Microsoft Dynamics NAV 2017

What's New?

Microsoft Dynamics NAV 2017 is a business solution from Microsoft that continues to be enhanced, quick to implement, easy to use and has the power to support your business ambitions.

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In Dynamics NAV 2017, integration and simplicity is the key. Dynamics NAV 2017 offers significant enhancements to the core application, as well as deeper integration with Office 365 and Power BI. Explore the highlights of the new capabilities and reach out to your Microsoft Dynamics partner to get a personal demo and learn more.

In Office 365 experience

Stay connected with all the parts of your business. Dynamics NAV works seamlessly with Office 365, which means you can easily manage business interactions with your customers and vendors directly within Outlook. Navigate effortlessly between your Dynamics NAV data and your Office tools – for example, Outlook, Microsoft Bookings, or Excel.

The improved compatibility enables you to easily create customers, vendors, quotes, and invoices, all without leaving Outlook. There is also improved Word integration, to help you lay out your documents professionally. The seamless experience means that you can save time, increase accuracy, and offer your customers an improved experience.

Faster 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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Optimized mobile CRM experience

Working on-the-go has never been easier with the optimized CRM (customer relationship management) functionality on your mobile.

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.

Enhanced user experience

Continuing the significant improvements to simplicity, productivity, and performance, 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.

Use advanced functionality by following non-intrusive, intelligent, in-application notifications, which guide you through relevant processes according to the context you are working in. These new types of notifications help even untrained users carry out advanced tasks, while the unobtrusive design does not prevent you from carrying on with your work. And you can get exactly the functionality you need because partners can build attractive notifications with context-specific actions.

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.

Works natively with Dynamics CRM

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

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

Be confident that your data is synchronized and up to date. You can keep prices and items updated in Dynamics CRM, using the mapping and synchronization for currencies, units of measure, items, and resources – creating a Dynamics NAV pricelist within Dynamics CRM

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Finance enhancements

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.

Payment reconciliation is now much more efficient because you can complete your payment and bank reconciliations in one step, matching all transactions at once, then posting and updating the bank reconciliation at the same time.

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.

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. 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.

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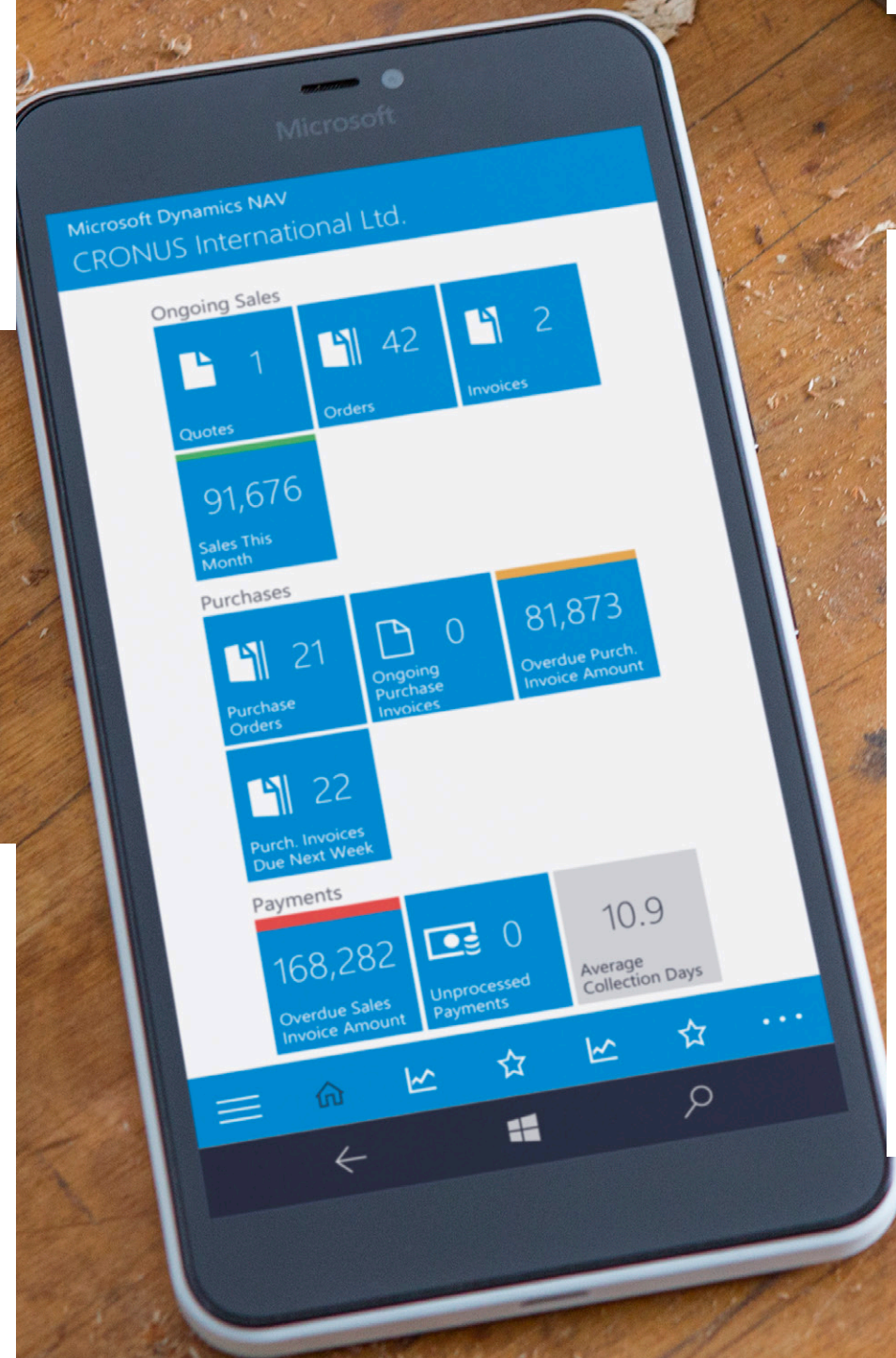
When you add your attributes and values to an item, you can see them all in a fact box, on both the card and the list. And you can filter your items based on attribute values, making it more efficient to add items to sales and purchase documents and limiting the list of items to choose from or take action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

Further enhancing navigation and web store integration, you can use categories to group items into a hierarchical structure, defining your own custom categories and 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.

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 Dynamics NAV 2017 role center.

Keep people informed with easy-to-share reports including key performance indicators (KPIs), inventory, sales and order status. Empower users to create self-serve reports from trusted data source for faster, more informed decision-making.

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Extensions

Modify your 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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