

# What's New NAV2017

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TIME FOR THE NEXT LEVEL  
WHAT'S NEW **NAV**

# What's New in Microsoft Dynamics NAV 2017


Microsoft Dynamics NAV 2017 continues to be enhanced, bringing together worlds, creating powerful new opportunities for you to add value, and supporting all your business ambitions.

## Two Worlds Together




- In Office 365 Experience
- Embedded PowerBI

## Enhance the Core



- Setup & Configuration
- User Experience
- Finance
- Jobs
- CRM
- Items

## New Opportunities



- E-Everything
- Cortana Intelligence
- PowerApps & Microsoft Flow
- Extensions



**TIME FOR THE NEXT LEVEL**  
**WHAT'S NEW NAV**

# Microsoft Dynamics NAV 2017 services

Continue investments from NAV 2015 and 2016



Electronic documents

PEPPOL

Custom ext.

Document exchange services

Tradeshift

Custom ext.

Document capture

Lexmark ICS

- Online verification
- Line support

Custom ext.

Currency

Yahoo / ECB

Custom ext.

Technology

- C/AL
- .NET
- ODATA
- XmlPort (out)
- Data Exchange Framework (in)
- Web services
- Table proxies
- Events

Service setup

- Create and setup
- Enable and test
- Status

Online payments

- Payment links in invoices
- PayPal Payment Standard support

Item Management

- Richer image support
- Attributes
- Categories

Bank

- Enhanced reconciliation
- Bank feeds (SaaS only)

Payroll

- Import/map transactions

PayPal

Custom ext.

Web stores

Investnet Yodlee

Custom ext.

TBD

Custom ext.



# Outlook Add-in



# Customer 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 database

ACTIONS

- Role Center
- ▶ Sales Orders
  - Dynamics CRM Sales Orders
- ▶ Sales Quotes
  - Blanket Sales Orders
  - Sales Invoices
- ▶ Sales Return Orders
- ▶ Sales Credit Memos
- Items
- Customers
- Item Journals
- Sales Journals
- Cash Receipt Journals

## Gestore ordini vendite

- Activities
- Self-Service
- My Customers

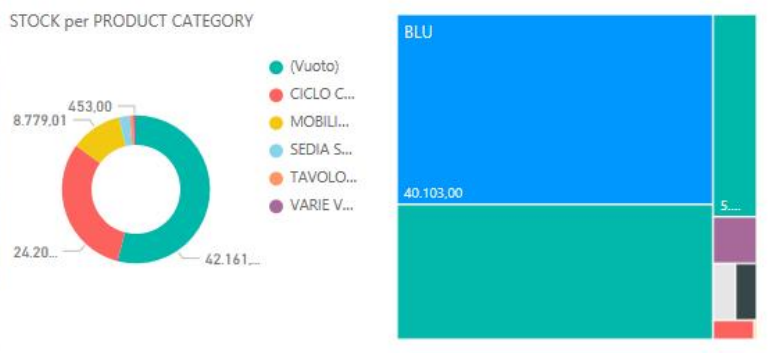
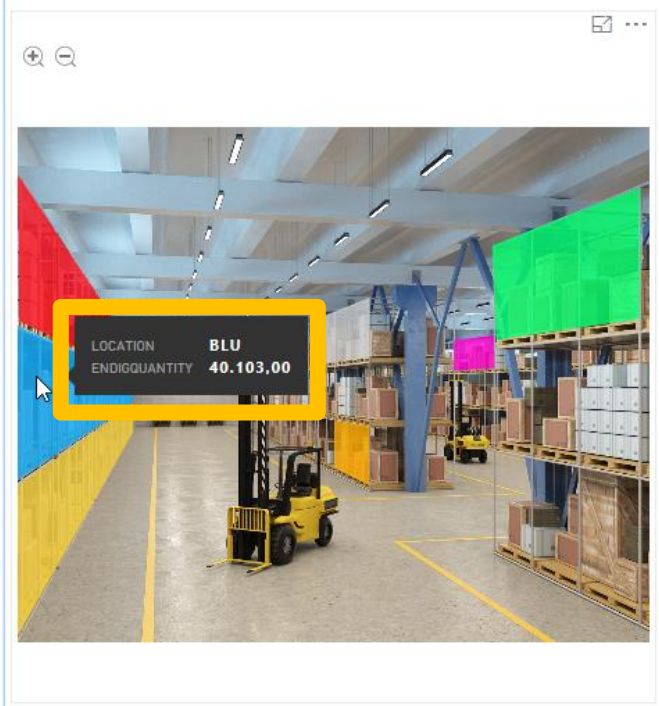
Power BI Reports

Select Report Expand Report Previous Report Next Report

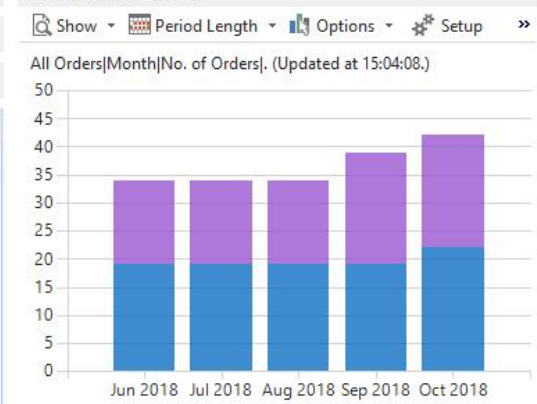
PERIOD: 01/01/2017 31/12/2018

PRODUCT CATEGORY:

- null
- CICLO CICLO
- MOBILIO Furniture ufficio
- SEDA Sedia per ufficio
- TAVOLO Tavoli assortiti
- VARIE Varie



### Trailing Sales Orders



### My Items

Manage List Open New Find Filter

Item No.	Description	Unit Price
1000	Bicicletta	4.000,00
1001	Cicloturismo	4.000,00
1100	Ruota anteriore	1.000,00

### Report Inbox

Show Unread Reports All Reports Delete

Created Date-Time	Description	Output Type
There is nothing to show in this view.		

### My Notifications

From	Creat... Date	Note	Page
EOS\A...	04/11/...	Operazione " completata.	
EOS\A...	03/11/...	Operazione " completata.	

# 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



# 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	✓

\* Only available with the latest version of the Dynamics NAV Universal App



# Contact Synchronization with Office 365

## **What**

Allows you to keep your contacts in Dynamics NAV 2017 in sync with your contacts in Office 365 or Microsoft Outlook.

## **Where**

Data are stored in:  
NAV Table Contact (5050)  
Exchange in «Dynamics NAV» Folder

## **How**

Contacts can be added or edited in either Microsoft Dynamics NAV 2017 or Office 365/Microsoft Outlook

## **When**

Manually synchronized to/from the Contacts List in NAV.  
Scheduled through Job Queue

# Microsoft Dynamics NAV

AZIONI HOME AZIONI NAVIGA REPORT

Crea interazione

Crea opportunità

Sincronizza con Office 365

Sincronizzazione completa con Office 365

Generale

Fai telefonata

Collega con esistente

Funzioni

Nuova offerta vendita

Nuovo documento

VISUALIZZAZIONE - LISTA CONTATTI [+ nuovo](#)

Nr.	Nome	Nr. di telefono	E-mail
<a href="#">CT200044</a>	...	BRIAN CLARK	<a href="mailto:brian.clark@cronuscorp.net">brian.clark@cronuscorp.net</a>
<a href="#">CT100164</a>	...	John Wood	<a href="mailto:john.wood@cronuscorp.net">john.wood@cronuscorp.net</a>
<a href="#">CT100131</a>	...	Kevin F. Browne	<a href="mailto:kevin.f.browne@cronuscorp.net">kevin.f.browne@cronuscorp.net</a>
<a href="#">CT100154</a>	...	Linda Contreras	<a href="mailto:linda.contreras@cronuscorp.net">linda.contreras@cronuscorp.net</a>
<a href="#">CT200066</a>	...	Mandy Vance	<a href="mailto:mandy.vance@cronuscorp.net">mandy.vance@cronuscorp.net</a>
<a href="#">CT100186</a>	...	Mary Baker	<a href="mailto:mary.baker@cronuscorp.net">mary.baker@cronuscorp.net</a>
<a href="#">CT200013</a>	...	Mike Nash	<a href="mailto:mike.nash@cronuscorp.net">mike.nash@cronuscorp.net</a>
<a href="#">CT200120</a>	...	Simon Rapier	<a href="mailto:simon.rapier@cronuscorp.net">simon.rapier@cronuscorp.net</a>
<b>CT000012</b>	...	<b>Rotadent ingranaggi S.r.l.</b>	<a href="mailto:rotadent.ingranaggi.srl@cronuscorp.net">rotadent.ingranaggi.srl@cronuscorp.net</a>
<a href="#">CT200080</a>	...	Pamela Ansman-Wolfe	<a href="mailto:pamela.ansman-wolfe@cronuscorp.net">pamela.ansman-wolfe@cronuscorp.net</a>
<a href="#">CT000013</a>	...	Sig.na Cinzia Di Marco	<a href="mailto:signa.cinzia.di.marco@cronuscorp.net">signa.cinzia.di.marco@cronuscorp.net</a>

Add Connection

View Parent

View in CRM

CRM

Cerca utenti

Rubrica

Trova

Modifica

[AV, admin@MSP465799.onmicrosoft.com](#)

S.r.l.

Maryann Barber

# Dynamics Office Add-in

## **What**

Explore tables within Dynamics NAV  
Read / write data respecting application business logic

## **Where**

Download from Office Store or directly from inside  
Excel

## **How**

Connect to NAV via Web Service through Azure Active  
Directory (AAD)

# Download from Office Store



Cartel1 - Excel



Dati Revisione Visualizza Sviluppo Dynamics NAV Power BI Power Pivot TEAM Aiutami.. Andrea Di..

Componenti aggiuntivi di Office

I MIEI COMPONENTI... | STORE

I componenti aggiuntivi possono accedere alle informazioni personali e a quelle dei documenti. Usando un componente aggiuntivo, accetti le relative Condizioni per l'utilizzo e l'Informativa sulla privacy.

Microsoft add  Consigliato per te 

Categoria		<b>Microsoft Dynamics Office Add-in</b> The Microsoft Dynamics Office Add-in enables data connections to Microsoft Dynamics	<b>Aggiungi</b>
<b>Tutto</b>			
CRM			
Analisi dati			
Visualizzazione		<b>Microsoft PowerApps Office Add-in</b> The Microsoft PowerApps Office Add-in enables data connections to Microsoft	<b>Aggiungi</b>
Revisione documenti			
App in primo piano			
Istruzione			

# Create a data connection

Changes to the data, including adding and deleting records, can be published to the Microsoft Dynamics NAV database

The screenshot displays the Microsoft Excel interface with the following components:

- Title Bar:** Chart of Accounts ADMIN 2016-04-21T14\_17\_14.xlsx - Excel
- File Name:** Jared Hall
- Menu Bar:** File, Home, Insert, Page Layout, Formulas, Data, Review, View, Developer, Add-ins, LOAD TEST, Dynamics NAV, Power Pivot, Team, Tell me, Share.
- Ribbon:** The Insert ribbon is active, showing options for PivotTable, Recommended PivotTables, Table, Pictures, Online Pictures, Illustrations, My Add-ins, Recommended Charts, Charts, PivotChart, 3D Map, Tours, Sparklines, Filters, Links, and Symbols.
- Worksheet:** A table with columns: No., Name, Income/Balance, Account Subcategory, Account Type, Totaling, Gen. Posting Ty. The data includes various account types such as BALANCE SHEET, ASSETS, Checking account, Saving account, Petty Cash, Accounts Receivable, Prepaid Rent, Prepaid Insurance, Inventory, Services, Equipment, Accumulated Depreciation, TOTAL ASSETS, LIABILITIES, Accounts Payable, and Purchase Discounts.
- Microsoft Dynamics Data Connector Pane:** Located on the right side, it shows options: New, Refresh, Publish, Filter, and Design.

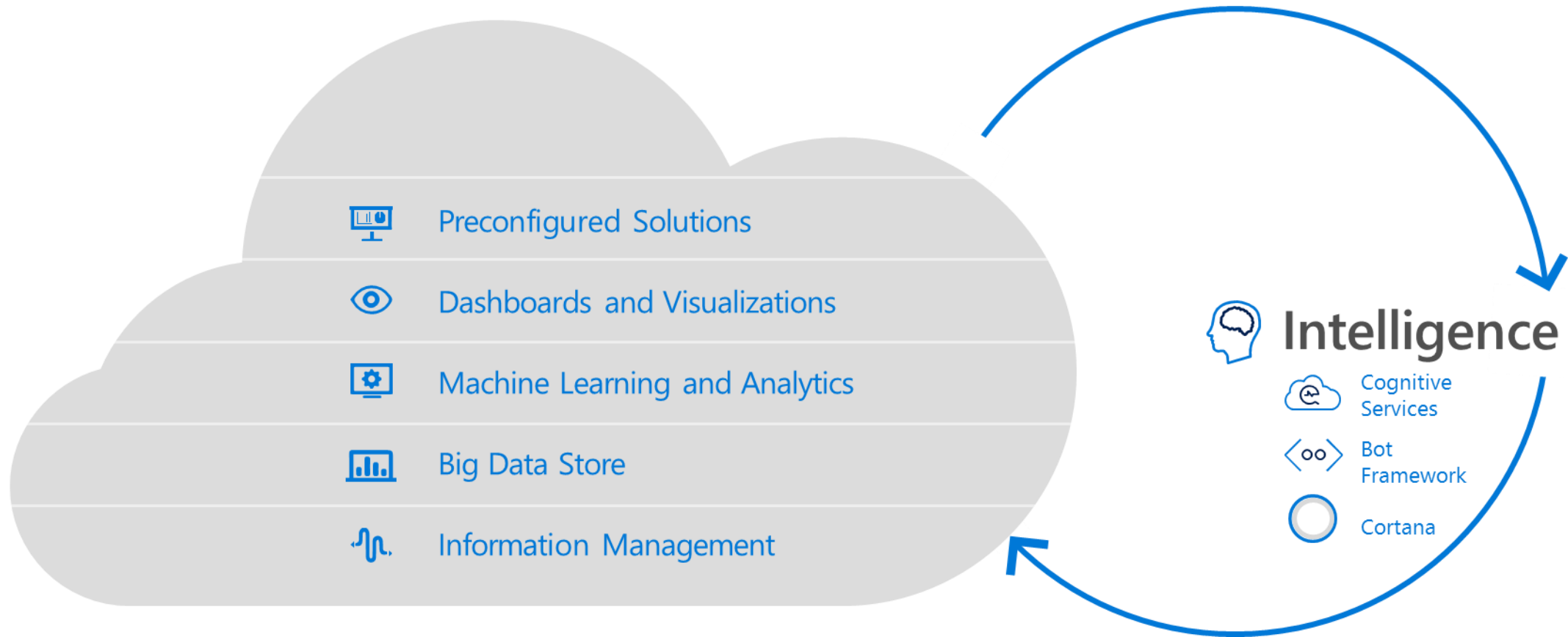
No.	Name	Income/Balance	Account Subcategory	Account Type	Totaling	Gen. Posting Ty
10000	BALANCE SHEET	Balance Sheet		Heading		
10001	ASSETS	Balance Sheet		Begin-Total		
10100	Checking account	Balance Sheet	Cash	Posting		
10200	Saving account	Balance Sheet	Cash	Posting		
10300	Petty Cash	Balance Sheet	Cash	Posting		
10400	Accounts Receivable	Balance Sheet	Accounts Receivable	Posting		
10500	Prepaid Rent	Balance Sheet	Prepaid Expenses	Posting		
10600	Prepaid Insurance	Balance Sheet	Prepaid Expenses	Posting		
10700	Inventory	Balance Sheet	Inventory	Posting		
10750	Services	Balance Sheet	Assets	Posting		
10800	Equipment	Balance Sheet	Equipment	Posting		
10900	Accumulated Depreciation	Balance Sheet	Accumulated Depreciation	Posting		
10990	TOTAL ASSETS	Balance Sheet		End-Total	10001..10990	
20001	LIABILITIES	Balance Sheet		Begin-Total		
20100	Accounts Payable	Balance Sheet	Current Liabilities	Posting		
20200	Purchase Discounts	Balance Sheet	Current Liabilities	Posting		
20300	Purchase Returns & Allowances	Balance Sheet	Current Liabilities	Posting		



Hi, I'm Cortana.



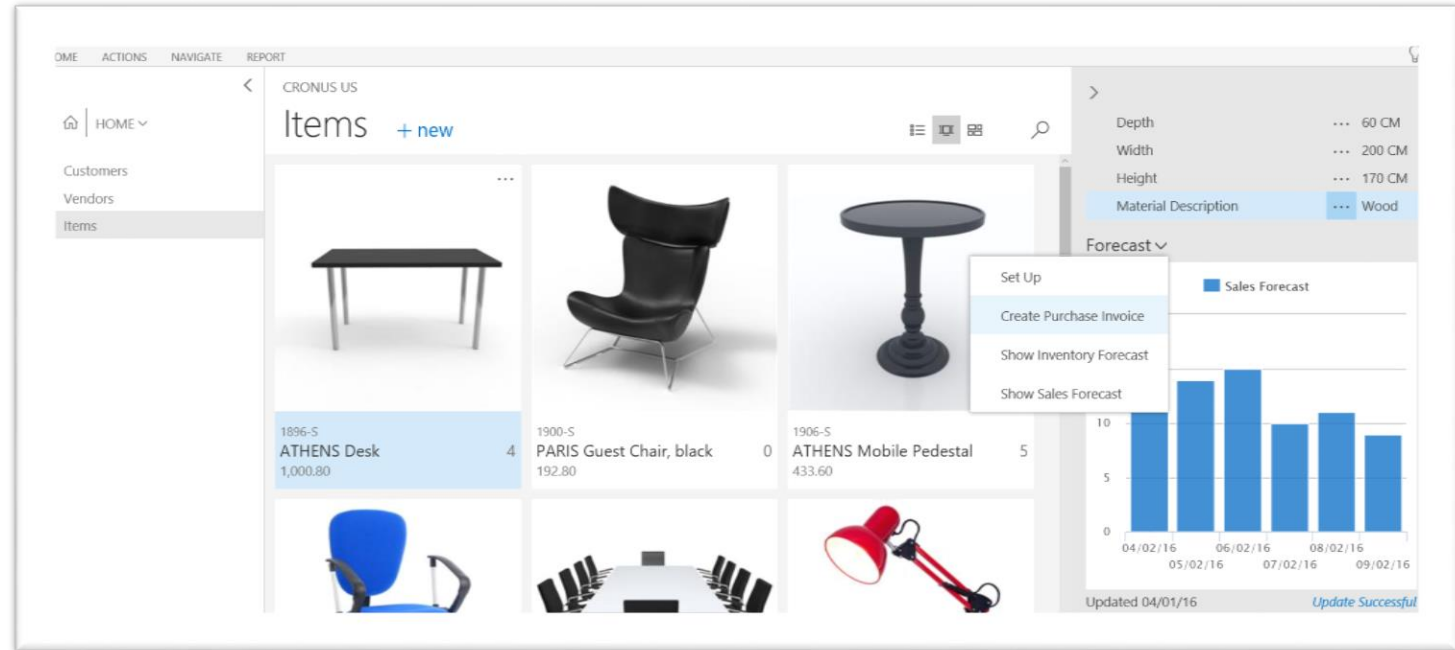
# Using exclusive, advanced intelligence technologies...



Forecasting sales

Forecasting Inventory

Forecasting CashFlow





# Customer benefits

## **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

# Customer benefits

## **EXTENSION READY**

Build and deliver business machine learning to customers using the Time Series API

## **LOW RAMP-UP COSTS**

Save time and money because the API is based on familiar C/AL and is straightforward and cost-efficient to use, without the need for training or re-training the model

## **WIDELY APPLICABLE**

Use data from many parts of Microsoft Dynamics NAV as a source for time series analysis

# Setup and Configuration

## What

More and more services

## How

Wizard, wizard, wizard...aka ASSISTED SETUP

Departments	Administration	Application Setup	General	Assisted Setup
Name	Status			
Migrate business data	Not Completed			
Set up Cash Flow Forecast	Not Completed			
Set up approval workflows	Not Completed			
Set up a customer approval workflow	Not Completed			
Set up email	Completed			
Set up Email Logging	Not Completed			
Set up Outlook for Financials	Completed			
Set up reporting	Not Completed			
Set up an item approval workflow	Not Completed			
Set up Azure Active Directory	Completed			
Set up a payment approval workflow	Not Completed			
Set up Dynamics CRM connection	Not Completed			

# Enhance the core

## **ITEM CATEGORIES**

Group items into a hierarchical structure and you can define your own custom categories, assigning attributes to each category.

## **ITEM ATTRIBUTES**

Add custom data, such as color, country of manufacture, size, or product dimensions, to applicable items, supplementing built-in global item fields.

## **ACCOUNT CATEGORIES**

Group accounts for categories and subcategories, get balance and filter in financial reports

# Paypal standard Links

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.



# Example of an invoice with a PayPal payment link

**Invoice**  
PS-INV103071

**cronus**

**Selangorian Ltd.**  
Mark McArthur  
153 Thomas Drive  
Chicago, IL 61236


*Ship-to Address*  
Selangorian Ltd.  
Mark McArthur  
153 Thomas Drive  
Chicago, IL 61236

**CRONUS USA, Inc.**  
7122 South Ashford Street  
Westminster  
Atlanta, GA 31772

Customer PO No.      Salesperson      Due Date      Payment Terms  
April 12, 2016      Net 14 days

Order No.      Shipment Method      Payment Method      Document Date  
March 29, 2016

Item No.	Description	Shipment Date	Quantity	Unit	Unit Price	Line Amount
1908-5	LONDON Swivel Chair, blue	03/29/16	1	Piece	190.10	190.10
Subtotal						190.10
Invoice Discount						0.00
Total Tax						9.51
Total USD						199.61

 **PayPal**

Pay with PayPal

Amount Subject to Sales Tax      190.10  
Amount Exempt from Sales Tax      0.00


Home Page      Phone No.      Email  
0666-666-6666

# Example of PayPal online payment for invoice

### Your order summary

Descriptions	Amount
<a href="#">Invoice PS-INV103071</a> Item price: \$199.61 Quantity: 1	\$199.61
<b>Item total</b>	<b>\$199.61</b>
<b>Total \$199.61 USD</b>	

### Choose a way to pay





[Pay with my PayPal account](#)  Log in to your account to complete the purchase

[Create a PayPal account](#)  
And pay with your debit or credit card

[Learn more about PayPal](#) - the faster, safer way to pay.

Country

Card number

Payment types    

Expiration date mm  / yy

CSC  [What is this?](#)

First name

Last name

Address line 1

Address line 2 (optional)

City/State

ZIP code

Phone type  [Why is this needed?](#)

Phone number 555-555-1234

# OCR Service

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.





# Customer 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

# New Opportunities

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.



# Power Apps



# Microsoft Flows



# Extensions

Introducing a new way to customize the application without modifying the underlying C/AL code.

Distributed via an «Extension package» file, such customizations can be easily installed, upgraded or uninstalled.

The screenshot displays the Microsoft Dynamics NAV development environment. The top part shows several windows: 'Codeunit 80001 EventSubscriberSample - C/AL Globals' with tabs for Variables, Text Constants, and Functions; 'RunWorkflowOnCancelCustomerApprovalReque - Pr...' showing a property value of 2; and 'C/AL Event Functions' listing an event type 'Business' with signature 'OnCancelCustomerApprovalRequest(Custom...'. A dialog box asks: 'Do you want to overwrite the edited function's signature with the parameters of the selected 'OnCancelCustomerApprovalRequest''.

The main window is 'Codeunit 80001 EventSubscriberSample - C/AL Editor' showing the following code:

```
1 Documentation()  
2  
3 OnRun()  
4  
5 LOCAL [EventSubscriber] RunWorkflowOnCancelCustomerApprovalRequest(Customer : Record Customer)  
6 // Once I get called I can do what ever I need to: Here a workflow started.  
7  
8 IF (Customer.Name = 'ABC') THEN BEGIN  
9
```

Below the code editor is the 'Gestione estensioni' (Extension Management) interface. It includes a search bar 'Digita per filtrare (F3) | Logo' and a dropdown arrow. The text 'Nessun filtro applicato' is displayed. The table below lists installed extensions:

AdditionalInfo	Nome	Versione
Installato	PayPal Payments Standard	versione 1.0.0.0
Installato	Sales and Inventory Forecast	versione 1.0.0.0

# Visual Studio Code

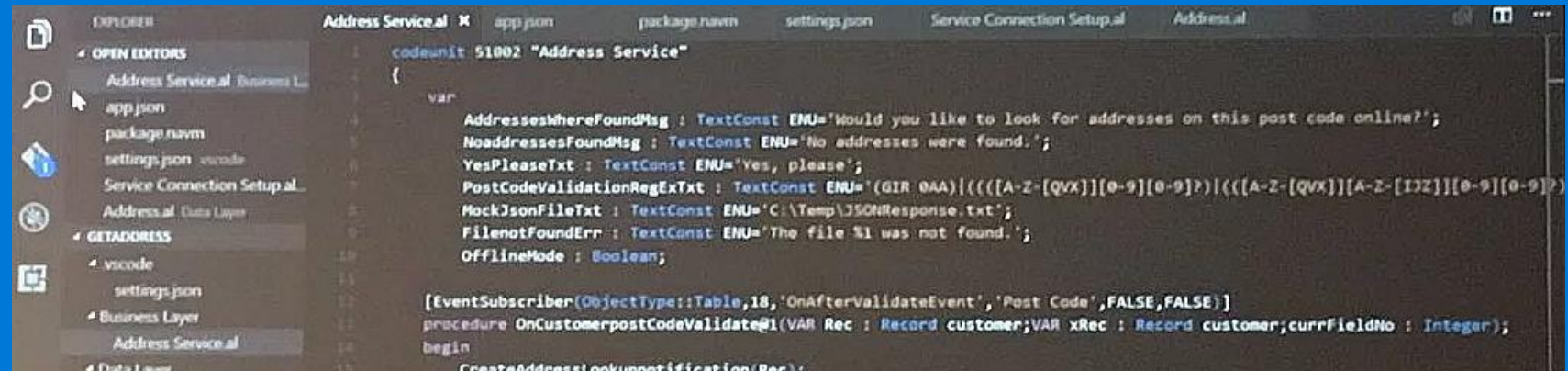
NAV 2017 Introduce Visual Studio Code Support for developing Extensions.

Full C/AL syntax.

Git Integration.

New text file format, more readable.

Extensions packages build without powershell.



```
codeunit 51002 "Address Service"
{
    var
        AddresseshereFoundMsg : TextConst ENU='Would you like to look for addresses on this post code online?';
        NoaddressesFoundMsg : TextConst ENU='No addresses were found.';
        YesPleaseTxt : TextConst ENU='Yes, please';
        PostCodeValidationRegExTxt : TextConst ENU='(GIR 0AA)|(((A-Z-[QVX]][0-9][0-9]?|(((A-Z-[QVX]][A-Z-[IIZ]][0-9][0-9]?
        MockJsonFileTxt : TextConst ENU='C:\Temp\JSONResponse.txt';
        FileNotFoundErr : TextConst ENU='The file %1 was not found.';
        OfflineMode : Boolean;

    [EventSubscriber(ObjectType::Table,18,'OnAfterValidateEvent','Post Code',FALSE,FALSE)]
    procedure OnCustomerpostCodeValidate@1(VAR Rec : Record customer;VAR xRec : Record customer;currFieldNo : Integer);
    begin
        CreateAddressLookupnotification(Rec);
    end;
}
```

```
table 1337 MyTable
{
    fields
    {
        field(1; FirstName; Text[50]) { }
        field(2; LastName; Text[50]) { }
        field(13; ValidRecord; Option)
        {
            OptionString = Valid,NotValid;
            Description = 'Indicate if the record is valid';
        }
    }
    keys
    {
        key(1;PK;Firstname)
        {
            Clustered = true;
        }
    }

    trigger OnInsert();
    begin
        //Do something very important here.
    end;
}
```

```
OBJECT Table 1337 MyTable
{
    OBJECT-PROPERTIES
    {
        Date=13-10-16;
        Time=[ 2:57:31 PM];
        Modified=Yes;
        Version List=;
    }
    PROPERTIES
    {
        TableType=Normal;
    }
    FIELDS
    {
        { 1 ; ;FirstName ;Text50 }
        { 2 ; ;LastName ;Text50 }
        { 3 ; ;validrecord ;Option ;OptionString=valid,invalid;
            Description=Indicate if the record is valid. }
    }
    KEYS
    {
        { ;Firstname ;Clustered=Yes }
    }
    FIELDGROUPS
    {
    }
    CODE
    {
        BEGIN
        END.
    }
}
```

# Self Service Customization

The image displays three overlapping screenshots of Microsoft Dynamics NAV in Design mode, illustrating the self-service customization process for a Customer Card page.

**Top Screenshot:** Shows the initial Design mode interface. The ribbon includes tabs for HOME, ACTIONS, NAVIGATE, and REPORT. A red arrow points to the 'Add Field to Page' icon in the top right corner.

**Middle Screenshot:** Shows the 'Add Field to Page' dialog box. The dialog prompts the user to 'Place fields by dragging from the list to a position on the page.' A list of fields is visible, including 'Cash No.' and 'Placed'.

**Bottom Screenshot:** Shows the 'Finish Up Design' dialog box. It informs the user that their changes have been recorded and asks them to 'Choose how to save changes'. The options are:

- Save for myself only: Your changes will be visible only to you.
- Save with my profile: Your changes will be visible to you and your profile.
- Save for everybody: Your changes will be visible to all users.
- Publish to Store: Your changes are saved as an EAS package.
- Save to new profile: Your changes are saved to a new profile.

The background of the screenshots shows the 'EDIT - CUSTOMER CARD' page for '01121212 - Spotsmever's Furnishings'. The page includes sections for General, Address & Contact, Invoicing, Payments, and Shipping. The 'General' section shows fields for Name, Credit Limit (LCY), Balance (LCY), Balance Due (LCY), and Document Sending. The 'Address & Contact' section shows fields for Address, City, Country/Region, and Contact Information. The 'Invoicing' section shows fields for VAT Registration No., Copy Sell-to Addr. L., Gen. Bus. Posting Gr., and Customer Posting G.. The 'Payments' section shows fields for VAT Registration No., Copy Sell-to Addr. L., Gen. Bus. Posting Gr., and Customer Posting G.. The 'Shipping' section shows fields for VAT Registration No., Copy Sell-to Addr. L., Gen. Bus. Posting Gr., and Customer Posting G..



# Grazie!

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