Product Overview

What's New in NAV 2017

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Metaphorix
CHANGING THE WAY YOU DO BUSINESS

Microsoft Partner
Gold Enterprise Resource Planning

Contents

1 New in NAV 2017

The latest version of the Microsoft flagship ERP product, Dynamics NAV 2017, was made available on general release in October 2016.

In this latest edition there have been a range of enhancements made and this brochure gives the details behind them.

Dynamics NAV 2017

NAV 2017 enhancements add to an already functionally rich solution in the following areas:

Bringing two worlds together:

- Office 365 experience
- Embedded Power BI

Enhancing the core application:

- Set-up and configuration
- User Experience
- Finance
- Jobs
- CRM
- Items

Creating new opportunities:

- E-everything
- Cortana Intelligence
- PowerApps and Microsoft flow

In this document the changes released with NAV 2017 fall under three main headings.

- Technology
- Ease-of-use
- Functionality

2 Technology

2.1 The ‘In Office 365’ Experience

You are able to use Contact Synchronisation to integrate your contacts from Microsoft Dynamics NAV 2017 with your People Hub in Office 365 or Microsoft Outlook.

This keeps your contacts synchronised between Microsoft Dynamics NAV 2017 and Office 365 or Microsoft Outlook, and automatically runs a background synchronisation at scheduled times.

Filters can be used to synchronize only the Microsoft Dynamics NAV 2017 contacts that you want to see in Office 365 or Microsoft Outlook.

Benefits:

- UPDATE CONTACTS WHERE YOU USE THEM MOST
  - Add and update contacts in People Hub in Office 365 or Microsoft Outlook and automatically synchronise back to Microsoft Dynamics NAV 2017

- FLEXIBLE
  - Synchronise only the contacts you need using the contacts filter and save your filters

- ALWAYS UP TO DATE
  - Synchronise daily or weekly keeping contacts up-to-date with automatic background synchronisation

- MANUALLY SYNCHRONISE
  - Synchronise contacts immediately from the contacts list in Microsoft Dynamics NAV 2017 editing your filters before synchronising. Run a full synchronisation to access all contacts

You can use also the Microsoft Outlook add-in to manage business interactions directly in Outlook. You can quickly access financial information and create and send documents without leaving Outlook.

You can also create a data connection from Microsoft Excel directly to your Microsoft Dynamics NAV data, and be able to view, edit and update the data

Benefits:

- SAVE TIME
  - Avoid switching between applications. Create and send documents to your business contacts directly from Microsoft Outlook. Access all your financial data with all the charting and data analytics functionality of Microsoft Excel

- STAY INFORMED
  - Quickly access all your financial data or information about your contacts and customers directly from Excel or Outlook. You can modify your data directly in Excel and push changes back into the Microsoft Dynamics NAV 2017 database

- INCREASE ACCURACY
  - Ensure the integrity of your data with validations on import from Excel

2.2 Cortana Intelligence

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.

- PREDICT POTENTIAL SALES
  - Manage your business effectively using the potential sales predictions from historical data

- OVERVIEW OF EXPECTED STOCK-OUTS
  - Gain a clear overview of expected stock-outs, based on current inventory and predicted sales

- BEST CHOICE
  - Get the best predictions, because the system uses different machine learning algorithms and compares the results, returning the predictions with the highest quality

- TRANSPARENCY
  - View the accuracy of each prediction and specify the quality you want, excluding the predictions that do not meet your specifications

2.3 PowerApps and Microsoft Flow

Only available through the Office 365 experience.

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.

- GET STARTED EASILY
  - Simply open Microsoft Excel, Power BI, PowerApps, or Microsoft Flow, select the connector, log in with your Microsoft Dynamics NAV 2017 credentials and get started. There is nothing to install or enable

- USE YOUR FAVOURITE APPLICATION
  - Choose to work in Power BI, PowerApps, Microsoft Excel or Microsoft Flow, taking advantage of the functionality of these powerful applications using your own data

- READ/WRITE DATA

    - Use the connector to read data from your database or to write data back to your database
- SECURE
    - Rest assured that your data is always secure because the connector leverages the existing permissions to your Microsoft Dynamics NAV 2017 data

3 Ease of Use

3.1 In Context Notifications

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.

Please note this is a developer tool not an end user one.

Benefits:

- SIMPLE TO USE
  - Follow the in-application notification to help you use advanced functionality, even for untrained users
- STRAIGHTFORWARD TO SET UP
  - Decide which notifications you want and specify the trigger conditions, all in one place
- IMPROVED LAYOUT
  - Create a consistent look for inbound messages, so recipients can easily understand the source of notifications and see they are from a trusted sender
- REUSE KNOWLEDGE
  - Reuse investments in report layout customisations to create matching custom email notification templates

3.2 Web Client – Why use it?

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 organisation, whether they are using a PC or Mac. Continuing the significant improvements from 2016 to simplicity, productivity, and performance, Microsoft Dynamics NAV 2017 simplifies the experience even further, in particular for novice users.

Benefits:

- IMPROVED USABILITY
  - Use wizards to learn new concepts or simplify data entry. Take immediate action on contextual notifications. Use redesigned tooltips to remind yourself about fields and actions, while you work

- ALL-NEW EXPERIENCES
  - Switch views to see and identify your list of records, including picture thumbnails in different sizes
- WINDOWS CLIENT FAVOURITES
  - Use popular shortcuts - press Escape to instantly exit a page, or use F5 to refresh the latest data in your browser, without fully reloading the page
- INCREASED SIMPLICITY
  - Work without distractions as the View and Edit actions are collapsed into one, and the Previous and Next Record actions are hidden. The ribbon always starts out expanded if the page has a Home tab

3.3 Client Enhancements

	All-new experiences	Win	Web	Tablet	Phone
*	**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.	No change	✓	✓	No change Already available
*	**Wizards** (also known as NavigatePage) are now supported on all clients and assist users with sequentially stepping through a task.	No change Already available	✓	✓	✓
*	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.	Not applicable	✓	✓	✓
*	**Factboxes** can now include pictures, such as on the Item card page.	No change Already available	✓	✓	✓
	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.	No change Already available	✓	✓	✓

Touch enhancements

Touch enhancements	Win	Web	Tablet	Phone
On smartphones, the **app bar** on the role center has moved to the bottom of the screen, making it more reachable from your thumbs.	Not applicable	Not applicable	Not applicable	✓
The **Tap and Hold gesture** is available when a list is displayed as bricks. This gesture displays the menu for the selected record.	Not applicable	Not applicable	✓	✓
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.	Not applicable	Not applicable	No change	✓
The **Delete** system action is given less prominence by moving it further down the Action Pane.	Not applicable	Not applicable	✓	✓
* **Swipe-Left or Swipe-Right** on a brick to immediately take action on that record.	Not applicable	Not applicable	Not applicable	✓

UI simplification

UI simplification	Win	Web	Tablet	Phone
Toggle View or Edit Mode using a single button, consistently across clients.	No change	✓	No change Already available	No change Already available
Previous and Next Record system actions are only shown on pages which display or can display multiple records.	No change	✓	✓	No change Already available
The **default button**, such as the OK button, is visually highlighted in blue on all dialogs.	No change	✓	No change	No change
When viewing a page for the first time, the **ribbon** will be expanded if that ribbon contains any promoted actions.	No change	✓	Not applicable	Not applicable
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.	No change Already available	✓	✓	Not applicable
Hovering over an action in the ribbon will show an inline **Tooltip**.	No change	✓	Not applicable	Not applicable

Productivity	Win	Web	Tablet	Phone
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.	No change Already available	✓	Not applicable	Not applicable
On **collapsed FastTabs**, clicking a summary field will expand the FastTab and set focus on that field so that you can begin typing immediately.	No change	✓	✓	Not applicable
The F5 key can be used to refresh the data on any page in the browser or Universal App.	No change Already available	✓	Not applicable	Not applicable
The ESC key replaces backspace as the keyboard shortcut to cancel or exit a page in the browser or Universal App.	No change Already available	✓	Not applicable	Not applicable
Improved performance on high-latency networks where you will notice pages loading up to twice as fast	No change	✓	✓	✓
Screen readers such as JAWS improved **accessibility**, with reading of dialogs, validation errors, mandatory indicators, empty lists, and navigation pane.	✓	No change	No change	No change

Mobile Devices	Win	Web	Tablet	Phone
* Added support for iPad Pro	Not applicable	Not applicable	✓	Not applicable
* Added support for iOS 9 and iOS 10	Not applicable	Not applicable	✓	✓
* Added support for Android 6 'Marshmallow'	Not applicable	Not applicable	✓	✓
* Added support for Windows 10 Mobile	Not applicable	Not applicable	Not applicable	✓

4 Functionality

4.1 Email Cover Pages

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.

Benefits:

- ATTRACTIVE, ACCURATE COMMUNICATION
    - Create visually-pleasing email messages that include invoice information, which are directly available and readable on any device, without opening any attachments.

- CONSISTENT MESSAGING
    - Use company-wide templates to ensure consistent, professional email messaging to your customers, regardless of who sends the message, or the device used.

- FLEXIBLE
    - Create multiple layouts for different customers or to support different contexts, such as holiday season.

- REUSE KNOWLEDGE
    - Reuse investments in report layout customizations to create matching email cover letter templates and use out-of-the-box Microsoft Word invoice cover-letter layout examples.

4.2 Embedded Power BI

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 centre. Leverage the Microsoft Dynamics NAV 2017 Power BI Content Pack to get started, and utilize existing Power BI security to manage reports.

Benefits:

- SECURE
    - Manage both the creating and viewing of the reports using security. Users can only create reports for data sets that they have security access to within Microsoft Dynamics NAV 2017. Only users that have access to the finished reports may view them

- GET STARTED QUICKLY
    - Get started quickly by using the Microsoft Dynamics NAV content pack. The content pack provides samples reports that you can use in both the demo or

production environment. You can also make edits to the content pack that we provide

- REPORTING WHEN AND WHERE YOU NEED IT
  - ➢ Any report that is created in Power BI may be made visible on the Microsoft Dynamics NAV 2017 role centres. This enables users to get the information they need to perform their job right from within their role centre

4.3 Enhanced Forecasting Cash Flow

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.

Benefits:

- EASY TO GET STARTED
  - ➢ Use the new wizard to complete the initial set up in just a few clicks, and extend your settings later, as required

- SIMPLE TO USE
  - ➢ Register manual expenses and revenue easily

- WIDE OVERVIEW
  - ➢ React proactively using a complete picture of your cash flow and of how liquidity is expected to evolve in the future

- ELIMINATE MANUAL UPDATES
  - ➢ Schedule the cash flow forecast to be calculated automatically

4.4 Reporting Data Set-up

We have introduced a new feature called Reporting Data Setup, which 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

Benefits:

- SECURE

- The creation of the OData end points is limited to only those in your organisation that have permissions to run the tool. All other security is managed through existing OData permissions

- EASY TO UNDERSTAND
  - Users no longer need extensive SQL knowledge to create impactful reporting data sets. Users are walked through an easy to use wizard that enables them to choose from familiar data sources, and apply filters to the data available in the data set

- ALL ABOUT REPORTING TOOLS
  - The OData end points that are created using the tool, enable Excel, PowerBI and other reporting tools, to connect to your Microsoft Dynamics NAV 2017 data

4.5 Reconciling Bank Payments

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.

Benefits:

- EFFICIENT PAYMENT RECONCILIATION
  - Display only unmatched transactions and match transactions against customer, vendor, and bank accounts. Easily adjust for unmatched transactions using a straightforward entry. View open transactions to verify your bank account

- AVOID DOUBLE WORK
  - Use a single-step process to match all transactions at once, then post and update the bank reconciliation at the same time

- AVOID ERRORS
  - Set security permissions for one person to import statements in the enhanced, secure end-to-end process

4.6 Account Categories

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.

Benefits:

- GET STARTED QUICKLY
  - Work with your financial reports immediately, with no set up required, using the default chart of accounts that is mapped to the categories

- EASY TO UNDERSTAND
  - Quickly recognize the categories that use terms such as assets, liabilities, and expenses. Account subcategories, such as cash, payroll liabilities, and advertising expenses, provide additional detail for your chart of accounts

- EASY TO PERSONALIZE
  - Modify the default set of categories, or create your own to meet your business needs

- READY TO USE REPORTS
  - Easily relate to your financial reports because account categories are used in the architecture of the balance sheet, income statement, cash flow statement, and retained earnings statement

4.7 Simplified Jobs

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 centre 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.

Benefits:

- SIMPLIFIED EXPERIENCE
  - Easily manage job tasks on the streamlined Job Card, and see essential columns by default on the Planning lines

- VISIBILITY INTO DETAILS
  - Quickly see the profitability of your job in the Project Manager role centre and use fact boxes with cost and billing information on the job card

- EASIER NAVIGATION
  - Quick access to creating a job, entering a job journal, and creating a job sales invoice

- NEW REPORT
  - Email a new job quote report to your customers so they have a record of the estimate of the job

4.8 Simplified Relationship Management

You can work more effectively with Relationship Management from your phone, taking advantage of enhancements to the Sales and Relationship Management Role Centre.

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.

Benefits:

- IMPROVED PHONE EXPERIENCE
  - ➢ Work successfully on your mobile, following up sales opportunities and interactions, and using straightforward processes

- SIMPLIFIED USER INTERFACE
  - ➢ Gain a clear overview working with contacts, opportunities, and interactions, and a dedicated Role Centre

- WEB CLIENT CAPABILITY
  - ➢ Manage your customer relationships effectively with more scenarios supported on the Web Client

4.9 Item Attributes

You can use item attributes to add custom data, such as colour, 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.

Benefits:

- CUSTOMER ATTRIBUTES
  - ➢ Manage items by creating custom item attributes that capture data about your items and help you pick your items. Add translations to attribute names and list options to support different languages

- ADD DATA
  - ➢ Gain information by assigning attributes per item and providing values for the attributes

- ENHANCED ORGANISATION

  - ➢ Save time by filtering on attribute values when adding items to sales and purchase documents, or organizing your items, limiting the list of items to choose from or take action on

- WEB STORE INTEGRATION
  - ➢ Reuse item attributes in web store integrations, driving the data on items in the shop, and ensuring a single source and alignment with attributes in the Microsoft Dynamics NAV clients

4.10 Item Categories

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.

Benefits:

- CUSTOM CATEGORIES
  - ➢ Create custom item categories and add translations to categories to support different languages

- ENSURE CONSISTENCY
  - ➢ Assign attributes to all items in a category, saving time and ensuring consistency across related items. Attributes from parent categories are also inherited

- ENHANCED BROWSING
  - ➢ Easily navigate through the category structure when adding items to sales and purchase documents, or organizing your items. In a given category structure, you can filter on attribute values

- WEB STORE INTEGRATION
  - ➢ Reuse item categories in web store integrations, driving the data on items in the shop, and ensuring a single source and alignment with attributes in the Microsoft Dynamics NAV clients

4.11 E-everything

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.

Benefits:

- HELP YOUR CUSTOMERS TO PAY YOU
  - Insert links to common payment services in invoices, making it easier for your customers to pay

- USE PAYPAL STANDARDS
  - Provide PayPal Standards payment links in invoices, supporting multiple ways of accepting payments, including credit cards, and PayPal accounts

- FLEXIBLE PER INVOICE SETTINGS
  - Specify payment services per invoice, or use default settings for all invoices. You can even add a payment service link after an invoice has been posted

- SUPPORTS CUSTOM LAYOUTS
  - Decide where you want the payment service links to appear in your invoice layout. Out-of-the-box built-in RDCL and Word invoice layouts include payment service links

4.12 Improved OCR

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.

Benefits:

- VERIFY INFORMATION VISUALLY
  - Use the new visual, HTML-based Lexmark ICS web page to verify invoices and train the system to recognize vendors or items

- EXTRACT LINES FROM INVOICES
  - Train invoice layouts to also extract invoice lines and have these appear in the generated purchase invoice, saving you time by using as much of the captured information as possible

- CREATE OR MAP VENDORS OR ITEMS
  - If a captured invoice contains an unknown vendor or item, you can create a new vendor or item based on the extracted content and use that, or you can pick an existing vendor or item. In this way, you train Microsoft Dynamics NAV 2017 to use this in the future