



Microsoft Dynamics NAV

Microsoft Dynamics NAV R2 Key Highlights

White Paper

This document provides an overview of the key features and enhancements in Microsoft Dynamics® NAV 2009 R2, scheduled for release in Q4 of CY2010.

10/1/2010

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INTRODUCTION

This document provides an overview of the key features and enhancements in Microsoft Dynamics® NAV 2009 R2 –scheduled for release in Q4 of CY2010. This release is significant as it delivers several new productivity benefits to customers and new ways for our partners to work smarter and grow their business.

Microsoft Dynamics NAV 2009 R2 delivers on our software-plus-services vision. Features such as Online Payment Service for Microsoft Dynamics NAV, Microsoft Dynamics CRM online integration, RoleTailored Access for Remote and Roaming Users, and .NET Interop help enable on-premise or partner-hosted deployment and extension of Microsoft Dynamics NAV – with Microsoft and with partner developed services in the cloud.

This release will also provide new ways to take advantage of the RoleTailored user experience with exciting business data visualization capabilities, more integration with the Microsoft stack including Windows 7 user experience integration, integration with Microsoft CRM out of the box and other improvements that empower employees to be more productive through intuitive and faster ways of working.

Finally, Microsoft Dynamics NAV 2009 R2 delivers many enhancements that will directly benefit partners who are developing new solutions and looking for ways to expand their business.

MICROSOFT DYNAMICS CRM INTEGRATION

Today, more than ever, business managers realize the importance of understanding their customers in order to serve them better and remain competitive in a dynamic market. Many companies use a CRM system to manage their customers, contacts, and sales order information, and an ERP system to manage their back office operations. However, they are not always able to synchronize the information in their CRM system with the information in their ERP system. At the end of the day, companies lose time, data, and valuable customer knowledge and insight trying to keep information up to date in both systems.

Microsoft Dynamics NAV 2009 R2 delivers integration with Microsoft CRM out of the box enabling companies to increase productivity across the organization. The integration is enabled using the Connector for Microsoft Dynamics, which utilizes Web Services to retrieve data in Microsoft Dynamics NAV and Microsoft CRM and synchronize the data between the two systems. What makes the Connector for Microsoft Dynamics so appealing is that Microsoft has developed it specifically for ERP to CRM integration for Microsoft Dynamics products – with Microsoft Dynamics GP as the first successful integration.

Customers have the flexibility to choose between integration to hosted or on-premises Microsoft Dynamics CRM or Microsoft Dynamics CRM Online with the option to migrate to either option over time.

Out-of-the-box functionality will provide basic integrations between Microsoft Dynamics NAV and Microsoft CRM making it easy to get data flowing between the two systems with minimal setup.

The solution is easy to install, use, and customize so partners will be able to extend the solution to include additional integration scenarios that are specific for vertical needs. Moreover, customers can customize the solution to support their own business processes.

The comprehensive UI makes it easy to set-up additional mappings for existing entities so that custom fields can be mapped. Additionally, synchronising custom entities between the two systems is

straightforward. Entities can be synchronised on a schedule that suits the individual entity and this is specified in the user interface of the Connector for Microsoft Dynamics.



Integrations to Microsoft CRM that we are planning to support out of the box in Microsoft Dynamics NAV 2009 R2.

The Connector for Microsoft Dynamics enables comprehensive monitoring of active integrations to make it simple to troubleshoot issues and keep the right data synchronised between the two business critical systems – Microsoft Dynamics CRM and Microsoft Dynamics NAV.

The current version of the Connector for Microsoft Dynamics supports integration to Microsoft CRM 4.0, the current version of Microsoft CRM, and will support Microsoft Dynamics NAV 2009 SP1 R2. An adapter for integration will be available to coincide with the launch of Microsoft CRM 2011, which means integrating with the latest versions of Microsoft products will always be possible with the Connector for Microsoft Dynamics.

The Connector for Microsoft Dynamics will be available to customers who have Microsoft Dynamics NAV and Microsoft CRM at no additional cost.

NEW BUSINESS OPPORTUNITIES FOR PARTNERS

The out of the box integration with Microsoft CRM gives partners new opportunities to attract new customers. Microsoft built the Connector for Microsoft Dynamics from the ground up with the main purpose of ensuring easy customization so partners can build their own solutions on top of the integration and thereby enable customized synchronization scenarios for customers.

Partners will be able to attract new customers who are looking to utilize the extensive functionality available in MS CRM. The benefits of customer relationship management (CRM) integration are easy and convincing to demonstrate, including eliminating redundant data entries, keeping information up to date in both ERP and CRM solutions and providing salespeople with the ability to access detailed

business information about contracts, pricing and product availability quickly. Employees will be able to focus on the areas they are responsible for in a tool they are familiar with – whether they are working with financial data or customer contacts.

ONLINE PAYMENT SERVICE FOR MICROSOFT DYNAMICS NAV

ERP system users can now connect to and benefit from a growing number of online services from Microsoft Dynamics ERP. The Payment Service for Microsoft Dynamics NAV is one example. The integration included in Microsoft Dynamics NAV 2009 R2 will allow Microsoft Dynamics NAV to process payment transactions from the Microsoft Dynamics NAV interface automatically. The solution will enable an authorization process and automatic capture of the required amount during posting. Furthermore, it is possible to refund against an existing transaction.

With this Microsoft-hosted service, users will be able to accept credit and debit card payments from Sales Orders and Invoices. The Online Payment Service works with all major credit cards and leading payment processing services. The number of available payment providers is growing in the US and Canada and today already include First Data, CyberSource, PayPal, and more. Support in other countries, including Europe, is underway. In addition, the Online Payment Service for Microsoft Dynamics NAV is compliant with the Payment Card Industry Data Security Standard (PCI DSS.)

This new feature in Microsoft Dynamics NAV 2009 R2 boosts productivity for customers. Unlike other payment services that require a third-party connection to payment providers, the Payment Service for Microsoft Dynamics NAV is a Microsoft –hosted service and the capabilities are built into the application, streamlining the payment process. What's more, because it is an online service, the availability of the service can be expanded quickly and easily – without having to bother with implementing a new device or new software.

Other benefits include:

1. **No need for third-party installation.** Authorize and settle credit card transactions directly from Microsoft Dynamics NAV, which means there is no need for third-party installation or configuration other than upgrading to or using Microsoft Dynamics NAV 2009 R2.
2. **Familiar user interface.** The payment information is built in to the existing order entry process – using the Sales Order and the Invoice as a starting point.
3. **Multiple payment providers.** The Payment Service supports most major credit cards (Visa, MasterCard, American Express, and Discover) and debit cards, and performs authorizations, settlement, voids, and refunds. It is possible to accept more than 20 international currencies (U.S. and Canadian dollars, Euros, British Pounds, Yen, and more). Payment providers include First Data, CyberSource, PayPal, and more. Visa and MasterCard PCI DSS validated service provider.
4. **Acceptance of multiple credit cards.** The choice of payment provider determines the available cards. Payment Services for Microsoft Dynamics NAV is supported by many of the top payment-processing agencies. Choose the one that meets your needs—you can use your existing merchant account or go through a simple sign-up process to get a new account. It is even possible to associate different processors for each type of credit card to help reduce your costs.

5. **Secure transactions.** The security for critical data and information is built-in, including storage of customer credit card information. Encryption is done on stored data and the payment service is compliant with Payment Card Industry Security Standard.

NEW BUSINESS OPPORTUNITIES FOR PARTNERS

The Online Payment Service for Microsoft Dynamics NAV is designed to give partners a foundation they can build on. It is easy to customize and partners will be to grow their business by extending the solution to include more payment processing scenarios for their customers. The Online Payment Service for Microsoft Dynamics NAV boosts productivity for partners by providing:

- Simple credit card process out of the box
- Connection through Microsoft-hosted service used by Microsoft ERP systems
- Support for country and currency depending on the payment provider
- Extension possibilities to Level 2 and Level 3
- Security and encryption can be modified and expanded

ROLE TAILORED CLIENT ACCESS FOR REMOTE AND ROAMING USERS

A key goal for Microsoft Dynamics NAV 2009 R2 is finding cost-effective ways to increase productivity for more people across the company. One way to do this is by extending the value of the RoleTailored Client to more users, including remote or roaming users.

Microsoft Dynamics NAV 2009 R2 supports direct access from the Microsoft Dynamics RoleTailored experience over the Internet. This enables remote or roaming users to take advantage of the richness of the RoleTailored interface and the many integration features connected to local resources, such as printers, the operating system, and Microsoft Office. It is possible to export Microsoft Dynamics NAV data to Microsoft Office applications without having to add the cost of a terminal server. This means customers will be able to leverage the investments already made in desktop applications in the company.

In addition, this helps to reduce the complexity and infrastructure costs compared with using other applications such as Citrix, enhancing the quality of experience, especially for hosting partners offering cloud-based Microsoft Dynamics NAV deployments.

This new feature in Microsoft Dynamics NAV 2009 R2 includes an authentication dialogue box that will prompt for user credentials and the ability to add a secure socket layer (SSL) certificate to the NAV Server.

NEW BUSINESS OPPORTUNITIES FOR PARTNERS

Partners will be able to approach new customers who are considering a hosting scenario for their Microsoft Dynamics NAV solution and smaller companies who may want to extend their solution but do not want to invest in on-premise hardware.

TREEMAP ANALYSIS AND TIMELINE VISUALIZATION

The saying “A picture speaks a thousand words” may be the best way to explain the new business data visualization capabilities in Microsoft Dynamics® NAV 2009 R2. In a dynamic business environment, managers must make business-critical decisions quickly and without hesitation. They turn to the wealth of data in their business system for answers but struggle to absorb and understand the large amounts of data quickly. Moreover, when it is time to make a decision, they may not have a complete picture of all the options available to them – and the consequences of those options. Building on the client extensibility capabilities in Microsoft Dynamics NAV 2009 SP1, the new business data visualization capabilities in Microsoft Dynamics NAV 2009 R2 include Treemap and Timeline business data visualizations. These are RoleTailored client control add-ins that provide a unique way to view and analyze business data in Microsoft Dynamics NAV. This capability gives companies a powerful way to make informed and more accurate decisions by enabling managers to:

- Picture the business** (delivers mental models).

Visualizations provide a mental model for business data and data dependencies. By seeing a visual representation of data and data dependencies, even non-expert users can more easily understand business data.

- Understand the business**; know state and trends (provides insight).

Visualizations are an entry point for understanding the current state of a business and trends. Users can drill down and filter data to provide intuitive, ad hoc analysis.

- Know how to act** (identifies actionable items and tasks).

Users can use business data to find items of interest and outliers that are based on certain objectives or measures. Those outliers can be converted into high-priority actionable tasks and possible actions.

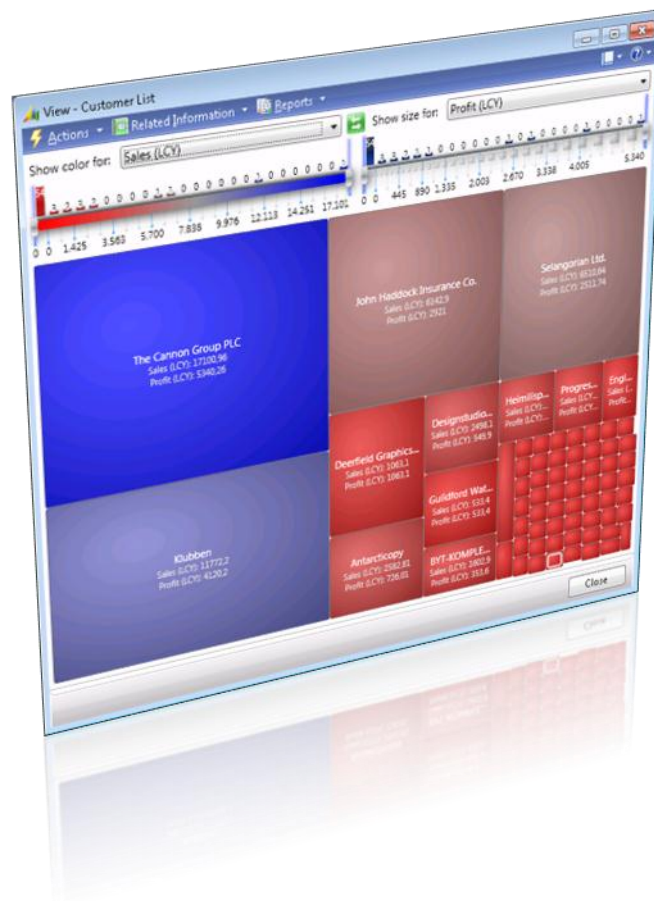
- Act wisely** (provides decision support, problem solvers, and optimization).

Problem solvers and optimizers help users decide on a strategy. They can provide suggestions for an action strategy that can lead to an optimal result for one or more objectives.

- Understand consequences** (visualizes consequences before acting).

Visualizations help users understand the impact of actions before they are committed. Visualizers can account for dependencies, predict the outcome of actions, and provide visualizations to users. Users will be able to **do their** work with the help of visualizations based on inventory data, sales orders, production orders, and other manufacturing-related data, and drill down into the details of the data from the actual visualization, to understand the reasons why and determine the best course of action. For example, if a user needs to understand why there is a decrease in the company's overall profit margin, the user will be able to visualize the trend, identify the item or items contributing to the loss, and create scenarios with various information and dimensions to determine what action or actions to take.

This release will include the Treemap Analysis – a feature that enables the comparison of any two values, for example sales and profits, and can be used to help identify outliers and actionable items. Combined with histogram-based visual filtering and integration into business logic and the user interface (UI) of the RoleTailored client, this is a powerful tool for end users.



The Treemap visualization is delivered as a RoleTailored client control add-in for Microsoft Dynamics NAV 2009 R2 and Microsoft Dynamics NAV 2009 SP1. You can use the Treemap visualization to integrate the visualization into customer projects and your add-in solutions. No dedicated granule is required.

This release will include the Timeline visualization implemented in the Item Availability application scenario, which allows a user to understand the availability of an item over time, compare multiple scenarios (with forecast, with planning events) and change the planning interactively in the visualizations.

NEW BUSINESS OPPORTUNITIES FOR PARTNERS

Microsoft Dynamics NAV 2009 R2 includes the possibility to create customized visualizations so ISV partners will be able to build visualization capabilities to fit the unique needs of their customers.

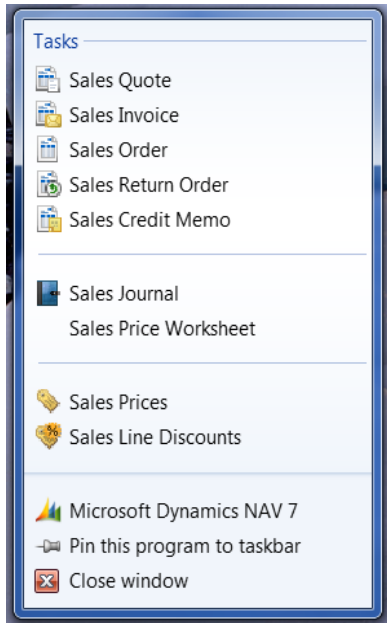
LEARN MORE

These two white papers provide more detailed information about the business data visualization capabilities in Microsoft Dynamics NAV 2009. They are available on PartnerSource. Read them to learn more about the components and installation.

- *Interactive Timeline Visualization for Microsoft Dynamics NAV 2009 R2 and Microsoft Dynamics NAV 2009 SP1*

- *Treemap Business Data Visualization for Microsoft Dynamics NAV 2009 R2 and Microsoft Dynamics NAV 2009 SP1*

WINDOWS 7 EXPERIENCE IMPROVEMENTS



Jump Lists make it easier for users to access recently used Microsoft Dynamics NAV actions, tasks and pages.

Microsoft Dynamics NAV 2009 R2 will support the usability and visual improvements in Windows 7. These deliver significant productivity benefits by making it easier to access and see frequently used programs, documents, links, and more. Microsoft Dynamics NAV 2009 R2 users will be able to take advantage of familiar Windows 7 features such as Jump Lists, Taskbar Preview, Thumbnail Preview and Icon Overlay functionality from the Role Center.

In Windows 7, Jump Lists take you right to the documents, photos or websites you use each day. In Microsoft Dynamics NAV 2009 R2, Jump Lists will take you to your preferred Microsoft Dynamics NAV actions, tasks and pages such as contacts, vendors, invoices, sales orders, sales quotes, and more. It will also be able to configure the Jump Lists according to the user's role to gain a RoleTailored experience.

This release will also support icon overlay for warnings, errors and progress information, which gives the user immediate status information on programs and activities from the Windows 7 taskbar. The user will also be able to place their mouse over the Microsoft Dynamics NAV icon on the task bar to see a thumbnail preview of each open window including company name for quickly identification of the company. All of these usability enhancements help improve navigation and minimize the number of clicks required to reach the information you need.

FILTER ON SUBFORMS

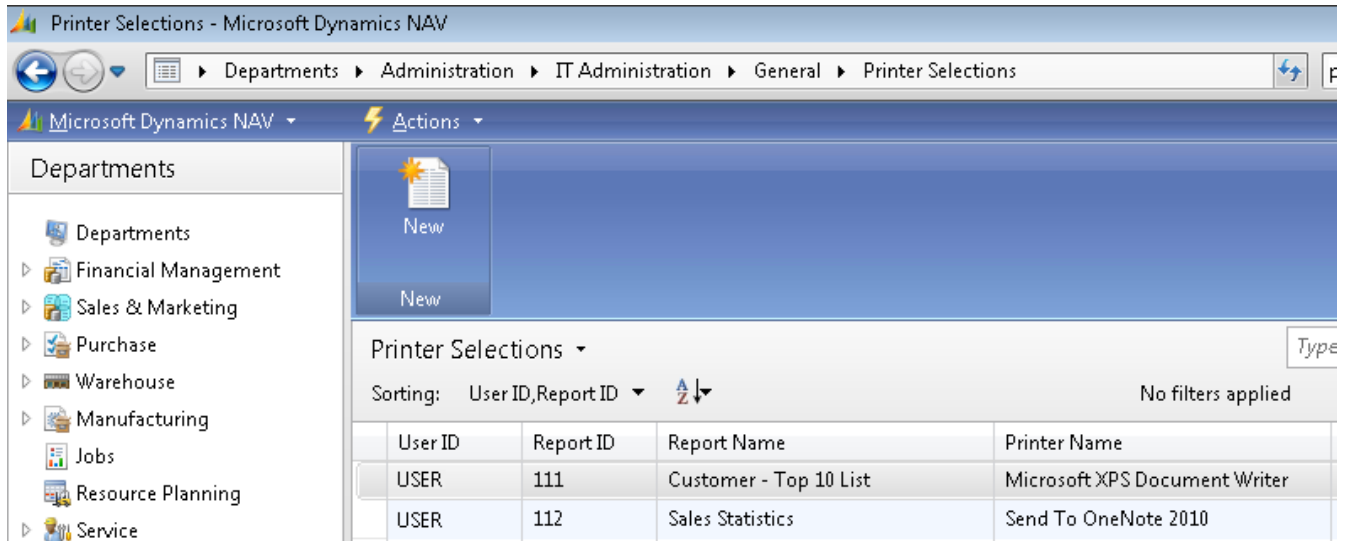
In addition to the Windows 7 user experience improvements, Microsoft Dynamics NAV 2009 R2 will include other enhancements that improve the way users interact with the application. For example, the Filter on Subforms feature makes it easier for users to get to the information they need faster. It can sometimes be difficult to find specific information, like a certain item number, on a large purchase order containing many lines of information. Since there is no search option available, the user must scroll through the entire order to find the information they need. This slows productivity. In Microsoft Dynamics NAV 2009 R2, it is possible to find specific information by applying the filter to specific items on an order or across all orders.

NEW BUSINESS OPPORTUNITIES FOR PARTNERS

The Filter on Subforms feature is a particularly effective feature to demonstrate for prospective customers as it shows how companies can improve their work processes with Microsoft Dynamics NAV 2009 R2. Partners can demonstrate this capability on any subform with lines, such as credit memos, sales orders, and purchase orders.

PRINTER SELECTIONS

It will also be possible to set up printer selection for reports from the RoleTailored Client. This means that a specific report will always print to a specific printer so the user does not have to select the correct printer every time.



.NET Interop

With Microsoft Dynamics NAV 2009 R2, partners will be able to harness the full power of the Microsoft .NET Framework and applications. Microsoft Dynamics NAV 2009 introduced calling into C/AL from .NET using web services. Now it is possible to use .NET types in code directly from C/AL. This enables C/AL developers to invoke the vast number of existing .NET-based APIs and reinforces the strength of the new modern 3-tier Microsoft Dynamics NAV 2009 platform. Partners will be able to integrate their .NET applications with Microsoft Dynamics NAV and build rich new application programs that are tightly integrated with Microsoft Dynamics NAV in a managed code environment. Integration with third-party assemblies is just as easy as with .NET Framework components and can expand the horizon of your Microsoft Dynamics NAV system dramatically.

NEW BUSINESS OPPORTUNITIES FOR PARTNERS

With full access to the Microsoft .NET Framework and the ability to integrate with original and third party applications, partners will be able to expand their business by developing new and better solutions and provide hosted services based on Microsoft Dynamics NAV. Easier integration with the Microsoft .NET Framework means more valuable data can be shared among applications.

PARTNER PRODUCTIVITY ENHANCEMENTS

Partners are at the heart of the Microsoft Dynamics NAV business. We continue our commitment to enabling partners to be more productive and take advantage of new business opportunities by empowering them with the platform and tools they need to develop, setup, configure and customize vertical solutions for their customers.

Microsoft Dynamics NAV 2009 R2 includes several significant partner productivity improvements including:

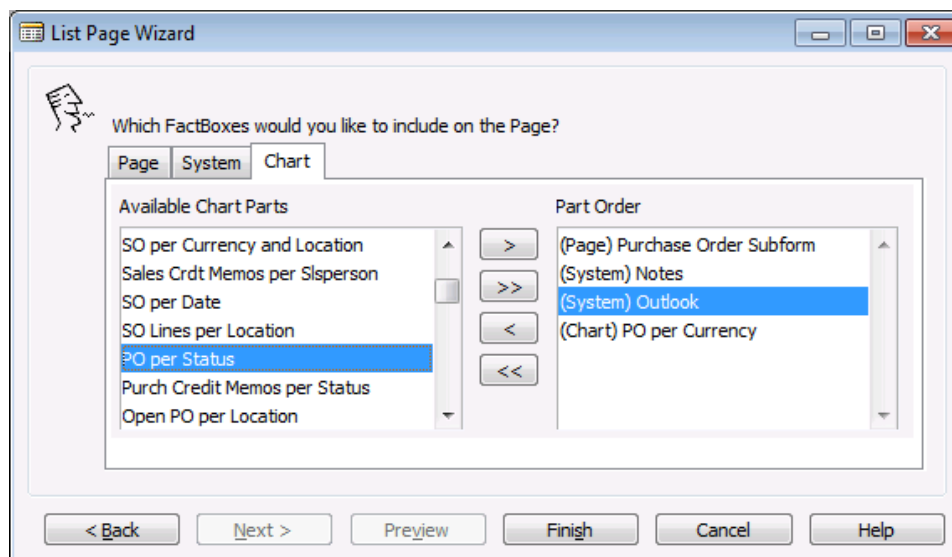
SYSTEM INDICATOR

Partners will now be able to see clearly, where they are working in the system. The System Indicator feature enables partners to see in what context they are working in the system – which company, database, development environment, etc. It will also be possible for partners to personalize the System Indicator with text, colors, and styles. Super users and administrators will be able to see if they are in configuration mode of the RTC. Users will be able to see if they are in training environment or see a company name – full or a customized text. Super users and administrators can also disable the personalization capability, which is especially relevant for computers with many casual users. This feature is a big productivity boost for partners as it helps developers who, for example, are working on a production system and a test system on the same computer, to see clearly what system they are working in.

PAGE DESIGNER IMPROVEMENTS

A key advantage to the RoleTailored user experience is that users have an overview of the information that is relevant to their role in the company. FactBoxes are an important part of the RoleTailored user experience. They show the user related information without having to open a new page.

Developers building RoleTailored solutions use the Page Designer to create and customize pages, including FactBoxes. We have made the Page Designer in Microsoft Dynamics NAV 2009 R2 even more efficient by providing support for picking FactBoxes, which makes it easier developers to include FactBoxes on pages.



It is easier to create Pages with FactBoxes in Microsoft Dynamics NAV 2009 R2.

There are additional improvements to the Page Designer. Container items are now highlighted on pages and in the Action menu, which dramatically helps to improve readability and speeds understanding of the page structure and layout.

LOCK/UNLOCK SUPPORT IN OBJECT DESIGNER

Microsoft Dynamics NAV 2009 R2 supports collaborative development by enabling smaller teams to collaborate in a structured way on a shared database. Objects in Object Designer can now be Locked,

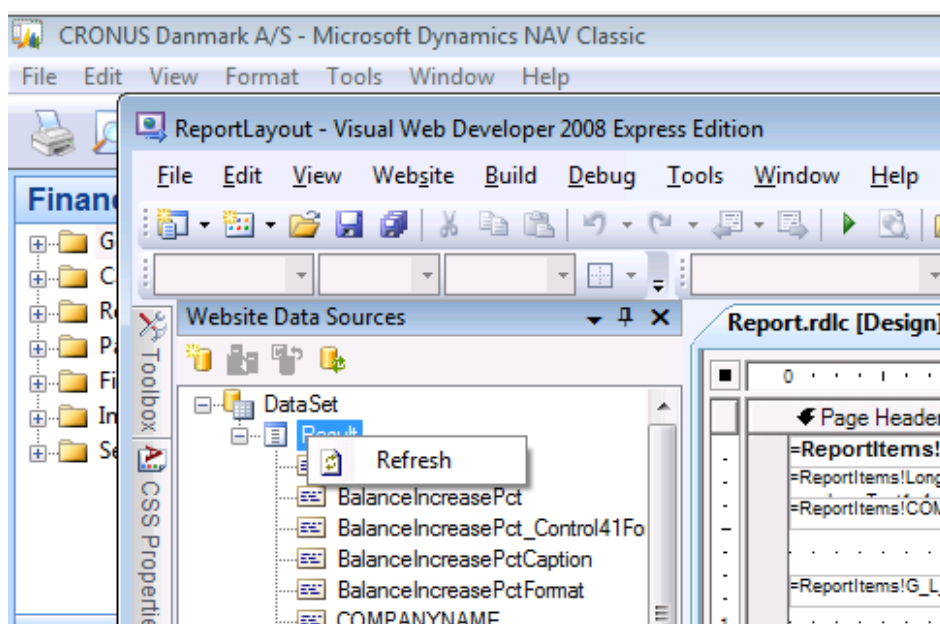
Unlocked, and Forced Unlocked. This new feature supports a multiple developer environment by allowing developers to reserve objects and then by easily showing other developers who are working in the system that particular application objects are locked and offers them a read-only version of those application objects. Without the read-only mode, developers could lose their work when more than one developer was working on the Microsoft Dynamics NAV system at a time.

GO-TO DEFINITIONS

The Go-to Definition feature makes it easier for partners to find functions from other objects when working and programming in the Microsoft Dynamics NAV development environment. The shortcut key, Control+F12, enables partners to jump around in the code to look up variables and find definitions and references. This speeds productivity for partners by eliminating extra steps and helping them to learn the system faster.

REPORT DATASET REFRESH

When partners are developing reports, it will now be possible to refresh the dataset, if modified, from within Visual Studio. This means Visual Studio does not need to be closed and opened to refresh the dataset.



NEW BUSINESS OPPORTUNITIES FOR PARTNERS

These developer improvements help developers to improve efficiency and create solutions that enable users to work more productively. In addition, many of these improvements will also help partners win new customers; for example, the improvements to the Page Designer can be used to demonstrate how partners can build richer, more customized solutions with Microsoft Dynamics NAV 2009 R2 in a faster and easier way.

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like and with familiar Microsoft software, automating and streamlining financial, customer relationship, and supply chain processes in a way that helps you drive business success.

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