

Microsoft Dynamics NAV 2017 – What's new

Bringing two worlds together

In Office 365 experience
Embedded Power BI

Enhancing the core application and platform

Setup and configuration
User experience
Finance
Jobs
CRM
Items

Creating new opportunities

E-everything
Cortana Intelligence
PowerApps & Microsoft Flow
Extensions



ON-PREMISES



IN THE CLOUD

What's new in Microsoft Dynamics NAV 2017?







In Office 365 experience

Stay connected with all the parts of your business. Microsoft Dynamics NAV is directly linked to Office 365, which means you can easily review, analyze, and share data with relevant colleagues in your organization. You can navigate effortlessly between your Microsoft Dynamics NAV data and your Office tools – for example, Microsoft Outlook, Microsoft Bookings, or Microsoft Excel.

Microsoft Dynamics

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OUTLOOK ADD-IN

-  **WHY** consider contact synchronization in Microsoft Dynamics NAV 2017?
-  **WHY** consider Office 365 in Microsoft Dynamics NAV 2017?
-  **HOW TO – DEMO** Contact synchronization with Microsoft Dynamics NAV 2017
-  **BLOG POST** Simplification through Outlook add-in in Microsoft Dynamics NAV 2017
-  **HOW TO – DEMO** Office 365 experience in Microsoft Dynamics NAV 2017 *coming soon*
-  **HOW DO I** work with Office 365 in Microsoft Dynamics NAV 2017? *coming soon*




EXCEL ADD-IN

-  **HOW TO – DEMO** Excel add-in with Microsoft Dynamics NAV 2017 *coming soon*
-  **HOW DO I** use Excel add-in in Microsoft Dynamics NAV 2017? *coming soon*

INVOICE FROM BOOKINGS

-  **HOW TO – DEMO** Invoice bookings with Microsoft Dynamics NAV 2017 *coming soon*
-  **HOW DO I** use invoice from bookings in Microsoft Dynamics NAV 2017? *coming soon*
-  **BLOG POST** Works natively with Microsoft Dynamics CRM.
Introduction to Microsoft Dynamics NAV and CRM integration *coming soon*

EMAIL COVER PAGES

-  **WHY** consider email cover letter templates in Microsoft Dynamics NAV 2017?
-  **HOW TO – DEMO** Custom email cover letter layouts with Microsoft Dynamics NAV 2017?
-  **HOW DO I** use custom email cover letter layouts in Microsoft Dynamics NAV 2017?

What's new in Microsoft Dynamics NAV 2017?

Embedded Power BI





Continuing the powerful integration, you can now use embedded Power BI to easily create insightful charts and reports, and then make them available within your Microsoft Dynamics NAV 2017 role center.

Getting started is easy using the Microsoft Dynamics NAV 2017 Power BI Content Pack. Use the sample reports in the content pack and see great examples of what you can do with Power BI, in a demo or production environment. And you can be confident that your data is secure because you can leverage the existing Power BI security to manage your reports.

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GENERAL

-  **WHY** consider integration with Power BI in Microsoft Dynamics NAV 2017?
-  **HOW TO – DEMO** Power BI integration with Microsoft Dynamics NAV 2017
-  **HOW DO I** integrate Power BI with Microsoft Dynamics NAV 2017? **coming soon**
-  **BLOG POST** Integration with Power BI in Microsoft Dynamics NAV 2017 **coming soon**

What's new in Microsoft Dynamics NAV 2017?

Setup and configuration

Get up and running faster. Save time and avoid unnecessary manual tasks with the assisted setup wizard that helps you import data, set up integration with Office 365, and enjoy a simplified setup experience, with predefined setup data and limited customer interaction.





Use the assisted setup feature to guide you through setup scenarios – simplifying and streamlining your tasks. For example, follow wizards to set up workflows for approvals, set the fiscal year, or set up US sales tax.

In addition, with improved support for cash management, it is easy to set up and adjust cash flow forecasting, gathering data from all relevant sources to provide you with a complete overview.




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SETUP EXPERIENCE

-  **WHY** consider simplified setup in Microsoft Dynamics NAV 2017?
-  **WHY** use CRM enhancement and simplification in Microsoft Dynamics NAV 2017?
-  **HOW TO – DEMO** Setup experience Demo with partner capabilities in Microsoft Dynamics NAV 2017 **coming soon**
-  **HOW DO I** use setup experience demo with partner capabilities in Microsoft Dynamics NAV 2017? **coming soon**

CASH FLOW SIMPLIFICATIONS

-  **WHY** consider forecasting cash flow in Microsoft Dynamics NAV 2017?
-  **HOW TO – DEMO** Cash flow simplifications in Microsoft Dynamics NAV 2017 **coming soon**
-  **HOW DO I** use cash flow simplifications in Microsoft Dynamics NAV 2017? **coming soon**

DATA SETUP REPORTING

-  **WHY** consider reporting data setup in Microsoft Dynamics NAV 2017?
-  **HOW TO – DEMO** Reporting data setup tool in Microsoft Dynamics NAV 2017?
-  **HOW DO I** use data setup reporting in Microsoft Dynamics NAV 2017? **coming soon**

What's new in Microsoft Dynamics NAV 2017?

User experience



Continuing the significant improvements to simplicity, productivity, and performance, Microsoft Dynamics NAV 2017 enhances your experience even further.

You can accomplish even more in your browser-based interface. For example, 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. In the Web Client, you can also use popular shortcuts; for example, press Escape to instantly exit a page, or F5 to refresh the latest data in your browser, without fully reloading the page.





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IN-CONTEXT NOTIFICATION

-  **WHY** consider notifications in Microsoft Dynamics NAV 2017?
-  **HOW TO – DEMO** Smart notifications for customers in Microsoft Dynamics NAV 2017

WEB CLIENT

-  **WHY** switching to the Web Client in Microsoft Dynamics NAV 2017?
-  **WHAT** is application areas and user experiences in Microsoft Dynamics NAV 2017? **coming soon**
-  **HOW DO I** design wizards for HTML in Microsoft Dynamics NAV 2017?
-  **HOW DO I** work with pictures in the Microsoft Dynamics NAV 2017 HTML clients **coming soon**

CLIENT ENHANCEMENTS

-  **WHAT** A complete list of client enhancements for end users in Microsoft Dynamics NAV 2017?
-  **WHAT** Client enhancements for developers and administrators in Microsoft Dynamics NAV 2017?
-  **HOW DO I** a complete list of client enhancements for end users in Microsoft Dynamics NAV 2017 Part 1 **coming soon**
-  **HOW DO I** a complete list of client enhancements for end users in Microsoft Dynamics NAV 2017 Part 2 **coming soon**

What's new in Microsoft Dynamics NAV 2017?


Finance

Work with ready-to-use financial statements and gain accessible insights into the financial performance of your business. 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, and point-in-time reporting means you can view the financial state of your business for any given time. Reporting is also made easier with the new Account Categories that provide structure to your chart of accounts.

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BANK PAYMENTS

-  **WHY** consider reconciling bank payments Microsoft Dynamics NAV 2017?
-  **HOW TO – DEMO** Processing bank payments in the payment reconciliation journal in Microsoft Dynamics NAV 2017
-  **HOW DO I** process bank payments in the payment reconciliation journal in Microsoft Dynamics NAV 2017 **coming soon**
-  **BLOG POST** Processing bank payments in the payment reconciliation journal in Microsoft Dynamics NAV 2017 **coming soon**

FINANCIAL REPORTS

-  **WHY** consider account categories in Microsoft Dynamics NAV 2017?
-  **WHY** consider financial reports in Microsoft Dynamics NAV 2017?
-  **HOW DO I** quickly access my financial data in Microsoft Dynamics NAV 2017?
-  **BLOG POST** Financial reports in Microsoft Dynamics NAV 2017
-  **HOW TO – DEMO** Financial reports in Microsoft Dynamics NAV 2017

What's new in Microsoft Dynamics NAV 2017?





Jobs

Working with Jobs is now more straightforward, helping you manage projects more easily and get more visibility into the details, set up jobs and enter time sheets using the new Jobs Setup wizard and quickly access common tasks, new charts, and a new My Jobs list using the updated Project Manager role center.

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GENERAL

-  **WHY** consider simplified jobs in Microsoft Dynamics NAV 2017?
-  **HOW TO – DEMO** Job simplicity in Microsoft Dynamics NAV 2017
-  **HOW DO I** use simplified job features in Microsoft Dynamics NAV 2017?
-  **BLOG POST** Simplified jobs in Microsoft Dynamics NAV 2017 *coming soon*

What's new in Microsoft Dynamics NAV 2017?

CRM





Microsoft Dynamics NAV 2017 continues to streamline your CRM experience and enhance the process of integrating to CRM online.

Use a new wizard to guide you through the setup process, which enables seamless coupling of Microsoft Dynamics CRM records with Microsoft Dynamics NAV 2017 records. The Microsoft Dynamics NAV Integration Solution on the CRM side is automatically deployed through the wizard.

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REPORTING ENHANCEMENTS

-  **WHY** consider simplified relationship management in Microsoft Dynamics NAV 2017?
-  **HOW TO – DEMO** Email logging setup in Microsoft Dynamics NAV 2017
-  **HOW DO I** setup email logging in Microsoft Dynamics NAV 2017?
-  **HOW DO I** integrate Microsoft Dynamics NAV 2017 with Microsoft Dynamics CRM online?

What's new in Microsoft Dynamics NAV 2017?

Items




Organize and classify your products the way you want, performing advanced searches on your catalog in just a few clicks and displaying only the information you need. You can create custom item attributes and assign an item attribute value, according to your business needs, helping you manage items or create sales documents.

When you add your attributes and values to an item, you can see them all in a fact box, on both the card and the list. And you can filter your items based on attribute values, making it more efficient to add items to sales and purchase documents and limiting the list of items to choose from or take action on.




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ITEM ATTRIBUTES

-  **WHY** consider item attributes in Microsoft Dynamics NAV 2017?
-  **HOW TO – DEMO** Item attributes in Microsoft Dynamics NAV 2017 *coming soon*
-  **HOW DO I** use item attributes in Microsoft Dynamics NAV 2017? *coming soon*

ITEM CATEGORIES

-  **WHY** consider item categories in Microsoft Dynamics NAV 2017?
-  **HOW TO – DEMO** Item categories in Microsoft Dynamics NAV 2017 *coming soon*
-  **HOW DO I** use item categories in Microsoft Dynamics NAV 2017? *coming soon*

What's new in Microsoft Dynamics NAV 2017?

E-everything




Make it easier for your customers to pay your invoices online by including hyperlinks to payment services, such as PayPal. Even provide PayPal Standards payment links in invoices, supporting multiple ways of accepting payments, including credit cards and PayPal accounts.

You can continue to make use of Optical Character Recognition (OCR), to help you track the items that you get in. Microsoft Dynamics NAV 2017 now enables you to extract the lines of an invoice and you can visually verify the information, training the OCR system online, using the Lexmark invoice capture service.




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PAYMENT SERVICE AND PAYPAL

-  **WHY** consider payment services and PayPal standards payment link in Microsoft Dynamics NAV 2017?
-  **HOW TO – DEMO** PayPal payment standards in Microsoft Dynamics NAV 2017?
-  **HOW DO I** use the PayPal payments standards in Microsoft Dynamics NAV 2017? **coming soon**

OCR

-  **WHY** consider OCR line support in Microsoft Dynamics NAV 2017?
-  **HOW TO – DEMO** OCR line support in Microsoft Dynamics NAV 2017? **coming soon**
-  **HOW DO I** use OCR line support in Microsoft Dynamics NAV 2017? **coming soon**

What's new in Microsoft Dynamics NAV 2017?

Cortana Intelligence





Built-in Cortana Intelligence takes advantage of historical data and improves your insights into your predicted sales, helping you manage your stock and respond to your customers. Based on the forecast, the Sales and Inventory extension helps create replenishment requests for vendors, saving you time.

You can be confident that you are working with the best predictions, because the system uses different machine learning algorithms and compares the results, returning the predictions with the highest quality.

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TIME SERIES

-  **WHY** consider using Cortana Intelligence in Microsoft Dynamics NAV 2017?
-  **HOW TO – DEMO** Time series API in Microsoft Dynamics NAV 2017
-  **HOW TO – DEMO** Sales and inventory forecast in Microsoft Dynamics NAV 2017
-  **HOW DO I** use the time series API in Microsoft Dynamics NAV 2017?

What's new in Microsoft Dynamics NAV 2017?

PowerApps & Microsoft Flow

Microsoft Dynamics NAV 2017 includes an entirely new integration with Microsoft Power BI.

Connect to your Microsoft Dynamics NAV instance and immediately have access to business performance insights into your business. The app is designed specifically for Small and Mid-sized Business (SMB) owners, managers, and executives to provide details about customers, sales, and finance. The dashboard and reports are built on top of a fully featured model, allowing you to explore and analyze your data as you need. And automatic refresh ensures you're always seeing the latest data.

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-  **WHY** consider using a connector with Microsoft Dynamics NAV 2017?
-  **HOW TO – DEMO** PowerApps & Microsoft Flow in Microsoft Dynamics NAV 2017
coming soon
-  **HOW DO I** use PowerApps & Microsoft Flow in Microsoft Dynamics NAV 2017?
coming soon
-  **BLOG POST** PowerApps & Microsoft Flow in Microsoft Dynamics NAV 2017
coming soon

What's new in Microsoft Dynamics NAV 2017?




Extensions

Modify your Microsoft Dynamics NAV system without directly altering the source resources, making it easier to deploy, manage, and upgrade customizations or extensions. Navigate through an install with only a few clicks and easily view extension information, such as name, description, version, publisher, and links. You can also install or uninstall extensions easily using the Extension Management page and quickly choose the extensions you want using the easily-recognizable logos.

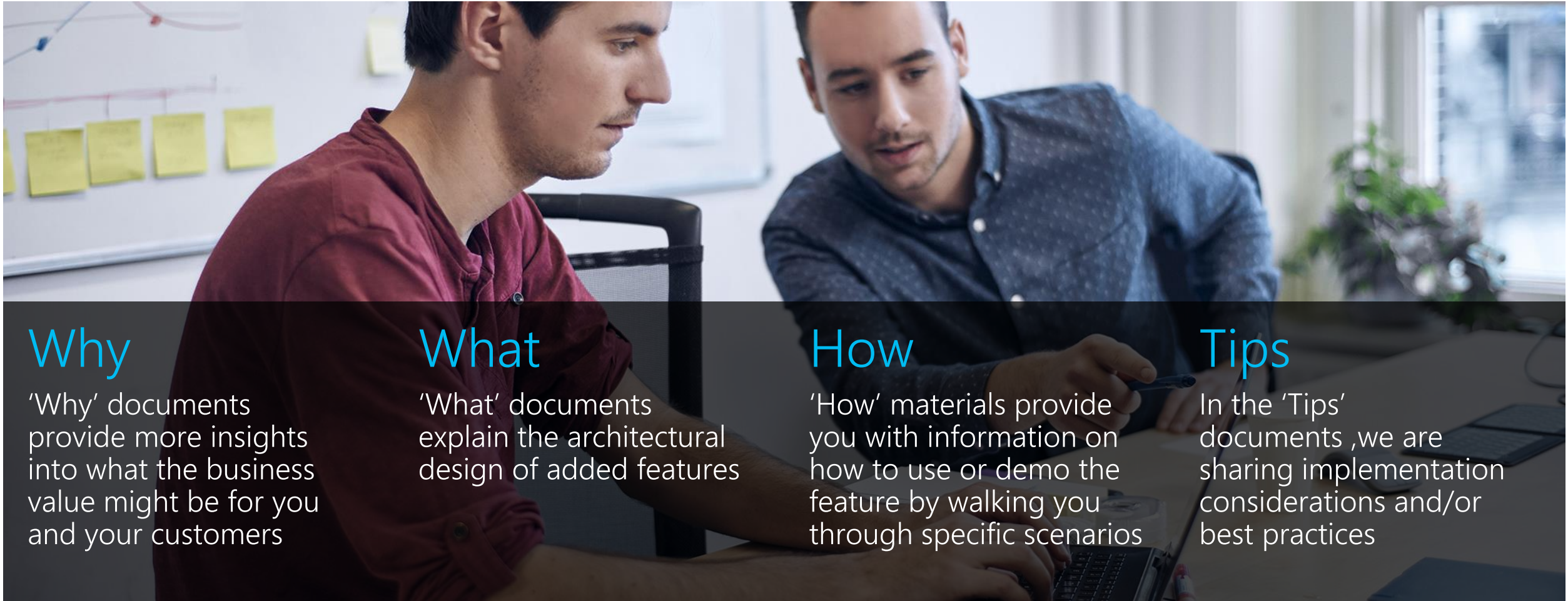
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GENERAL

-  **WHY** consider more capabilities for extensions with Microsoft Dynamics NAV 2017?
-  **HOW TO – DEMO** More capabilities for extensions in Microsoft Dynamics NAV 2017
-  **BLOG POST** More capabilities for extensions in Microsoft Dynamics NAV 2017
coming soon

Supporting materials



Why

'Why' documents provide more insights into what the business value might be for you and your customers

What

'What' documents explain the architectural design of added features

How

'How' materials provide you with information on how to use or demo the feature by walking you through specific scenarios

Tips

In the 'Tips' documents, we are sharing implementation considerations and/or best practices

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Partner confidential 17-10-2016



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