up-to-data data for gaining business insights to make strategic and operational decisions.
Analyze data from different application areas through Microsoft Excel via the OLAP cubes	4.00	Business Analytics Base Functionality (7020)	The basic offering enables customers to analyze data from different application areas within Microsoft NAV. It includes: • A set of forms within Navision for configuration of dimensions and measures. • A configuration engine that configures DTS packages for data transfer and schema for OLAP cubes and data mart tables. Customers can view and analyze data through Microsoft Excel via the OLAP cubes.
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
Improved the overall performance when handling document exchange	4.00	Report Designer (100 Reports) (7115)	XML PORT DESIGNER, 8700 XML PORTS (EACH) AND 8750 XML PORTS (100) A new XML Port feature makes it easier for partners to customize Microsoft Navision. The XML port improves the overall performance of Microsoft Navision when handling document exchange, and reduces the need for partners to have expert knowledge of XML parsers. Partners can develop, implement and manage XML documents in an efficient and cost effective way, and customers can more easily manage data exchange of business documents.
Report Development	2013 R2	Report Designer (100 Reports) (7115)	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.
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.
Send NAV information between two employees as e-mail	3.60	Application hyper linking	APPLICATION HYPER LINKING Application hyper linking enables users to send information between two employees as e-mail. One example: an employee sends customer information to a supervisor and asks the supervisor to change the credit limit. When the supervisor receives the e-mail – the supervisor can click on the hyperlink, Navision will automatically start and the customer information will automatically be shown. Now the supervisor can change the credit limit. The Navision client now supports Hyperlinks to forms and reports. These are added as two new entries in the File->Send ->Link by e-mail or File->Send->Shortcut to Desktop. You will also find a new entry in the Edit menu – Copy link.
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

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Import of language module, Select language, Printing Multilanguage enabled documents	3.60	Core	MULTILANGUAGE Multilanguage has three features: • Import of language module • Select language • Printing Multilanguage enabled documents The import of a language module is a feature that imports language modules into Navision. A language module is a file that has on-line Help, system texts and application text for a particular language. There are no limitations in the number of languages Navision can handle. The Select language feature enables the user to switch language on the client in real time. The user will be able to switch between languages that are imported in Navision. When the user switches e.g. from a German to English - online help and error messages in the application will be in English. The printing of documents is enabled to handle more languages. This makes it possible for a user to print invoices to his customers in different countries in the same batch. The user starts the printing, and Navision will automatically select the appropriate language for the customer in question. Thereby the company is able to provide their customers with trading documents in the appropriate language. C/ODBC has also been changed to handle Multilanguage for Navision. The new C/ODBC version covers the following Multilanguage areas: • Table Names • Field Names • OptionString values When you link a table by setting another application language other than the default language and this language has a corresponding output from Navision, you will notice that the value of the table name, the field names and the option field within the table will be shown in the language chosen.
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
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.

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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.
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

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Employee portal	4.00	Employee Portal (2450)	The Employee Portal is Microsoft Dynamics NAV's integration to Microsoft SharePoint. Connections to Windows SharePoint Services as well as to the Microsoft Office SharePoint Server are supported. This gives easy access to live Microsoft Dynamics NAV data for employees via a known Microsoft Web platform. This allows for simpler tasks (such as view, create, update, and delete data) to be placed in an easy to use and well-known environment. The solution has similar functionality as the discontinued Navision User Portal. The granule is a toolkit that makes Microsoft Dynamics NAV data and business logic available in SharePoint - a framework to present and update data via Microsoft SharePoint. Microsoft Dynamics NAV Employee Portal includes three generic web parts which can be configured to display data directly from Microsoft Dynamics NAV. The List web part – to display data in list format – ideal for displaying a list of customers, vendors or orders. Card web part can be configured to display a more detailed view data for example a customer card. The last web part is the Header/line web part which is very effective to display information like an order. Furthermore it will be possible to view reports and execute business logic directly from within SharePoint as well as perform searches. Employee Portal functionality is sold on a per license basis (NOTE this is a change to previously), with the standard requirement o license all access to Microsoft Dynamics NAV through other means that the full User through DCO. This means each user accessing the Employee Portal solution must be licensed with DCO. Requirements: None, although for performance reasons it is recommended that an additional Application Server be utilized in conjunction with Employee Portal
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.
Microsoft Dynamics NAV's integration to Microsoft SharePoint	4.00	Employee Portal (2450)	The Employee Portal is Microsoft Dynamics NAV's integration to Microsoft SharePoint. Connections to Windows SharePoint Services as well as to the Microsoft Office SharePoint Server are supported. This gives easy access to live Microsoft Dynamics NAV data for employees via a known Microsoft Web platform. This allows for simpler tasks (such as view, create, update, and delete data) to be placed in an easy to use and well-known environment. The solution has similar functionality as the discontinued Navision User Portal. The granule is a toolkit that makes Microsoft Dynamics NAV data and business logic available in SharePoint - a framework to present and update data via Microsoft SharePoint. Microsoft Dynamics NAV Employee Portal includes three generic web parts which can be configured to display data directly from Microsoft Dynamics NAV. The List web part – to display data in list format – ideal for displaying a list of customers, vendors or orders. Card web part can be configured to display a more detailed view data for example a customer card. The last web part is the Header/line web part which is very effective to display information like an order. Furthermore it will be possible to view reports and execute business logic directly from within SharePoint as well as perform searches. Employee Portal functionality is sold on a per license basis (NOTE this is a change to previously), with the standard requirement o license all access to Microsoft Dynamics NAV through other means that the full User through DCO. This means each user accessing the Employee Portal solution must be licensed with DCO. Requirements: None, although for performance reasons it is recommended that an additional Application Server be utilized in conjunction with Employee Portal
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.
Personal menus, Shortcuts	4.00	Menu personalization	• End users can personalize menu content to suit the way they work. For example, they can hide menu items that they do not use very often. • End users can make shortcuts to the menu items that they use the most and also to all the files, programs and web sites that they use in their daily work.

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New Functionality Name	NAV version in which it was introduced	NAV Module Name	New Functionality Description
The Action Pane has been redesigned and is now referred to as the ribbon	2013	Menu personalization	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 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.
Navigation Pane similar to the Microsoft Office Outlook 2003	4.00	Office Look Navigation Pane Replaces Main Menu	OFFICE LOOK NAVIGATION PANE REPLACES MAIN MENU We have introduced a Navigation Pane similar to the one in Microsoft Office Outlook 2003. The new Navigation Pane helps users work more efficiently in Navision by combining easy-to-access menu information with personalization options. Further, users with administrator permissions for the Navigation Pane have various menu configuration options. Here are some of the main benefits: • Customer license file and security permissions automatically determines the menus shown and the items shown within each menu. • The content of the main menu has been restructured to reflect our end users' tasks and make it easier for them to find the functionality they need. • End users can personalize menu content to suit the way they work. For example, they can hide menu items that they do not use very often. • End users can make shortcuts to the menu items that they use the most and also to all the files, programs and web sites that they use in their daily work. Administrator users can be granted access to the Navigation Pane Designer: • Administrators can create and modify menus to best suit their companies' departmental needs. • Administrators can assign users to menus so that end users only see menus that are relevant to their roles.
Online Help is changed to HTML format	3.01	Online help	IMPROVED ONLINE HELP In Navision, the online Help is changed to HTML format. The HTML online Help is structured according to the main menu, and users will be able to use a Table of Contents, links to related tasks or a full text search across the online help to find help for a particular subject. The online Help also include help, which was previously included in the printed manuals. The online Help is much more comprehensive than before. It contains information about tasks and forms as well as conceptual information. There are three new kinds of Help topics: form topics, task topics, and conceptual topics. We are providing Help for many of the forms. We are providing extensive online procedural (task) Help as well as some online conceptual information. Previously, procedural information, conceptual information and information about forms was found only in the manuals. Much of the existing information has been moved from the manuals to the online Help. We continue to provide the usual table and field Help.

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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.
Record Level Security	3.01	Permissions (1410)	PERMISSIONS Record Level Security Navision offers an enhancement of the permission system. The feature gives customers the possibility to give users limited access to a specific table. This is a feature that is relevant if customers wish to give a sales assistant access to the customer table, but the sales assistant is only allowed to see information regarding a specific set of customers. With Record Level Security, the administrator is able to specify a set of filters that will be set before the user is able to see the data. Record Level Security is a feature for Microsoft SQL Server option for Navision only.
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.
Key Performance Indicators (KPIs) can be viewed in a generic graph component	4.00	Simple Bar Chart Graph Components	SIMPLE BAR CHART GRAPH COMPONENTS New pre-defined Key Performance Indicators (KPIs) can be viewed in a generic graph component in Microsoft Navision 4.0 that can be customized by partners. The pre-defined KPIs represent Financial Management, Supply Chain Management and CRM. The graph component enables users to create a simple bar chart diagram consisting of a limited number of squares and the ability of drilling down. The graph can be generic and customized by partners.
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).
Incorporated the look and feel of Windows XP	3.10	Windows XP	WINDOWS XP IMPLEMENTATION Navision 3.10.A incorporated the look and feel of Windows XP into its design, with new colors and a new logo. The basic graphic design elements of Windows XP are implemented as follows: • The main menu will have the colors of Windows XP. • Essential icons in the Object Designer and the application, including the toolbar icons, will have the look and feel of Windows XP.
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.

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New Functionality Name	NAV version in which it was introduced	NAV Module Name	New Functionality Description
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.
NAV Portal Framework for SharePoint.	2013 R2	SharePoint Client	Applies only for customers using SharePoint. NPF contains all Web client functionality, with the following exceptions: - Navigation pane is not added by default to master page - Regional settings and time zone are taken from SharePoint SharePoint-specific Functionality in NPF: 1. NAV Web Parts - Show NAV pages, no reports - Get filter values from other Web Parts - Send data rows to other Web Parts 2. SharePoint branding - CSS, themeing 3. Scalability - SharePoint farm 4. SharePoint integration - Authentication, timezone, regional settings, extranet, etc. Use NPF when: - The customer has invested in SharePoint - Integration of SharePoint functionality with Microsoft Dynamics NAV is needed.
Contact Salutation and Multilanguage Attachments	3.10	Campaign Management (5130)	CAMPAIGN MANAGEMENT Contact Salutation and Multilanguage Attachments - The same document template can be used to send a document to people of different nationalities in their native language. Salutation formulas in different languages can be set up and used with a standard document in the right language.
Segmentation and mail merges	3.01	Campaign Management (5130)	With the segmentation feature, you can create new segments and reuse existing ones for the purpose of making marketing campaigns. You can also, for example, specify whether or not you want these segments updated every time new information on the contact is entered, or you can 'freeze' the group for follow-up activities. It is also possible to dynamically execute mail merges for identified segments with Microsoft Word documents or even e-mails campaigns using Outlook.
Customer classification and segmentation (single criteria)	3.01	Contact Classification (5120)	This feature enables you to classify your customers according to revenue or other criteria. You can define segments on these characteristics and use them for campaign purposes.
Customer cross-classification	3.60	Contact Classification (5120)	CONTACT CLASSIFICATION The existing Contact Classification granule has been improved in order to segment customers into A, B, and C customers based on questionnaire weights. It is now possible to cross-classify customers, meaning that the weights of two questions will identify the value of a third question.
CRM	4.00	Contact Management (5110)	You use this granule to maintain an overview of your contacts, and personalize your approach to them. In the Contact Management granule, you can record your contact information for all your business relationships. For each contact you can specify the individual contact persons related to this contact. The duplicate check function automatically alerts you if you enter contact information that already exists. You can categorize your contacts based on profiling questions in order to have a precise view of prospects and customers. The granule is tightly integrated with Sales & Receivables application area which means, for example, that you can issue quotes to prospects or create sales documents for specific contact persons (requires Sales Order Management).
Profiling	3.01	Contact Management (5110)	As part of Contact Management, profiling allows you to characterize your contacts on a personal level as well as on a company level, based on your own criteria. For example, you could specify your contact's preferred language, hobbies and interests. On a company level you could enter any information that is important for you to know. All this can be used later for creating very specific segments.
Quotation to Contacts	3.10	Contact Management (5110)	CONTACT MANAGEMENT Quotation to Contacts - Quotes can be issued to prospects and sales documents can be created for specific contact people.
Search for all information related to a specific contact	3.60	Contact Search (5170)e	CONTACT SEARCH This search functionality extends the usability of our solution as it becomes possible to search for all information related to a specific contact – for example, an opportunity, a contact address, or even comments on this contact. We have introduced fuzzy logic in this feature to make the search overcome misspelling.
Document logging	3.10	Interaction/Document Management (5160)	Document Logging - Navision can automatically record interactions when other actions in Navision are performed. All Navision documents that are sent to contacts, like sales orders or quotes, can be logged and retrieved at a later stage from a document archive.
Interaction log	3.01	Interaction/Document Management (5160)	Interaction log • The interaction log gives you an instant overview of all your interactions. Some entries are logged automatically; these are typically business documents generated by Navision, for example, invoices and payment reminders. Other interactions are logged manually, for example, Microsoft Word documents, meetings and telephone conversations.

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Microsoft Word integration	3.01	Interaction/Document Management (5160)	Microsoft Word Integration • This granule provides integration of Microsoft Word with Microsoft Business Solutions–Navision. This makes it easy to look up a contact and launch Microsoft Word using a given template in order to write, for instance, a letter. Basic information can then be transferred from Navision to the Microsoft Word document.
Save an interaction during the process and later reopen and continue	4.00	Interaction/Document Management (5160)	Postponed Interaction Log Entries - the possibility to save an interaction during the process and later reopen and continue.
Telephony Application Programming Interface (TAPI)	3.01	Interaction/Document Management (5160)	Telephony Application Programming Interface (TAPI) • Navision integrates to Microsoft TAPI. Using TAPI-compliant telecom devices, it is possible to dial a contact's number simply by clicking a button in Navision.
Log all email correspondence	3.60	Mail Logging for MS Exchange (5180)	EMAIL LOGGING FOR MS EXCHANGE You use this granule to log all email correspondence. You can log inbound and outbound emails sent through Navision or Outlook and you can even set-up the program to log automatically or manually in Navision. The solution is server based and requires Microsoft Exchange Server (min. version 5.5 with service pack 4) in order for you to keep emails in their natural environment and thereby ease your administration.
Sales opportunity tracking	3.01	Opportunity Management (5140)	This granule helps you to keep track of sales opportunities. Your salespeople have an overview of what's in the pipeline and can plan ahead accordingly. Opportunity Management can also help you to break up your sales process into different stages.
Multiple Meeting Participants, Improved Calendar Integration, Look up from Microsoft Navision to Related Outlook Item & v.v., Optimized Synchronization	3.70	Outlook Client Integration (5195)	• Multiple Meeting Participants - In Microsoft Navision, it is now possible to register information regarding all meeting attendees on To-dos. Both contacts and salespeople can be registered as attendees to a particular meeting, with no limit to the number of participants. This improvement is valid regardless of whether the customer has Outlook Integration or not. • Improved Calendar Integration - It is now possible to fully synchronize the attendee's information between Microsoft Navision and Outlook. • Look up from Microsoft Navision to Related Outlook Item - It is now possible to open up the corresponding Outlook item (Contact/Task/Meeting) from the corresponding Microsoft Navision form (Contact/To-do). • Look Up from Outlook to Microsoft Navision - It is now possible to open up a specific Microsoft Navision record from the corresponding Outlook Item. A new toolbar with an Open Microsoft Navision Contact (or Open Microsoft Navision To-do) button is automatically created in Outlook. • Optimized Synchronization - The synchronization mechanism has been optimized. The synchronization will still run in the background when Outlook has been closed. We are now able to synchronize correctly in case the user deletes all the Outlook items in a specific folder.
Outlook client integration enhanced: application focus improved (no need to jump between applications)	4.00	Outlook Client Integration (5195)	• Digital Security Certificate • Two-way synchronization of all fields. • Grouping Outlook tasks • Synchronization of Team to-dos/restructuring of Team to-dos.
Outlook client integration enhanced: improved sales visibility	5.00	Outlook Client Integration (5195)	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.
Synchronizes to-dos and contacts in with meetings, tasks and contacts in Microsoft Outlook	3.60	Outlook Client Integration (5195)	You use this granule to synchronize your to-dos and your contacts in with meetings, tasks and contacts in Microsoft Outlook. You can create, update, cancel and delete in one program and the other program is automatically synchronized. You can also use this granule when you need access to information or even update information when working offline. This is due to a batch job that you can run when you are online again.
Using Office 365 in Microsoft Dynamics NAV	2013 R2	Outlook Client Integration (5195)	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. Enable Microsoft Office 365: Low entry cost, always up-to-date, subscription-based Office 365 offering Integration based on usage scenarios: Mix and match Microsoft Dynamics NAV and Office clients to match the individual customer requirements. Access anywhere: Use Microsoft Dynamics NAV Web client and Office Web apps for working from any device.
Schedule and allocate resources in an optimal way to meet customer expectations and obligations	3.60	Planning and Dispatching (5941)	PLANNING AND DISPATCHING The planning and dispatching features allows service organizations to schedule and allocate resources in an optimal way to meet customer expectations and obligations. Planning: • The ability to plan resources according the service obligations engaged is key to most service organizations. Dispatching: • The dispatching feature in CRM – Service gives the opportunity to schedule and allocate resource according to, for instance, availability, skills and geographical proximity to the service site. Furthermore the dispatching feature provides an overview of the overall service load level of the organization. Additionally service tasks can be prioritized and escalated from the dispatching feature.
Creation improvement, Nav style, blocking	3.60	Service Contract Management (5931)	SERVICE CONTRACT MANAGEMENT • It is now possible to create service contracts without creating service contract quotes first, making it more flexible to register service contracts in the application. • Service contracts have been restructured to comply with the Navision style guide. The service contract window now includes a header and line, and the contract templates are kept in a separate table, making it easier for partners to work with the application. • It is possible to block service contracts to prevent additional changes.
Dimensions on Service Contracts	3.10	Service Contract Management (5931)	• Dimensions on Service Contracts - You can use the general multiple dimensions functionality on service contracts just as you like you use it in the rest of the product.

1click factory

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Multiple contracts per item (service levels)	3.70	Service Contract Management (5931)	SERVICE CONTRACT MANAGEMENT • The ability to issue multiple contracts per service item will facilitate our customers' needs for handling diverse service level agreements for service items. Some service items may require distinctly differently composed service level agreements, depending on the kind of service (e.g. hardware/software maintenance). Customers will now have the flexibility to manage such service level agreement diversity. • The application has also been improved in the Service Order Management area, so users will now have support for selecting the appropriate service contract for a service item in the order uptake process. In addition, the ability to issue multiple contracts per service item will enable customers to issue multiple quotation offers for a service item, whether or not it is covered by contracts. • The improvements we have made to the way contractually related service ledger entries are handled will improve the reliability of the affected statistics and the traceability of their composition.
Renewals	3.60	Service Contract Management (5931)	SERVICE CONTRACT MANAGEMENT • It is now possible to create service contracts without creating service contract quotes first, making it more flexible to register service contracts in the application. • Service contracts have been restructured to comply with the Navision style guide. The service contract window now includes a header and line, and the contract templates are kept in a separate table, making it easier for partners to work with the application. • It is possible to block service contracts to prevent additional changes.
Service contract templates, quotes, history, gains/loses, Trendscape	3.01	Service Contract Management (5931)	SERVICE CONTRACT MANAGEMENT Service Contract Management enables service organization to set up, manage and monitor service-related contractual agreements with their customers. This is facilitated through features such as: • Contract templates – Through CRM – Service it is possible to set up service contract templates and groups which allows service organizations to (re-)use standardized contractual information. • Contract quotes – CRM – Service supports an iterative contract negotiation process through the use of contract quotes. Quotes can be saved, so the development of the contractual negotiation can be traced. • Contract history – A complete history of the changes made to the contract is available in CRM – Service. • Contractual gains / loses – This feature gives the service organization an insight into the financial impact of contractual changes. • Invoicing of contracts and contractually related service is very flexible in CRM – Service. This ensures that the service organization can accommodate a wide range of business relationships, customs and practices. • The Trendscape analysis feature gives you key performance indicators (such as profit, income or cost) on the service contracts on a given timeframe. • Dimensions on Service Contracts - You can use the general multiple dimensions functionality on service contracts just as you like you use it in the rest of the product.
Register basic information on the equipment on which service is performed (contract, components, warranty, history, KPIs with Trendscape)	3.01	Service Item Management (5921)	SERVICE ITEM MANAGEMENT Service Item Management allows the service organization to register basic information on the equipment on which service is performed. This includes features such as: • Contractual information – it is possible to enter/access contractual related information on each service item, such as response time, contractual values, upcoming service etc. • Component management – in CRM – Service, it is possible to manage service items, which have BOM like component structure. This enables the service organization to manage e.g. warranty issues separately on a component level, and it also enables the tracking of changes in composition of service items over time. • Warranty management --the ability to manage warranty as part of the overall service offering is important to most service organizations. In CRM – Service it is possible to handle warranty on parts and labor separately. • A complete history of the service performed to a service item is available in CRM – Service. This also includes contractual changes. • The Trendscape analysis feature gives you key performance indicators (such as profit, income or cost) on the service item in a given time frame.
Base Calendars	3.10	Service Order Management (5911)	• Replace Working Calendars with Base Calendars features - We have implemented new base calendar functionality in the application so that the same calendar can be used throughout Navision.
Correlation of resource skills and service item types	3.01	Service Order Management (5911)	Skills management: • In CRM – Service, it is possible to set up and manage the correlation of resource skills and service item types, so service organizations always know which technicians are skilled for servicing certain equipment types.
Customer service & warrantee management	3.60	Service Order Management (5911)	You use this granule to register your after-sales issues including service requests, services due, service orders, and repair requests. Service requests can be initiated by your customers or automatically according to the terms stipulated in your service contract *). Data can be entered in the service orders by a call-center employee or by your repair shop. You can also use this granule to register ad hoc or 'one-off' service orders. In this granule you can register and manage loaner equipment, lent out to customers. A complete history of your service orders and service order quotes is also available through the Service Order Log.
Customer template improvement	3.10	Service Order Management (5911)	• Customer template improvement - We have implemented the new customer template functionality from CRM – Marketing & Sales, which allows for a more structured approach to template-based customer creation.
Discounts	3.60	Service Order Management (5911)	• Have quantity discounts on service orders.
Fault and Resolution Management	3.01	Service Order Management (5911)	Fault and Resolution Management: • A flexible tool for managing fault and resolution classifications are incorporated in CRM – Service. This gives service organizations the benefit of a structured management approach without imposing certain work routines on them. Industry wide standard fault and resolution management approaches are also supported by CRM – Service.

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Handling of inventory consumption for outbound service	5.00	Service Order Management (5911)	• 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.
Item-Bin movement tracking	3.70	Service Order Management (5911)	• It is now possible to register the items that are taken from a bin in the warehouse in a Service Order.
Loaner Management	3.01	Service Order Management (5911)	Loaner Management: • Management of equipment loaned to customers during a service process is supported in CRM – Service, thus supporting service organizations in delivering superior customer service. .
Quantity used & charged	3.60	Service Order Management (5911)	• Specify both the quantity used and the quantity to be charged to the customer on service orders to make the invoice handling more flexible.
Service document - client connection	3.60	Service Order Management (5911)	The ability to create service documents for contacts and assign service quotes to prospects.
Service History	3.01	Service Order Management (5911)	Service History: • A complete history of the changes made to a service order is available in CRM – Service.
Service item worksheet	3.01	Service Order Management (5911)	Service Item Worksheet: • An effective tool for services performed is delivered through the service item worksheets in CRM – Service. The feature enables the technician to enter the spare parts used and time spent to resolve the service issue. The information entered here make up the basis for the invoicing.
Service quotes & orders numbering	3.60	Service Order Management (5911)	It is now possible to: • Have a different number series associated to service quotes and service orders respectively.
Service request handling	3.01	Service Order Management (5911)	Service Management was a new module for 3.01. The granules were restructured and renumbered in 3.60 and have not changed name or number since then. SERVICE ORDER MANAGEMENT To many service organizations the management of service orders is key to their business. In CRM – Service, service order management is made easy and accommodating. Service Request Handling: • Quotations. Many service organizations treat service order quotes separately from actual service orders. This business need is supported in CRM – Service. It is of course possible to convert the quotes to actual service orders subsequently. • Preventive maintenance service orders. In CRM – Service, service requests don't have to be initiated by the customer, they can also be generated by contractual obligations, for example. • Reactively generated service orders. A reactive service request, either by existing customers or on a one-off basis from walk-up customers, is supported by an efficient service request process.
Time Sheets enhancements	2013	Service Order Management (5911)	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.
Service price groups, calculation structures, reports	3.60	Service Price Management (5912)	SERVICE PRICE MANAGEMENT • Service price management allows the set up of service price groups to take into consideration the service item (or service item group) as well as the type of fault the service task involves. • Service price groups can be set up for a limited period of time, and/or for a specific customer or currency. • Price calculation structures can be used as templates to assign a price to a service task. For example, this makes it possible to assign specific items included in the service price as well as the type of work included. • And to ensure that the right prices are applied, it is possible to assign fixed, minimum, or maximum prices, depending on agreements with customers. • Service price group reports allow you to keep track of the profitability of each service price group.
To-do and interaction log linkage	3.60	Task Management (5150)	TASK MANAGEMENT The to-do and interaction log are linked more so that it becomes easier to have a closed loop of to-dos. There is no longer a need to have a contact for every to-do, which makes it possible to create internal to-dos.
To-do list	3.03	Task Management (5150)	TASK MANAGEMENT The to-do and interaction log are linked more so that it becomes easier to have a closed loop of to-dos. There is no longer a need to have a contact for every to-do, which makes it possible to create internal to-dos.
Accounting Periods Comparison Improvement	3.10	Accounts Schedules (3040)	• If the Accounting Periods are of different lengths, it is now possible to compare a period with, for example, the previous period or the same period in the previous fiscal year, in the account schedule. • Year to date option will now work when fiscal years are of different length. • Now you have the possibility to include ledger entries made on the closing date just prior to a given period.

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Online Payment Service for Microsoft Dynamics NAV (2009 R2)	2009	Bank Management (5010)	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.
SWIFT and IBAN Bank Information	3.70	Bank Management (5010)	BANK ACCOUNT MANAGEMENT SWIFT and IBAN Bank Information – You can now add these to the Company Information form and all company, customer and vendor bank accounts in the program.
Bank statement import and payment export	2013 R2	Bank Management (5010)	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. 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. 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.
Export Payment Data – SEPA Credit Transfer	2013 R2	Bank Management (5010)	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. You can create the correct payment proposal easier and faster through functions available in the Payment Journal. You save money by getting access to more banks in the SEPA zone when better conditions are available due to more bank competition. You get help avoiding paying vendors twice as the Microsoft Dynamics NAV provides an alert if a payment has been exported previously. You can easily investigate what has been exported and by whom over time by using the Credit Transfer Register. 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. Minimizes the time needed to search for the right, open documents as bank payments are automatically applied to open customer and vendor documents. You save time by being able to create files for upload instead of having to key in all payments instructions in the bank application. Styling gives the user an intuitive overview of the application process.
Export Payment Data to an Electronic Bank File	2013 R2	Bank Management (5010)	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. You can create the correct payment proposal easier and faster through functions available in the Payment Journal. 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. You get help to avoid paying vendors twice as the system provides an alert if a payment has been exported previously. You can easily investigate what has been exported and by whom over time by using the Credit Transfer Register.
SEPA Direct Debit Collections	2013 R2	Bank Management (5010)	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. 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. 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. 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.
Electronic Payments	2015	Bank Management (5010)	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.
Bank reconciliation	3.10	Bank Account Reconciliation (5030)	This granule enables you to reconcile your bank accounts in Microsoft Dynamics NAV with the bank's statements. You can apply amounts from your bank account ledger to the reconciliation form and keep track of all bank statements.
Automated bank reconcilation	2013 R2	Bank Account Reconciliation (5030)	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. 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. High speed bank data entry as bank statement data is automatically imported into mapped fields in the reconciliation window. 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. Flexible user experience with data via manual tools that are available as needed to match and unmatch data. 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. 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.

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Automatic Payment Reconciliation	2015	Bank Account Reconciliation (5030)	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.
Administers and analyze the effective costs	5.00	Cost Accounting (3220)	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)
SQL 2000 & SQL 2005, very complex calculations can be stored in cubes	5.00	Cost Accounting (3220)	Business Analytics has been updated as follows: • A new version of BA Basic o Runs on SQL 2000 and SQL 2005 • A new version of BA Advanced 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: 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 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)	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'.
Basic fixed assets	3.01	Basic Fixed Assets (5260)	• You can create new fixed asset cards by copying an existing fixed asset card. • You can copy information from fixed asset entries to a G/L Budget using the FA Posting Group accounts. Alternatively, you can create new G/L Budget entries when you run the Fixed Asset – Projected Value report. • Fixed Asset Acquisition List report – Provides a list of all acquisitions during a specified period. You can also choose to include assets that have been created but have no acquisition entries posted.
Copy functionality and Fixed Asset Acquisition List report	3.70	Basic Fixed Assets (5260)	BASIC FIXED ASSETS • You can create new fixed asset cards by copying an existing fixed asset card. • You can copy information from fixed asset entries to a G/L Budget using the FA Posting Group accounts. Alternatively, you can create new G/L Budget entries when you run the Fixed Asset – Projected Value report. • Fixed Asset Acquisition List report – Provides a list of all acquisitions during a specified period. You can also choose to include assets that have been created but have no acquisition entries posted.
User interface and workflow improvement (Half-Year Conversion)	3.01	Basic Fixed Assets (5260)	Fixed Assets improvements have been made to the user interface and workflow, and a number of errors have been corrected using suggested solutions where possible. Specific improvements are: • It is now possible to sell a fixed asset from a sales invoice. • The Fixed Asset Depreciation Book for an asset is now displayed in the bottom of the Fixed Asset card. • The depreciation method Half-Year Convention has been implemented.

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New Functionality Name	NAV version in which it was introduced	NAV Module Name	New Functionality Description
Automated document approval process	5.00	Basic General Ledger (3010)	Document Approval This feature introduces an approval process for sales and purchase documents which includes: • 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)	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.
Document archiving	2009	Basic General Ledger (3010)	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.
G/L Entry Table Locking Redesign	2013	Basic General Ledger (3010)	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
Importing of opening balances into journals and active documents with dimensions	2013	Basic General Ledger (3010)	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
More possibilities of VAT Reports setup	2013	Basic General Ledger (3010)	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.
Rapid Implementation Methodology (RIM)	5.00	Basic General Ledger (3010)	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: Industry-Specific Information Implementation Questionnaire 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: 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)	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.
Translated payment terms (shipment method and payment terms on an invoice will appear in the correct language)	5.00	Basic General Ledger (3010)	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.

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New Functionality Name	NAV version in which it was introduced	NAV Module Name	New Functionality Description
VAT calculation improvement (reliability)	3.10	Basic General Ledger (3010)	VAT functionality has been improved. The prime development goals were to make VAT calculation on sales and purchase documents more transparent and to ensure the reliability of all VAT calculations. • Rounding on sales/purchase documents is now easier to understand. Values that result in posted values are rounded and displayed in a way that corresponds to the final precision (after posting). • It is now possible to manually change VAT amounts in journals and on totals per VAT%. The program will check for maximum allowed corrections and provide a log of corrections for VAT authorities. • It is now possible to define whether or not VAT should be calculated in a journal (for VAT related to the Account No. and Bal. Account No. fields). • VAT registration numbers are now checked to ensure that they are valid. A user-defined VAT format check has been implemented. • It is now possible to print the VAT-VIES report without having to manually specify the Sell-to Customer No. field. The program inserts the sell-to/buy-from number automatically on a journal line during posting if the Sell-to Customer No. is not already specified by the user.
VAT Rate Change Tool	2013	Basic General Ledger (3010)	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
VAT Clauses	2013 R2	Basic General Ledger (3010)	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.
New XBRL reporting capabilities	3.10	Basic XBRL (3070)	XBRL reporting capabilities will be included in this release. XBRL is an XML-based specification that uses accepted financial reporting standards based on standardized, underlying data tags to exchange financial reports across all software and technologies, including the Internet. XBRL offers several key benefits: technology independence, full interoperability, efficient preparation of financial statements and reliable extraction of financial information. Information is entered only once, allowing that same information to be rendered in any form, such as a printed financial statement, an HTML document for the company's Web site, a filing document for submission to government agencies, a raw XML file or other specialized reporting formats, such as credit reports or loan documents. With XBRL-enabled Navision, you can: • Import unlimited numbers of taxonomies from public authorities, credit institutions, banks, and so on • View information attached to taxonomy • Map taxonomy lines to any combination of general ledger accounts, using standard Navision filters • View and print out XBRL document file for appraisal before sending • Export XBRL document that can then be sent as e-mail XBRL Specification 2 Support - Existing XBRL functionality revised to accommodate the release of XBRL Specification 2 by the XBRL Consortium.
Budgets improvement (matrix window, adjustment, Excel import & export, budgeted & actual comparison)	3.01	Budgets (3030)	This granule has not changed number or name from 2.60 to 4.0. The Budget window has been simplified so that the window has the same look and feel as matrix windows elsewhere in the program. Improvements include: • You can budget in the matrix window by selecting between a combination of G/L account and period. If you have purchased dimensions functionality you can also select a combination of up to four dimensions. • You can copy budgets from previous periods and revise budget figures using an adjustment factor. If you have purchased dimensions functionality, you can attach an unlimited number of dimensions to a budget entry. • You can easily export budgets to and import budgets from Excel. • You can compare budgeted amounts with actual amounts per G/L account and period. If you have purchased dimensions functionality, you can compare budgeted amounts with actual amounts per dimension.
New master data change log	3.60	Change Log (3080)	Enables you to log user changes made to Navision master data. It is possible to log all direct modifications a user manually makes to the data in the database. The change log functionality makes it possible to get a chronological list of all manual changes to data in any field in any table and to see who (what user ID) made the changes. It does not record changes to data made by running batch jobs, code units or renaming records.
Consol, Translation Method for each individual G/L account	4.00	Consolidation (3050)	To comply with SFAS52/1AS21 in relation to foreign currency translation, customers can now choose which method to use when translating a specific G/L account from a foreign entity. You simply select the appropriate Consol, Translation Method for each individual G/L account.
Administers and sets up the effective costs budget	5.00	Cost Budget (3230)e	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)
Cost Accounting improvements	2013	Cost Budget (3230)e	Cost accounting has the following main components: - 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

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New Functionality Name	NAV version in which it was introduced	NAV Module Name	New Functionality Description
Create and distribute and reconcile inter-company transactions between multiple Microsoft Navision solutions and across multiple companies	4.00	Inter-company Postings (3090)	Intercompany Postings is new functionality that helps customers create and distribute inter-company transactions between multiple Microsoft Navision solutions and across multiple companies. • Customers can create all the necessary documents – sales and purchase documents, general ledger entries and more – for the entire workflow, for more than one company at a time. Intercompany Postings allows for multiple databases, multiple currencies, different charts of accounts and multiple languages. • Customers can make the correct due to/due from entries in more than one company, using relevant intermediary accounts. Transactions referring to another set of books within the same group of legal entities can be entered directly in the GL or when entering sales and purchase documents.
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)	Intercompany Purchase Cost Distribution 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. Secondly, spokes within the Hub'n Spoke structure are invoiced by vendors and recorded costs need to be spread across the organization.
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	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)
Multiple location functionality extension to handle administrative centers	3.01	Responsibility Centers (3060)e	Extends the multiple location functionality by providing the possibility to handle administrative centers. A responsibility center can be a profit center, investment center or a cost center. It is possible to set up user-specific views to help show only sales and purchase documents related to a particular user as well as a setting. For example, prices for responsibility centers.
Agile Manufacturing including Supply Planning and Capacity Planning	3.01	Agile Manufacturing (5805)	AGILE MANUFACTURING This granule gives you access to run Agile Manufacturing including Supply Planning and Capacity Planning.
Add capacities (work centers) to the manufacturing process (manual and order planning)	3.01	Basic Capacity Planning (6010)	6010 BASIC CAPACITY PLANNING This granule is used for adding capacities (work centers) to the manufacturing process. You can set up routings and use these routings on production orders and in material requirements planning. This lets you see loads and the task list for the capacities. Manual Planning - This feature is a simple supply planning tool that functions as a manual MRP system, where the user makes planning decisions order-by-order based on visibility and manual planning functions. The Order Planning feature uses parts of the existing planning engine to find and analyze new demand but it does not consider planning parameters defined for the items and is therefore much more transparent than the automatic system. The Order Planning window displays all new demand along with advanced availability information and suggestions for supply. It provides the visibility and tools needed to manually plan for demand from both sales lines and component lines and then create different types of supply orders directly. It requires that a Planner deals with demand level-by-level. That is, any dependent demand for lower-level production items is only visible to the system after the higher level is planned. The Order Planning feature includes functions to supply from alternative sources, to easily create different supply orders and to quickly recalculate new demand.
Manual planning, Order planning window	4.00	Basic Capacity Planning (6010)	Manual Planning - This feature is a simple supply planning tool that functions as a manual MRP system, where the user makes planning decisions order-by-order based on visibility and manual planning functions. The Order Planning feature uses parts of the existing planning engine to find and analyze new demand but it does not consider planning parameters defined for the items and is therefore much more transparent than the automatic system. The Order Planning window displays all new demand along with advanced availability information and suggestions for supply. It provides the visibility and tools needed to manually plan for demand from both sales lines and component lines and then create different types of supply orders directly. It requires that a Planner deals with demand level-by-level. That is, any dependent demand for lower-level production items is only visible to the system after the higher level is planned. The Order Planning feature includes functions to supply from alternative sources, to easily create different supply orders and to quickly recalculate new demand.
Demand Overview is available in four new areas	2013	Basic Supply Planning (5810)	Information from the planning engine is now available in the following areas: - Jobs - Service Management - Sales - Production 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
Material requirements planning based on demand	3.01	Basic Supply Planning (5810)	BASIC SUPPLY PLANNING You use this granule for material requirements planning based on demand. The granule includes features for master production scheduling and material requirements planning. The granule also includes action messages for fast and easy balancing of supply and demand. The material requirements planning feature supports bucketless and bucketed material requirements planning. You can set up items with their own reordering policy, and you can register whether they are manufactured by or purchased from a third party. The granule automatically creates production orders and purchase orders.
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

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New Functionality Name	NAV version in which it was introduced	NAV Module Name	New Functionality Description
New Planning Parameters on Item card	2013	Basic Supply Planning (5810)	Five new reorder period fields have been added to the item card planning parameters to help optimize when and how much to reorder: - Time Bucket - Rescheduling Period - Lot Accumulation Period - Dampener Period - Overflow Level One new reorder quantity field has been added to the item card planning parameters to help optimize how much to reorder (Dampener Quantity) 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: - Default Dampener Quantity - Blank Overflow Level 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
New Planning Parameters on Item card and Manufacturing Setup window	2013	Basic Supply Planning (5810)	Five new reorder period fields have been added to the item card planning parameters to help optimize when and how much to reorder: - Time Bucket - Rescheduling Period - Lot Accumulation Period - Dampener Period - Overflow Level One new reorder quantity field has been added to the item card planning parameters to help optimize how much to reorder (Dampener Quantity) 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: - 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: - Item Availability by Event - Item Availability by Timeline - Item Availability by BOM Level
Analyze: answer the main questions in forecasting: what did customers buy (“products”), who bought and where (“markets”) and when did they buy (“time"). Forecast: automatically distribute quantities defined at a given aggregation level down into more detailed quantities.	3.60	Demand planner 2.0 User	Analyze: answer the main questions in forecasting: what did customers buy (“products”), who bought and where (“markets”) and when did they buy (“time"). Forecast: automatically distribute quantities defined at a given aggregation level down into more detailed quantities.
Analyze: answer the main questions in forecasting: what did customers buy (“products”), who bought and where (“markets”) and when did they buy (“time”)	3.60	Demand planner 2.0 User	With this granule you can model your business based on a multi-dimensional hierarchical data model. The dimensions, products, markets and time, correspond to the main questions in forecasting: what did customers buy (“products”), who bought and where (“markets”) and when did they buy (“time”). Each dimension can be divided in as many levels as needed. This allows you to analyze data at any level: from the most detailed level such as product-customer-week up to aggregated level such as product family-country-year.
Collaboration: sharing forecasts with external people, managing consensus, consolidating.	3.60	Demand planner 2.0 User	The granule also includes collaboration features that allow sharing forecasts with external people such as sales, marketing and product managers, managing consensus, and consolidating the agreed upon plans. Each player involved in the process can receive part of the plan he/she is involved in, work on it using Microsoft Excel, and synchronize modifications, iterating as often as necessary to arrive at a consensus. The user can work in online or offline mode as needed.
Demand forecasting based on items	3.01	Demand planner 2.0 User	5820 DEMAND FORECASTING You use this granule for demand forecasting based on items.

1click factory

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New Functionality Name	NAV version in which it was introduced	NAV Module Name	New Functionality Description
Forecast: automatically distribute quantities defined at a given aggregation level down into more detailed quantities	3.60	Demand planner 2.0 User	On the forecasting side, the solution automatically distribute quantities defined at a given aggregation level down into more detailed quantities. It also includes a library of selected forecasting algorithms that can derive the future demand forecast from the analysis of the past data. These forecasting algorithms can be applied to several business contexts; they can generate forecasts for stable or seasonal demand, as well as account for increasing or decreasing sales trends. A "best fit" functionality, for an automated selection of the proper algorithm and related parameters, allows users to apply powerful statistical techniques to demand forecasting, without being statistical experts. An "a priori" estimate of the possible error for each algorithm is automatically calculated. Further it is possible to set filters in order to visualize only those data of interest, define warnings to highlight exceptions and present data in a graphical manner. The granule also includes collaboration features that allow sharing forecasts with external people such as sales, marketing and product managers, managing consensus, and consolidating the agreed upon plans. Each player involved in the process can receive part of the plan he/she is involved in, work on it using Microsoft Excel, and synchronize modifications, iterating as often as necessary to arrive at a consensus. The user can work in online or offline mode as needed.
Plan by taking capacity constraints into account, calculate capable-to-promise (CTP)	3.01	Finite Loading (6030)	FINITE LOADING Finite Loading helps planners make more reliable plans by taking capacity constraints into account. • The feature ensures that no more work is assigned to a work center than the work center can be expected to execute during a given time period. • Finite loading considers the present load to figure out when to place a task. Finite loading is simpler than finite scheduling. It does not optimize load automatically, and it has no graphical interface. • If the Order Promising granule has been purchased, Finite loading also enables the system to calculate capable-to-promise (CTP).
Machine centers as capacities to the manufacturing process	3.01	Machine Centers (6020)	MACHINE CENTERS This granule is used for adding machine centers as capacities to the manufacturing process.
Production bill of material	3.01	Production Bill of Materials (5420)	PRODUCTION BILL OF MATERIALS You use this granule for creating production bills of materials. The granule is also required for configuration of all other Navision Manufacturing granules. The granule also includes facilities for standard cost calculation.
Standard cost calculation	3.01	Production Bill of Materials (5420)	PRODUCTION BILL OF MATERIALS You use this granule for creating production bills of materials. The granule is also required for configuration of all other Navision Manufacturing granules. The granule also includes facilities for standard cost calculation.
Creating production orders, posting consumption and output	3.01	Production Orders (5410)	You use this granule for creating and handling production orders. The granule provides you with the basic facilities necessary for creating production orders and posting consumption and output to the production orders. Once you have created a production order, you can calculate net requirements based on that production order.
Easy production reporting	4.00	Production Orders (5410)	Easy Production Reporting - This feature makes it possible to record consumption and output from the context of a production order line. The Production Journal window combines the functions of the consumption journal and the output journal into one journal, which is accessed directly from a released production order line. When the journal is opened, it is preset with the expected or remaining (by partial posting) quantities or times to be recorded – both output and consumption. With the use of routing link codes, the consumption lines (components) will be indented under the linked output lines (operations) thus providing a nice process overview. Quantities and times already recorded for the production order line are displayed at the bottom of the journal as actual entries.
Finished status, Finished order No	3.10	Production Orders (5410)	PRODUCTION ORDERS • Terminated the Finished Order Nos. - It will only be possible to specify a number series for released production orders – the finished production order will just inherit the released production order number. This make sense, as the production order number is often used as document number on posted entries, so, by not changing the number, you ensure that the navigate function works as intended. • Adding Finished as a status type to the production order and, consequently, move finished production order information to production order and terminating tables related to the finished production order.
Manufacturing	3.60	Production Orders (5410)	You use this granule for creating and handling production orders. The granule provides you with the basic facilities necessary for creating production orders and posting consumption and output to the production orders. Once you have created a production order, you can calculate net requirements based on that production order. As an alternative to automatic planning, this granule offers a manual supply planning tool. The Order Planning window provides the visibility and tools needed to manually plan for demand from sales lines and then create different types of supply orders directly.
Graphical representation of production orders and capacity loading in an integrated Gantt component	4.00	Production Schedule (6040)	Graphical Production Schedule - This feature provides a graphical representation of production orders and capacity loading in an integrated Gantt component. The Production Schedule window is a Gantt chart, which is fully integrated with Microsoft Navision and allows a user to reschedule operations by drag and drop in a graphical interface and thus update the related production order data. The feature does not provide new scheduling functionality – it merely enables in a graphical interface the tasks otherwise done in tabular form in routings, task lists, load windows, etc. As such, it is a consolidation of existing data and functions for capacity planning and scheduling in one graphical interface, which provides much improved overview and simplicity of use for different user roles.
Production schedule	4.00	Production Schedule (6040)	Graphical Production Schedule - This feature provides a graphical representation of production orders and capacity loading in an integrated Gantt component. The Production Schedule window is a Gantt chart, which is fully integrated with Microsoft Navision and allows a user to reschedule operations by drag and drop in a graphical interface and thus update the related production order data. The feature does not provide new scheduling functionality – it merely enables in a graphical interface the tasks otherwise done in tabular form in routings, task lists, load windows, etc. As such, it is a consolidation of existing data and functions for capacity planning and scheduling in one graphical interface, which provides much improved overview and simplicity of use for different user roles.
Manage versions of manufacturing bill of materials and routings	3.01	Version Management (5430)	VERSION MANAGEMENT You use this granule for creation and handling of versions of manufacturing bill of materials and routings.
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

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New Functionality Name	NAV version in which it was introduced	NAV Module Name	New Functionality Description
Export to Excel	3.60	Advanced Dimensions (4780)	You now have the possibility to export the information displayed in the Analysis by Dimensions form to Excel. Navision automatically creates a pivot table displaying the information allowing further analysis in Excel.
Unlimited number of additional company-defined dimensions and dimension values, Business rules and Analysis Capabilities	3.01	Advanced Dimensions (4780)	In addition to the 2 global dimensions in the Basic Dimensions Granule, the user could set up an unlimited number of additional company-defined dimensions and dimension values. The Advanced Dimensions granule also offers the following additional functionality to support the dimensions: Flexible Dimension Setup • In addition to the 2 Global Dimensions, you can choose 6 additional dimensions as shortcut dimensions. Business Rules • Dimension combinations can be excluded or restricted to mirror company procedures and practices. • Default dimensions on accounts are extended so that default dimensions can be set up for entire account types. • You can prioritize which default dimensions will be posted if a conflict arises between suggested dimension values for the same dimension. Analysis Capabilities • Analysis views gather and allow you to view database information about dimensions on G/L entries and budgets, based on company-defined criteria. Using the analysis view, you can filter and manipulate entries, compare them to budgeted figures, and drilldown to investigate relationships. • Account Schedule can be based on G/L entries from a selected analysis view and the results immediately exported to Excel for visual representation. • Included in the feature are two new reports for producing dimensions information at the detail and total level.
Flexible Dimension Setup, Business Rules	3.01	Basic Dimensions (4760)	BASIC DIMENSIONS (FORMERLY DEPARTMENTS AND PROJECTS IN NAVISION 2.XX) New dimensions functionality adds a great deal of new capabilities to the 3.01 version. The two dimensions, department and project, have been removed from the program. These were replaced by two “global” dimensions that the user could define without partner customization. A range of new functionality supports dimensions: Flexible Dimension Setup • Dimension setup is independent of your Chart of Accounts, so new dimensions are easily added. • Hierarchical relationships can be created within dimensions, so you use the same dimensions for both financial accounting and reporting. • Dimensions are easily entered on journals and sales and purchase documents by since Global Dimensions are automatically set up as shortcut dimensions. Business Rules • Default dimensions on accounts are extended so that default dimensions can be set up per single account or groups of accounts.
Business Notification	4.00	Business Notification (7010)	Microsoft Navision Business Notification granule is functionality within Microsoft Business Solutions–Navision that gives customers the ability to automatically send notifications and alerts both internally in the company and externally to business partners. These alerts and notifications are sent via emails, based on business rules, determined by the customer’s business needs and set up within their Microsoft Navision solution.
Business Notification Worksheet	4.00	Business Notification Worksheet (7011)	The Business Notification Worksheet included in Navision 4.0, enables customers to run events in periodic batches. The granule also includes the following six out-of-the-box event templates that cover and solve problems around the supply chain business processes: • Purchase order - Ensure delivery of goods • Purchase order - Vendor confirmation not received: • Purchase order - goods not received from vendor • Production order - Production delayed • Inventory - Item quantity status • Production BOM, and Production BOM version – Items updated
Run events in periodic batches	4.00	Business Notification Worksheet (7011)	The Business Notification Worksheet included in Navision 4.0, enables customers to run events in periodic batches. The granule also includes the following six out-of-the-box event templates that cover and solve problems around the supply chain business processes: • Purchase order - Ensure delivery of goods • Purchase order - Vendor confirmation not received: • Purchase order - goods not received from vendor • Production order - Production delayed • Inventory - Item quantity status • Production BOM, and Production BOM version – Items updated
Supports conformance level 2 and will supports the majority of the business intelligence tools on the market.	4.00	C/ODBC (1700)	C/ODBC Microsoft Navision 4.0 includes a completely new ODBC driver. The ODBC driver for Microsoft Navision 4.0 supports conformance level 2 and will supports the majority of the business intelligence tools on the market. The new ODBC driver is built on top of C/Front which will be embedded within the ODBC driver. The C/Front granule is not required to run the new ODBC driver.
Automate manual work like service contract renewal	3.01	Job Queue (3810)	JOB SCHEDULING Job scheduling enables service organizations to automate their otherwise tedious and time consuming manual work like service contract renewal.
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	• 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.

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New Functionality Name	NAV version in which it was introduced	NAV Module Name	New Functionality Description
Jobs	3.70	Jobs (4510)e	Jobs: Keep track of usage on jobs and data for invoicing the customer by managing both fixed-price jobs and time-and- materials jobs.
Jobs WIP and Job Income Recognition batch jobs preview / report	3.70	Jobs (4510)e	Jobs WIP and Job Income Recognition batch jobs – You can now print or preview a report from these batch jobs without posting to the ledger.
Project management, planning and tracking improvement	5.00	Jobs (4510)e	• 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: - 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
Personalized sales and purchase analysis reports	4.00	Analysis Reports (4230)	Sales and Purchase Analysis Reports Analysis reports enables users to create customized reports based on records of their posted transactions, for example, sales, purchases, transfers and inventory adjustments. In a customizable report, the source data, which is derived from the item ledger (with associated value entries), can be combined, compared and presented in meaningful user-defined ways. In this sense, the analysis report is very similar to a PivotTable report in Microsoft Excel. For example, customers can create a personalized report that focuses on their key customers in terms of total turnover both in amounts and quantities sold, gross profit and gross profit percentage during the current month, and have it compare those figures with the results from previous months or the same month last year, and calculate deviations. All this can be done in one and the same view, with the possibility to navigate to the cause of identified problem areas by drilling down to the level of individual transactions. The look and feel of the Sales and Purchase Analysis Reports is similar to the Account Schedule features offered in the General Ledger area of Navision. Sales and Purchase Analyses by Dimensions Enables users to analyze Sales Amount, COGS, Purchase Cost and item sales and purchase quantities. You can: • Quickly change the information to show in the columns and lines in the analysis. • Analyze on specific items and periods. • Analyze on specific customers and vendors • Analyze on specific locations • Analyze on dimensions. • Export your analysis to Microsoft Excel. The look and feel of the Sales and Purchase Analyses by Dimensions is similar to the Analysis by Dimensions features offered in the General Ledger area of Navision.

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New Functionality Name	NAV version in which it was introduced	NAV Module Name	New Functionality Description
Sales and Purchase Analyses by Dimensions (Sales Amount, COGS, Purchase Cost and item sales and purchase quantities)	4.00	Analysis Reports (4230)	Sales and Purchase Analysis Reports Analysis reports enables users to create customized reports based on records of their posted transactions, for example, sales, purchases, transfers and inventory adjustments. In a customizable report, the source data, which is derived from the item ledger (with associated value entries), can be combined, compared and presented in meaningful user-defined ways. In this sense, the analysis report is very similar to a PivotTable report in Microsoft Excel. For example, customers can create a personalized report that focuses on their key customers in terms of total turnover both in amounts and quantities sold, gross profit and gross profit percentage during the current month, and have it compare those figures with the results from previous months or the same month last year, and calculate deviations. All this can be done in one and the same view, with the possibility to navigate to the cause of identified problem areas by drilling down to the level of individual transactions. The look and feel of the Sales and Purchase Analysis Reports is similar to the Account Schedule features offered in the General Ledger area of Navision. Sales and Purchase Analyses by Dimensions Enables users to analyze Sales Amount, COGS, Purchase Cost and item sales and purchase quantities. You can: • Quickly change the information to show in the columns and lines in the analysis. • Analyze on specific items and periods. • Analyze on specific customers and vendors • Analyze on specific locations • Analyze on dimensions. • Export your analysis to Microsoft Excel. The look and feel of the Sales and Purchase Analyses by Dimensions is similar to the Analysis by Dimensions features offered in the General Ledger area of Navision.
KPI web services	2013 R2	Analysis Reports (4230)	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. Easy for the system implementer to set up a KPI integration solution between Microsoft Dynamics NAV and Excel or SharePoint. You can create a KPI web service for as many account schedules as you want. Enables easy access to view and analyze continuously updated data outside of Microsoft Dynamics NAV.
Cost Revaluation	3.01	Basic Inventory (4010)	Cost Revaluation With Navision, you can revalue every cost type, whether you do actual costing, average or standard costing. The revaluation journal suggests the items and their current costs and allows you to change those costs directly. After posting and cost adjustment, the system records the revaluation entries for document purposes. The revaluation includes work-in-process. Even though it's January 20, and need to adjust the inventory from January 1, you can do so. And that is without stopping the company from making transactions in your solution. Everyone can work on, consuming and distributing goods, even though you make your back-in-time revaluation.
Cost structures and components (Direct cost, Indirect cost, Variance, Revaluation, Rounding)	3.01	Basic Inventory (4010)	Cost Structures and Components To get a better overview of what makes up the cost of the product, the solution now comes with cost components. Cost components could be either: • Direct cost - Direct costs of material and manufacturing related to those materials. For manufacturing purposes, direct cost is further divided into material and labor cost share. Direct costs can further be split-up into what we call item charges: including freight and insurance or any type of costs related to receiving the item. • Indirect cost - Indirect costs of material – being overheads both on the material and labor side – can be entered for standard costing purposes, posted and analyzed. • Variance - Variance between standard costs and actual costs can be analyzed both on direct and indirect costs (when it comes to overhead costs). You only use variance when you use standard costing on materials. Differences between actual costs (including cost charges) and standard costs are posted to variance accounts, while standard costs change the value of COGS and inventory for the item. • Revaluation - Cost changes as a cause of revaluation are posted in the system with separate cost types. This makes it easier to review the effect of revaluation for analysis purposes. These postings are traceable for later auditing. • Rounding - Whenever the solution finds a need to record rounding residuals, these are also posted automatically. Rounding problems in Navision have been eliminated and postings are traceable for later auditing.
Cost Traceability and Rollback	3.01	Basic Inventory (4010)	Cost Traceability and Rollback The costing structure in Navision is designed to accurately track cost changes. The system uses the date of the posting for the costing and no longer uses the time of the posting. You are no longer forced to post costs in sequence. Instead, post them when you're ready and the system will automatically roll the cost structure back to the right cost. You can see how costs have changed with direct drilldown capability on the average cost field in the item card. An item value entry carefully logs and records every change in the cost of the individual entries. This goes for both purchase with later freight costs, revaluation back in time, roll-up of manufacturing costs through the bills of materials and adjusting the Cost of goods sold even though you already sold the item to a customer.

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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)	Costing Features: Costing Data Trustworthiness • Cost update on the sales/customer statistics • Inventory Period Closing feature • Corrected principles behind cost adjustment batch job Traceability • 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 Simplicity and Usability • 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 New • Periodic average costing method
Manufacturing Costing foundation changes, Test Report for Inventory Value Calculation, Report Enhancements	3.10	Basic Inventory (4010)	Manufacturing Costing foundation changes • Terminated the following journal lines and entries • Consumption Journal Line • Capacity Journal Line • Output Journal Line • Production Order Ledger Entry • Finished Production Order Ledger Entry • Machine Center Ledger Entry • Work Center Ledger Entry • Introducing the Capacity Ledger Entry • Moving information from terminated entries to: • Item Ledger Entry • Value Entry • Capacity Ledger Entry Test Report for Inventory Value Calculation - Allows testing preconditions for the inventory value calculation (including standard cost calculation). Report Enhancements - The Inventory Valuation - WIP report now includes capacity cost.
Reconciliation Traceability	3.60	Basic Inventory (4010)	Reconciliation Traceability • Inventory and G/L are reconciled by creating G/L entries based on the value information stored in value entries. As no direct relationship exists between G/L and value entries, it can be difficult to determine exactly what value entry initiated the creation of a G/L entry. Also, the fact that value information on value entries is allowed to change when running the Adjust Cost – Item Entries batch job creates problem when comparing balances in inventory and G/L for different dates. The importance of having this traceability is basically a matter of making the user confident with the way the system works. Reconciliation can be a complicated matter with a lot of postings, but making the user able to verify specific postings creates confidence regarding the total number of postings. With the reconciliation traceability functionality, the cost adjustment will not modify value entries – new entries are inserted instead.
The basis for setting up a cash flow prognosis	5.00	Basic Inventory (4010)	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)

What's New in Microsoft Dynamics NAV

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New Functionality Name	NAV version in which it was introduced	NAV Module Name	New Functionality Description
The basis for setting up a cash-flow prognosis	5.00	Basic Inventory (4010)	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.
Undo Quantity Posting	3.60	Basic Inventory (4010)	Undo Quantity Posting • Today, the system requires that a quantity posted as received/shipped must also be invoiced. In some situations this is not desirable, for example, if the wrong quantity has been posted as received/shipped. It could also be that a quantity received is later rejected by an internal inspection then the user must invoice the purchase order and post a corrective purchase credit memo in order to update inventory value and availability. The Undo Quantity Posting functionality allows the user to undo a quantity posting, while creating the necessary audit trail and reversing cost exactly.
Customer and vendor ledger entries transaction-based and directly linked to G/L entries	3.01	Basic Payables (3510)	The application of customer and vendor ledger entries has been improved. The prime development goals were to make customer and vendor ledger entries transaction-based and directly linked to G/L entries. • To fulfill legal requirements in all countries, it has been necessary to redesign the customer and vendor ledger entries to ensure that posted customer and vendor entries are not altered. Posted customer and vendor ledger entries are now directly linked to the posted entries in the G/L entries, making it much easier to recognize entries from the same document. • It is now possible to reconcile an earlier Balance at Date at any time because on every document it is possible to see how an amount has been changed with regard to exchange rates and payment discounts. • If you apply payments and invoices after you have posted them, you can choose the date and document number of the application posting. This allows you to post the application in a later period if it is no longer possible to post to the period in which the application occurred.
Improved flexibility in Applying Cash Payments (Partial Payments)	4.00	Basic Payables (3510)	Improved flexibility in Applying Cash Payments (Partial Payments) - Microsoft Navision 4.0 provides the ability to decide how a payment is applied, which gives greater flexibility in using the solution. This includes: • Selecting the specific amount to apply to individual documents in a multiple document application • Viewing information about both the applying entry and the application in a single form • More detailed information about the amounts that will be posted to the GL prior to posting such as payment discounts and rounding amounts. Unapplied • It's possible to reverse all postings and changes related to an application of vendor ledger entries. Unapplied entries are set as open entries so that they can be applied again correctly.
Payment Discount Reductions for Credit Memos and Refund Documents, Reminders	3.10	Basic Payables (3510)	Payment Discount Reductions for Credit Memos and Refund Documents The main goal has been to include payment discount on credit memos. The problem was that if a payment discount had been granted and then the items purchased had been returned and a credit memo created, the payment discount was not taken into account on the credit memo. This has been remedied and these new features are now included: • The calculation and handling of payment discount on credit memos mirrors that on invoices • A new document, the Refund document, has been created. This document reflects the negative payment when refunding money to the customer.
Payment Tolerance and Payment Discount Tolerance, new reports (Statement Report, Aged Accounts Payable report, Vendor Purchase List report, Vendor Payment Receipt report, Vendor Trial Balance report)	3.70	Basic Payables (3510)	Payment Tolerance and Payment Discount Tolerance • Payment Tolerance - The program allocates payment tolerance amounts across all documents in a multiple document application. You can also specify whether tolerance will be automatically allowed or whether the user can decide on a case-by-case basis. • Payment Tolerance – You can now close an outstanding invoice with a payment amount that is slightly larger than what is owed. General Improvements • Aged Accounts Payable report – Provides an alternative layout to the existing Summary Aging Reports. • Vendor Purchase List report – Lists vendors with total LCY purchases for the specified period above a predefined minimum. • Vendor Payment Receipt report – Enables you to print a report that displays the vendor ledger entries that a payment has been applied to. • Vendor Trial Balance reports – Shows the vendor debit and credit net change during a specified period and the current fiscal year (grouped by Posting Group). • Blocking of Vendors – It is now possible to select different levels of blocking for vendors. The different levels determine the transactions that can be performed with that vendor.
Payment registration	2013 R2	Basic Payables (3510)	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. Simplicity: All processes brought together on one page to efficiently handle registration of incoming payments. Ability to accommodate various ways of doing payment registration. Productivity: Easy overview of open entries. Easy sorting and filtering across open entries. Less data entry. 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.

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New Functionality Name	NAV version in which it was introduced	NAV Module Name	New Functionality Description
Automated payment registration	2013 R2	Basic Payables (3510)	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. 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. Visual design provides the user with an intuitive overview of the application process.
Payments)	4.00	(3260)	Improved flexibility in Applying Cash Receipts (Partial Payments)
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
Payment Tolerance and Payment Discount Tolerance, new reports (Statement Report, Aged Accounts Receivable report, EC Sales List report, Customer Sales List report, Customer Payment Receipt report, Customer Trial Balance report)	3.70	Basic Receivables (3260)	Payment Tolerance and Payment Discount Tolerance • Payment Tolerance - The program allocates payment tolerance amounts across all documents in a multiple document application. You can also specify whether tolerance will be automatically allowed or whether the user can decide on a case-by-case basis. • Payment Tolerance – You can now close an outstanding invoice with a payment amount that is slightly larger than what is owed. General Improvements • Statement Report – Gives you the option to add an aging band to the customer statement. The report also presents historical information. • Aged Accounts Receivable report – Provides an alternative layout to the existing Summary Aging Reports. • EC Sales List report – provides a list of sales to EU countries as required by local authorities. • Customer Sales List report – Lists customers with total LCY sales for the specified period above a predefined minimum. • Customer Payment Receipt report – Enables you to print a report confirming receipt of a customer payment and shows the documents to which the payment was applied (if any). • Customer Trial Balance reports – Shows the customer debit and credit net change during a specified period and the current fiscal year (grouped by Posting Group). • Blocking of Customers – It is now possible to select different levels of blocking for customers. The different levels determine the transactions that can be performed with that customer.
Assign items to bins, the smallest unit in the warehouse logical structure	3.70	Bin (4170)	You use this granule to organize your warehouse by assigning items to bins, the smallest unit in the warehouse logical structure. This is done on the item journals or directly on the document lines (does not only apply to order lines). This granule is free when a customer purchases 4,620 Warehouse Management Systems and requires that you have purchased Granule 4040, Multiple Locations.
Cycle counting to verify inventory record data	3.60	Cycle Counting (4160)	Cycle counting is a basic method of verifying inventory record data. It is used to maintain and increase inventory accuracy. Cycle counting is set up on item or SKU level. Cycle counting is available as a basic granule, which means that it can be used with or without WMS.
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.
Take/place items from/in inventory without purchasing or selling them	3.60	Internal Picks and Put Aways (4630)	INTERNAL PICKS AND PUT-AWAYS A company sometimes needs to take/place items from/in inventory without purchasing or selling them. This could be for testing purposes, or your salesperson has had to lend some items for a demonstration, or too many items were picked for a production, so now the remaining items must be placed back in inventory. Internal Picks and Put-away functionality offers the following features: • Allows you to pick or put-away items without using a source document. • When picking items to a specific zone and bin, the system uses the bin ranking to automatically tell you where to pick the items from. • When putting away items from a specific zone and bin, the system can tell you where to put-away the items by using the bin ranking and put-away template.
Sales and Purchase budgets (Microsoft Excel Import and export)	4.00	Item Budgets (4240)	Item Budgets enables users to create Sales and Purchase Budgets. Sales and Purchase Budgets: • Can be entered in terms of monetary values (Sales, COGS, Cost) and Quantities. • Can be created for specific items and periods. • Can be exported to and imported from Microsoft Excel. • Can be created for specific customers and vendors (Requires Granule 3260 and/or 3510) • Can be created for specific dimensions (Requires at Granule 4760 as a minimum). The look and feel of the Sales and Purchase Analyses by Dimensions is similar to the G/L Budget features offered in the General Ledger area of Navision.
Sales and Purchase Budgets can be entered in terms of monetary values (Sales, COGS, Cost) and Quantities, created for specific items and periods, customers and vendors, dimensions.	4.00	Item Budgets (4240)	Item Budgets enables users to create Sales and Purchase Budgets. Sales and Purchase Budgets: • Can be entered in terms of monetary values (Sales, COGS, Cost) and Quantities. • Can be created for specific items and periods. • Can be exported to and imported from Microsoft Excel. • Can be created for specific customers and vendors (Requires Granule 3260 and/or 3510) • Can be created for specific dimensions (Requires at Granule 4760 as a minimum). The look and feel of the Sales and Purchase Analyses by Dimensions is similar to the G/L Budget features offered in the General Ledger area of Navision.
Assignment of Non-Inventorial Cost	3.60	Item Charges (4150)	• Assignment of Non-Inventorial Cost – The system can now account for important cost components, such as cost of freight-out. Another example could be accounting for the usage of vendor-owned inventory. A special scenario is the resale-minus agreement. This is an agreement whereby a sales office, part of a larger organization, doesn't own their inventory, but gets billed a fixed percentage of the resale price whenever they sell something. With the improved item charge functionality, the system supports the assignment of non-inventorial cost to outbound entries.

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New Functionality Name	NAV version in which it was introduced	NAV Module Name	New Functionality Description
Instantly cross-reference any vendor, customer or internal code and find the corresponding item numbers used by customers and vendors	3.01	Item Cross References (4120)	Item Cross-Reference assists sales or purchase personnel whenever they enter an order to instantly cross-reference any vendor, customer or internal code and find the corresponding item numbers used by customers and vendors. It supports numbers for customers, vendors, and manufacturers, as well as universal product codes (UPCs) and European article numbers (EANs).
Offer customers a substituting product whenever the one that is requested is not in inventory	3.01	Item Substitutions (4110)	Item Substitutions helps sales personnel offer customers a substituting product whenever the one that is requested is not in inventory. It can also be used for offering alternative products while taking the order. This you do to offer similar items in a variety of styles, brands and price categories.
FEFO and reports	5.00	Item Tracking (4140)	• 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.
Integrating Reservations and Item Tracking	3.60	Item Tracking (4140)	Integrating Reservations and Item Tracking • Reservation and Item Tracking has now been integrated, thereby removing previous conflicts and making reservation against Serial and Lot No. possible.
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
Accurate tracking of inventory from one location to another	3.01	Location Transfers (4100)	Location Transfers enables accurate tracking of inventory from one location to another. Transfer orders are included in the planning calculations to plan the physical movement of items from one location to another. When you want to transfer items, you create a transfer order containing a line for each inventory item that is being transferred. When the inventory is shipped from the source location, it is considered to be in transit until it is received at its destination. In this way, a transfer order is a document you use to monitor your transfer operation.
Order-by-order environment, pick is created from the released order	3.70	Pick (4200)	You use this granule to enable your warehouse employees to carry out their dedicated tasks. This is done from a separate user interface when shipping items in an order-by-order environment. Here the pick is created from the released order.
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)	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.)
Standard Purchase Codes	3.70	Purchase Invoicing (3520)	Standard Purchase Codes – It is now possible to set up standard or default purchase document lines, including quantities, for a vendor. This minimizes the data entry required for those vendors with standard repetitive invoices e.g.: electricity, telephone and heating invoices or repetitive item purchases. You enter the vendor number in a purchase document and select the standard purchase code to retrieve for the vendor. The program then fills in the purchase document lines based on the code selected.
Incoming documents in an electronic form.	2013 R2	Purchase Invoicing (3520)	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.
Specify purchase prices for individual vendors (specific items or groups)	3.60	Purchase Line Pricing (3590)	This granule allows you to specify purchase prices for individual vendors. These can include specific items and/or groups of items. Purchase prices are based on a monetary value. With a purchase price, you negotiate the actual prices with the vendor. Purchase prices can be managed by period of validity, thereby making it readily visible whether the item is purchased for the right cost over time. Purchase prices can either be set up for one occurrence or as a recurring agreement. As long as the terms of the agreement stay constant, you can let seasonal agreements automatically start and end based on the specified date range. Easy maintenance is provided by allowing the user to: • Simulate a purchase price before it is implemented. • Trace how a purchase price was calculated.
Purchase order management	4.00	Purchase Order Management (3530)	Prepayments allow the user to create one or more prepayment invoices based on a purchase order. The prepayment can be either a set amount or a percentage of the total invoice. Prepayment invoices are tracked until the order is fully invoiced. 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.

What's New in Microsoft Dynamics NAV

3.01 to 2017

New Functionality Name	NAV version in which it was introduced	NAV Module Name	New Functionality Description
Purchase return order (created, linked to replacement purchase orders)	3.01	Purchase Order Management (3530)	This granule allows you to create a purchase return order, to compensate your own company for wrong or damaged items. Items can be picked from the purchase return order. It is possible to do partial return shipments and to combine return shipments in one credit memo. With this granule you can link purchase return orders with replacement purchase orders.
Specify purchase line discounts for individual vendors (specific items or groups)	3.60	Purchase Order Management (3530)	This granule allows you to specify purchase line discounts for individual vendors. These can include specific items and/or groups of items. Purchase line discounts are based on a discount percentage. With a line discount, you negotiate the percentage that the vendor will give your company as a discount. Purchase line discounts can be managed by period of validity, thereby making it readily visible whether the item is purchased for the right cost over time. Purchase line discounts can either be set up for one occurrence or as a recurring agreement. As long as the terms of the agreement stay constant, you can let seasonal agreements automatically start and end based on the specified date range. Easy maintenance is provided by allowing the user to: • Simulate a purchase line discount before it is implemented. • Trace how a purchase line discount was calculated.
Integration of Multiple Locations, Blanket and Service Orders in the planning Calculations	3.01	Requisition Management (3550)	Integration of Multiple Locations in the planning Calculations • The multiple location structure is included in the materials planning engine. Companies that are spread over different geographical areas benefit from multiple-location planning. Companies with several locations need to plan not only manufacturing orders, but also transfer -, service - and purchase orders. This is what multiple-location planning solves. • The planning system calculates individual plans according to the individual inventory and planning parameters defined by the Stock keeping Unit (SKU). When the planning system analyzes the supply and demand pattern at a specific location and/or a variant of the item, it uses the planning parameters from the SKU identified by the item, the location and/or the variant. As an alternative to replenishment by purchase or production, the SKU can state that replenishment will happen by transfer from another location stated at the SKU. Integration of Blanket Orders in the planning calculations • Blanket orders are long-term sales contracts against which short-term releases will be generated to satisfy requirements. Integration of blanket orders into the planning calculations will help companies take part in supply chain collaboration or JIT contracting for bigger companies. The planner will achieve more accurate forecasts for planning purposes and the sales personnel will benefit from easier order management. Integration of Service Orders in the planning calculations • Any company with field service and maintenance of customers, along with supply planning against them, will require service orders to be planned against. While in some cases spare parts are standard and are planned against using forecasts, other parts might be so special that they require custom planning for that individual customer. • With the integration of service orders in the supply planning system, that demand will be treated as normal demand. There will be no need to hand-carry that demand through the company's supply chain. This includes solving the need to give promises to the customer, reserve special demand for that customer, and plan against variations in service requirements versus forecasted plans.
Maximum Inventory and Reorder Point parameters complies with the standards within Material Requirements Planning, Stock value used will include all items on inventory at the specific point of time	3.70	Requisition Management (3550)	Improved handling of planning parameters • The interpretation of the Maximum Inventory and Reorder Point parameters has been changed to comply with the standards within Material Requirements Planning. This means that when stocks pass the reorder point, the system will place an order to cover the difference between the actual stock and the maximum level as indicated in "Maximum Inventory" on the item. • The stock value used when handling Maximum Inventory and Reorder Point will include all items on inventory at the specific point of time, meaning that also stocks which are not available - due to reservations – will be taken into account. • Item requisition information is now entered directly on the planning and replenishment tabs of the item card.
Sales Invoice Information Pane (customer's sales history, item availability)	4.00	Sales Invoicing (3270)	Information Pane on the Sales Invoice – A new pane containing: • Instant access to and a good overview of the customer's sales history, available credit and shipping and contacts information. • Information about item availability, substitutes, prices and discounts are contained in a single view, which makes it easy to provide quick answers to customer questions. • Invoice entry is expedited through, for example, a "copy to document" function directly from the sales history window.
Sales Quote Number Maintained in Documents, Customer Sales History	2009	Sales Invoicing (3270)	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.)
Standard Sales Codes	3.70	Sales Invoicing (3270)	Standard Sales Codes - It is now possible to set up standard or default sales document lines, including quantities, for a customer. This minimizes the data entry required for those customers with standard repetitive invoices. You enter the customer number in a sales document and select the standard sales code to retrieve for the customer. The program then fills in the sales document lines based on the code selected.
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.

What's New in Microsoft Dynamics NAV
3.01 to 2017

New Functionality Name	NAV version in which it was introduced	NAV Module Name	New Functionality Description
Specify sales line discounts for individual customers or manage general sales line discounts for groups of customers (or all your customers)	3.60	Sales Line Discounting (3370)	This granule allows you to specify sales line discounts for individual customers or manage general sales line discounts for groups of customers (or all your customers). These can include specific items and/or groups of items. Sales line discounts are based on a discount percentage. With a line discount, you negotiate the percentage that the customer or customer discount group will get as a discount. Sales line discounts can be managed by period of validity, thereby making it readily visible whether the item is sold for the right price. Sales line discounts can either be set up for one occurrence or as a recurring agreement. As long as the terms of the agreement stay constant, you can let seasonal agreements automatically start and end based on the specified date range. Easy maintenance is provided by allowing the user to: • Apply a sales line discount to more than one customer. • Simulate a sales line discount before it is implemented. • Trace how a sales line discount was calculated.
Specify sales prices for individual customers or manage general sales prices for groups of customers (or all your customers)	3.60	Sales Line Pricing (3380)	This granule allows you to specify sales prices for individual customers or manage general sales prices for groups of customers (or all your customers). These can include specific items and/or groups of items. Sales prices are based on a monetary value. With a sales price, you negotiate the actual prices with the customer or customer price group. Sales prices can be managed by period of validity, thereby making it readily visible whether the item is sold for the right price. Sales prices can either be set up for one occurrence or as a recurring agreement. As long as the terms of the agreement stay constant, you can let seasonal agreements automatically start and end based on the specified date range. Easy maintenance is provided by allowing the user to: • Apply a sales price to more than one customer. • Simulate a sales price before it is implemented. • Trace how a sales price was calculated.
Information Pane on the Purchase Order, Purchase Quote Number Maintained in Documents	2009	Sales Order Management (3280)	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.
Sales Order Information Pane (customer's sales history, item availability)	4.00	Sales Order Management (3280)	Information Pane on the Sales Order – A new pane containing: • Instant access to and a good overview of the customer's sales history, available credit and shipping and contacts information. • Information about item availability, substitutes, prices and discounts are contained in a single view, which makes it easy to provide quick answers to customer questions. • Order entry is expedited through, for example, a "copy to document" function directly from the sales history window.
Handling of inventory consumption for outbound service	5.00	Sales Order Management (3280)	• 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.
Sales return order (created, linked to replacement sales orders)	3.01	Sales Return Order Management (3350)	This granule allows you to create a sales return order, to compensate a customer for wrong or damaged items. Items can be received against the sales return order. It is possible to do partial return receipt and to combine return receipts in one credit memo. With this granule you can link sales return orders with replacement sales orders. People responsible for handling returns can enter information relevant to further handling of the returned inventory.
Item at a specific location and/or as a variant	3.01	Stockkeeping Units (4045)	A Stock keeping Unit (SKU) is defined as an item at a specific location and/or as a variant. With SKUs, companies with multiple locations are able to add replenishment information, addresses, and some financial posting information at the location level.
Automated Data Capture System (ADCS)	3.60	Automated Data Capture System (4640)	AUTOMATED DATA CAPTURE SYSTEM The new Automated Data Capture System (ADCS) consists of three main components: • A modern communication infrastructure, which controls the information flow between the device and. This design includes the use of Navision Application Server (ATAS), a new communication system services component, and a device-specific plug-in. • A number of scenarios that support workflows in the new WMS system and enable the automation of the warehouse. • A mini-form designer in C/AL, which enables communication between any table and a device. With this you can add any field and enable the flow of information both from and to this field, without leaving C/AL. If a customer want to use the ADCS for other scenarios than the ones supported in this version, then it is possible to use the mini-form designer and the ADCS architecture to model the new workflows.
Automated Data Capture System is available in the RoleTailored client	2013	Automated Data Capture System (4640)	The implementation of Automated Data Capture System is now based on web services and is available in the RoleTailored client
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
Set up and maintain bins	3.70	Bin Set-Up (4660)	BIN SET-UP You use this granule to easily set up and maintain your bins. This is done by defining both the layout of your warehouse and dimensions of your racks, columns, and shelves. Furthermore, you use the granule to easily set up and maintain your planning parameters. This is done by defining the limitations and characteristics of each bin.

1click factory

What's New in Microsoft Dynamics NAV

3.01 to 2017

New Functionality Name	NAV version in which it was introduced	NAV Module Name	New Functionality Description
Promise reliable delivery dates (non-working days accounted for sales orders, order promising, etc)	3.10	Calendars (3360)	The calendar functionality helps companies to retain their customers by promising reliable delivery dates. This functionality is mainly used for customers, namely on sales orders and when running order promising, but it can also be used internally and for vendors. With this functionality, it is possible to create several base calendars (specifying working and non-working days) and to designate them to customers, vendors, locations, company, shipping agent services and the service management setup. For each customer, vendor, location and so on, it is only possible to make exceptions relevant for this customer, vendor, location and so on. If non-working days have been defined, those days will be taken into consideration in the date calculations on sales orders, purchase orders, transfer orders, production orders, service orders and on the Requisition Worksheet and Planning Worksheet.
Calculate if a requested delivery date can be met	3.01	Order Promising (3320)	This granule was new in 3.01 and has not changed number or name from 3.01 to 4.0. The Order Promising feature helps sales and purchase personnel calculate if a requested delivery date can be met. The two flows of receiving and delivering are linked through the available-to-promise and capable-to-promise feature that helps identify when the goods are available in the inventory. On the sales side, the order promising helps to better serve the customer, and, on the purchase side, to assist the purchaser to determine when to purchase. • Order Promising calculates the earliest possible date that an item on a sales order line can be shipped and delivered. The system operates with two concepts, ATP (available to promise) and CTP (capable to promise). ATP is the uncommitted portion of a company's inventory and planned production, purchase and transfer. CTP is used to perform "what-if" scenarios. • If the Finite Loading granule is present, the load on the capacity constrained resources is taken into account. For manufactured items, the availability of the component is also taken into account. A multilevel check is done if the components are subassemblies. • The system will calculate the latest shipment and picking dates based on the delivery date as well as the delivery time to customer and internal handling time. The functionality will help the user to make faster and more accurate decisions. In addition, it is possible to set up shipping agents and to relate their services to the actual shipping time.
Order-by-order environment, put away is created from the released order	3.70	Put Away (4180)	You use this granule to enable your warehouse employees to carry out their dedicated tasks. This is done from a separate user interface when receiving items in an order-by-order environment. Here the put away is created from the released order.
Warehouse management system	3.70	Warehouse Management Systems (4620)	WAREHOUSE MANAGEMENT SYSTEMS WMS is a perfect solution for companies that want to reduce costs through effective warehouse processes. It is aimed at companies that need to receive and ship goods while optimizing space utilization and knowing exactly ħ
Multi-order environment, the put away is created from the receipt	3.70	Warehouse Receipt (4190)	You use this granule to enable your warehouse employees to carry out their dedicated tasks. This is done from a separate user interface when receiving items in a multi-order environment. Here the put away is created from the receipt.
Multi-order environment, pick is created from the shipment	3.70	Warehouse Shipment (4210)	You use this granule to enable your warehouse employees to carry out their dedicated tasks. This is done from a separate user interface when shipping items in a multi-order environment. Here the pick is created from the shipment.
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.

What's New in Microsoft Dynamics NAV

3.01 to 2017

New Functionality Name	NAV version in which it was introduced	NAV Module Name	New Functionality Description
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.
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.

What's New in Microsoft Dynamics NAV

3.01 to 2017

New Functionality Name	NAV version in which it was introduced	NAV Module Name	New Functionality Description
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.
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.

What's New in Microsoft Dynamics NAV
3.01 to 2017

New Functionality Name	NAV version in which it was introduced	NAV Module Name	New Functionality Description
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)
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.

What's New in Microsoft Dynamics NAV

3.01 to 2017

New Functionality Name	NAV version in which it was introduced	NAV Module Name	New Functionality Description
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.
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.