




# ENHANCEMENTS

Microsoft Dynamics NAV 2009

Simple. Smart. Innovative.





"Microsoft Dynamics NAV 2009  
has given us a big boost in  
terms of efficiency by helping  
us streamline our process flow  
and making it easier for our  
employees to be successful."

—Henrik Dam Jespersen, Owner and CEO, Hurup

*Microsoft Dynamics NAV 2009*

## Realize the benefits of upgrading

From its origins in the 1980s, Microsoft Dynamics® NAV, formerly Microsoft® Business Solutions–Navision®, has grown from a relatively simple financial management system into a comprehensive enterprise resource planning (ERP) solution on which more than 73,000 mid-sized organizations depend. Microsoft Dynamics NAV 2009 builds on years of incremental growth and technology innovation to deliver a superior business management solution that can streamline your specialized business processes and adapt to the unique way you do business. Easy to use, it helps your people work fast and smart so they can better contribute to your business success.

By upgrading to the latest version of Microsoft Dynamics NAV, you can give people the information and tools they need to help your business grow. Powerful new functionality and technology innovations include individual and organizational productivity enhancements; improved integration with Microsoft Office and other Microsoft products; easier customizations; and easier connectivity to other line-of-business systems.



## Invest in your future

Maintaining and upgrading your business management solution is an essential part of doing business. By taking advantage of improved functionality, new features, and enhanced capabilities, you can boost productivity, reduce costs, and improve customer service. You also can keep your solution up to date with technology advances such as new operating systems and improved infrastructure changes.

Too often, businesses hold back on upgrading their existing solution. One fear is that upgrading will be a costly, time-consuming process that won't yield measurable benefits. Another is that the existing solution won't have the staying power to justify an upgrade effort.

With more than two decades of growth and stability behind it, Microsoft Dynamics NAV is a solution that helps you keep pace in a changing marketplace. Upgrading to Microsoft Dynamics NAV 2009 is an exceptional opportunity to add value to your solution and help your business grow. Powerful functionality and breakthrough user experience and technology innovations simplify access to information, improve organizational agility, and maximize your investment in Microsoft products and technologies.

In addition, with Microsoft Dynamics NAV, organizations can maximize their investments in other Microsoft technology. Services and functionality offered through the Microsoft .NET Framework, Windows®, Microsoft SQL Server®, Microsoft BizTalk® Server, Microsoft SharePoint®, Microsoft Office, and emerging technologies can create synergies and enhance the capabilities of Microsoft Dynamics NAV. These combinations of software and technology serve to magnify the focus on productivity improvements and process optimization.

Keeping your business management solution up to date and your people equipped with the information and tools they need to drive business success is easy and cost-effective with the Business Ready Enhancement Plan. With the plan, you can count on a clear path to the future with smooth transitions to each new product generation and comprehensive training, support, and service. The plan includes all upgrades and service pack updates, along with investment protection, lifecycle support, and much more.

Get more value from Microsoft Dynamics NAV—today, tomorrow, and into the future.



## Upgrade easily

Microsoft Dynamics NAV 2009 is designed to help contain the costs of upgrading, avoid business disruptions, and streamline customizations to help deliver a low total cost of ownership.

### **Help control upgrade costs**

With an enhanced upgrade toolkit in Microsoft Dynamics NAV 2009, your local Microsoft Certified Partner can efficiently perform upgrades of Microsoft Business Solutions–Navision and Navision versions 2.0 and later. In addition, with your enrollment in the Microsoft Dynamics Business Ready Enhancement Plan, you can move to future solutions without repurchasing functionality you already license. The Business Ready Enhancement Plan enables you to realize your full potential every step of the way through your entire lifetime as a Microsoft Dynamics NAV customer. You get better value from your investment, budget predictability, and maximum productivity with access to exclusive training and support tools.

Help ensure upgrade success by working with an Upgrade Service Center, a specialized Microsoft Partner focused on performing Microsoft Dynamics NAV upgrades. These upgrade specialists work with your local partner to make sure that your upgrade to Microsoft Dynamics NAV 2009 is fast, efficient, and thorough.

### **Avoid business disruptions**

Major new technology innovations, including a more flexible solution architecture and Web services, make it easier than ever to adapt your business systems to meet changing demands while avoiding disruption to your operations. Tighter integration with Microsoft technologies and an intuitive user experience help you make full use of your existing productivity applications, accelerate employee learning, and decrease training costs.

### **Customize with ease**

The Client/Server Integrated Development Environment (C/SIDE®) enables rapid, cost-effective customizations so developers can make changes to the solution and implement them with ease. The fully open platform is ideal for businesses looking for one solution that can be adapted to changing needs and growth.





*Navision 2.6–3.0*

## New ways to compete

The solution has come a long way since the release of Navision Financials 2.60 in the spring of 1999. A standard, fully integrated system for business management and accounting, Navision 2.60 was easy to install, learn, and use. Navision 2.60 also delivered greater independence through a growing network of support professionals.

The subsequent release of Navision 3.0 in 2001 included significant enhancements and new functionality. Financial Management, Manufacturing, Distribution, Customer Relationship Management, and other Navision application areas delivered capabilities that enabled you to manage your entire business efficiently and cost-effectively.

And with Navision 3.0, e-commerce products and improved business and implementation methodologies came together to meet the specific needs of small to midsized businesses around the world—giving you the power to grow and compete internationally.



Navision 3.10

## Improved ability to profit from collaboration

With Navision 3.10, the entire line of Navision product offerings—Financial Management, Manufacturing, Distribution, Customer Relationship Management, and E-Commerce—was integrated into a single collaborative business management solution that provided fast way to realize full business potential.

Version 3.10 product offerings considerably strengthened capacity for business-to-business collaboration by delivering an IT infrastructure with rich e-commerce and Internet-based capabilities. For the first time, you could access your Navision data using a Web browser, saving valuable time previously spent searching in various programs and files for personal, team, corporate, and external information.

**Commerce Gateway**, a business-to-business solution, opened up Navision to electronic exchange of trading documents with other systems.

**Navision Customer Relationship Management** delivered strong functionality to support customer relationship management efforts.

**Navision Financial Management** enhancements delivered fast, easy implementation and gave you easier ways to access, view, and use financial information.

These improvements made it possible for you to interact with business partners electronically, manage customer relationships more effectively, and administer financial and supply chain tasks with greater efficiency.



## Enhanced efficiency and productivity

In addition to gaining a new product name—Microsoft Business Solutions—Navision—the acquisition of Navision by Microsoft in early 2002 delivered a number of benefits to Navision users.

### **Exchange financial information across software and technologies**

The 3.60 release introduced new financial management features and improved XBRL functionality. This release also added the capability to export dimensional information in Navision Analysis Views to Microsoft Office Excel®, which further deepened integration with Microsoft Office applications.

### **Manage supply chain issues more successfully**

Along with improvements to existing functionality, new distribution functionality introduced warehouse management systems, cycle counting, internal picks and putaways, and Automated Data Collection System (ADCS).

### **Use customer relationship management to increase profitability**

We introduced improved customer relationship management functionality—including integration with Microsoft Office Outlook® e-mail messages, tasks, contacts, and meetings—to help you increase profitability, keep your focus on profitable customers, and control all aspects of marketing and sales.

### **Tailor Microsoft Navision solutions more easily to meet specific needs**

Microsoft Navision 3.60 introduced features to better support solution developers, including a new debugger, the ability to run reports using the Application Server, and the means to identify data for exchange with external applications.

### **Log user changes made to Microsoft Navision master data**

The change log functionality made it possible to get a chronological list of all changes to any field in any table (except changes to “working documents” such as journals and sales and purchase orders) and to view who made the changes.



## Simpler, more flexible ways to grow your business

The 3.70 release of Microsoft Navision focused on improvements across many areas. In particular, enhanced functionality within Microsoft Navision Financial Management increased customer satisfaction, payment tolerance, information worker productivity, and administrative control.

New and improved financial management reports and functionality were also implemented in this release. Additional enhancements addressed market requirements for Microsoft Navision Basic Warehousing and supported greater ease of use.

Customer relationship management enhancements included improved Outlook integration that streamlined user interaction and provided more flexibility. Finally, numerous improvements increased the overall quality for Microsoft Navision Supply Chain Management.

### **Allocate payment tolerance amounts across all documents**

With improved functionality within Microsoft Navision Financial Management Payment Tolerance and Payment Discount Tolerance, you could specify whether tolerance would be automatically allowed or decided on a case-by-case basis.

### **Improved integration with Outlook**

With this release, you could now access relevant records in Microsoft Navision from Outlook and designate multiple meeting participants.

### **Meet customer-specific supply chain needs**

Many improvements to Microsoft Navision Distribution increased the solution's overall stability, ease of deployment, usability, and quality, including restructured warehouse capabilities.

### **Set up standard or default purchase and sales document lines**

Standard purchase codes minimized the data entry required for vendors with standard repetitive invoices or item purchases. With standard sales codes, you could set up standard or default sales document lines, including quantities, to minimize data entry for customers with standard repetitive invoices.



*Microsoft Dynamics 4.0*

## Simpler, more flexible ways to grow your business

Enhancements in Microsoft Dynamics NAV 4.0 included new and improved features designed to deliver an improved user experience, greater simplicity, and superior productivity. Improvements in release 4.0 provided you with superior ways to:

### **Gain targeted insight into your business**

Business Analytics in Microsoft Dynamics NAV added powerful analytical tools to help business decision-makers quickly gain access to relevant information, respond quickly to changing situations, and make faster, more confident business decisions.

### **Exchange information and transactions across companies**

Complex business processes were simplified with support for different charts of accounts, multiple databases, multiple currencies, and multiple languages.

### **Take the pain out of routine accounting processes**

This release gave you the ability to quickly reverse journal postings and changes for manual entries in general ledger journals—including related entries such as customer, vendor, and value-added tax (VAT) entries—with full audit support. You could also define, apply, and unapply partial payments. Plus, new consolidation features enabled global businesses to choose their preferred method for translating the general ledger account from a foreign entity.

### **Empower employees with a solution they'll want to use**

With Microsoft Dynamics NAV 4.0, employees were able to work with a familiar Outlook-like navigation menu that could be tailored to the way your business works.



# Microsoft Dynamics NAV 4.0 enhancements

## **Stay alert to changing business conditions**

Designed to map to your business requirements, Business Notifications in Microsoft Dynamics NAV 4.0 helped you gain controlled awareness of changing conditions so you could take action and resolve issues quickly.

## **Make decision support part of your everyday business operations**

Predefined key performance indicators (KPIs) provided fast insight into business health across your organization. You could view KPIs in graphical displays, with easy drill-down into Microsoft Dynamics NAV applications.

## **Produce key reports easily and efficiently**

Microsoft Dynamics NAV 4.0 offered new reports—Analysis Budgets, Sales and Purchase Reports, and Analysis Views by Dimension—so your organization could analyze data easily and efficiently. Employees could create reports directly from within Microsoft Dynamics NAV to get the insight they needed without adding complexity to the way they worked.

## **Manage manufacturing processes to keep pace in a competitive marketplace**

Manufacturing Foundation in Microsoft Dynamics NAV 4.0 provided core planning and process management capabilities, including deep visibility into work in process and support for order-by-order planning workflow, manual planning, graphical production schedule, Gantt charts, and easy production reporting. Along with an attractive entry price point, this flexible solution supported a phased implementation that enabled businesses to add more functionality when the time was right.

## **Work smoothly with Microsoft applications and technologies**

Microsoft Dynamics NAV 4.0 offered the look and feel of Outlook, along with improved integration with Microsoft Office applications that helped you make full use of the familiar productivity software you already used. Just as important, industry-standard Microsoft technologies could help fuel processes and performance across your entire solution.



*Microsoft Dynamics NAV 5.0*

## Free people to achieve more

Microsoft Dynamics NAV 5.0 has been designed to interact with the latest generation of Microsoft productivity, database, messaging, collaboration, and operating system software to deliver even more efficiency and insight to business decision-makers. It's familiar, it fits your current systems and planned upgrades, and it fuels business productivity and smart decisions as never before.

With this release, solution enhancements focus on three areas that can deliver significantly improved business value:

- **Powerful new and improved application functionality** that increases the value of your solution by fueling productivity, providing greater access to the information and tools your people need to work, and facilitating effective collaboration.
- **Simplicity in the way people use, adapt, and implement** Microsoft Dynamics NAV, with less complicated processes, new upgrade tools, and enhancements to the application and development environment.
- **Increased integrated innovation** that enables time-saving and streamlined business processes through deeper integration with Microsoft Office applications and other Microsoft products, including compatibility with Windows Vista®.



# Microsoft Dynamics NAV 5.0 enhancements

## **Fuel productivity with new and enhanced functionality in more than a dozen areas**

Improvements include new capabilities for sales and purchase document approval, integration with Windows Live™ Local Search for maps and directions, prepayment capabilities, Microsoft Office Open XML Formats to export data to Excel or Microsoft Office Word, and Record Links to documents on Microsoft Office SharePoint Server 2007.

## **Take action through contextual business intelligence**

Microsoft Dynamics NAV 5.0 provides deeper, more flexible business intelligence capabilities. With contextual business intelligence, everyone in your organization, whether working at a strategic, tactical, or operational level, can make confident decisions with scalable, easy-to-use business intelligence tools.

## **Connect employees, customers, and partners with enhanced collaboration features**

Help people work together more effectively within intranet and extranet environments with collaborative tools based on SharePoint technology. The new Record Links feature enables users to link documents to any Microsoft Dynamics NAV 5.0 record, such as a sales order or purchase order. People can store the documents in Microsoft Windows SharePoint Services or on a file server, access them as needed, and share them with others.

## **Integrate more tightly with the latest Microsoft products and technologies**

Office XML Formats make it easier to work with Microsoft Dynamics NAV 5.0 data in other Microsoft programs such as Excel and Word. Microsoft Dynamics NAV works smoothly with Windows Vista, the 2007 Microsoft Office system, Microsoft SQL Server 2005, Microsoft BizTalk Server 2006, SharePoint Server, Microsoft Office PerformancePoint® Server, and the Microsoft .NET Framework.

## **Get up and running fast with Microsoft Dynamics Sure Step and the Rapid Implementation Methodology**

Now fully integrated into Microsoft Dynamics NAV 5.0, the Rapid Implementation Methodology (RIM), part of Microsoft Dynamics Sure Step, provides a standardized, global methodology and suite of tools that facilitate faster, easier implementations and upgrades. RIM includes a project schedule for scoping, questionnaires to collect key information, industry data files to upload industry-specific data, and master data templates to facilitate data migration.

## **Join a growing online community of partners and customers**

Share knowledge through enriched online forums, tutorials, best practices, and improved, process-oriented user documentation.



## Innovation to help people excel

Microsoft Dynamics NAV 2009 helps people work faster and more effectively than ever before and gives your business the flexibility to adapt to new opportunities and growth. The 2009 release offers breakthrough user experience and technology innovations that provide simplified, role-based access to relevant information, improve organizational agility, and streamline integration with a wide range of applications and data sources. With improved reporting and tighter Windows SharePoint Services integration, your people can share information and collaborate more effectively to continue driving your business forward.

The release of Microsoft Dynamics NAV 2009 adds these innovations to the product:

- **Role Centers** that provide role-based views of data so people can organize and prioritize their work, and infrequent users of Microsoft Dynamics NAV can be productive right away.
- **Three-tier architecture** that makes it easier for you to tailor Microsoft Dynamics NAV to meet specific business requirements while giving you the flexibility to add functionality as your business changes and grows.
- **Web services support** that simplifies the integration of Microsoft Dynamics NAV into your existing IT infrastructure and makes it easier for your Microsoft partner to integrate the program with other line-of-business systems and service-oriented applications.
- **Enhanced reporting** and business intelligence capabilities that reduce ad-hoc requests for information and reports and empower managers and employees to make fast, informed decisions.



# Microsoft Dynamics NAV 2009 enhancements

## **Help people excel at their jobs**

A revolutionary role-based graphical user interface—called the Role Center—gives your employees access to relevant information with just a few clicks. With an overview of their tasks and activities, they can easily organize and prioritize their work. Microsoft Dynamics NAV 2009 comes with 21 Role Centers that can be personalized to fit unique work styles, and you can work with your partner to build new ones that meet specialized business needs.

## **Improve focus and agility**

The new Microsoft Dynamics NAV 2009 three-tier architecture makes it easy to tailor your business management solution to meet specific business and industry requirements while giving you the flexibility to add features and functionality as your business changes and grows. The service-oriented architecture provides the infrastructure to extend or adapt your solution and add more users with minimal disruption to your business.

## **Connect your business with a wide range of applications and data sources**

By using Web services, developers and partners can simplify the effort to connect Microsoft Dynamics NAV with existing IT systems. And, Microsoft Dynamics NAV 2009 now works with the Microsoft .NET Framework, helping to simplify IT administration and making it easier to integrate with or build add-on .NET applications.

## **Make the most of your IT investments in Microsoft programs and services**

Microsoft Dynamics NAV 2009 is tightly integrated with SharePoint Server and Windows SharePoint Services—powerful software that can help you to communicate and collaborate more effectively. Employees can easily access Outlook, Excel, and Word from their Role Centers, making it easy to find, use, and share information. Also, combined with SQL Server Reporting Services and SQL Server Analysis Services, Microsoft Dynamics NAV 2009 enables you to take advantage of the powerful performance and business intelligence capabilities of SQL Server 2008 to accelerate business insight.



## Add value by upgrading to Microsoft Dynamics NAV 2009

The history of Microsoft Dynamics NAV is one of continuous effort to deliver enhanced functionality, technology improvements, and low total cost of ownership, while maintaining the simplicity that has always been a core value of this solution. Upgrading to Microsoft Dynamics NAV 2009 helps you keep processes up to date with changing business requirements, sharpen your competitive edge, maximize your operational efficiency, and take your business to the next level of success. Upgrade to Microsoft Dynamics NAV 2009 to take advantage of:

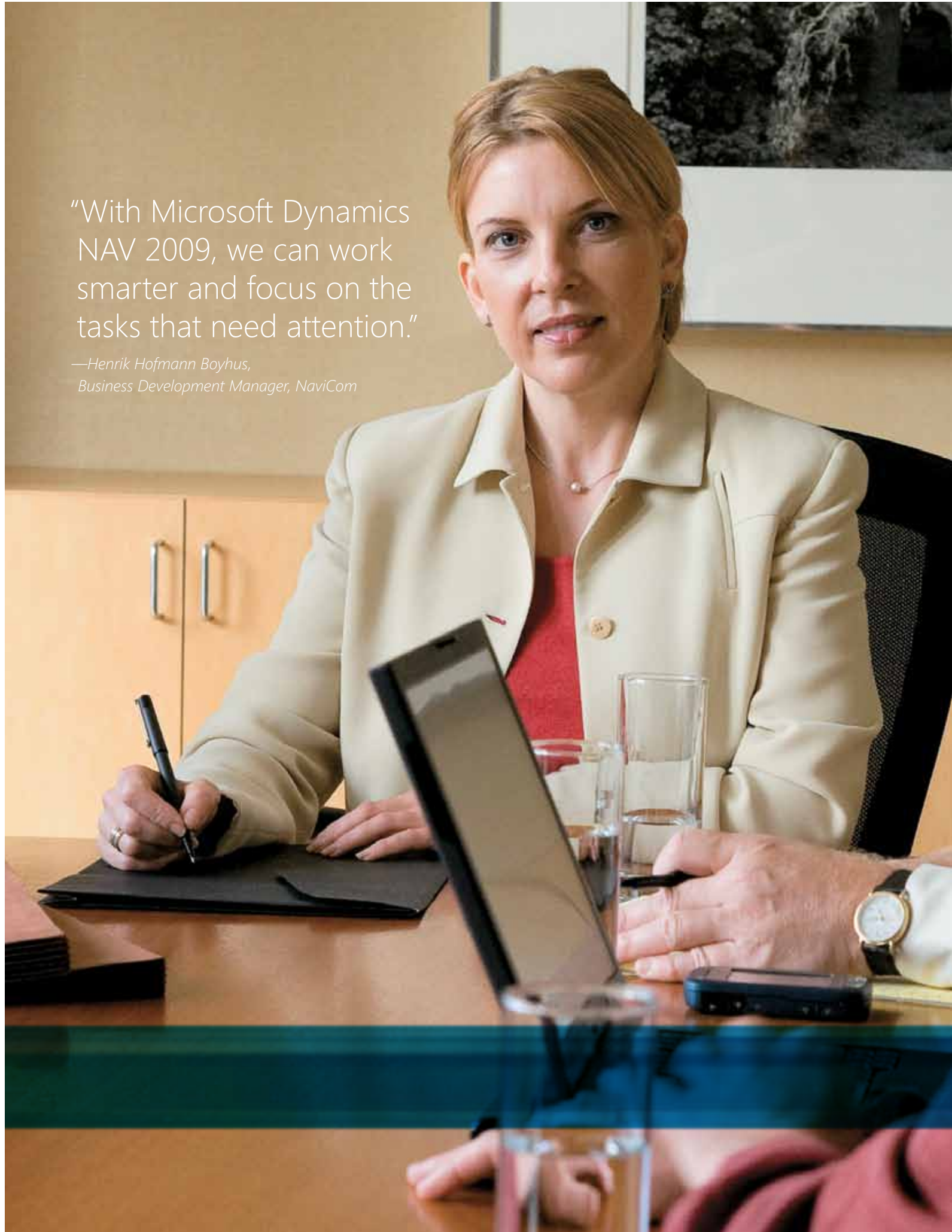
- Role Centers that give people access to the information, processes, and tools they need to work quickly and effectively.
- Technology innovations that make it easier to connect systems, share data, and strengthen relationships.
- Reduced need for customizations, which lessens maintenance complexity and lowers cost.
- Better integration with Microsoft Dynamics NAV throughout your organization and with other software to further improve processes and productivity.

Simple. Smart. Innovative. Microsoft Dynamics NAV 2009 can help people unleash their individual potential and, in turn, fuel new levels of business performance.



“With Microsoft Dynamics NAV 2009, we can work smarter and focus on the tasks that need attention.”

—Henrik Hofmann Boyhus,  
*Business Development Manager, NaviCom*





## Enhancements comparison

	Software Version					
	3.10	3.60	3.70	4.0	5.0	2009
<b>FINANCIAL MANAGEMENT</b>						
Dimensions	◆	◆	◆	◆	◆	◆
XBRL	◆	◆	◆	◆	◆	◆
Payment Tolerance/Payment		◆	◆	◆	◆	◆
Discount Tolerance						
Change Log		◆	◆	◆	◆	◆
Business Analytics				◆	◆	◆
Intercompany Postings				◆	◆	◆
Intercompany Purchase Cost Distribution					◆	◆
Improved Payment Functionality (Partial Payment)				◆	◆	◆
Prepayments					◆	◆
Unapply and Reversal of Journal Postings				◆	◆	◆
Consolidation Improvements				◆	◆	◆
Predefined KPIs				◆	◆	◆
Sales and Purchase Document Approval					◆	◆
<b>CRM</b>						
Document Management	◆	◆	◆	◆	◆	◆
Opportunity Management	◆	◆	◆	◆	◆	◆
Interaction Log	◆	◆	◆	◆	◆	◆
Campaign Management	◆	◆	◆	◆	◆	◆
Telephony Application Programming Interface (TAPI)	◆	◆	◆	◆	◆	◆
Classification Management	◆	◆	◆	◆	◆	◆
Contact Management	◆	◆	◆	◆	◆	◆
Outlook Integration		◆	◆	◆	◆	◆
Service Item Management	◆	◆	◆	◆	◆	◆
Service Order Management	◆	◆	◆	◆	◆	◆
Service Contract Management	◆	◆	◆	◆	◆	◆
Planning and Dispatching	◆	◆	◆	◆	◆	◆
Service Price Management	◆	◆	◆	◆	◆	◆

	Software Version					
	3.10	3.60	3.70	4.0	5.0	2009
<b>E-BUSINESS</b>						
Commerce Gateway	◆	◆	◆	◆	◆	◆
• Based on Microsoft BizTalk Server		◆	◆	◆	◆	◆
Employee Portal	◆	◆	◆	◆	◆	◆
<b>PROJECT MANAGEMENT</b>						
Jobs	◆	◆	◆	◆	◆	◆
<b>SUPPLY CHAIN</b>						
Warehouse Management	◆	◆	◆	◆	◆	◆
• Warehouse Management Systems		◆	◆	◆	◆	◆
• Internal Picks and Put-Aways		◆	◆	◆	◆	◆
• Automated Data Capture System (ADCS)		◆	◆	◆	◆	◆
<b>MANUFACTURING</b>						
• Finite Loading of Capacity	◆	◆	◆	◆	◆	◆
• Manufacturing Foundation (manual planning, graphical production schedule, production reporting)				◆	◆	◆
<b>INVENTORY</b>						
• Item Charges	◆	◆	◆	◆	◆	◆
• Cycle Counting		◆	◆	◆	◆	◆
• Costing	◆	◆	◆	◆	◆	◆
• Item Tracking	◆	◆	◆	◆	◆	◆
Standard Cost Worksheet			◆	◆	◆	◆
Contract Pricing	◆	◆	◆	◆	◆	◆
Campaign Pricing			◆	◆	◆	◆
Supply Planning			◆	◆	◆	◆
Business Notification				◆	◆	◆
Items Budget and Analysis Reports				◆	◆	◆

	Software Version					
	3.10	3.60	3.70	4.0	5.0	2009
<b>FOUNDATION (AND OVERALL SOLUTION)</b>						
Application Server	◆	◆	◆	◆	◆	◆
Record Level Security on Microsoft SQL Server	◆	◆	◆	◆	◆	◆
Application Hyperlinking	◆	◆	◆	◆	◆	◆
Reports on Application Server		◆	◆	◆	◆	◆
Print SQL Server Reporting Services from within Microsoft Dynamics NAV						◆
Windows Vista Design						◆
Setup Checklist Wizard			◆	◆	◆	◆
Menu Display According to User Permission			◆	◆	◆	◆
Debugger	◆	◆	◆	◆	◆	◆
XMLport Object				◆	◆	◆
ODBC Driver	◆	◆	◆	◆	◆	◆
Outlook-Like User Interface				◆	◆	◆
Improved Navigation				◆	◆	◆
Multilanguage Support	◆	◆	◆	◆	◆	◆
HTML Help Support	◆	◆	◆	◆	◆	◆
Infrastructure Deployment for Multi-Site Companies	◆	◆	◆	◆	◆	◆
Office XML					◆	◆
Record Links to Documents in Microsoft Office SharePoint Server					◆	◆
Rapid Implementation Methodology				◆	◆	◆
Windows Live Local Search Integration (Powered by Microsoft Virtual Earth™)					◆	◆
Three-Tier Architecture						◆
Web Services						◆
Role Centers						◆
Microsoft .NET Framework						◆



For more information about Microsoft Dynamics NAV 2009,  
visit [www.microsoft.com/dynamics/nav](http://www.microsoft.com/dynamics/nav).

**About Microsoft Dynamics**

Microsoft Dynamics is a line of adaptable, easy-to-use enterprise resource planning (ERP) and customer relationship management (CRM) applications that enable business decision-makers to run their businesses efficiently and drive business success. Delivered through a network of channel partners providing specialized services, these integrated, adaptable ERP solutions work like and with familiar Microsoft software to streamline processes across an entire business.

**For more information**

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