Product Overview and Capability Guide Microsoft Dynamics NAV 2015

October, 2014

Contents

1 Microsoft Dynamics NAV

A Proven Solution for Your Business

Partners Boost Success for Small and Midsize Businesses

2 How to Buy Microsoft Dynamics NAV 2015

The Starter Pack

The Extended Pack

3 Packaging of Functionality in Microsoft Dynamics NAV 2015

Microsoft Dynamics NAV 2015 Starter Pack functionality

Microsoft Dynamics NAV 2015 Extended Pack functionality

4 Product Capabilities in Microsoft Dynamics NAV 2015

Financial Management
> General
> Fixed Assets
> Cash Management

Supply Chain Management (SCM)
> Sales and Receivables
> Sales Tax
> Purchase and Payables
> Inventory
> Warehouse Management

Manufacturing
> Basic Manufacturing
> Agile Manufacturing
> Supply Planning
> Capacity Planning

Project Management
> Resources
> Jobs

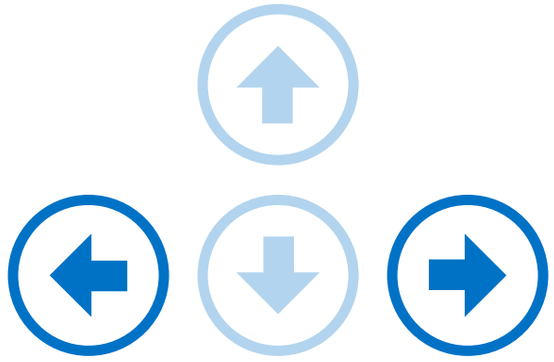
Sales, Marketing, and Service Management
> Sales and Marketing
> Service Management

Human Resources Management (HRM)

Languages

Configuration and Development
> Application Objects
> Other
> Local Granules

5 Microsoft Resources



Use the arrow keys left and right to navigate this PDF document or the menu to the left of the page.

You can also move back and forward on the blue arrows to the right.

Enjoy your reading.

Phone | 800.331.8382 Address | 1000 Ballpark Way, Suite 315, Arlington, TX 76011 Web Address | http://clientsfirst-tx.com

1.

Microsoft Dynamics NAV

Office 365 Windows Azure

Phone | 800.331.8382 Address | 1000 Ballpark Way, Suite 315, Arlington, TX 76011 Web Address | http://clientsfirst-tx.com

Microsoft Dynamics NAV

Microsoft Dynamics NAV

Menu

1 Microsoft Dynamics NAV

A Proven Solution for Your Business

Partners Boost Success for Small and Midsize Businesses

2 How to Buy Microsoft Dynamics NAV 2015

3 Packaging of Functionality in Microsoft Dynamics NAV 2015

4 Product Capabilities in Microsoft Dynamics NAV 2015

5 Microsoft Resources

Microsoft Dynamics NAV

A Proven Solution for Your Business

Microsoft Dynamics NAV is multi-language, multi-currency business management solution that helps more than 100,000 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.

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 vcollaboration 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 is sold by a global network of solution specialists, known as partners or resellers. Your local partner prices and implements Microsoft Dynamics NAV based upon your unique needs. Microsoft partners provide deep local and technical knowledge of specific industry and vertical requirements.

Microsoft Dynamics NAV

Menu

1
Microsoft Dynamics NAV

A Proven Solution for Your Business

Partners Boost Success for Small and Midsize Businesses

2
How to Buy Microsoft Dynamics NAV 2015

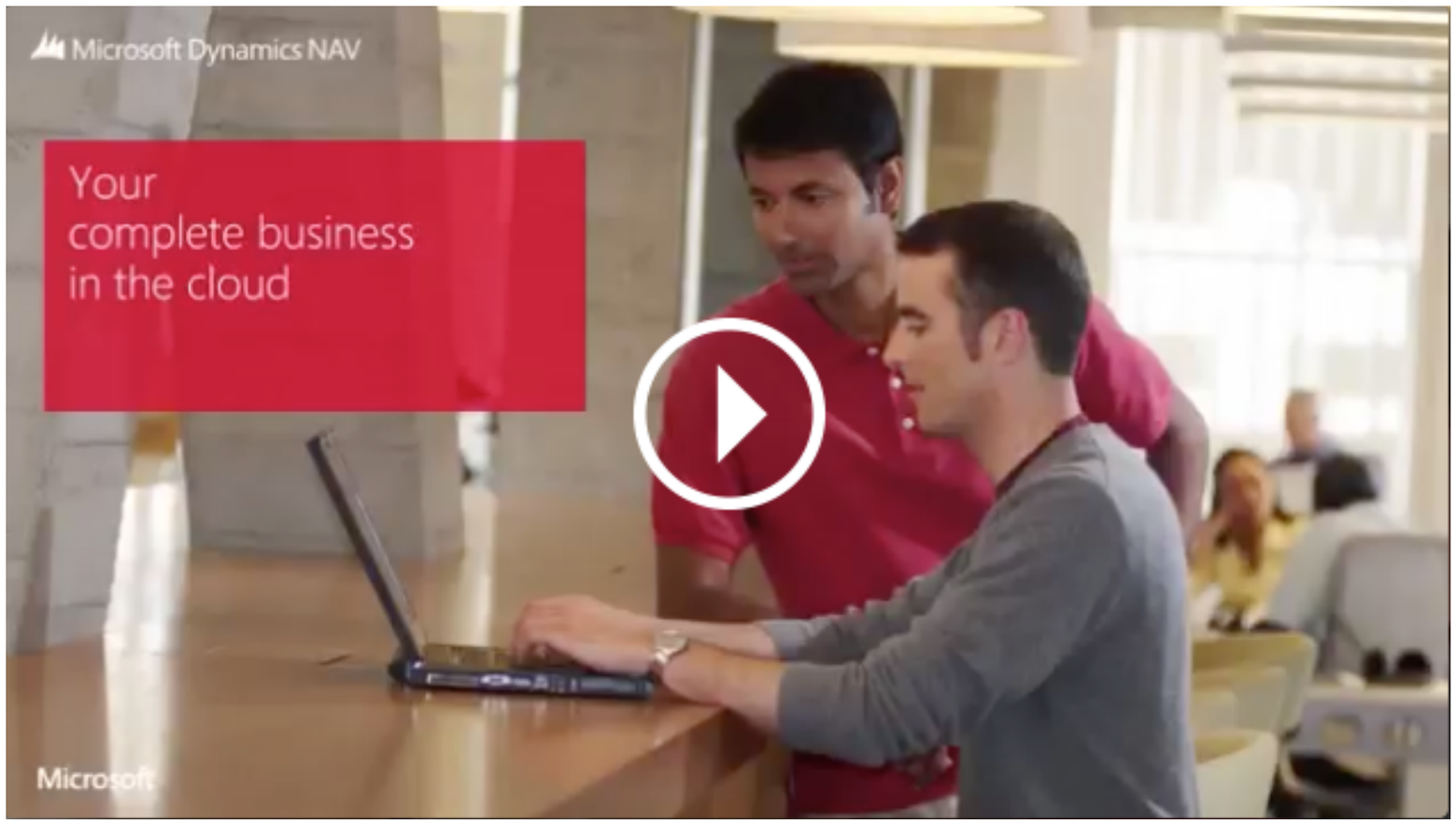
3
Packaging of Functionality in Microsoft Dynamics NAV 2015

4
Product Capabilities in Microsoft Dynamics NAV 2015

5
Microsoft Resources

Your Complete Business in the Cloud.

Microsoft Dynamics NAV and Office 365



2.

How to Buy Microsoft Dynamics NAV 2015

Microsoft Dynamics NAV

Menu

1 Microsoft Dynamics NAV

2 How to Buy Microsoft Dynamics NAV 2015
The Starter Pack
The Extended Pack

3 Packaging of Functionality in Microsoft Dynamics NAV 2015

4 Product Capabilities in Microsoft Dynamics NAV 2015

5 Microsoft Resources

2. How to Buy Microsoft Dynamics NAV 2015

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

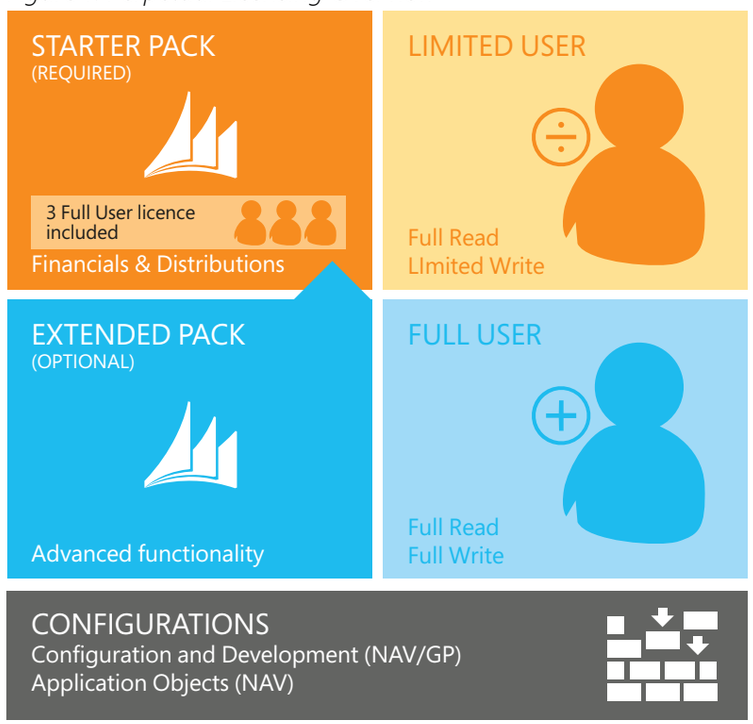
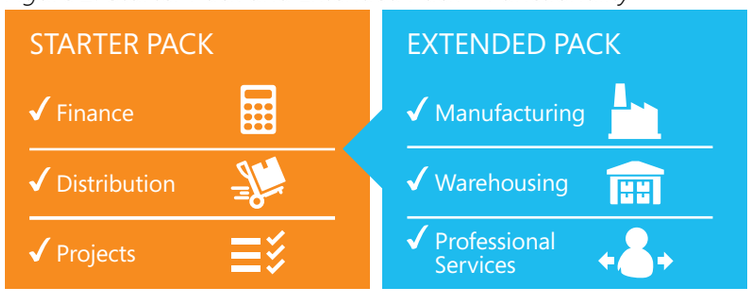


Figure 2: Starter Pack and Extended Pack – Functionality



Microsoft Dynamics NAV

Menu

1
Microsoft Dynamics NAV

2
How to Buy Microsoft Dynamics NAV 2015
The Starter pack
The Extended pack

3
Packaging of Functionality in Microsoft Dynamics NAV 2015

4
Product Capabilities in Microsoft Dynamics NAV 2015

5
Microsoft Resources

THE STARTER PACK

Small and midsize businesses can quickly and affordably get started with Microsoft Dynamics NAV 2015. 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

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.

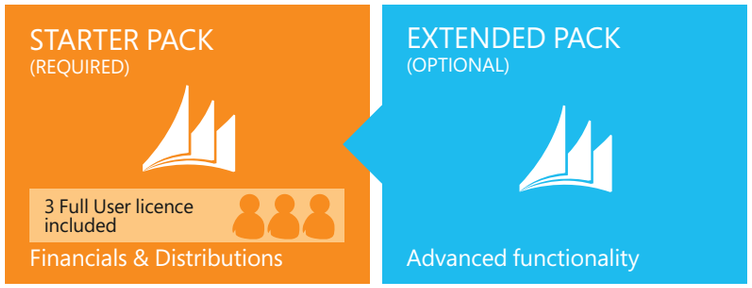
THE EXTENDED PACK

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
- Basic Customer Relationship Management (CRM) to manage customer and supplier relationships and offer the highest quality of service and support.

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.

Phone | 800.331.8382 Address | 1000 Ballpark Way, Suite 315, Arlington, TX 76011 Web Address | http://clientsfirst-tx.com

3.

Packaging of Functionality in Microsoft Dynamics NAV 2015

Menu

1
Microsoft Dynamics NAV

2
How to Buy Microsoft Dynamics NAV 2015

3
Packaging of Functionality in Microsoft Dynamics NAV 2015

Starter Pack functionality
> 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

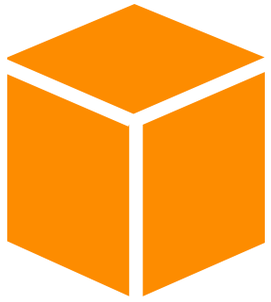
4
Product Capabilities in Microsoft Dynamics NAV 2015

5
Microsoft Resources

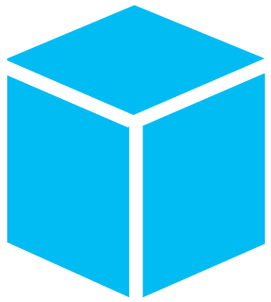
3. Packaging of functionality in Microsoft Dynamics NAV 2015

Microsoft Dynamics NAV comes with a wide set of functionalities that through Microsoft Dynamics NAV 2015 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 wide set of Business Insight and reporting functionality as an integral part of the product. Additionally the Starter pack comes with a wide set to 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, Manufacturing. It comes with additional customization objects for doing more extensive customizations.

Phone | 800.331.8382 Address | 1000 Ballpark Way, Suite 315, Arlington, TX 76011 Web Address | http://clientsfirst-tx.com

Microsoft Dynamics NAV

Menu

1 Microsoft Dynamics NAV

2 How to Buy Microsoft Dynamics NAV 2015

3 Packaging of Functionality in Microsoft Dynamics NAV 2015

Starter Pack functionality
> 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

4 Product Capabilities in Microsoft Dynamics NAV 2015

5 Microsoft Resources

Microsoft Dynamics NAV 2015 **Starter Pack functionality**

FINANCIAL MANAGEMENT

- √ Basic General Ledger
- √ Allocations
- √ Budgets
- √ Accounts Schedules
- √ Consolidation
- √ Basic XBRL
- √ Change Log
- √ Cash Flow Forecast
- √ Basic Fixed Assets
- √ Insurance
- √ Maintenance
- √ Fixed Assets – Allocations
- √ Reclassification
- √ Bank Management
- √ Check Writing
- √ Bank Reconciliation
- √ Payment Handling

CUSTOMER RELATIONSHIP MANAGEMENT

- √ Contact Management
- √ Task Management
- √ Outlook Client Integration

PROJECT MANAGEMENT

- √ Basic Resources
- √ Capacity Management
- √ Multiple Costs
- √ Budgets/Estimates
- √ Phases/Tasks/Steps
- √ Jobs Suite

CONFIGURATION AND DEVELOPMENT

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

Microsoft Dynamics NAV 2015 **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.

- √ Contact Classification
- √ Campaign Management
- √ Opportunity Management
- √ Interaction/Document Management
- √ Mail Logging for MS Exchange
- √ Service Order Management
- √ Service Price Management
- √ Service Item Management
- √ Service Contract Management
- √ Planning and Dispatching

CONFIGURATION AND DEVELOPMENT EXTENDED

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

Phone | 800.331.8382 Address | 1000 Ballpark Way, Suite 315, Arlington, TX 76011 Web Address | http://clientsfirst-tx.com

Microsoft Dynamics NAV

Menu

1 Microsoft Dynamics NAV

2 How to Buy Microsoft Dynamics NAV 2015

3 Packaging of Functionality in Microsoft Dynamics NAV 2015

Starter Pack functionality
> 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

4 Product Capabilities in Microsoft Dynamics NAV 2015

5 Microsoft Resources

Microsoft Dynamics NAV 2015 **Starter Pack functionality**

SUPPLY CHAIN MANAGEMENT

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

HUMAN RESOURCE MANAGEMENT

- √ Basic Human Resources

LANGUAGES

- √ Multiple Document Languages
- √ Multiple Languages (Each)

OTHER

- √ Time Sheet
- √ Unlimited Companies
- √ Subsidiary (Each)
- √ Per Database License
- √ Multiple Currencies
- √ Intrastate
- √ Extended Text
- √ Job Queue
- √ Basic Dimensions
- √ Reason Codes
- √ Advanced Dimensions
- √ Dynamics NAV Server
- √ Connector for Microsoft Dynamics

Microsoft Dynamics NAV 2015 **Extended Pack functionality**

(includes all the functionality in the starter pack)

SUPPLY CHAIN MANAGEMENT

- √ 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 Set-Up

MANUFACTURING SOLUTIONS

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

Phone | 800.331.8382 Address | 1000 Ballpark Way, Suite 315, Arlington, TX 76011 Web Address | http://clientsfirst-tx.com

4.

Product Capabilities in Microsoft Dynamics NAV 2015

Microsoft Dynamics NAV

Menu

1
Microsoft Dynamics NAV

2
How to Buy Microsoft Dynamics NAV 2015

3
Packaging of Functionality in Microsoft Dynamics NAV 2015

4
Product Capabilities in Microsoft Dynamics NAV 2015

5
Microsoft Resources

Financial Management
> General
> Fixed Assets
> Cash Management

Supply Chain Management (SCM)
> Sales and Receivables
> Sales Tax
> Purchase and Payables
> Inventory
> Warehouse Management

Manufacturing
> Basic Manufacturing
> Agile Manufacturing
> Supply Planning
> Capacity Planning

Project Management
> Resources
> Jobs

Sales, Marketing, and Service Management
> Sales and Marketing
> Service Management

Human Resources Management (HRM)

Languages

Configuration and Development
> Application Objects
> Other
> Local Granules

4. Product Capabilities in Microsoft Dynamics NAV 2015

FINANCIAL MANAGEMENT

General

Accounts Schedules

Powerful financial reporting tool which 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, 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.

Basic General Ledger

This granule 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
- 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 granule.
- 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

Microsoft Dynamics NAV

Menu

1
Microsoft Dynamics NAV

2
How to Buy Microsoft Dynamics NAV 2015

3
Packaging of Functionality in Microsoft Dynamics NAV 2015

4
Product Capabilities in Microsoft Dynamics NAV 2015

5
Microsoft Resources

Financial Management
> General
> Fixed Assets
> Cash Management

Supply Chain Management (SCM)
> Sales and Receivables
> Sales Tax
> Purchase and Payables
> Inventory
> Warehouse Management

Manufacturing
> Basic Manufacturing
> Agile Manufacturing
> Supply Planning
> Capacity Planning

Project Management
> Resources
> Jobs

Sales, Marketing, and Service Management
> Sales and Marketing
> Service Management

Human Resources Management (HRM)

Languages

Configuration and Development
> Application Objects
> Other
> Local Granules

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 granule 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.

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 granule. If data used is retrieved from several Microsoft Dynamics NAV solutions, use this granule only in the parent company.

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.

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 granule includes:

> Transfer costs from 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.

> Cost budgets and transfer cost budget entries to actual entries.

Phone | 800.331.8382 Address | 1000 Ballpark Way, Suite 315, Arlington, TX 76011 Web Address | http://clientsfirst-tx.com

Microsoft Dynamics NAV

Menu

1
Microsoft Dynamics NAV

2
How to Buy Microsoft Dynamics NAV 2015

3
Packaging of Functionality in Microsoft Dynamics NAV 2015

4
Product Capabilities in Microsoft Dynamics NAV 2015

5
Microsoft Resources

Financial Management
> General
> Fixed Assets
> Cash Management

Supply Chain Management (SCM)
> Sales and Receivables
> Sales Tax
> Purchase and Payables
> Inventory
> Warehouse Management

Manufacturing
> Basic Manufacturing
> Agile Manufacturing
> Supply Planning
> Capacity Planning

Project Management
> Resources
> Jobs

Sales, Marketing, and Service Management
> Sales and Marketing
> Service Management

Human Resources Management (HRM)

Languages

Configuration and Development
> Application Objects
> Other
> Local Granules

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

Fixed Assets

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 granule 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.

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.

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. Keep easily 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 customers bank account and generate bank direct debit file in ISO20022/SEPA format.

Phone | 800.331.8382 Address | 1000 Ballpark Way, Suite 315, Arlington, TX 76011 Web Address | http://clientsfirst-tx.com

Microsoft Dynamics NAV

Menu

1
Microsoft Dynamics NAV

2
How to Buy Microsoft Dynamics NAV 2015

3
Packaging of Functionality in Microsoft Dynamics NAV 2015

4
Product Capabilities in Microsoft Dynamics NAV 2015

5
Microsoft Resources

Financial Management
> General
> Fixed Assets
> Cash Management

Supply Chain Management (SCM)
> Sales and Receivables
> Sales Tax
> Purchase and Payables
> Inventory
> Warehouse Management

Manufacturing
> Basic Manufacturing
> Agile Manufacturing
> Supply Planning
> Capacity Planning

Project Management
> Resources
> Jobs

Sales, Marketing, and Service Management
> Sales and Marketing
> Service Management

Human Resources Management (HRM)

Languages

Configuration and Development
> Application Objects
> Other
> Local Granules

Reconciliation of Incoming and Outgoing Bank Transactions

Import bank transaction data from electronic files sent from you 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. Modify the 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

Check Writing

Generate Computer printed checks with 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. Assists internal control by ensuring that the computer check is actually printed before posting the Payment. Check printing comes with flexible user options like voiding a check, Reprinting, Using check forms with preprinted stubs, testing before printing and also a 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 granule 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 granules. Sales Invoicing is also frequently used with this granule. Always use this granule when your solution requires a customer table.

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.

Phone | 800.331.8382 Address | 1000 Ballpark Way, Suite 315, Arlington, TX 76011 Web Address | http://clientsfirst-tx.com

Microsoft Dynamics NAV

Menu

1
Microsoft Dynamics NAV

2
How to Buy Microsoft Dynamics NAV 2015

3
Packaging of Functionality in Microsoft Dynamics NAV 2015

4
Product Capabilities in Microsoft Dynamics NAV 2015

5
Microsoft Resources

Financial Management
> General
> Fixed Assets
> Cash Management

Supply Chain Management (SCM)
> Sales and Receivables
> Sales Tax
> Purchase and Payables
> Inventory
> Warehouse Management

Manufacturing
> Basic Manufacturing
> Agile Manufacturing
> Supply Planning
> Capacity Planning

Project Management
> Resources
> Jobs

Sales, Marketing, and Service Management
> Sales and Marketing
> Service Management

Human Resources Management (HRM)

Languages

Configuration and Development
> Application Objects
> Other
> Local Granules

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 as based on item 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 granule 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, 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 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 granule 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.)

Phone | 800.331.8382 Address | 1000 Ballpark Way, Suite 315, Arlington, TX 76011 Web Address | http://clientsfirst-tx.com

Microsoft Dynamics NAV

Menu

1
Microsoft Dynamics NAV

2
How to Buy Microsoft Dynamics NAV 2015

3
Packaging of Functionality in Microsoft Dynamics NAV 2015

4
Product Capabilities in Microsoft Dynamics NAV 2015

5
Microsoft Resources

Financial Management
> General
> Fixed Assets
> Cash Management

Supply Chain Management (SCM)
> Sales and Receivables
> Sales Tax
> Purchase and Payables
> Inventory
> Warehouse Management

Manufacturing
> Basic Manufacturing
> Agile Manufacturing
> Supply Planning
> Capacity Planning

Project Management
> Resources
> Jobs

Sales, Marketing, and Service Management
> Sales and Marketing
> Service Management

Human Resources Management (HRM)

Languages

Configuration and Development
> Application Objects
> Other
> Local Granules

Sales Return Order Management

This granule 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 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 granule to post purchase transactions and manage payables in multiple currencies for each vendor. This granule is always used if your solution requires a vendor table. It is integrated with General Ledger and Inventory and required for the configuration of all other Purchase and Payables granules. Purchase Invoicing is also frequently used with this granule.

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 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 granule 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.

Phone | 800.331.8382 Address | 1000 Ballpark Way, Suite 315, Arlington, TX 76011 Web Address | http://clientsfirst-tx.com

Microsoft Dynamics NAV

Menu

1
Microsoft Dynamics NAV

2
How to Buy Microsoft Dynamics NAV 2015

3
Packaging of Functionality in Microsoft Dynamics NAV 2015

4
Product Capabilities in Microsoft Dynamics NAV 2015

5
Microsoft Resources

Financial Management
> General
> Fixed Assets
> Cash Management

Supply Chain Management (SCM)
> Sales and Receivables
> Sales Tax
> Purchase and Payables
> Inventory
> Warehouse Management

Manufacturing
> Basic Manufacturing
> Agile Manufacturing
> Supply Planning
> Capacity Planning

Project Management
> Resources
> Jobs

Sales, Marketing, and Service Management
> Sales and Marketing
> Service Management

Human Resources Management (HRM)

Languages

Configuration and Development
> Application Objects
> Other
> Local Granules

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 granule 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 drag and drop, prior to executing on the plan.

Alternatively, use the 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 granule 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.

Phone | 800.331.8382 Address | 1000 Ballpark Way, Suite 315, Arlington, TX 76011 Web Address | http://clientsfirst-tx.com

Microsoft Dynamics NAV

Menu

1
Microsoft Dynamics NAV

2
How to Buy Microsoft Dynamics NAV 2015

3
Packaging of Functionality in Microsoft Dynamics NAV 2015

4
Product Capabilities in Microsoft Dynamics NAV 2015

5
Microsoft Resources

Financial Management
> General
> Fixed Assets
> Cash Management

Supply Chain Management (SCM)
> Sales and Receivables
> Sales Tax
> Purchase and Payables
> Inventory
> Warehouse Management

Manufacturing
> Basic Manufacturing
> Agile Manufacturing
> Supply Planning
> Capacity Planning

Project Management
> Resources
> Jobs

Sales, Marketing, and Service Management
> Sales and Marketing
> Service Management

Human Resources Management (HRM)

Languages

Configuration and Development
> Application Objects
> Other
> Local Granules

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, 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 granule is required for the configuration of all other Inventory granules.

Bin

Organize your warehouse by assigning items to bins, the smallest unit in the warehouse logical structure. Bin assignment is done as 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 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 ofan 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.

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.

Assembly Management

Specify a list of sellable items, raw materials, subassemblies and/or resources as 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 an 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.

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.

Using the worksheet, you can:

> Carry out cost updates for both the purchased components and capacity by using different sorting criteria in several worksheets simultaneously, and then later consolidate them into one.

> Get information that can help you identify and avoid potential errors by simulating the cost of the manufactured item due to changes in components and/or capacity use cost and then viewing the effect.

> Help ensure that you execute the changes at a given date and that any revaluation resulting from cost changes is dealt with 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.

Phone | 800.331.8382 Address | 1000 Ballpark Way, Suite 315, Arlington, TX 76011 Web Address | http://clientsfirst-tx.com

Microsoft Dynamics NAV

Menu

1
Microsoft Dynamics NAV

2
How to Buy Microsoft Dynamics NAV 2015

3
Packaging of Functionality in Microsoft Dynamics NAV 2015

4
Product Capabilities in Microsoft Dynamics NAV 2015

5
Microsoft Resources

Financial Management
> General
> Fixed Assets
> Cash Management

Supply Chain Management (SCM)
> Sales and Receivables
> Sales Tax
> Purchase and Payables
> Inventory
> Warehouse Management

Manufacturing
> Basic Manufacturing
> Agile Manufacturing
> Supply Planning
> Capacity Planning

Project Management
> Resources
> Jobs

Sales, Marketing, and Service Management
> Sales and Marketing
> Service Management

Human Resources Management (HRM)

Languages

Configuration and Development
> Application Objects
> Other
> Local Granules

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

Capture data automatically. Keep data accurate, even in a hectic environment. ADCS supports some of the workflows in the Warehouse Management Systems 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, purchase, transfers, returns, and production orders. Service Orders is not included. To effectively use this granule, it is recommended that you also purchase the Put Away, Warehouse Receipt, Pick, and Warehouse Shipment granules.

MANUFACTURING

Basic Manufacturing

Production Bill of Materials

Create bills of materials and calculate standard cost. Required for configuration of all other Manufacturing granules.

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. Production Orders 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 granule enables you to run Agile Manufacturing, Supply Planning, and Capacity Planning granules.

Version Management

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

Phone | 800.331.8382 Address | 1000 Ballpark Way, Suite 315, Arlington, TX 76011 Web Address | http://clientsfirst-tx.com

Supply Planning

Basic Supply Planning

Plan material requirements based on demand with support for master production scheduling and materials requirements 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.
- 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.

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 granule, Finite Loading also enables the system to calculate capable-to-promise (CTP).

Machine Centers

Add machine centers as capacities to the manufacturing process.

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 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.

Phone | 800.331.8382 Address | 1000 Ballpark Way, Suite 315, Arlington, TX 76011 Web Address | http://clientsfirst-tx.com

Microsoft Dynamics NAV

Menu

1
Microsoft Dynamics NAV

2
How to Buy Microsoft Dynamics NAV 2015

3
Packaging of Functionality in Microsoft Dynamics NAV 2015

4
Product Capabilities in Microsoft Dynamics NAV 2015

5
Microsoft Resources

Financial Management
> General
> Fixed Assets
> Cash Management

Supply Chain Management (SCM)
> Sales and Receivables
> Sales Tax
> Purchase and Payables
> Inventory
> Warehouse Management

Manufacturing
> Basic Manufacturing
> Agile Manufacturing
> Supply Planning
> Capacity Planning

Project Management
> Resources
> Jobs

Sales, Marketing, and Service Management
> Sales and Marketing
> Service Management

Human Resources Management (HRM)

Languages

Configuration and Development
> Application Objects
> Other
> Local Granules

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.

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.

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 granule 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 granule 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.

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, like 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.

Phone | 800.331.8382 Address | 1000 Ballpark Way, Suite 315, Arlington, TX 76011 Web Address | http://clientsfirst-tx.com

Microsoft Dynamics NAV

Menu

1
Microsoft Dynamics NAV

2
How to Buy Microsoft Dynamics NAV 2015

3
Packaging of Functionality in Microsoft Dynamics NAV 2015

4
Product Capabilities in Microsoft Dynamics NAV 2015

5
Microsoft Resources

Financial Management
> General
> Fixed Assets
> Cash Management

Supply Chain Management (SCM)
> Sales and Receivables
> Sales Tax
> Purchase and Payables
> Inventory
> Warehouse Management

Manufacturing
> Basic Manufacturing
> Agile Manufacturing
> Supply Planning
> Capacity Planning

Project Management
> Resources
> Jobs

Sales, Marketing, and Service Management
> Sales and Marketing
> Service Management

Human Resources Management (HRM)

Languages

Configuration and Development
> Application Objects
> Other
> Local Granules

Mail Logging for Microsoft Exchange Server

Log all email correspondence. Log inbound and outbound email 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.

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.

Service Management

Planning and Dispatching

Assign personnel to work orders. 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 granule, 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 granules.

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 granule 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.

Phone | 800.331.8382 Address | 1000 Ballpark Way, Suite 315, Arlington, TX 76011 Web Address | http://clientsfirst-tx.com

Microsoft Dynamics NAV

Menu

1
Microsoft Dynamics NAV

2
How to Buy Microsoft Dynamics NAV 2015

3
Packaging of Functionality in Microsoft Dynamics NAV 2015

4
Product Capabilities in Microsoft Dynamics NAV 2015

5
Microsoft Resources

Financial Management
> General
> Fixed Assets
> Cash Management

Supply Chain Management (SCM)
> Sales and Receivables
> Sales Tax
> Purchase and Payables
> Inventory
> Warehouse Management

Manufacturing
> Basic Manufacturing
> Agile Manufacturing
> Supply Planning
> Capacity Planning

Project Management
> Resources
> Jobs

Sales, Marketing, and Service Management
> Sales and Marketing
> Service Management

Human Resources Management (HRM)

Languages

Configuration and Development
> Application Objects
> Other
> Local Granules

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.

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.

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 (Each)

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 language granule for the specific language.

Each language granule 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

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).

Phone | 800.331.8382 Address | 1000 Ballpark Way, Suite 315, Arlington, TX 76011 Web Address | http://clientsfirst-tx.com

Microsoft Dynamics NAV

Menu

1
Microsoft Dynamics NAV

2
How to Buy Microsoft Dynamics NAV 2015

3
Packaging of Functionality in Microsoft Dynamics NAV 2015

4
Product Capabilities in Microsoft Dynamics NAV 2015

5
Microsoft Resources

Financial Management
> General
> Fixed Assets
> Cash Management

Supply Chain Management (SCM)
> Sales and Receivables
> Sales Tax
> Purchase and Payables
> Inventory
> Warehouse Management

Manufacturing
> Basic Manufacturing
> Agile Manufacturing
> Supply Planning
> Capacity Planning

Project Management
> Resources
> Jobs

Sales, Marketing, and Service Management
> Sales and Marketing
> Service Management

Human Resources Management (HRM)

Languages

Configuration and Development
> Application Objects
> Other
> Local Granules

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 granule also enables you to use the Navigation Pane Designer. This means, for example, that you can create new menu items. This granule 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 granule 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 development environment. Microsoft Visual Report Designer comes with Microsoft Visual Studio 2010 SP1 Professional, Premium, or Ultimate.

This granule 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 granule 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 granule).

Table Designer

Change existing table definitions and create 10 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 granule 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 granule 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).

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 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)

10 Codeunits are included in the **Starter Pack** and 10 more are included in the **Extended Pack**. Additional groups of 100 are available in the Customization suite.

Microsoft Dynamics NAV

Menu

1
Microsoft Dynamics NAV

2
How to Buy Microsoft Dynamics NAV 2015

3
Packaging of Functionality in Microsoft Dynamics NAV 2015

4
Product Capabilities in Microsoft Dynamics NAV 2015

5
Microsoft Resources

Financial Management
> General
> Fixed Assets
> Cash Management

Supply Chain Management (SCM)
> Sales and Receivables
> Sales Tax
> Purchase and Payables
> Inventory
> Warehouse Management

Manufacturing
> Basic Manufacturing
> Agile Manufacturing
> Supply Planning
> Capacity Planning

Project Management
> Resources
> Jobs

Sales, Marketing, and Service Management
> Sales and Marketing
> Service Management

Human Resources Management (HRM)

Languages

Configuration and Development
> Application Objects
> Other
> Local Granules

Reports (100)

Additional groups of 100 are available in the Customization suite.

Tables (10)

10 tables are included with the **Extended Pack**. Additional groups of 10 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

Time Sheet

Time Sheet is a simple and flexible solution for time registration with manager approval. Time sheet provides integration to Service, Jobs and Resource.

Advanced Dimensions

Advanced Dimensions provides unlimited dimensions for use in transactions in all ledgers. You can name all the dimensions as most appropriate for your business. In addition to an unlimited number of dimensions, this granule 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 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 granule 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.

Phone | 800.331.8382 Address | 1000 Ballpark Way, Suite 315, Arlington, TX 76011 Web Address | http://clientsfirst-tx.com

Microsoft Dynamics NAV

Menu

1
Microsoft Dynamics NAV

2
How to Buy Microsoft Dynamics NAV 2015

3
Packaging of Functionality in Microsoft Dynamics NAV 2015

4
Product Capabilities in Microsoft Dynamics NAV 2015

5
Microsoft Resources

Financial Management
> General
> Fixed Assets
> Cash Management

Supply Chain Management (SCM)
> Sales and Receivables
> Sales Tax
> Purchase and Payables
> Inventory
> Warehouse Management

Manufacturing
> Basic Manufacturing
> Agile Manufacturing
> Supply Planning
> Capacity Planning

Project Management
> Resources
> Jobs

Sales, Marketing, and Service Management
> Sales and Marketing
> Service Management

Human Resources Management (HRM)

Languages

Configuration and Development
> Application Objects
> Other
> Local Granules

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.

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 granules). 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.

At payment, gains/losses are realized, and corresponding postings are made in the general ledger. If you use an additional reporting currency in the general ledger, the Exchange Rate Adjustment option also adjusts the general ledger according to your setup for each general ledger account.

Per Database License (SQL Server)

Per Database License is required when you want to run several databases on the same instance of SQL Server. Each database uses its own license file. In order to have more than one database using different license files, those license files must contain this granule. Without it, all databases on the server that do not use their own license files use one common license file.

Phone | 800.331.8382 Address | 1000 Ballpark Way, Suite 315, Arlington, TX 76011 Web Address | http://clientsfirst-tx.com

Microsoft Dynamics NAV

Menu

1 Microsoft Dynamics NAV

2 How to Buy Microsoft Dynamics NAV 2015

3 Packaging of Functionality in Microsoft Dynamics NAV 2015

4 Product Capabilities in Microsoft Dynamics NAV 2015

5 Microsoft Resources

Financial Management
> General
> Fixed Assets
> Cash Management

Supply Chain Management (SCM)
> Sales and Receivables
> Sales Tax
> Purchase and Payables
> Inventory
> Warehouse Management

Manufacturing
> Basic Manufacturing
> Agile Manufacturing
> Supply Planning
> Capacity Planning

Project Management
> Resources
> Jobs

Sales, Marketing, and Service Management
> Sales and Marketing
> Service Management

Human Resources Management (HRM)

Languages

Configuration and Development
> Application Objects
> Other
> Local Granules

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.

Permissions

Assign and limit user permissions with this advanced and detailed system. Control access to each table, page report, codeunit, XMLport, and menu unit of Microsoft Dynamics NAV.

Salespeople/Purchasers

Keep track of purchases and sales per person by assigning purchasers to vendors and salespeople to customers. Purchasers and salespersons are tracked in the Vendor Ledger, Customer Ledger, Item Ledger, Job Ledger, and Resource Ledger. Statistics are generated about individual salespeople and purchasers based on this information, which can be used for calculating commissions.

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 granule can be used alone or in combination with the Permissions granule.

Local Granules

Local Granules

Microsoft Dynamics NAV provides numerous granules that support local business processes and practices. They are available as Additional Components (a la carte granules).

Consult the latest price list for details and availability for the particular licensing package.

Phone | 800.331.8382 Address | 1000 Ballpark Way, Suite 315, Arlington, TX 76011 Web Address | http://clientsfirst-tx.com

5.

Microsoft Recources

Microsoft Dynamics NAV

Menu

1
Microsoft Dynamics NAV

2
How to Buy Microsoft Dynamics NAV 2015

3
Packaging of Functionality in Microsoft Dynamics NAV 2015

4
Product Capabilities in Microsoft Dynamics NAV 2015

5
Microsoft Resources

5. Microsoft Resources

Microsoft Dynamics Website 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 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

Microsoft Dynamics NAV 2015 is 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 in the cloud or on your servers—the choice is yours.
- Help to increase productivity and to simplify your business by connecting key functions within your organization.
- Manage your multi-location or multi-national growing business with global ERP features.
- With Microsoft Dynamics NAV and Office 365, share the big picture across your organization by bringing your email, calendar, and files together with your data, reports, and business management software.

Today, more than 100,000 customers are using Microsoft Dynamics NAV in 42 country versions to drive business success and stay ahead of competition.

Learn More about Microsoft Dynamics NAV, Click here >

http://clientsfirst-tx.com

United States and Canada toll free (800) 331-8382

Clients First®
BUSINESS SOLUTIONS
Microsoft Dynamics NAV Practice