

Product Overview and Capability Guide

Microsoft Dynamics NAV 2018

December, 2017



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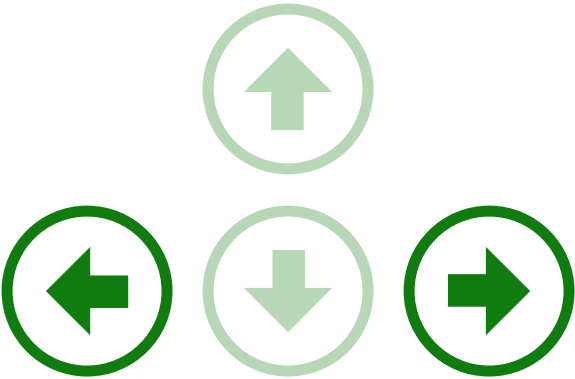
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Microsoft Dynamics NAV 2018



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Microsoft Dynamics NAV A Proven Solution for Your Business



Microsoft Dynamics NAV is multi-language, multi-currency business management solution that helps small and mid-size companies worldwide manage their accounting and finances, supply chain, and operations. Start with what you need now, and easily adapt as your business needs change. In the Microsoft cloud or on your servers—the choice is yours.

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ONE LOGIN TO YOUR DAY

Microsoft Dynamics NAV and Office 365 is the winning combination for business. When your email, calendar, and files seamlessly come together with your data, reports and business processes you get an integrated experience that no other stand-alone enterprise resource planning (ERP) solution can match. Share the big picture on your team collaboration site and conveniently drill into the details within Microsoft Dynamics NAV without the need to change from one application to the other. A consistent user experience across devices makes it easy for your people to complete their everyday tasks whether they are in the office or on the go.

PARTNERS BOOST SUCCESS FOR SMALL AND MIDSIZE BUSINESSES

Microsoft Dynamics NAV is sold, implemented, and supported by a global network of solution consultants called partners. These local partners will meet with you to discuss your requirements and then create a price quote based upon your business needs. Ultimately, the price of your solution depends on your specific functionality needs, the number and type of users who will be accessing the system, the needed implementation support, and how you choose to deploy the software—on-premises or in the cloud, whichever model best fits your business.

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Your Complete Business in the Cloud. Microsoft Dynamics NAV and Office 365



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See how easy it is to manage your finances, operations, and grow your sales. View the guided tours to see how Microsoft Dynamics NAV and Microsoft Office 365 can help you.

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How to Buy Microsoft Dynamics NAV 2018



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2. How to Buy Microsoft Dynamics NAV 2018

Microsoft Dynamics NAV is available exclusively through Microsoft Dynamics Certified Partners. These Value Added Resellers provide planning, implementation, customization, and support services aimed at optimizing the solution for each customer’s specific needs. Regardless of how and where the software is deployed, customers have the choice of purchasing their Microsoft Dynamics NAV licenses up front, or paying a monthly fee to a service provider.

Perpetual Licensing

Perpetual Licensing for Microsoft Dynamics NAV is designed to help small and midsize businesses get started with an affordable upfront starting price, rapid start tools and built in functionality. With Microsoft Dynamics Perpetual Licensing, customers license the ERP Solution functionality, and access to that functionality is secured by licensing users.

Service Provider’s Subscription Licensing

Service provider’s Subscription Licensing for Microsoft Dynamics NAV is designed to help keep the upfront cost to a minimum through a “per user per month” licensing fee. This helps small and midsize businesses get started with a low initial cost while leveraging the built-in functionality and rapid start tools.

Both licensing models are designed to simplify the purchase process. Customers have the choice of two concurrent-user types, Limited User and Full User, and the option to give those users access to advanced functionality through the “Extended Pack.”

Figure 1: Perpetual Licensing Overview

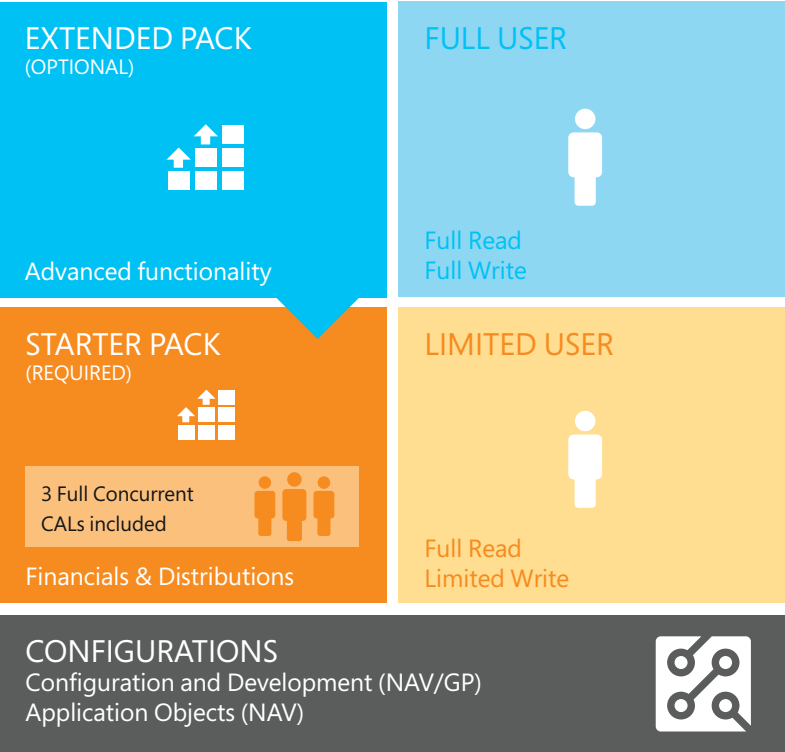


Figure 2: Starter Pack and Extended Pack – Functionality



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THE STARTER PACK

Small and midsize businesses can quickly and affordably get started with Microsoft Dynamics NAV 2018. The Starter Pack offers core Financials, Distribution and Professional Services functionality, plus three Full User licenses for one price.

The functionality included in the Starter Pack is designed to help customers:

- > Gain control and insight over their finances
- > Purchase and sell items and materials
- > Pay and manage employees
- > Manage the billables generated by consultants
- > Customer Relationship Management (CRM) to manage customer and supplier relationships and offer the highest quality of service and support.

For many businesses, this is the only license component required.

Figure 3: Starter Pack



Notes:

Additional software licenses may be required, such as Microsoft Windows Server, Microsoft SQL Server, Microsoft Office 365 and Microsoft SharePoint. These licenses are not included with the Starter Pack. Additional software must be licensed according to the applicable license terms.

See Licenses of Additional Software for more information.

THE EXTENDED PACK

Businesses that require more advanced functionality can license the optional and additive Extended Pack. The Extended Pack enables customers to integrate core financials and distribution management with broader functionality extensions such as:

- > Manufacturing to support and control the manufacturing environment
- > Warehousing to manage the warehouse to support operations

The first three Full Users included in the Start Pack get to access to all of the incremental functionality.

Figure 4: Extended Pack



Notes:

- > The Starter Pack is a prerequisite to the Extended Pack
- > Upon purchasing the Extended Pack the functionality is extended to all current and coming users of the customer.

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Packaging of Functionality in Microsoft Dynamics NAV 2018



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3. Packaging of Functionality in Microsoft Dynamics NAV 2018

Microsoft Dynamics NAV comes with a wide set of functionalities that through Microsoft Dynamics NAV 2018 provide some great opportunities for deployment supporting business processes and enhancing business productivity within the organization. A Microsoft Dynamics NAV customer can choose whether to deploy the Starter and Extended Pack through the Microsoft

Windows client for Microsoft Dynamics NAV, the Web client for Microsoft Dynamics NAV or the Microsoft Dynamics NAV Portal framework for Microsoft SharePoint (also known as the Microsoft Dynamics NAV SharePoint client) all through the same User types.



The Starter Pack is for companies who need core financials and trade functionality: Including; Basic Financials Management (General Ledger and Fixed Assets); Basic Supply Chain Management and Basic Sales Management (Sales, Purchasing and Inventory); Professional Services (Project management) with a broad set of Business Insight and reporting functionality as an integral part of the product. Additionally the Starter Pack comes with a wide range of tools to customize the solution, to meet the needs of every customer together with deep integration opportunities to be made through web services.



The Extended Pack is for growing, midmarket, or high-functional-needs companies who are looking for an adaptive solution with a broad set of functionality: including Warehousing, and Manufacturing. It comes with additional customization objects for doing more extensive customizations.

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- > Financial Management
 - > Customer Relationship Management
 - > Project Management
 - > Configuration and Development
 - > Supply Chain Management
 - > Human Resource Management
 - > Languages
 - > Other

- Extended Pack functionality**
- > Financial Management Ext.
 - > Customer Relationship Management Ext.
 - > Configuration and Development Ext.
 - > Supply Chain Management
 - > Manufacturing Solutions

Microsoft Dynamics NAV 2018 Starter Pack functionality

FINANCIAL MANAGEMENT

✓ Basic General Ledger	✓ Basic Fixed Assets	✓ Payment Handling
✓ Allocations	✓ Insurance	✓ Basic Dimensions
✓ Budgets	✓ Maintenance	✓ Advanced Dimensions
✓ Accounts Schedules	✓ Fixed Assets – Allocations	✓ Unlimited Companies
✓ Consolidation	✓ Reclassification	✓ Multiple Currencies
✓ Basic XBRL	✓ Bank Management	✓ Deferrals
✓ Change Log	✓ Check Writing	
✓ Cash Flow Forecast	✓ Bank Reconciliation	

CUSTOMER RELATIONSHIP MANAGEMENT

✓ Contact Management	✓ Interaction/Document Management
✓ Task Management	✓ Mail Logging for Microsoft Exchange
✓ Outlook Client Integration	✓ Microsoft Dynamics CRM integration
✓ Contact Classification	
✓ Campaign Management	
✓ Opportunity Management	

PROJECT MANAGEMENT

✓ Basic Resources	✓ Multiple Costs	✓ Jobs
✓ Capacity Management	✓ Estimates	✓ Time Sheet
	✓ Tasks/Steps	

CONFIGURATION AND DEVELOPMENT

✓ Report Designer (100 Reports)	✓ XML Port (100 XML)
✓ Table Designer (10 Tables)	✓ Page Designer (100 Pages)
✓ Query Designer (100 Query)	✓ Code units (10)

Microsoft Dynamics NAV 2018 Extended Pack functionality (includes all the functionality in the starter pack)

FINANCIAL MANAGEMENT EXTENDED

- ✓ Responsibility Centers
- ✓ Inter-company Postings
- ✓ Cost Accounting

CUSTOMER RELATIONSHIP MANAGEMENT EXT.

- ✓ Service Order Management
- ✓ Service Price Management
- ✓ Service Item Management
- ✓ Service Contract Management
- ✓ Planning and Dispatching

CONFIGURATION AND DEVELOPMENT EXTENDED

✓ Table (10 tables)	✓ Code units (10 units)
✓ Pages (100 pages)	✓ XML Port (100 XML)

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- Extended Pack functionality**
- > Financial Management Ext.
 - > Customer Relationship Management Ext.
 - > Configuration and Development Ext.
 - > Supply Chain Management
 - > Manufacturing Solutions

Microsoft Dynamics NAV 2018 Starter Pack functionality

SUPPLY CHAIN MANAGEMENT

✓ Basic Receivables	✓ Purchase Invoice Discounts	✓ Location Transfers
✓ Sales Invoicing	✓ Requisition Management	✓ Item Substitutions
✓ Sales Order Management	✓ Alternative Order Addresses	✓ Item Cross References
✓ Sales Invoice Discounts	✓ Purchase Return Order Management	✓ Nonstock Items
✓ Alternative Ship-To Addresses	✓ Purchase Line Discounting	✓ Item Tracking
✓ Shipping Agents	✓ Purchase Line Pricing	✓ Item Charges
✓ Sales Return Order Management	✓ Drop Shipments	✓ Bin
✓ Sales Line Discounting	✓ Salespeople/Purchasers	✓ Pick
✓ Sales Line Pricing	✓ Basic Inventory	✓ Analysis Reports
✓ Sales Tax	✓ Multiple Locations	✓ Item Budgets
✓ Basic Payables	✓ Stock-Keeping Units	✓ Workflows
✓ Purchase Invoicing	✓ Alternative Vendors	✓ Document Management, Document Capture and OCR
✓ Purchase Order Management	✓ Assembly	✓ E-services

HUMAN RESOURCE MANAGEMENT

- ✓ Basic Human Resources

SPROG

- ✓ Multiple Document Languages
- ✓ Multiple Languages

OTHER

✓ Subsidiary (Each)	✓ Job Queue
✓ Intrastate	✓ Reason Codes
✓ Extended Text	✓ Dynamics NAV Server

Microsoft Dynamics NAV 2018 Extended Pack functionality (includes all the functionality in the starter pack)

SUPPLY CHAIN MANAGEMENT EXT

- ✓ Order Promising
- ✓ Calendars
- ✓ Campaign Pricing
- ✓ Cycle Counting
- ✓ Put Away
- ✓ Warehouse Receipt
- ✓ Warehouse Shipment
- ✓ Standard Cost Worksheet
- ✓ Warehouse Management Systems
- ✓ Internal Picks and Put Aways
- ✓ Automated Data Capture System
- ✓ Bin Setup

MANUFACTURING SOLUTIONS

✓ Production Orders	✓ Demand Forecasting
✓ Production Bill of Materials	✓ Basic Capacity Planning
✓ Version Management	✓ Machine Centers
✓ Agile Manufacturing	✓ Finite Loading
✓ Basic Supply Planning	

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Product Capabilities in Microsoft Dynamics NAV 2018



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4. Product Capabilities in Microsoft Dynamics NAV 2018

FINANCIAL MANAGEMENT

General

Accounts Schedules

Powerful financial reporting tool that can help accountants and financial analysts to extract the most essential business data from the chart of accounts, budgets, cash flow accounts and cost types into financial reports, which can be used to efficiently monitor the health of the business and provide valuable input for the business decision makers. You get to choose the accounts you want to monitor and report on, change the order of the accounts, and combine figures in various ways, set up which columns to print, change the description of the accounts and supply them with additional notes.

In addition, you can make simple calculations on the data you selected on the accounts schedules worksheet, and compare current figures with historical ones and with your budgets.

Allocations

Allocate general ledger entries to combinations of accounts, departments, and projects using allocation keys based on amount, percentage, or quantity. This feature is available through Recurring General Journals.

Basic General Ledger

This module includes all the basic functionality necessary for setting up a company and posting to the general ledger, chart of accounts, general journals, VAT facilities, recurring journals, and source codes. Also includes:

- > Facilities for internal and external reporting.
- > RapidStart Services for Microsoft Dynamics NAV
- > Workflow for approval of sales and purchase documents.
- > Posting and reporting in your company's base currency.
- > Posting and reporting in an additional currency with the addition of the Multiple Currencies module.
- > Employee ledger entries: post general journal line with "Employee" as account type or balancing account type will generate an employee ledger entry.
- > Capability to export data from any form to Microsoft Word or Microsoft Excel using style sheets.
- > Capability to link to external documents.
- > Two languages—U.S. English and one other.
- > Set up sales and purchase documents archiving.
- > Background posting.

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Basic XBRL

Export documents from Microsoft Dynamics NAV in XBRL (Extensible Business Reporting Language) format and import XBRL taxonomies into Microsoft Dynamics NAV from the Internet, email, or other systems. XBRL is an XML-based specification that uses accepted financial reporting standards based on standardized, underlying data tags. The module includes:

- > Capability to map your general ledger to XBRL taxonomies so that the same XBRL document instance can be used for various purposes, independent of the format required by the receiver of the document.
- > Support for the XBRL 2.1 Specification released by the XBRL Consortium.

Budgets

Work with budgets in general ledger accounts. After you have created a budget, you can print a balance that shows variances to the budget by percentage. Work with multiple budgets at one time. For example, work with a 100 percent budget, a 110 percent budget, and so on. Budgets are generally entered per period for the relevant general ledger accounts. Budgets can be exported/imported to/from Excel, allowing you to use all the calculation capabilities of Excel while preparing your budgets.

Change Log

Log user changes made to Microsoft Dynamics NAV master data. You can log all direct modifications a user makes to the data in the database, except for changes to “working documents” such as journals, sales orders, and purchase orders. The change log functionality makes it possible to get a chronological list of all changes to any field in any table (except those “working documents” just mentioned) and to identify by user ID who made the changes.

Consolidation

Consolidate companies in Microsoft Dynamics NAV. The companies can come from one or from several different Microsoft Dynamics NAV databases or other files, and you can import and export financial information in this module. If data used is retrieved from several Microsoft Dynamics NAV solutions, use this module only in the parent company.

Deferrals

Set up deferral templates that automate the process of deferring revenues and expenses over a pre-defined schedule. This enables companies to easily recognize revenues and expenses in periods other than the period in which the transaction is posted.

Intercompany Postings

Manage accounting for more than one company in the same posting process. The companies can be in the same or in one of several different Microsoft Dynamics NAV databases. You can also send documents to partner companies. Users control the document flow through an Inbox/Outbox feature, and transactions are completed as general journal transactions or through receivables and payables, which enables the use of currencies and correct reconciliation.

Responsibility Centers

Set up profit centers and/or cost centers. A company can sell items with specific prices and that are related to a responsibility center. You can tie a user to a responsibility center so that only sales and purchase documents related to the particular user are displayed. Users get assistance with entering extra data, such as dimensions and location codes.

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Cost Accounting

Cost Accounting provides an efficient way to control the company's costs by providing visibility and insight into budgeted and actual costs of operations, departments, products, and projects. Cost Accounting synchronizes cost information with the general ledger, and then allocates that information to different costs centers and cost objects.

This module includes enabling you to:

- > Transfer costs from the general ledger.
- > Enter and post internal charges and allocations directly in the Cost Accounting Cost journal.
- > Predefine recurring cost allocation rules on cost allocation cards and execute in a batch job.
- > Undo allocations.
- > Create cost budgets and transfer cost budget entries to actual entries.

Cash Flow Forecast

Cash Flow Forecast provides a prediction of how a company's liquidity—cash and other treasure positions—will evolve over time. It consists of two things—cash receipts and cash disbursements—the money you expect to receive and the cash you expect to pay out—plus the liquid funds you have available. These elements together show you a direct cash flow forecast.

You can also 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 in NAV 2018, including jobs and tax data.

Basic Fixed Assets

Keep track of fixed assets such as buildings, machinery, and equipment. You can also post various fixed-asset transactions: acquisitions, depreciation, write-downs, appreciation, and disposal. For each fixed asset, you set up depreciation books in which the methods and other conditions used for calculating depreciation are defined. You can set up an unlimited number of depreciation books to satisfy legal requirements, and for tax and internal accounting purposes. This module is well suited for international companies that need to use many depreciation methods.

Fixed Assets Allocations

Allocate different percentages of fixed asset transactions, such as acquisition cost and depreciation, to different departments or projects by using allocation keys. Useful for when several departments share a fixed asset.

Insurance

Keep track of insurance coverage and annual insurance premiums for your fixed assets and easily determine whether your assets are under-insured or over-insured. You can attach each asset to one or more insurance policies and also index insurance amounts.

Maintenance

Record maintenance and service expenses for each fixed asset. Get the detailed information you need to analyze and make decisions about the renewal and disposal of fixed assets.

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Reclassification

Reclassify a fixed asset or part of a fixed asset—for example, from one department to another. You can split one fixed asset into several fixed assets, or combine several fixed assets into one fixed asset. When you need to dispose of one part of a fixed asset, you can split it into two assets and then dispose of the appropriate one.

Advanced Dimensions

Advanced Dimensions provides unlimited dimensions for use in transactions in all ledgers. You can name all the dimensions according to what is most appropriate for your business. In addition to an unlimited number of dimensions, this module includes advanced dimensions functionality that enables you to set up rules for how to combine dimensions and dimension values. This helps you control the use of dimensions and increases the reliability of output based on dimensions.

You can also:

- > Set up rules for prioritization of default values and define dimension rules to fit your specific business.
- > Set up and use analysis views to analyze general ledger transactions per dimension and combine dimensions as you want.
- > Include budget information in analysis views, which is an advanced way of analyzing data using dimensions.
- > Combine analysis of dimensions with the use of account schedules.

Basic Dimensions

Add two additional dimensions to the general ledger and to any of the other ledgers in Microsoft Dynamics NAV for greater flexibility when working with analytical tools. You can give the two dimensions the names that are most appropriate for your business and assign dimension codes to each transaction that involves a general ledger account, customer, vendor, fixed asset, resource, job, or inventory item. In addition, you can define default dimension values and rules for the default values for all account types (general ledger, customer, vendor, item, and so on) to help you easily add dimensions to all transactions. This module can be used in companies that, for example, have several projects, regions, or profit centers.

You can also use it to:

- > Closely analyze projects in companies that work with projects across departments and functions.
- > Generate a statement of operations for a company car account, where the individual automobiles are set up as projects.
- > Establish a single account for all company cars, even though a detailed statement per car is called for.
- > Print a balance for a given department or project or for combinations of the two.

Unlimited Companies

Provide competitive pricing if your business needs more than one company.

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Multiple Currencies

Manage multiple currencies throughout the system, including payables and receivables, general ledger reports, resource and inventory items, and bank accounts (when integrated with the Cash Management features). With Multiple Currencies, you can:

- > Enter exchange rates and convert currency in full compliance with euro legislation (including “triangulation”) in the European Monetary Union (EMU) countries. Triangulation is the required method of currency conversion during the transitional period of the euro.
- > Perform currency conversion according to exchange rates that are stored and maintained in the exchange rate table.
- > Set up a currency in the exchange rate table and specify the format so that amounts will always be shown in the correct format on all forms and reports throughout the system.
- > Enter exchange rates for a date or for a period in the exchange rate table.
- > Calculate the exchange rate associated with the date on the transaction for each conversion of a currency amount to a local amount.
- > Save historical exchange rates in the exchange rate table to keep track of fluctuations over a period of time.
- > Transact business in any number of currencies for any customer and vendor. For example, companies can issue an invoice in one currency and accept payment for that invoice in a different currency.
- > Manage currency conversion dynamically and help ensure efficient processing of exchange rate updates.
- > Store details of transactions involving receivables and payables in local and foreign currencies so that aging and reports for receivables and payables can be printed in local or foreign currency.
- > Use the Exchange Rate Adjustment option to adjust receivables and payables and post unrealized gains/losses to the general ledger.

Bulk Invoicing from Microsoft Bookings

For companies using the Bookings App in Office 365, it’s possible to do bulk invoicing for bookings. The Uninvoiced Bookings page in Microsoft Dynamics NAV provides a list of the company’s completed bookings. In this page you can quickly select the bookings you want to invoice and create draft invoices for the services provided.

Cash Management

Bank Account Management

Create, operate and manage multiple bank accounts for catering to your diverse business needs and across different currencies.

Electronic Payments and Direct Debits

Create payment proposals based on vendor documents and generate bank payment files in ISO20022/SEPA format or use the Bank Data Conversion Service for generating the appropriate electronic payment file for your bank. Easily keep track of the payment export history for your electronic payments and recreate a payment file whenever needed. Apply payments comes with simple streamlined process to mark and process the desired transactions.

Create direct debit collections to get the money directly from your customer’s bank account and generate a bank direct debit file in ISO20022/SEPA format.

In NAV 2018 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.

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Reconciliation of Incoming and Outgoing Bank Transactions

Import bank transaction data from electronic files sent from your bank in ISO20022/SEPA format—or use the Bank Data Conversion Service for other file types. Apply the bank transactions automatically to open customer and vendor ledger entries and create your own mapping rules. Review the proposed applications and account mappings in an easy and intuitive way. It is possible to modify the algo algorithm behind the record matching is possible by modifying, removing or adding rules.

Bank Account Reconciliation

Import bank statement data from electronic files sent from you bank in ISO20022/SEPA format—or use the Bank Data Conversion Service for other file types. Reconcile your bank statement data automatically to open bank account ledger entries and keep track of all bank statements.

You can also 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.

Check Writing

Generate Computer printed checks with a unique number series for each bank account. You can specify on the payment journal line whether you want this payment to be made with a computer or a manual check. This assists internal control by ensuring that the computer check is actually printed before posting the payment. Check printing comes with flexible user options, such as voiding a check, reprinting, using check forms with preprinted stubs, testing before printing, and also the possibility to consolidate payments for a vendor into a single check.

SUPPLY CHAIN MANAGEMENT (SCM)

Sales and Receivables

Alternative Ship -Tos

Set up multiple ship-to addresses to accommodate customers that in addition to a main business address have more than one site to which order can be shipped. These additional locations can then be selected by the order processor when creating a sales order or invoice.

Basic Receivables

Set up and maintain the customer table. Post sales transactions in journals and manage receivables; register customers and manage receivables using general journals. Together with Multiple Currencies, this module can post sales transactions and manage receivables in multiple currencies for each customer. Basic Receivables is integrated with Basic General Ledger and Inventory and is required for the configuration of all other Sales and Receivables module. Sales Invoicing is also frequently used with this module.

Calendars

Set up calendars with working and non-working days. Assign a base calendar to customers, vendors, locations, companies, shipping agent services, and the service management setup—and make changes to each as necessary. Calendar entries will be used in date calculations on sales orders, purchase orders, transfer orders, production orders, service orders, and requisition and planning worksheets.

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Campaign Pricing

Work with sales prices and sales line discounts connected with specific campaigns. After you have activated the prices/discounts, any customer or contact related to a company currently in a segment associated with a given campaign can access the price/discount associated with that campaign. Prices are valid for the life of the campaign or until you decide to deactivate them. When you create a sales document or service order, the campaign price/discount is included among the pricing reductions available when Microsoft Dynamics NAV chooses the price to retrieve on the line.

Order Promising

Promise accurate order shipment and delivery dates to customers based on an item's current and future availability. When items are not available to meet a customer's requested delivery date, calculate the earliest shipment date as either an available-to-promise date that is based on upcoming uncommitted supply or a capable-to-promise date—a date when items can become available should they be replenished.

Sales Invoicing

Set up, post, and print customer invoices and sales credit memos. This module is fully integrated with General Ledger and Inventory.

Sales Invoice Discounts

Calculate invoice discounts automatically. Set up any number of invoice discount terms, including a certain minimum amount, discount percentage, and/or a service charge. The discount is calculated on the individual item lines and becomes part of the net sum of the invoice. Calculations can be done in both local and foreign currencies.

Sales Line Discounting

Manage flexible item price discount structures that differentiate between special agreements with individual customers and customer groups, and are conditioned by such parameters as minimum quantity, unit of measure, currency, item variant and time period. The best unit price, as based on the highest discount, unit price is calculated for the sales line when the order details meet the conditions specified in the sales line discounts table.

Sales Line Pricing

Manage flexible item price structures that differentiate between special agreements with individual customers and customer groups, and are conditioned by such parameters as minimum quantity, unit of measure, currency, item variant and time period. The best, that is, the lowest, unit price is brought to the sales line when the order details meet the conditions specified in the sales prices table. Make updates and changes to the price agreements as recorded in the sales prices table by using the sales price worksheet.

Sales Order Management

Manage sales quotes, blanket sales orders, and sales order processes. Setting up an invoice directly differs from setting up a sales order in which the quantity available is adjusted as soon as an amount is entered on a sales order line. Quantity available is not affected by an invoice until the invoice is posted.

Use the Sales Order Management module to:

- > Manage partial shipments.
- > Ship and invoice separately.
- > Create prepayment invoices for the sales order.
- > Use quotes and blanket orders in the sales phase. (Quotes and blanket orders do not affect inventory figures.)

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Sales Return Order Management

This module enables you to create a sales return order, so you can compensate a customer for wrong or damaged items. Items can be received against the sales return order. Create a partial return receipt or combine return receipts on one credit memo. Link sales return orders with replacement sales orders.

Shipping Agents

Set up multiple shipping agents (for example, UPS, DHL, external carriers, or your own carrier) and relate their services (express, overnight, standard) with shipping time. Associate default shipping agents and their services with individual customers or specify those details on sales orders and transfer orders to improve accuracy of order promising.

Sales Tax

Sales Tax

Calculate Sales Tax and set up individual tax areas for each customer and vendor. Also enables you to calculate the use tax on the tax. Sales tax can also be calculated from the general journal lines. Please check your local pricelist for availability

Purchase and Payables

Alternative Order Addresses

Set up multiple addresses to manage orders from vendors that in addition to a main business address have more than one site from which they ship orders. These additional locations can then be selected by the purchasing agent when creating a purchase order or invoice.

Basic Payables

Set up and maintain a vendor table, post purchase transactions in journals, and manage payables. Includes the vendor table and enables you to generate vendor ledger entries using general journals. Use this together with the Multiple Currencies module to post purchase transactions and manage payables in multiple currencies for each vendor. This module is always used if your solution requires a vendor table. It is integrated with General Ledger and Inventory and it is required for the configuration of all other Purchase and Payables module. Purchase Invoicing is also frequently used with this module.

Drop Shipments

Handle order shipments directly from the vendor to the customer without having to physically stock items in your inventory while still keeping track of order costs and profit. The drop shipment process is facilitated through the automatic linking of sales and purchase orders that control the built-in sequence of posting tasks.

Purchase Invoicing

Set up, post, and print purchase invoices and purchase credit memos. This module is integrated with General Ledger and Inventory.

Purchase Line Discounting

Manage multiple item purchase price discounts that you have negotiated with individual vendors as based on such parameters as minimum quantity, unit of measure, currency, item variant and time period. The best, as based on the highest discount, unit cost is calculated for the purchase line when the order details meet the conditions specified in the purchase line discounts table.

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Purchase Invoice Discounts

Calculate invoice discounts automatically. The discount can differ from vendor to vendor with different minimum amounts (also in different currencies) and different rates, depending on the size of the invoice. The discount is calculated on the individual item lines and becomes part of the net sum of the invoice.

Purchase Line Pricing

Manage multiple item purchase prices that you have negotiated with individual vendors as based on such parameters as minimum quantity, unit of measure, currency, item variant and time period. The best, that is the lowest, unit cost is brought to the purchase line when the order details meet the conditions specified in the purchase prices table.

Purchase Order Management

Manage purchase quotes, blanket orders, and purchase order processes. Creating a purchase order differs from creating a purchase invoice directly. The quantity available is adjusted as soon as an amount is entered on a purchase order line, but it is not affected by a purchase invoice until the invoice is posted.

Use this module to:

- > Manage partial receipts.
- > Receive and invoice separately and create prepayment invoices for the purchase order.
- > Use quotes and blanket orders in the purchase phase. (Quotes and blanket orders do not affect inventory figures.)

Purchase Return Order Management

Create a purchase return order in order to compensate your own company for wrong or damaged items. Items can then be picked from the purchase return order. You can set up partial return shipments or combine return shipments in one credit memo and link purchase return orders with replacement purchase orders.

Requisition Management

Automate the supply planning process by using the Requisition Worksheet. Generate optimal suggestions for replenishing inventory through purchases and transfers based on the item's current and future demand and availability, as well as a variety of planning parameters, such as minimum and maximum quantities and reorder quantities. Display a graphical overview of the planning impact and allow the user to change the plan using a drag-and-drop operation, prior to executing the plan.

Alternatively, use Order Planning—a simplified supply planning tool that enables you to plan supply for all types of demand in an order-by-order fashion, with no considerations for optimization.

Inventory

Analysis Reports

Provide company decision-makers, especially those with overall responsibility for sales, purchases, and product portfolio management, with an efficient and flexible way to get meaningful information out of the system to inform day-to-day decisions. Built on item entries, this module provides a customizable, analytic view that enables people to add and combine analysis objects—customers, items, and vendors—according to their needs.

You can:

- > Present figures in both amounts and quantities and compare by periods as well as against budget. When the figures are put in a formula, they can become an indicator of the company's performance.
- > Drill down to locate the cause of problems.
- > View sales dynamics; analyze inventory turnover; evaluate customers' buying behavior; spot trends; reconsider product offerings, prices, and vendors; and make informed business decisions.

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Alternative Vendors

Manage purchase of the same item from several different vendors. Set up alternative vendors for an item, specify typical lead times used by a specific vendor to deliver that item, and associate price and discount agreements for that item with each vendor.

Basic Inventory

Set up items that you carry in your stock and specify their unit of measures, costing method, inventory posting group, unit cost and price and other properties. Post item transactions, such as sales, purchase, and negative and positive adjustments from item journals. Quantity and cost records of the posted transactions are stored in the inventory ledger that is the basis for inventory valuation and other costing calculations.

Integrated with General Ledger and with the posting processes in Sales and Receivables and Purchase and Payables, this module is required for the configuration of all other Inventory modules.

Bin

Organize your warehouse by assigning items to bins, the smallest unit in the warehouse logical structure. Bin assignment is done as according to the item journals or directly on the document lines (does not apply to order lines).

Cycle Counting

Manage cycle counting, a basic method of verifying inventory record data used to maintain and increase inventory accuracy. Set up cycle counting on the item or SKU level.

Item Budgets

Make sales and purchase budgets on the customer, vendor, and item levels, and in both amounts and quantities. Prepare and record a sales budget that can serve as input to decision-makers in other operational areas, such as purchasing and logistics. Decision-makers gain information about future expected demand that they can use for business discussions with the customers. After budgets are made, track the actual sales performance by means of calculating the variance. The ability to move budgeted figures between the system and Excel provides additional flexibility to the budgeting process.

Item Charges

Manage item charges. Include the value of additional cost components such as freight or insurance into the unit cost or unit price of an item.

Item Cross References

Quickly and precisely identify the items a customer is ordering on the basis of item numbers other than your own. Cross-reference information from customers, vendors, and manufacturers, as well as generic numbers, universal product codes (UPCs), and European article numbers (EANs) that can be stored and easily accessed.

Item Substitutions

Link items with the same or similar characteristics so that if a customer orders an item that is unavailable, you can offer substitute items and avoid losing the sale. Or, provide an extra service to your customer by offering lower-cost alternatives.

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Item Tracking

Manage and track serial and lot numbers. Assign serial or lot numbers manually or automatically, and receive and ship multiple quantities with serial/lot numbers from a single order line entry.

Item Categories

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.

Item Attributes

Use item attributes to add custom data, such as color, 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.

Image Analyzer

The Image Analyzer extension uses powerful image analytics provided by the Computer Vision API for Microsoft Cognitive Services to detect attributes in images you add to items and contact persons.

Assembly Management

Specify a list of sellable items, raw materials, subassemblies and/or resources as an Assembly Bill of Materials that comprises a finished item or a kit. Use assembly orders to replenish assembly items, to stock or capture the customer's special requirements to the kit's bill of materials directly from the sales quote, blanket, and order line in the assembly-to-order processes.

Location Transfers

Track inventory as it is moved from one location to another and account for the value of inventory in transit and at various locations.

Multiple Locations

Manage inventory in multiple locations that may represent a production plant, distribution centers, warehouses, show rooms, retail outlets and service cars.

Nonstock Items

Offer items to customers that are not part of your regular inventory but that you can order from the vendor or manufacturer on a one-off basis. Such items are registered as nonstock items but otherwise are treated like any other item.

Pick

Enable warehouse workers to create a pick from the released order. Pick is managed from a separate user interface when shipping items in an order-by-order environment.

Put Away

Enable warehouse workers to create a put away from the released order. Put Away is managed from a separate user interface when receiving items in an order-by-order environment.

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Standard Cost Worksheet

Efficiently review and update standard costs with this worksheet. The Standard Cost Worksheet provides a company's controllers with a reliable and efficient way to maintain accurate and up-to-date inventory costs. Work with standard cost updates the same way you work with an Excel spreadsheet but within the framework of Microsoft Dynamics NAV. Because it provides an overview of the current standard costs, the worksheet is a convenient place to prepare for a cost update without the changes having an immediate effect in the system.

Stock-Keeping Units

Manage stock-keeping units (SKUs). Identical items with the same item number can be stored in different locations and managed individually at each location. Add cost prices, replenishment, manufacturing information, and so on, based on the location.

Warehouse Receipt

Enable warehouse workers to create a put-away from the receipt. Warehouse Receipt is managed from a separate user interface when receiving items in a multi-order environment.

Warehouse Shipment

Enable warehouse workers to create a pick from the shipment. Warehouse Shipment is managed from a separate user interface when shipping items in a multi-order environment.

Warehouse Management

Automated Data Capture System (ADCS)

Capture data automatically. Keep data accurate, even in a hectic environment. ADCS supports some of the workflows in the Warehouse Management Systems module that enables warehouse automation.

Bin Setup

Easily set up and maintain your bins by defining both the layout of your warehouse and dimensions of your racks, columns, and shelves; set up and maintain your planning parameters by defining the limitations and characteristics of each bin.

Internal Picks and Put-Aways

Create pick and put-away orders for internal purposes, without using a source document (such as a purchase order or a sales order). For example, pick items for testing or put away production output.

Warehouse Management Systems

Manage items on a bin level. Receive and put away items in a bin; pick items from a bin according to a put-away template; and pick items based on the zone and bin ranking. Move items between bins using a report for optimizing the space usage and the picking process, or move items manually. Warehouse instruction documents are created for the pick and put-away process, which can be carried out for sales, purchases, transfers, returns, and production orders. Service orders are not included.

MANUFACTURING

Basic Manufacturing

Production Bill of Materials

Create bills of materials and calculate standard costs. Required for the configuration of all other Manufacturing modules.

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Production Orders

Create and manage production orders, and post consumption and output to the production orders. After you have created a production order, you can calculate net requirements based on that production order. The Production Orders module includes a manual supply planning tool as an alternative to automatic planning. The Order Planning window provides the visibility and tools you need to manually plan for demand from sales lines and then to create different types of supply orders directly.

Agile Manufacturing

Agile Manufacturing

This module enables you to run the Agile Manufacturing, Supply Planning, and Capacity Planning modules.

Version Management

Create and manage different versions of the manufacturing bill of materials and routings. You must purchase the Basic Capacity Planning module before you can set up multiple versions of routings.

Supply Planning

Basic Supply Planning

Plan material requirements based on demand with support for master production scheduling and materials requirements planning. Basic Supply Planning includes:

- > Automatic production orders and purchase orders.
- > Action messages for fast and easy balancing of supply and demand.
- > Support for bucket-less and bucketed material requirements planning.
- > The Setup for items with their own reordering policy, including registration of whether they are manufactured by or purchased from a third party.

Demand Forecasting

Manage demand forecasting based on items. Input demand (sales) forecasts for products and components in a more convenient way (daily, monthly, quarterly). This data allows the system to plan and create production and purchase orders taking into consideration the demand forecast together with the level of available inventory and parameters of requirement planning.

Sales and Inventory Forecasting

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.

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Capacity Planning

Basic Capacity Planning

Add capacities (work centers) to the manufacturing process. Set up routings and use these routings on production orders and in material requirements planning. View loads and the task list for the capacities.

Finite Loading

Manage finite loading of capacity-constraint resources. Taking capacity constraints into account so that no more work is assigned to a work center than the capacities can be expected to execute during a given time period. This is a simple tool without any optimization. Used with the Order Promising module, Finite Loading also enables the system to calculate capable-to-promise (CTP).

Machine Centers

Add machine centers as capacities to the manufacturing process. Machine centers are designed to help you manage capacity of a single machine/producing resource. With machine centers, you can plan/manage capacity on several levels: on a more detailed level for machine centers and on a consolidated level for work centers. Machine centers allow users to store more default information about manufacturing processes, such as setup time or default scrap percentage.

PROJECT MANAGEMENT

Resources

Basic Resources

Keep track of resources and prices. Register and sell resources, combine related resources into one resource group, or track individual resources. Divide resources into labor and equipment and allocate resources to a specific job in a time schedule.

Capacity Management

Plan capacity and sales, and manage usage statistics and profitability of resources. Create your plan in a calendar system with the required level of detail and for the period of time that you need. Also monitor resource usage and get a complete overview of your capacity for each resource with information about availability and planned costs on orders and quotes.

Multiple Costs

Manage alternative costs for resources and resource groups. The costs can be fixed or based on an additional percentage or an additional fixed charge. Define as many work types as you need.

Jobs

Keep track of usage on jobs and data for invoicing the customer. Manage both fixed-price jobs and time-and-materials jobs. You can also:

- > Create a plan for a job with multiple tasks and task groupings. Each task can have a budget and can be done for whatever period of time you need.
- > Copy a budget from one job to another and set up a job-specific price list for charging of items, resources, and general ledger account expenses to the job's customer.
- > View suggested Work in Progress and Recognition postings for a job.
- > Plan and invoice the job in a currency other than the local currency using Jobs together with Multiple Currencies.
- > Assign a specific job to a specific customer and invoice the job completely or partially using Jobs together with Sales Invoicing.
- > 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 center 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.

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Time Sheet

Time Sheet is a simple and flexible solution for time registration with manager approval. Time Sheet provides integration to the Service, Jobs, and Basic Resources modules.

SALES, MARKETING, AND SERVICE MANAGEMENT

Sales and Marketing

Campaign Management

Organize campaigns based on segments of your contacts that you define. Define segments based on specific criteria, such as sales, contact profiles, and interactions, and reuse existing segments or segmentation criteria. Use the Merge feature in Word (or send other file formats) to communicate with the contacts in your segment. To send a document to people of different nationalities in their native language, use Campaign Management with Interaction/Document Management.

Relationship Management

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.

Contact Classification

Sort your contacts into categories, and automatically classify your customers based on criteria you specify. For example, you can see the program group contacts in terms of revenue. Use this information to target contacts for your campaigns. Divide your customers into ABC segments and even use this module for rating (assign the weights of two questions to identify the value of a third question).

Contact Management

Maintain an overview of your contacts, and personalize your approach to them. Record your contact information for all business relationships. This module is tightly integrated with the Sales and Receivables application area. You can also:

- > Specify the individual people related to each contact.
- > Get an automatic alert if you enter contact information that already exists with the duplicate check function.
- > Get a precise view of prospects and customers by categorizing your contacts based on profiling questions.
- > Issue quotes to prospects or create sales documents for specific contacts if you have Sales Order Management.
- > Use Contact Synchronization to integrate your contacts from Microsoft Dynamics NAV 2018 with your People Hub in Office 365 or Microsoft Outlook.
- > Keep your contacts synchronized between Microsoft Dynamics NAV 2018 and Office 365 or Microsoft Outlook, and automatically run a background synchronization at scheduled times.
- > Use filters to synchronize only the Microsoft Dynamics NAV 2018 contacts that you want to see in Office 365 or Microsoft Outlook.

Interaction /Document Management

Record all the interactions that you have with your contacts—for example, telephone calls, meetings, or letters. Attach documents to interactions (Word, Excel, or .txt files). You can also automatically record other interactions—for example, all Microsoft Dynamics NAV documents that you send to your contacts, such as sales orders or quotes, can be logged and retrieved at a later time. By using TAPI (Telephony Application Programming Interface) compliant telecom devices, you can call a contact by clicking a button on the electronic contact card.

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Mail Logging for Microsoft Exchange Server

Log all email correspondence. Log inbound and outbound email messages sent through Microsoft Dynamics NAV or Microsoft Outlook®, and set up the program to log automatically or manually in Microsoft Dynamics NAV. The solution is server-based and requires Microsoft Exchange Server (please refer to the Microsoft Dynamics NAV software requirements) in order for you to keep email messages in their natural environment to ease administration.

Opportunity Management

Keep track of sales opportunities. Section your sales processes into different stages, and use this information to get an overview of and manage your sales opportunities.

Outlook Client Integration

Synchronize your to-do items and your contacts in Microsoft Dynamics NAV with meetings, tasks, and contacts in Outlook. Create, update, cancel, and delete in one program and, at a specific time, synchronize from within Outlook. You can also customize synchronization by adding fields or adding new entities to be synchronized.

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.

Task Management

Organize the tasks related to your sales and marketing activities. Create to-do lists for yourself and assign tasks to other users or teams of users. Automatically create recurring to-do items and activities consisting of several to-do items.

Integration with Dynamics 365 for Sales

Integrate Dynamics NAV with Dynamics 365 for Sales in a few easy steps using assisted setup. The assisted setup helps you synchronize your data across the two, including sales orders, item availability, units of measure, and currencies.

Service Management

Planning and Dispatching

Assign personnel to work orders and log details such as work order handling and work order status. For dispatching, manage service personnel and field technician information, and filter according to availability, skills, and stock items. Gain an overview of service task prioritization, service loads, and task escalations.

Service Contract Management

Set up an agreement with the customer concerning the service level to be delivered. With this module, you can:

- > Maintain information on contract history, contract renewal, and contract templates.
- > Manage warranty details on service items and spare parts.
- > Record details on service levels, response times, and discount levels, as well as on the service history of each contract, including used service items and parts and labor hours.
- > Measure contract profitability.
- > Generate contract quotes.

It is recommended that you also use the Service Order Management and Service Item Management modules.

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Service Item Management

Record and keep track of all your service items, including contract information, component management, and BOM reference and warranty information. Use the Trendscape Analysis feature to view key performance indicators on the service item in a given time frame.

Service Order Management

Register your after-sales issues including service requests, services due, service orders, and repair requests. Service requests can be initiated by the customer or created automatically according to the terms in your service agreement. Data can be entered in the service orders by a call center employee or by your repair shop. You can also use this module to register impromptu or one-off service orders.

Register and manage equipment loaned to customers. Get a complete history of your service orders and service order quotes through the Service Order Log.

Service Price Management

Set up, maintain, and monitor your service prices. Set up price groups based on different criteria—such as the service item (or several item groups), the service task involved, or the type of fault—for a limited period of time, or for a specific customer or currency. Define price calculation structures that include all parameters involved in providing service—for example, the parts used, the different work types, and the service charges. The system automatically assigns the correct price structure to the service orders that match the service price group criteria. You can also assign fixed prices, minimum prices, or maximum prices to service price groups and view statistics about the profitability of each service price group.

Workflow

General

Model real-life business processes such as best practices or industry-specific standards. For example, ensure a customer's credit limit has been independently verified or require a two-person approval for a significant vendor payment. Workflows in Microsoft Dynamics NAV focus on three main building blocks and workflow processes, short or long, are likely to be comprised of steps related to these three blocks, which are:

- > Approval—leave a work task, item, or document in a blocked or unapproved state until approved by a suitable person in your organization.
- > Notification—tell users that something has happened and/or that they need to take some kind of action.
- > Process automation—execute a process routine and have the Microsoft Dynamics NAV system calculate something or perform an action.

Along with approval, notification, and process automation, workflows in events react to real parameters in your business. Workflows can be triggered by credit limits, geographies, totals, individual owners, or any one of hundreds of other potential conditions.

Sales & Marketing

Out of the box, Dynamics NAV 2018 supports sales document and customer approval workflows that enable users to submit sales documents and customer verification, for approval according to a predefined hierarchy of approval managers. The approvals can be done with accounting manager or another similar significant role in your company. In this way, you can have workflows that need approval when sales discounts exceed a limit and need approval by sales managers, or you can have notifications sent to account managers when new customers are created in a particular geography.

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Purchase and Integration

Microsoft Dynamics NAV 2018 integration with Optical Character Recognition (OCR) services and purchase workflows go hand-in-hand. External invoices can be received, processed, and generate payment lines with workflows. At any stage a user can change the conditions for automatically processing and have documents sent for approval before processing if they exceed limits or some other condition.

Workflow groups and features

- > Sales & Purchase Documents
- > Sales & Marketing
- > Finance
- > Integration workflows
- > Administration
- > Job queue support for process automation
- > Email and Microsoft Dynamics NAV Notes for notifications
- > Workflow designer

E-services

Electronic Invoicing

Send and receive electronic invoices and credit memos as either files or using a document exchange service. Out-of-the-box, the PEPPOL format and the free Tradeshift document exchange service are supported, but the architecture allows for adding additional formats or document exchange service software (requires partner customization).

In addition, a number of standards used in electronic document exchange are now supported, including a Global Location Number (GLN) ID for customers and vendors, Global Trade Item Number (GTIN) for items, and international codes on units of measures, currencies, tax codes, tax schemes, and countries.

Furthermore, a new Document Sending Profile concept aggregates all tasks around sending documents, be it by email message, print, or file and enables you to set up preferred send behavior defaults for a customer or vendor, or a group of customers/vendors.

Received electronic documents are integrated into the document management features, that is, they are stored in Incoming Documents, along with PDF or scanned paper invoices, from which the user can create Purchase Invoices and Purchase Credit Memos, or General Journal Lines, and add text-to-account rules to automatically default account rules based on the vendor or line data. Errors and warnings in connection with the conversion are available for the incoming document, and links to the document enables navigation from any created document, posted document, or ledger entry in Microsoft Dynamics NAV.

Using a free Tradeshift account, documents can be sent to and received from other parties on the Tradeshift network, and delivery status as well as activity logging is available inside Microsoft Dynamics NAV for the document exchange service interaction.

Workflow can be added to automatically process any incoming electronic document, for example, from creating the corresponding draft purchase document in Microsoft Dynamics NAV to posting it and creating payment lines depending on workflow conditions, such as per vendor and/or amount.

Currency exchange rates

Update currency exchange rates using third-party web services that deliver exchange rates as XML files or streams. Updates can be performed manually or automatically using the job queue functionality. Yahoo and European Central Bank (ECB) currency feeds are supported out of the box, and other currency services can be added mapping the data in the feed into the currency exchange rates setup, a task that can be done in the end user client without developer permissions.

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Document Management

Incoming documents

Scanned incoming paper as well as electronic documents can be stored in Microsoft Dynamics NAV in Incoming Documents. From here, they can be further processed into documents in Microsoft Dynamics NAV. Links to the incoming document allow navigation from any created document, posted document, or financial transaction ledger entry in Microsoft Dynamics NAV.

From these locations, the linked original document(s) is accessible for viewing. It is also possible to find ledger entries that do not have an attached incoming document, and attach an incoming document entry manually.

Paper documents can be scanned and added manually to the incoming documents, or captured using a phone or tablet with the Microsoft Dynamics NAV app or, for example, Office Lens.

Optical Character Recognition (OCR)

The OCR integration enables you to extract unstructured PDFs, lines of an invoice, scanned invoices or credit memos into structured data, allowing further automatic processing similar to electronic documents. Add text-to-account rules to automatically default account rules based on the vendor.

Out-of-the-box, the Kofax¹⁾ Invoice Capture Service (ICS) for Microsoft Dynamics NAV is supported, but the architecture allows for use of a different OCR service or external software (requires partner customization). With the Kofax Invoice Capture Service integration, header, lines and total information can be extracted. Documents can also be forwarded directly to the OCR service using email messages. Take advantage of vendor synchronization. Vendor information including number, name, address, VAT registration, phone, and bank account data is transferred to Kofax ICS when synchronizing. To use Kofax Invoice Capture Service for Microsoft Dynamics NAV, an account must be created at Lexmark Invoice Capture Service and a free SKU will be available.

Incoming documents can be sent to and received from OCR manually, as well as automatically using a job queue.

1) formerly known as Lexmark

Incoming document workflow

Add workflows to automatically process any incoming electronic document, e.g.,

- > Send and receive documents to/from OCR automatically,
- > Create draft purchase document in Dynamics NAV
- > Post draft document
- > Create payment lines for posted documents

Workflow conditions can be defined by the user to control flow based on, e.g., vendor or amount.

Reporting

Document Reporting

A user can use Microsoft Word as a layout and editing option for any document report. A single report can be different layouts, either RDLC, Word or both.

End users can modify their own document reports and control which layout is the active one for a given report.

Preconfigured Excel Reports

The Business Manager and Accountant Role Centers have a new option in the ribbon for Excel Templates. From the Excel Templates list, users can choose a preconfigured report that is ready to print from Excel.

Report Scheduling

Users can schedule any report to run at a given point in time – either as reoccurring or one time – and be bundled into an Inbox on the Role Center

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Reporting Data Setup

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 sets.

Jet Reports Express for Dynamics NAV

This Microsoft Excel add-in with Microsoft Dynamics NAV - gives users a simple way to create basic reports and business queries inside Excel. It comes with specific core features like the Table Builder, GL reporting and more. It also includes a set of key reports for Excel users. Please go to Customer Source to learn more.

Other reporting components will have been described within its designated feature areas.

POWER BI CONTENT PACK

Connect to your Microsoft Dynamics NAV instance and PowerBI.com and immediately get access to a business performance dashboard with insights into your business.

The new PowerBI.com Content Pack for Microsoft Dynamics NAV is designed specifically for SMB owners, managers, and executives and provides 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. Automatic refresh will ensure you're always seeing the latest data.

[You can read more about Microsoft Dynamics NAV Power BI & Reporting capabilities here.](#)

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 role center.

Leverage the Microsoft Dynamics NAV 2018 Power BI Content Pack to get started, and utilize existing Power BI security to manage reports. Embedded Power BI reporting is easily visible from within the most highly-used lists in Dynamics NAV.

HUMAN RESOURCES MANAGEMENT (HRM)

Basic Human Resources

Efficiently manage your company's human resources. Group and track relevant employee information and organize employee data according to different types of information, such as experience, skills, education, training, and union membership. Store personal information, track job openings in your organization, and extract a list of candidates for these positions. Keep track of benefits and company items such as keys, credit cards, computers, and cars. Easily record all types of absences in units of measure that you define, and attach alternative addresses and relatives' names to employees.

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CLIENTS AND USABILITY

Microsoft Dynamics NAV can be deployed on-premise or in the cloud and customers can access their solution through role-based interfaces on their desktop, in a browser, or with a native mobile app on a tablet or mobile device.

With Microsoft Dynamics NAV you can do more on the go, in the office, or at home with different client opportunities.

Windows Client

Microsoft Dynamics NAV Windows client, where the starting point is the Role Center. The Role Center can be customized to users individual needs based on their role, company, and daily tasks and is also present in any of the other client types below

Web Client

The Web client gives users access to Dynamics NAV from a web browser. Users can view and modify data from a user-friendly interface that resembles the Microsoft Dynamics NAV Windows client. As in the Windows Client your starting page is the Role Center. Using the Web client there is no need to install Dynamics NAV components on your device. It's also easy to personalize your workspace directly in the browser and changes are immediately saved and only seen by you, even if you sign into the browser or app from another device.

Tablet Client

Microsoft Dynamics NAV Tablet client is targeted at users in small and medium sized businesses that want to access data from a tablet. Some of the advantages of offering tablet solutions are portability and flexibility, when the users is away from the desk, on the train etc.

Mobile Client

Microsoft Dynamics NAV Mobile client is Microsoft Dynamics NAV for iOS, Android, and Windows. Access all your data by connecting to your Microsoft Dynamics NAV 2018 server from your smartphone with the familiar, role-tailored experience and functionality on your mobile device.

SharePoint Client

The Microsoft Dynamics NAV SharePoint client enables you to interact with Microsoft Dynamics NAV data from a Microsoft SharePoint website—SharePoint Online or SharePoint On-premise. Users can combine Microsoft Dynamics NAV functionality with that of Microsoft SharePoint to create collaborative workspaces and share data and insight with more people within the company.

LANGUAGES

Multiple Document Languages

Set up alternative descriptions of your inventory items and print reports in multiple languages (for example, you can make invoices in the receiver's language). Descriptions can be linked to individual customers, which is especially useful for sales to foreign countries.

It can, however, be useful to customize the item descriptions even for domestic customers. The alternative item descriptions are automatically selected. To use the multiple language features, the texts for the alternative languages must be inserted in the relevant application objects.

Multiple Languages

Switch languages on the client in real time, provided that the language is available in the program. The language module can be used to run multilanguage functionality.

IMPORTANT: *Users can use this language module only if the personal license file contains the objects for the specific language.*

Each language module covers the functionality for only one specific language. For example, the Danish language module contains all Danish strings for Danish functionality. It does not contain Danish strings for French or other language functionality

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CONFIGURATION AND DEVELOPMENT

Application Builder (A la carte)

Change the business rules and special calculations that work behind the scenes. Business rules and special calculations are defined in C/AL (the C/SIDE application language). Although this granule includes access to C/AL, it does not permit access to existing C/AL code that updates write-protected tables (for example, postings). With Application Builder, you can create entirely new areas of functionality for your application, enabling you to tailor Microsoft Dynamics NAV to fit your entire organization. It also enables you to create 100 codeunit objects (numbered from 50,000 to 50,099). You can also take advantage of the functionality included for developers in the Navigation Pane Designer (for example, creating new menu items).

Page Designer

Change existing pages (windows displayed on the screen for data entry and inquiry), and it enables you to create 100 page objects (included and numbered from 50,000 to 50,099). The Page Designer also enables you to use the Navigation Pane Designer. This means, for example, that you can create new menu items. This module does not include access to C/AL from pages.

Report Designer

Change existing reports and create 100 new report objects (numbered from 50,000 to 50,099). This module provides access to C/AL (the C/SIDE application language) from reports used for defining special calculations and business rules. Create new reports from scratch or copy an existing report to use as a starting point. Every report in Microsoft Dynamics NAV is created using this tool and can therefore be easily customized. You will need the Microsoft Visual Studio Report Designer 2010 to design the layout of a report in the development environment. Microsoft Visual Studio Report Designer comes with Microsoft Visual Studio 2010 SP1 Professional, Premium, or Ultimate.

This module enables you to take advantage of the functionality included for developers in the Navigation Pane Designer (for example, creating new menu items).

Solution Developer (A la carte)

Change the business rules and special calculations that work behind the scenes. Business rules and special calculations are defined in C/AL (the C/SIDE application language). This module provides access to code that updates write-protected tables to the Merge and Upgrade Tools. You can also:

- > Change or create any object type.
- > Use the menu options Translate/Export and Translate/Import in the Object Designer.

(These options are not available with the Application Builder module).

Table Designer

Change existing table definitions and create ten new tables (numbered from 50,000 to 50,009). You can change properties on fields, such as the field name, decimal places, and maximum value, add new fields to existing tables, and create new tables to store data specific to your business. Create keys for sorting information and change or create new FlowFields and FlowFilters for “slicing and dicing” information in new ways. This module does not include access to C/AL from tables.

XMLports (100)

Create new or change existing XMLport objects. XMLport Designer provides access to C/AL (the C/SIDE application language) from XMLports used for defining special calculations and business rules. Every XMLport object in Microsoft Dynamics NAV is created using this tool and can therefore be customized easily. This module enables you to create 100 new XMLport objects (numbered from 50,000 to 50,099) and to take advantage of the functionality included for developers in the Navigation Pane Designer (for example, creating new menu items).

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Query Designer

The Query Designer provides the ability to modify existing queries in the application, as well as create up to 100 new queries. The Query Designer is the main tool for creating objects of the type Query. Query objects retrieve subsets of data spread across the database and are data pumps for various places within the application such as charts and business logic.

Application Objects

Codeunits (100)

Ten Codeunits are included in the Starter Pack and ten more are included in the Extended Pack. Additional groups of 100 are available in the Customization suite.

Reports (100)

Additional groups of 100 are available in the Customization suite.

Tables (10)

Ten tables are included with the Extended Pack. Additional groups of ten are available in the Customization suite.

XMLports (100)

100 XMLports are included with the Extended Pack. Additional groups of 100 are available in the Customization suite.

Queries (100)

Additional groups of 100 are available in the Customization suite.

Pages (100)

100 Pages are included with the Extended Pack. Additional groups of 100 are available in the Customization suite.

Other

Simplified Setup

From the Setup and Extensions button in the navigation pane in the Business Manager and Accountant Role Centers. You can use the assisted setup feature to guide you through setup scenarios, simplifying and streamlining the set up of selected areas. For example, you can:

- > Launch the application with as little user interaction as possible.
- > Use a predefined set of data to quickly set up main features.
- > Use the new Assisted Company Setup wizard to enhance first-time experiences.

Extended Text

Set up an unlimited number of lines to describe inventory items, resources, and general ledger accounts. You can set up extended text so that an additional description is copied automatically onto sales or purchase documents when lines are entered. The description can also be made date-sensitive to allow for special messages for a specific period—for example, to communicate certain promotional offerings or certain warranty conditions. You can also specify extended text for various languages.

Intrastat

Automatically retrieve the necessary data to report Intrastat information to statistics authorities. Local customs authorities can inform you whether your company is obligated to file such a report.

Job Queue

Automate service or schedule tasks. For example, you can automatically generate service contract renewals or service contract invoices.

You can set up the program to automatically check whether there are any batches to be processed on a specific date.

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Reason Codes

Define a set of reason codes that can be assigned to individual transactions throughout the system. This provides additional user-defined audit trails that complement the information already provided by system assigned audit trails and posting descriptions. Define reason codes on journals as well as on sales and purchase headers. For example, use reason codes to mark all ledger entries made in connection with the closing of the fiscal year.

Subsidiary (Unlimited)

For Perpetual Licenses the Software License Terms (SLT) permit qualified affiliates of the licensing company to grant systems access to employees of those affiliates, making subsidiary licensing redundant. Please refer to the SLT for full details.

Unlimited Companies

Provide competitive pricing if your business needs more than one company.

User IDs and Passwords

Create user IDs and passwords to limit access to the information in Microsoft Dynamics NAV to selected individuals. Control access to the solution and give all designated users full permissions. These security features are a function of the Microsoft Dynamics NAV database.

This feature can be used alone or in combination with the Permissions features.

User Tasks

You can create tasks to remind you of work to be done. It's possible for the user to create these for yourself, or assign tasks to colleagues.

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5. Learn More

On the Microsoft Dynamics website you can learn about what Microsoft Dynamics solutions can do for your organization and how to get started:

[Read more? Click here >](#)

Software License Terms Get specific product software license terms.

[License terms? Click here >](#)

CustomerSource—Microsoft Dynamics CustomerSource is a password-protected site for customers who use Microsoft Dynamics products. Included as a benefit of your service plan, CustomerSource allows you to search a powerful Knowledge Base for Microsoft Dynamics, view online training for Microsoft Dynamics, download updates, and find other timely information and resources virtually 24-hours a day. (Sign-in required.)

[24 hours CustomerSource. Click here >](#)

PartnerSource—Partners can get Microsoft Dynamics-specific information, order forms, and more:

[Information on PartnerSource. Click here >](#)



About Microsoft Dynamics NAV

Dynamics NAV 2018 is a quick to implement, simple-to-use business solution from Microsoft with the power to support your business ambitions.

Streamline and connect your entire business:

- > Deploy on-premises or in the cloud, whichever model best fits your business.
- > Help to increase productivity and to simplify your business by connecting key functions within your organization.
- > Manage your multilocation or multi-national growing business with global ERP features.
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