

# INTEGRATE

Microsoft Dynamics™ NAV\*

## Integrated Innovation in Microsoft Dynamics NAV

White Paper

How Microsoft Dynamics NAV Utilizes Other Microsoft Products and  
Technologies to Create Value for Customers and Partners

\* Microsoft Dynamics NAV, formerly Microsoft® Business Solutions–Navision®

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[www.microsoft.com/dynamics/nav](http://www.microsoft.com/dynamics/nav)



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## *Introduction*

This white paper is intended for Microsoft partners. It reviews how Microsoft Dynamics NAV and other Microsoft products create value for customers and partners by enabling small and medium-sized companies to increase productivity, improve collaboration and make smart business decisions.

After reading this paper you will know:

- **What Microsoft Dynamics NAV is and how Microsoft products and technologies have always been an integral part of Microsoft Dynamics NAV**
- **Which Microsoft products and technologies integrate with Microsoft Dynamics NAV**
- **How this integration benefits customers and partners**

## *Background*

### **What is Microsoft Dynamics NAV?**

Microsoft Dynamics NAV is an integrated business management solution designed specifically for the unique needs of growing, small to medium-sized companies. It is ideal for businesses looking for one solution that is fast to implement, easy to customize and simple to use and maintain. Microsoft Dynamics NAV delivers integrated functionality to support solutions for Financial Management, Supply Chain Management, Customer Relationship Management and e-Commerce.

The product originates in Denmark and was the flagship solution of Navision a/s when Microsoft acquired Navision a/s in May 2002. Today it is one of four products in the Microsoft Dynamics product portfolio.

Microsoft Dynamics NAV was originally envisioned around three fundamental design principles – simplicity, flexibility and adaptability. The Microsoft Dynamics NAV development team's unwavering commitment to these principles and the expertise of the Microsoft partners has made Microsoft Dynamics NAV the success it is today. To date, Microsoft has over 1500 Microsoft partners specializing in Microsoft Dynamics NAV in at least 50 countries serving more than 48,000 small to medium-sized companies. These companies rely on Microsoft Dynamics NAV every day to help them run their operations.

### **Better Together: A Successful History of Integrated Innovation**

Microsoft Dynamics NAV has a long history of utilizing Microsoft technologies and products. As early as 1993, the development team behind Microsoft Dynamics NAV recognized the potential of the Microsoft® for Windows® NT 32-bit graphical user interface (GUI)-based software. At that time, a major development effort was initiated to create a new generation of solutions with a highly adaptable and easy-to-customize user interface. This resulted in the successful launch of Microsoft Navision Financials Windows 95 and Windows NT versions in 1995 – making it one of the first accounting solutions for small and medium-sized businesses based on Microsoft Windows.

Since then, innovative enhancements have been made to Microsoft Dynamics NAV making it even easier and more cost-efficient to sell, implement, upgrade, use and maintain. And, Microsoft products and technologies have been and continue to be an integral part of these enhancements.

For example, in 2000, Commerce Gateway for Microsoft Dynamics NAV was one of the world's first solutions based on Microsoft BizTalk Server. Today, Microsoft Dynamics NAV represents a significant number of the total sales of Microsoft BizTalk Server. And, again in 2000, User Portal for Microsoft Dynamics NAV was one of the first the world's first solution based on Microsoft's Digital Dashboard. Today, Microsoft Dynamics NAV is leveraging the benefits of Microsoft SharePoint technologies with a new employee portal based on Microsoft Windows SharePoint Services.

Integrated innovation and Microsoft technologies continue to be the foundation for the future development of Microsoft Dynamics NAV. Integrated innovation will enable us to achieve our ultimate goal of empowering both Microsoft Dynamics NAV customers and partners to realize business success by working more productively without increasing costs.

### *Integrated Innovation in Microsoft Dynamics NAV Today*

Microsoft Dynamics NAV integrates with a number of Microsoft products and technologies to help Microsoft Dynamics NAV customers realize business success in three ways:

1. Empowering employees to work more productively in a cost-efficient way
2. Seamlessly connecting people, processes and information throughout the business and
3. Providing employees with better insight so they make smarter decisions.

<b>Overview of Microsoft Products &amp; Technologies in Microsoft Dynamics NAV</b>			
<b>Microsoft Product/Technology</b>	<b>How Integrated Innovation Benefits Customers</b>		
	<b>Productivity</b>	<b>Connectivity</b>	<b>Insight</b>
Microsoft® Windows® 2000	*		
Microsoft® Windows® XP	*		
Microsoft® Windows® Server 2003	*	*	
Windows® Installer and Active Directory®	*		
Microsoft® SQL Server® 2000	*	*	*
Microsoft® SQL Server® 2000 Notification Services	*		*
Microsoft Internet Information Server		*	
Microsoft® Exchange Server		*	
Microsoft® BizTalk® Server	*	*	
Microsoft® SharePoint® Portal	*	*	*
Microsoft® Windows® SharePoint® Server	*	*	*
Microsoft® Commerce Server		*	
Microsoft® .NET		*	
Microsoft® Office Suite – Including Excel & Word	*	*	*
Microsoft Outlook® 2000/XP/2003	*	*	

## Companies Can Do More, Faster, without Increasing Costs

Increasing employee productivity – without increasing costs – is a top priority among growing small and medium-sized customers. With tight integration to the Microsoft productivity tools Microsoft Office and Microsoft Windows, Microsoft Dynamics NAV enables employees in small and medium-sized businesses to work faster, smarter and get more done in less time.

### A familiar user-interface increases productivity

Customer research shows that employees waste valuable time re-keying redundant information and data into disparate systems, switching back and forth between different applications and getting reacquainted with applications that look and feel different.

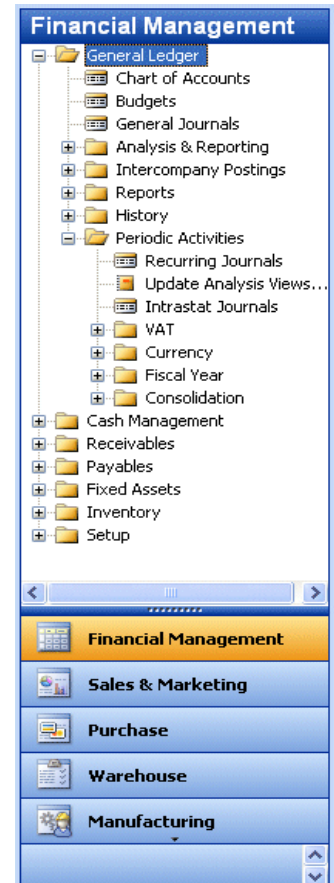
The intuitive, task-based design of Microsoft Dynamics NAV looks just like Microsoft Windows. The familiar user environment enables employees to work faster and more efficiently because they feel “at home” with the application.

The Navigation Pane has the familiar look and feel of the Navigation Pane in Microsoft® Office Outlook® 2003. Its main menu content has been structured around departmental areas to reflect employees’ roles and tasks. Each of these areas has its own menu. This makes it easy for employees to find the functionality they need, quickly.

The Navigation Pane displays one menu at a time. Menu buttons at the bottom of the pane enable users to switch from one menu to another. The menus are organized in intuitive, logical tree structures, just like the folder structure in Windows Explorer. Menus contain menu items for the windows, reports, and batch jobs that users have access to. To make it easier to navigate within a menu, related menu items are gathered in menu groups.

Systems administrators can use the Navigation Pane Designer to configure the Microsoft Dynamics NAV main menu to suit the way their organizations operate. They can also assign users to menus so that employees only see the menus that are relevant to their roles.

The familiar and intuitive Microsoft environment enables new employees to start working immediately thereby saving money on training. If they have worked in a Microsoft program before or are used to surfing the Internet then they have all the training they need to start working.

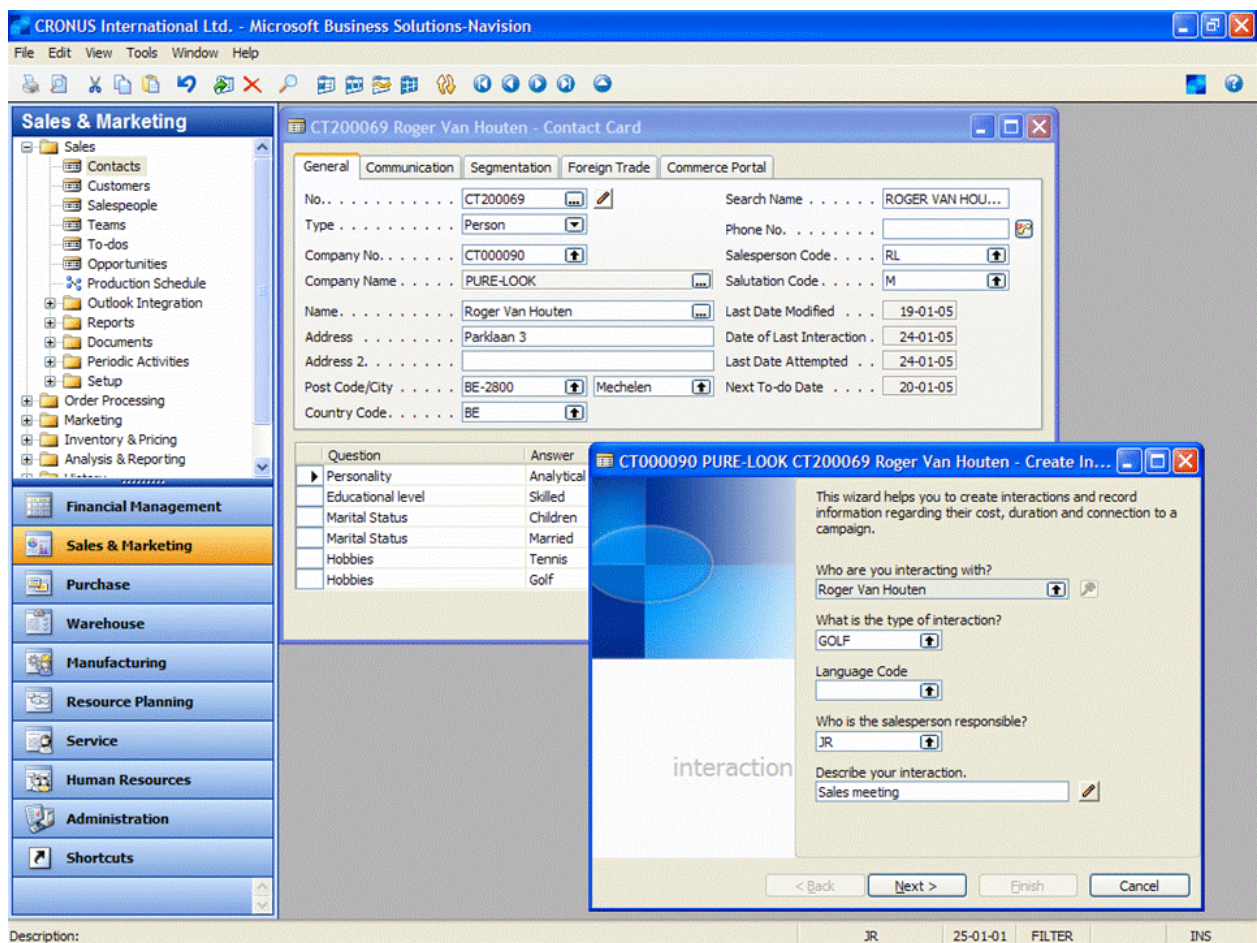


*The main menu in Microsoft Dynamics NAV looks and feels like Microsoft Windows*

### Integration with Word, Outlook, and Excel helps employees work faster

The tight integration of Microsoft Dynamics NAV with Microsoft Office enables employees to draw on the functionality of familiar programs such as Microsoft Word, Microsoft Outlook, and Microsoft Excel. Users can build queries that will extract data directly from the database from within Microsoft Word to create customer letters. Or users can export data from Microsoft Dynamics NAV directly into a Microsoft Excel spreadsheet to produce reports or create a pivot table for analysis.



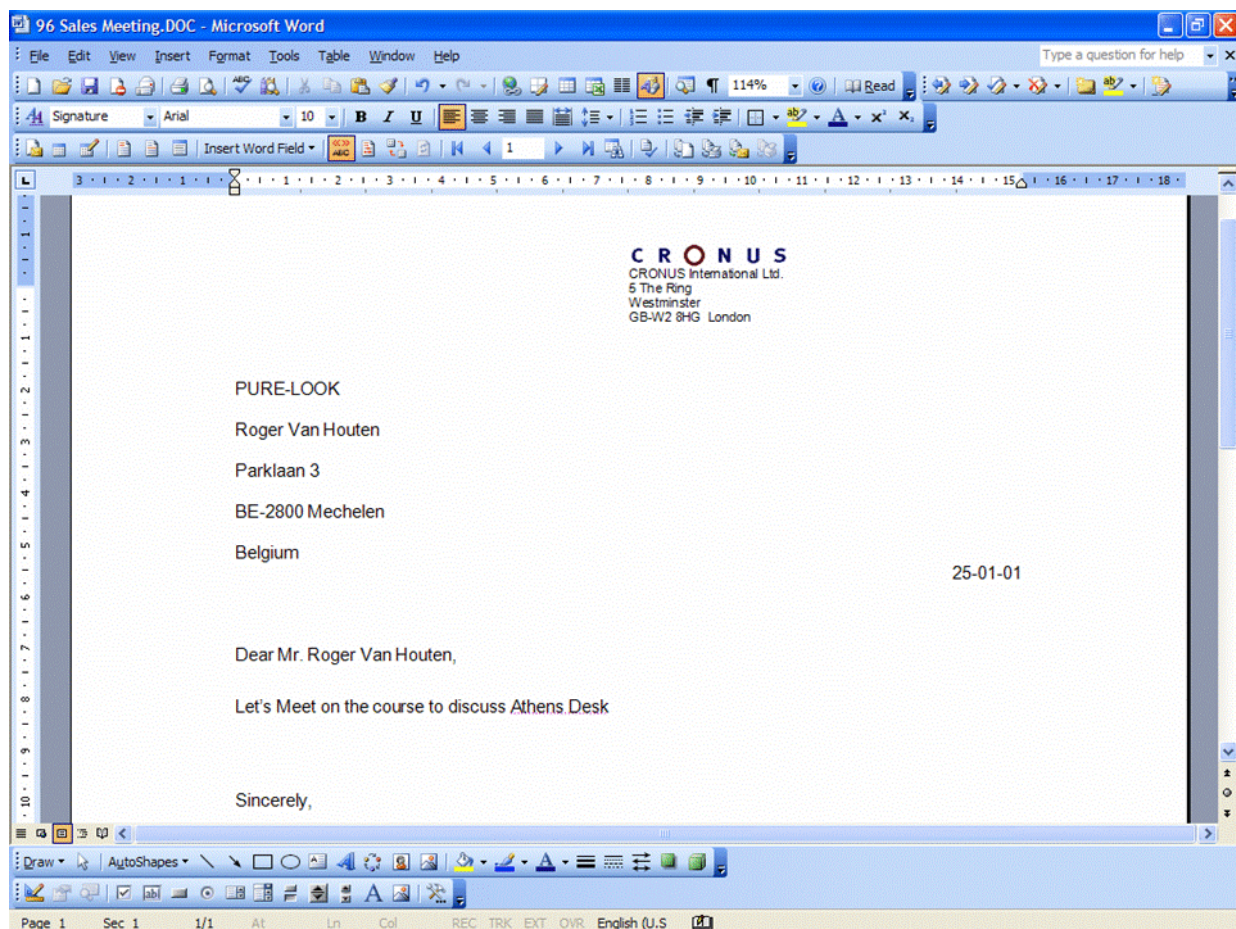


**Figure 1** Tight integration with Microsoft Office enables users to create letters using Microsoft Word from within the Microsoft Dynamics NAV application. Here, the user is about to create a letter from the customer contact card in Microsoft Dynamics NAV.

Employees can book meetings, manage contacts and tasks and send email in Microsoft Dynamics NAV and synchronize automatically with Microsoft Outlook. Users can also access up-to-date contacts, tasks and calendar information from Microsoft Outlook directly in Microsoft Dynamics NAV.

Users can also keep records of e-mail correspondence, business contacts, meetings, tasks, appointments, and so on, in both Outlook and Microsoft Dynamics NAV and share selected records with colleagues. For example: when an e-mail from Microsoft Dynamics NAV is created, the e-mail is also registered in Outlook, and when a task is assigned in Outlook, the task is also registered in Microsoft Dynamics NAV.

Integrated innovation enables better communication with customers and colleagues. E-Mail Logging gives a greater overview of e-mails. Employees can integrate e-mails between Microsoft Outlook and Microsoft Dynamics NAV. Companies are able to maintain current e-mail records in both systems and employees can share and publish knowledge about external contacts.



**Figure 2** Here you can see how the information retrieved from the Microsoft Dynamics NAV contact card is now used in a letter created in Microsoft Word. Integration between Microsoft Dynamics NAV and Microsoft Office make all of this happen automatically. The user does not have to "jump" back and forth between applications.

In addition, Microsoft Dynamics NAV industry specific solution templates utilize Microsoft Excel and Microsoft Project for set-up and project planning. This helps partners increase productivity and reduces customer total-cost-of-ownership.

## Smart Tags give employees a more effective working environment

The tight integration between Microsoft Dynamics NAV and Microsoft Office enables employees to access information that is stored in Microsoft Dynamics NAV without leaving Microsoft Word, Excel or Outlook. Smart Tags functionality provides predefined information such as a name or an address and is recognized in Microsoft Office applications and more detailed information from Microsoft Dynamics NAV can be added.

## Integration with Microsoft SQL Server and Microsoft SharePoint helps employees access the information they need to do their job

Microsoft SQL Server 2000 Notification Services enable organizations to increase productivity by providing their customers and employees with the information they need when they need it so they can make timely, informed decisions.



The Microsoft SQL Server Option for Microsoft Dynamics NAV provides analysis and reporting services so it's easier for employees to access, extract and analyze business data and information quickly so they make sound decisions faster.

Employee Portal for Microsoft Dynamics NAV uses Microsoft SharePoint technology to save employees time by giving them instant access to the information they need to do their job.

Salespeople can access customer accounts and sales history, and enter orders. Purchasers can look up stock availability, and production designers can look up BOMs. Without having to learn a new system, staff gets access to:

- **Analytical reports**
- **Real-time integrated data**
- **Sales and service tools**

Companies can create a company-wide intranet where you decide how much access your employees have to the system. This helps ensure that employees remain focused on relevant data, and don't waste time struggling to learn a system that they really don't need to use.

## *Seamless Connectivity of People, Processes and Information*

To remain competitive today, small and medium-sized businesses must be able to connect and share data and information cost-efficiently among employees, customers and business partners and across different systems.

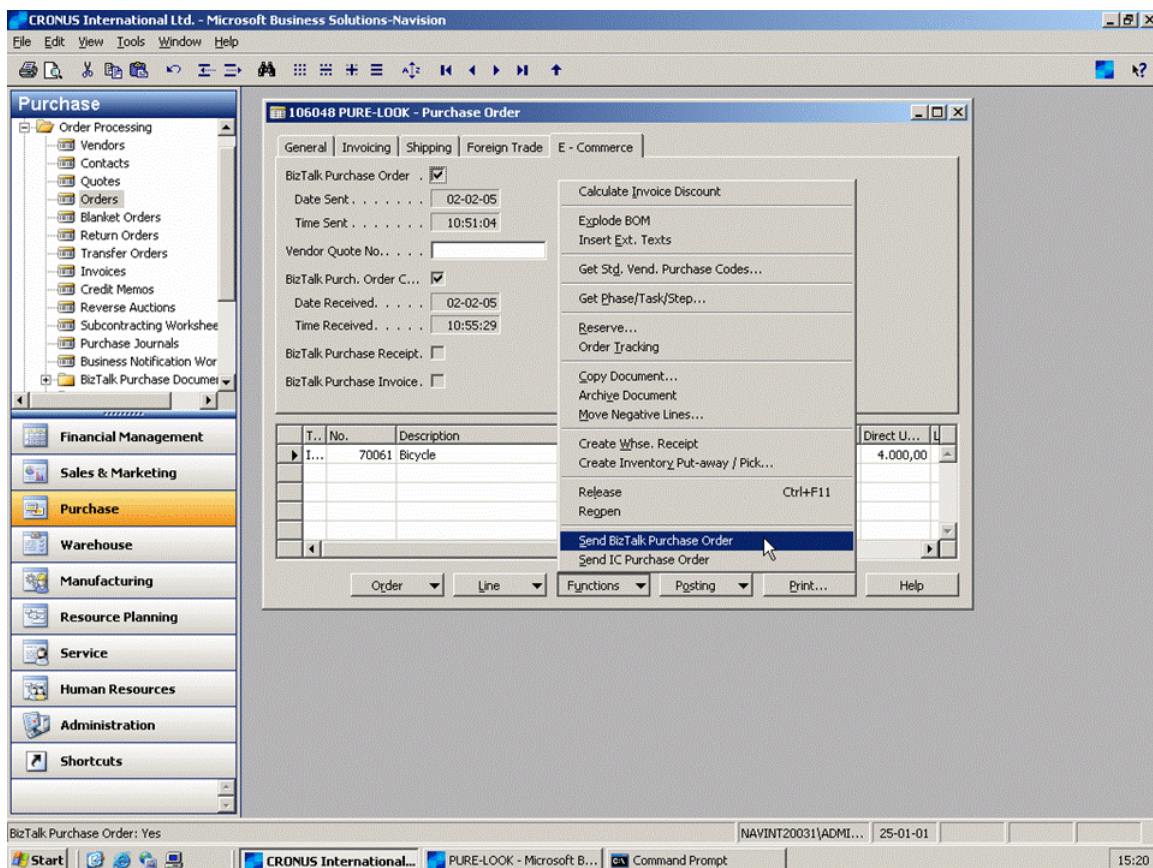
### **Microsoft BizTalk Server and Microsoft Dynamics NAV**

Microsoft Dynamics NAV integrates with Microsoft BizTalk Server to facilitate the electronic exchange of business documents between business partners. Commerce Gateway helps customers efficiently unite systems, employees, and trading partners and automates their interactions in a flexible way. Information sent or received by Commerce Gateway is automatically updated in Microsoft Dynamics NAV. This eliminates the need for manual data entry and significantly increases data accuracy.

This tight integration enables companies to become more competitive. They can reach out to new trading partners cost-efficiently – regardless of the system they use or the standards they require. Companies can work faster. The time it takes to respond to requests for information and documents decreases so companies can do more. And, Microsoft BizTalk Server works with the Application Server for Microsoft Dynamics NAV to immediately handle sales orders. This improves service and makes companies more attractive to new trading partners.

For example, Microsoft customer, CRT Group was the first organization in the Asia Pacific region to implement Commerce Gateway for Microsoft Dynamics NAV. CRT Group is a leading transport company in Australia and they needed an integrated financial and transport logistics management system with an e-business interface. According to CRT, their customer service staff saved up to 50% in order entry time in just one month following implementation of Commerce Gateway. Tony McAvaney, Logistics Project Manager of Qenos, one of CRT Group's most important trading partners, reported that Commerce Gateway eliminated the double entry issues. Data errors, as a result, dropped 75% – virtually eliminating the costs of those errors – a benefit for both organizations.





**Figure 3** Commerce Gateway was one of the first solutions to utilize Microsoft BizTalk Server and comes with 16 schemas out-of-the-box

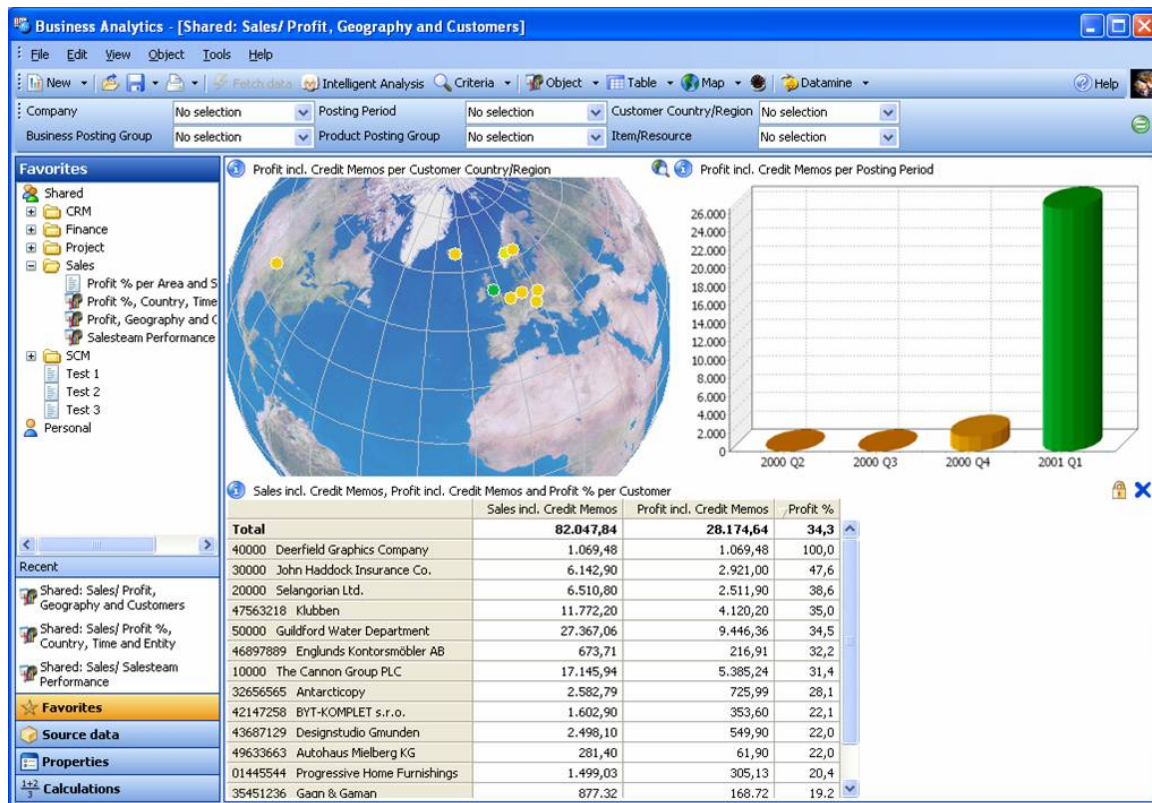
## Integrated innovation helps companies leverage the power of the Internet

Commerce Portal for Microsoft Dynamics NAV is an Internet-based e-commerce solution within Microsoft Dynamics NAV that leverages the Internet to streamline interactions with vendors and customers. Commerce Portal is based on technology from Microsoft such as Microsoft Windows Server, Microsoft Internet Information Server (ISS), Active Server Pages, Microsoft Commerce Server and Microsoft .NET.

In addition, all relevant data in the Commerce Portal is synchronized with Microsoft SQL Server so that the data is actually stored in both the Database Server for Microsoft Dynamics NAV and the Microsoft SQL Server database. The system automatically synchronizes the Microsoft SQL Server database, and subsequently the Web pages on a storefront, with the C/SIDE Database for Microsoft Dynamics NAV.

## Better Insight and Smarter Business Decisions

Companies today are buried under an enormous amount of data and information – so much so that companies end up analyzing too much of the wrong information and missing out on profitable opportunities. For example, information in their system is not up-to-date so employees are notified too late of problems or opportunities to make a difference. Often, when needing data from other departments, employees must have someone send them the data since it is stored in departmental data sources which are not shared. And moving data from one source to another and reformatting it for analysis can cause errors. The challenge lies in being able to access the right information and transform it into insight and knowledge.



**Figure 4** Integration between Microsoft Dynamics NAV and Microsoft SQL helps users transform data into better business decisions

## Integration enables efficient sharing of data and information

Microsoft Dynamics NAV draws on the benefits of Microsoft SQL Server and Microsoft Windows SharePoint Services to unlock the value of business data and share relevant information among employees across the organization in a secure way.

Since the release of Microsoft Navision 2.5, Microsoft has been providing the Microsoft SQL Server Option to customers as an alternative to the Database Server for Microsoft Dynamics NAV. This option gives customers the opportunity to run their business on Microsoft's industry-leading database technology and gives partners greater flexibility in recommending and designing a solution that meets the needs of customers.

The Microsoft SQL Server option offers a number of benefits to those customers whose businesses require data integration across many systems and applications. It also provides benefits to customers where down time means loss of revenue or business interruption, and who need faster access and work with more data and information from their system.

Business Analytics in Microsoft Dynamics NAV utilizes Microsoft SQL Server Analysis services. And, Business Notification in Microsoft Dynamics NAV utilizes Microsoft SQL Notification Services.

## A cost-efficient way to deploy a Web-based interface and share information

Employee Portal for Microsoft Dynamics NAV is a very convenient and powerful .NET- based product to cover distributed information needs. It's an Intranet solution that utilizes Microsoft SharePoint



Services and integrates with Microsoft SharePoint Portal making it possible to work with real-time business information such as invoices, customer data and reports directly – and in a secure environment – from Microsoft Dynamics NAV. Employees can access and share Microsoft Office documents, receive information or updates quickly or update relevant business information in Microsoft Dynamics NAV. Like all Microsoft Dynamics NAV solutions, Employee Portal has been developed with the user in mind so that it's both intuitive and simple to use. Customers save on training costs, and employees can start working immediately. There are no extra software costs. Microsoft SharePoint Services is included in Microsoft Windows 2003.

## *How Integrated Innovation Helps Microsoft Certified Partners Improve Customer Total Cost of Ownership*

Integrated innovation in Microsoft Dynamics NAV enables partners to realize business success, too, by increasing productivity and making it easier for partners to focus on their key competencies. Instead of partners using valuable resources on integrating their customers' solutions with other systems, they can focus on differentiating themselves and developing unique solutions with a lower total cost of ownership.

Microsoft Dynamics NAV has developed Microsoft Dynamics NAV Rapid Implementation Methodology which utilizes Microsoft Excel and Microsoft Project. These are templates that help partners rapidly implement standard industry solutions boosting partner productivity and decreasing customer total-cost-of-ownership.

1	2	3	4
1	Sales & Receivables Setup	Table 311	The Options you choose in the "Answer" column can be transferred to the new Navision Database.
2	Question	Answer options	Answer
3	Are discounts posted on separate accounts in General Ledger ?	No	0
4		Invoice Discount	
5		Line Discount	
6		All Discounts	
7			
8	Do you want the program to give a warning about the customer's credit status when you create a sales order or invoice ?	Credit limited	1
9		Overdue balance	
10		Both warnings	
11		No warning	

**Figure 5** The setup of Microsoft Dynamics NAV Rapid Implementation Methodology is done in Microsoft Excel making it easy for partners to quickly implement unique solutions for their customers

## *Conclusion*

Microsoft Dynamics NAV was created with the spirit of integrated innovation. As one of the very early adopters of Microsoft products and technologies, Microsoft Dynamics NAV continues to utilize Microsoft products and technologies to help customers increase productivity, collaboration and business insight. Microsoft Dynamics NAV and Microsoft products and technologies boost partner productivity and profitability, too. Instead of wasting valuable resources on integration, partners can focus on adding more customers and developing unique solutions that help small and medium-sized businesses around the world achieve business success.

## *About Microsoft Dynamics*

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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