

# 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

Learn more at <http://aka.ms/NAVGetReady>




## 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

## EXCEL ADD-IN

-  **HOW DO I** configure the Excel add-in in Microsoft Dynamics NAV 2017?

## 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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Learn more at <http://aka.ms/NAVGetReady>

## 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** embed Power BI reports in Microsoft Dynamics NAV 2017?
-  **HOW DO I** Set up an Azure Active Directory Application in Microsoft Dynamics NAV 2017?

# 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?

## CASH FLOW SIMPLIFICATIONS

-  **WHY** consider forecasting cash flow in Microsoft Dynamics NAV 2017?

## 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 the reporting data setup tool in Microsoft Dynamics NAV 2017?

# 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?
-  **HOW DO I** design wizards for HTML in Microsoft Dynamics NAV 2017?

## 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?

# 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

## 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.

Microsoft Dynamics

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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?

# 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.

Microsoft Dynamics

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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 AND CATEGORIES

-  **WHY** consider item attributes in Microsoft Dynamics NAV 2017?
-  **WHY** consider item categories in Microsoft Dynamics NAV 2017?
-  **HOW TO – DEMO** Item attributes and categories in Microsoft Dynamics NAV 2017 **coming soon**
-  **HOW DO I** use item attributes and 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** set up the PayPal payments standard in Microsoft Dynamics NAV 2017?

## OCR

-  **WHY** consider OCR line support in Microsoft Dynamics NAV 2017?
-  **HOW TO – DEMO** Capturing invoices with lines for Microsoft Dynamics NAV 2017?

# 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.

Microsoft Dynamics

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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

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.

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## GENERAL

-  **WHY** consider using a connector with Microsoft Dynamics NAV 2017?

# 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.

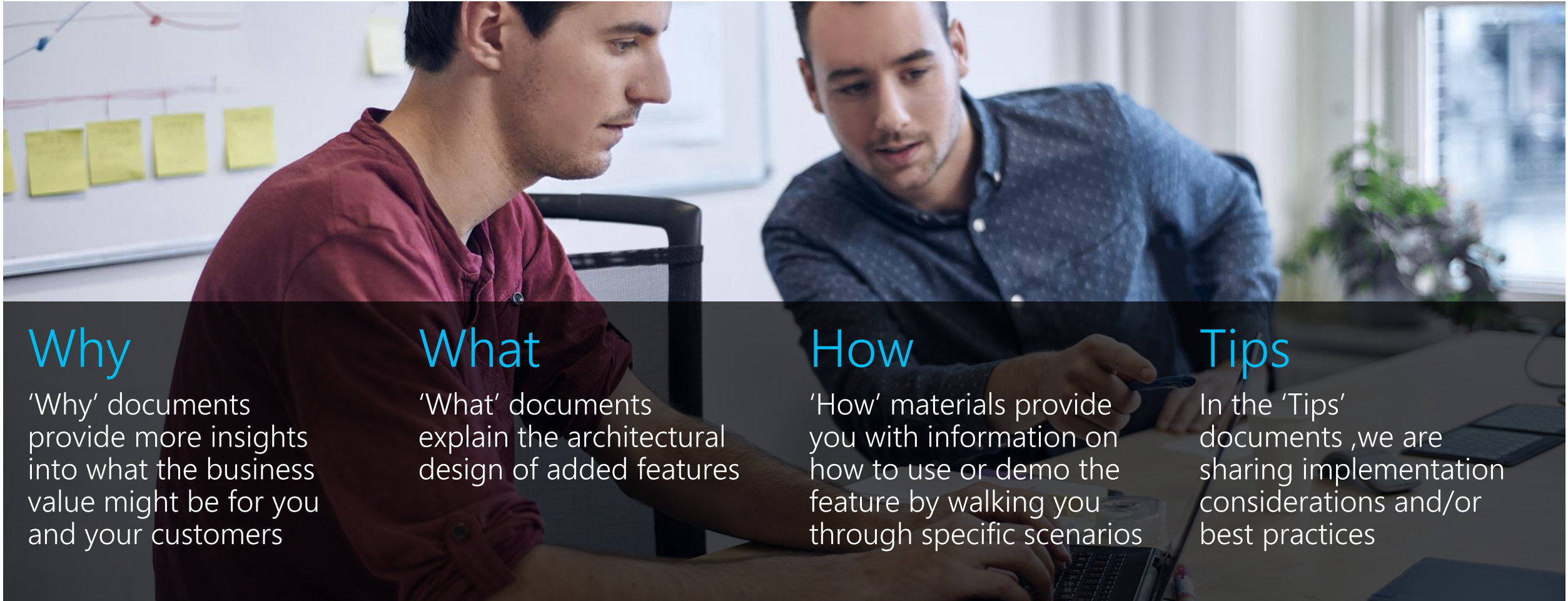
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## GENERAL

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

# 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 17-11-2016



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