Microsoft Dynamics NAV 2016

Licensing Guide



Microsoft Dynamics NAV

Microsoft

# **Using This Guide**

Use this guide to improve your understanding of how to license Microsoft Dynamics NAV 2016 under the Perpetual Licensing or the Subscription Licensing model. It also applies to Microsoft Dynamics NAV 2013, 2013 R2, and 2015. It does not apply to Microsoft Dynamics GP, Microsoft Dynamics AX, Microsoft Dynamics SL, or prior versions of Microsoft Dynamics NAV. This guide is not intended to influence the choice of Microsoft Dynamics products and services. The examples presented in this guide are illustrative. Microsoft Corporation reserves the right to review and/or update the existing version of this document without any advance notice.

For help determining the right technology solution for any given organization, including the license requirements for a specific product or scenario, consult with your Microsoft Dynamics Certified Partner or your Microsoft account team.

This guide does not supersede or replace any of the legal documentation covering use rights for Microsoft products. Specific product license terms are detailed in the Software License Terms (SLT) document, which is available at <a href="http://go.microsoft.com/fwlink/?LinkID=627433&clcid=0x409">http://go.microsoft.com/fwlink/?LinkID=627433&clcid=0x409</a>.

## **License Keys vs. License Entitlements**

An important distinction to make is between license keys (activation keys) and license entitlements. You use license keys to activate the Microsoft Dynamics software. License entitlements are what you are entitled to run and use based on the licenses you have acquired as described in the SLT.

Since the release of Microsoft Dynamics NAV 2013 R2 CU10, license keys are version-specific. For example, a Microsoft Dynamics NAV 2016 license key is required to activate Microsoft Dynamics NAV 2016 software and a Microsoft Dynamics NAV 2016 license key will not activate any other versions of the software.

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# Overview of Microsoft Dynamics NAV 2016 Licensing Requirements

Microsoft Dynamics NAV 2016 licensing is designed to help small and midsize businesses jumpstart their financial insights and distribution management and then easily extend into all functional areas.

The two license models available for Microsoft Dynamics NAV 2016 provide customers with a simplified, yet flexible, purchase experience. The entire solution can be licensed with as little as one and as much as four core components: The Starter Pack, the Extended Pack, the Full User and the Limited User. Additional configuration components are also available.

With Microsoft Dynamics NAV 2016, you must license:

- The solution functionality; and
- Access to the solution functionality by your users

# **Licensing the Solution Functionality**

Microsoft Dynamics NAV 2016 functionality is delivered through the Starter Pack and the Extended Pack.

The required **Starter Pack** gives you core financials and distribution functionality to help you:

- Gain control and insights over your finances
- Manage sales items and materials in a distribution environment
- Provide licensed users a singular view of the business from virtually anywhere through a variety of devices

The optional and additive **Extended Pack** adds functionality that integrates core financials and distribution management capabilities with industry specific functionality extensions such as:

- Manufacturing to support and control the manufacturing environment
- Warehousing to manage the warehouse to support operations
- Professional Services to manage the billables generated by consultants
- Basic Customer Relationship Management (CRM) to manage customer and supplier relationships and offer the highest quality of service and support

**Note:** Licenses for additional software required to run the solution, such as Microsoft Windows Server, Microsoft SQL Server, and Microsoft SharePoint Server, are <u>not</u> included with the Starter Pack, the Extended Pack, or any of the access licenses. You need to license any additional software according to their applicable license terms. See <u>Licenses for Additional Software</u> for more information.

# **Licensing User Access to the Solution Functionality**

Users accessing the solution must be defined according to the type of access they need: Full or Limited.

Figure 1: Full vs. Limited User Licenses



**Full Users** receive unrestricted direct or indirect access to all of the functionality in the licensed server software including setting-up, administering, and managing all parameters or functional processes across the ERP Solution. Full Users require more write capabilities that those available to Limited Users.

Limited Users get restricted access to the ERP Solution to complete only the following tasks:

- "Read" access to any data contained in the ERP solution; and
- "Write" access to a maximum of 3 table objects with the following exceptions:
  - Limited users are not authorized to write directly or indirectly to the following tables: General Ledger Entry (table number 17), Permission Set (table number 2000000004), Permission (table number 2000000005) or Access Control (table number 2000000053);
     and
  - Tables described in <u>Appendix A: Limited User Included Tables</u> do not count towards the 3 table objects.

Writing the transactions of a Limited User to a temporary table then having a Full User (or a system process) post those transactions to table 17 is an example of indirect write access to table 17, which is not permitted. Transations created by a Limited User are not considered indirect write access if (i) they are needed by a Full User as in an input to perform their job function and (ii) transactions are processed individually (not in a batch).

The Limited User Included Tables should allow you to perform the following tasks:

## Sales

- Create a Customer with relevant contact details, based on a template or from scratch.
- Create an Opportunity for an existing Campaign, and relate it to Sales Quotes or Orders.
- Quotes:
  - Create a Sales Quote for an existing or a new Customer.
  - o Send a Sales Quote by email, send it for approval, or convert it to a Sales Order.
- Orders
  - Create a Sales Order for an existing or a new Customer.
  - Send a Sales Order for approval.

## <u>Purchase</u>

- Create a Vendor with relevant contact details, based on a template or from scratch.
- Create a Purchase Order for an existing or a new Vendor.
- Send a Purchase Order for approval.

#### Other Tasks

- Fill in an existing timesheet
- Perform Document Capture Expense reporting by scanning an invoice to create an incoming document

#### **Role Centers**

• Use the charts on two role centers: Order Processor (for Sales scenarios) and Purchasing Agent (for Purchase scenarios).

However, if your specific deployment requires more than 3 tables not part of the Included range in order to fulfill these tasks, a Full User will be required.

Any access beyond these limitations requires Full User access.

When assigning security rights to users, the system administrator will designate them as Full Users or Limited Users.

# **Access License Types**

Microsoft Dynamics NAV 2016 offers two types of access licenses: **Concurrent Client Access Licenses** (**CALs**), only available under the Perpetual Licensing model, and **User Subscription Access Licenses** (**SALs**), only available under the Subscription Licensing model.

**Concurrent CALs** are based on the number of users accessing the solution simultaneously. While this access license type allows an unlimited number of individuals to be defined in the system, the number of individuals accessing the solution at any given time may not exceed the total licensed number of Concurrent CALs. Concurrent CALs are assigned temporarily to an individual user for the duration of their active session. Once that individual ends the active session, the CAL then becomes available for use by another individual. Concurrent CALs license individual users to access the application only while they are consuming one of the Concurrent CALs (making it unavailable for other individuals to access the application).

**User SALs**, only available in the Subscription Licensing model, grant individual users the right to access the application irrespective of the number of users simultaneously accessing the application. Unlike Concurrent CALs, a unique User SAL must be assigned to each individual user that will access the solution functionality. SALs are specific to an individual and cannot be shared.

Refer to the <u>Perpetual Licensing and Subscription Licensing Models</u> section later in this document for additional details.

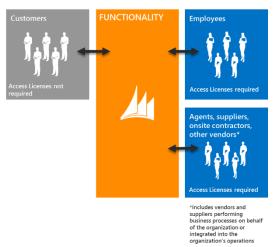
# **Access by External Users**

Your customers are external users. The Starter Pack includes the rights for an unlimited number of external users to access the ERP solution without the need for individual Access Licenses as long as following two restrictions are met:

- External users cannot use any clients provided by the Microsoft Dynamics NAV Application
  Programming Interface (API), such as the Microsoft Dynamics NAV 2016 Windows client, the
  Microsoft Dynamics NAV 2016 Web client, the Microsoft Dynamics NAV for Windows, the
  Microsoft Dynamics NAV for iPad or iPhone app, or the Microsoft Dynamics NAV for Android
  Tablet or Phone app.
- External user licenses cannot be used by you to provide business process outsourcing services to your customers.

Your system administrator designates external users in the user table by assigning such users an External User designation.

Figure 2: Internal vs. External Users



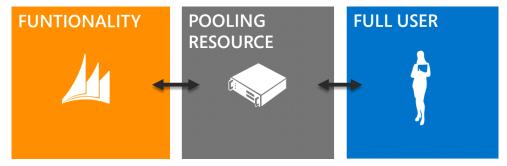
# Multiplexing

Multiplexing is the use of hardware or software (including manual procedures) to reduce the number of users that directly access the Microsoft Dynamics ERP solution by pooling connections. Multiplexing does not reduce the number of Access Licenses required. Any user that directly or indirectly reads from or writes to the ERP solution's database in real-time mode or via batch whether connecting individually or through a data consolidation process must be licensed with the appropriate access license type in compliance with the Software License Terms.

**Note**: Licensed users may manually rekey information (coming from non-licensed users) into the Microsoft Dynamics ERP solution. This scenario is not considered to be multiplexing.

Figure 3: Multiplexing

Multiplexing does not reduce the number of user licenses required.



# Customizing the ERP Solution

A suite of tools is available to help partners customize your ERP Solution. Your partner may license application objects as needed to modify the solution to your specific requirements. If you are a larger customer with your own IT department, please ask your partner about Application Builder and Solution Developer, two functionality modules designed to give you the tools to modify your solution on your own.

Figure 7: Adding Customization



# Licensing Models

Microsoft Dynamics NAV 2016 is licensed through one of two licensing models: Perpetual Licensing and Subscription Licensing.

With **Perpetual Licensing**, you license the software with permanent usage rights. So, you can use the licensed version of the software for as long as you choose. Perpetual Licensing might be for you if you prefer an upfront investment or if you want to manage the solution internally, and will run the software on your premises (or, subject to license mobility rights, have it hosted by a third party Infrastructure as a Service [laaS] provider acting as your agent).

With **Subscription Licensing**, you license non-perpetual rights to use the software, meaning you can use the software only during the term of the agreement secured by periodic payments. This model lowers your initial licensing costs and provides you with the flexibility to increase or decrease subscription license counts from one subscription term to the next. You can use Subscription Licensing when you want to have the ERP solution hosted and managed as Software as a Service (SaaS) by your partner or any third party. Alternatively, the software may be deployed on your premises, provided that your Microsoft Dynamics NAV partner provides day-to-day management services and maintains sole control over the solution.

There are significant licensing differences between Perpetual Licensing and Subscription Licensing, as illustrated below.

Figure 4: Perpetual and Subscription Licensing at-a-glance

|   | Perpetual | Subscription |
|---|-----------|--------------|
| Self-managed, on-premises deployment              | ✓         |              |
| Self-managed, hosted deployment (laaS)*           | ✓         |              |
| Partner-managed, on-premises deployment           |           | <b>*</b>     |
| Partner-managed, partner-hosted deployment (SaaS) |           | ✓            |
| Own your licenses                                 | ✓         |              |
| Lease your licenses                               |           | <b>*</b>     |
| Concurrent access licenses                        | ✓         |              |
| Per User access licenses                          |           | ✓            |

<sup>\*</sup>Requires an active enhancement Plan

# Perpetual Licensing

With Perpetual Licensing, you license the desired solution functionality and access to that functionality is secured by licensing access licenses.

# Licensing the Solution Functionality under Perpetual Licensing

It is now easy for small and midsize businesses to quickly and affordably get started with Perpetual Licensing. The Starter Pack gives customers all application setup utilities, provides usage rights to core Financials and Distribution functionalities, plus includes the first three Full Concurrent CALs. You need only one Starter Pack license per ERP Solution deployment—even if your installation is deployed over multiple servers as long as you own those servers and that they are in the same physical location. For many organizations, the Starter Pack is the only Microsoft Dynamics license component they will need.

Figure 5: Starter Pack



If you want to deploy some of the advanced functionality delivered by Microsoft Dynamics NAV 2016, you can license the optional and additive Extended Pack.

When you license the Extended Pack, the first three Full Concurrent CALs included in the prerequisite Starter Pack also get access to all of the advanced functionality.

Figure 6: Extended Pack



If you have more than three Full Users that need to access the solution functionality at the same time, you must acquire additional Full Concurrent CALs beyond the first three included with the Starter Pack.

# **Deploying Your Self-Managed Solution in an laaS Environment**

If you have an active enhancement plan, you have the licensing flexibility you need to manage your own solution, but deploy it in an Infrastructure as a Service (laaS) environment, such a Microsoft Azure. Through the License Mobility rights included with your enhancement plan, you may reassign your ERP solution licenses to:

- Any servers running physical operating system environments (OSEs) or virtual OSEs dedicated to you and located within the same Server Farm as often as needed, or
- From one Server Farm to another, but not on a short-term basis (i.e., not within 90 days of the last assignment).

Microsoft Dynamics NAV 2015 may be deployed in a multitenant environment where, by definition, the OSE is not dedicated to you. In such case, you are required to install your license key in the tenant database. Please note that this exception to the License Mobility requirement that the OSE be dedicated to you only applies to the Microsoft Dynamics NAV software and not to any of the other Microsoft components required for your ERP solution to run.

Also, please note that SQL Server Runtime Use licenses, offered in Order Central, do not qualify for License Mobility rights. So, if you are deploying your ERP solution in an laaS environment, you will be required to license SQL through other licensing programs.

"Server Farm" means a single data center or two data centers each physically located:

- In a time zone that is within four hours of the local time zone of the other (Coordinated Universal Time (UTC) and not DST), and/or
- Within the European Union (EU) and/or European Free Trade Association (EFTA).

# **Licensing User Access under Perpetual Licensing**

Under Perpetual Licensing, you license Full access to the solution with Full Concurrent CALs and Limited access to the solution with Limited Concurrent CALs. When assigning security rights to users, the system administrator will designate each user as a full user or a limited user.

Microsoft Dynamics NAV 2016 contains two concurrency "counters"— one for Full Users and another one for Limited Users—to help you make sure that the number of users concurrently logged into the solution does not exceed your licensed number of Full and Limited Concurrent CALs. When a user attempts to log in, they will automatically be routed through the appropriate counter based on their assigned user type. If the maximum number of licensed concurrent users has already been reached, the user will not be able to log in until someone logs out.

**Note:** When a Full User accesses a session using web services, the session is "locked" to that user for a minimum of two hours, after which time, if the user has logged out, the session becomes available to other users. For Limited Users, the session is tied to that user for a minimum of 15 minutes. The user may release the locked session at any time by logging into the solution through any of the Microsoft Dynamics NAV clients and logging out. At that time, the application will release all sessions tied to that user.

Please note that users accessing the application indirectly, such as through a third party application, require to be licensed with and consume the appropriate CAL type, even if those users are not directly logging into the ERP solution. The responsibility for ensuring proper concurrency usage falls to the third party application provider.

# Subscription Licensing

With Subscription Licensing, customers subscribe to the rights to use Microsoft software and services instead of owning them.

Solution Functionality and User Access are licensed through three Subscriber Access Licenses (SALs):

- **Standard User SAL** is a required SAL that entitles the licensed user to perform Full User tasks across the ERP Solution using all of the functionality included in the Starter Pack. Every Full User requires a Standard User SAL. The Standard User SAL grants all licensed users the right to use the functionality contained in the Starter Pack.
- **Extended Use Additive SAL** is an optional functionality license type, additive to the Standard SAL, which expands the rights of all licensed users to perform tasks using all of the functionality in the Extended Pack. The Extended Use Additive SAL grants all licensed users the right to use the functionality contained in the Extended Pack as long as every Full User licensed with a Standard User SAL is also licensed with an Extended Use Additive SAL.
- **Limited User SAL** is an optional access license type that entitles the licensed user to perform Limited User tasks across the ERP Solution using the same functionality footprint available to the Full Users. Every Limited User requires a Limited User SAL.

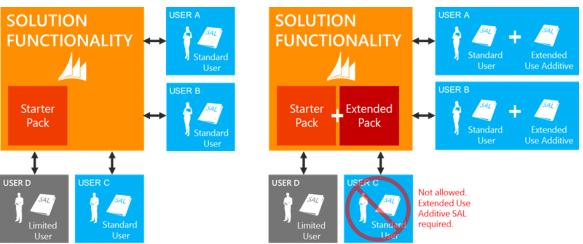
Refer to <u>Appendix B: Microsoft Dynamics NAV 2016 Functionality</u> at the bottom of this document for a list of the included functionality in the Starter Pack and Extended Pack.

# **Choosing the Appropriate SAL Type**

To choose the appropriate SAL type, determine the functionality you require for the ERP solution. If you require only the functionality included in the Starter Pack, then license Standard User SALs (or a combination of Standard User SALs and Limited Use SALs). If you also require the functionality of the Extended Pack, then license Extended Use Additive SALs for all Standard User SALs.

Note: You must license Extended Use Additive SALs in the same quantity as Standard User SALs.

Figure 7: Choosing the appropriate SAL type



**Note:** Microsoft Dynamics NAV 2016 includes at no charge, one SAL for an External Accounting User using the client software only for the sole purpose of providing supplemental professional accounting or bookkeeping services related to the auditing process, and one SAL for a System Administor User for an employee of your Microsoft Dynamics partner to manage your application and provide support.

# **Subscription Licensing Term**

Microsoft Dynamics NAV 2016 is licensed on a monthly basis, giving you the flexibility to adapt your SAL counts from one month to the next as required by your changing business trends.

When adding SALs, the cost of the license will be pro-rated based upon the time remaining in the current month's term (based on a standardized 30 day month). So, for example, if there are 10 days left until the end of the term, you will pay the monthly charge divided by 30 times 10. When removing SALs, the reduced SAL count takes effect at the start of the subsequent monthly term.

The only commitment for Subscription Licensing is a full month term so, except for having to let your subscription run its course until the end of the current term, you can cancel at any time without any penalties.

# **Enhancement Plan Benefits**

Your Microsoft Dynamics solution puts you at the top of your game—and your Microsoft Dynamics service plan keeps you there. It's what you need to stay compliant, stay competitive, and get the greatest value from your solution over time. Your plan, along with the services your Microsoft Dynamics partner provides, will give you the winning combination for success!

- License Mobility Rights: Deployment flexibility for the Perpetual Licensing model that enables you to manage your own solution yet host it in an Infrastructure as a Service (laaS) environment, such as Microsoft Azure.
- Optimizing ongoing value: Access to new version upgrades, features, and innovative capabilities help customers remain compliant and competitive—and stay on the leading edge of technology.
- **Protecting your investment:** Ready access to service packs and hotfixes keep customer's solution up-to-date and running at peak performance levels. Microsoft ensures support throughout the solution's life cycle, and the Microsoft product roadmap helps customers plan for the future.
- **Increasing business productivity**: Self-support tools and training through CustomerSource empower customers to increase productivity and manage complex business challenges.
- Offering powerful flexibility: Customers decide the level of help they need, with a rich self-help knowledge base, tremendous training resources, an online community of users, and 1:1 help from Microsoft experts.

If you license your solution under the Perpetual Licensing model, additional Customer Support offerings may be available in your region. For information on the availability of the Advantage Plus Plan, or for more detailed information on the benefits, visit <a href="http://www.microsoft.com/dynamics/customer/en-us/service-plans.aspx">http://www.microsoft.com/dynamics/customer/en-us/service-plans.aspx</a>.

# Licenses for Additional Software

Licenses for additional software that may be required for the solution—such as Microsoft Windows Server, Microsoft SQL Server, and Microsoft SharePoint Server—and their corresponding Access Licenses are not included with the Microsoft Dynamics NAV 2016 licenses. You must acquire any necessary licenses for these additional products under the licensing model for the particular product (which may be different

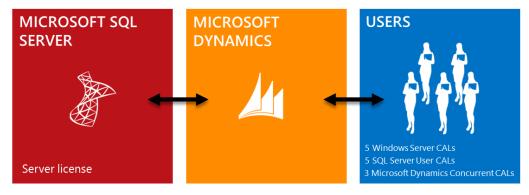
than the model used for Microsoft Dynamics NAV 2016). To learn more or acquire licenses for additional software, find and contact a Microsoft Volume Licensing partner <u>via:</u> <a href="http://www.microsoft.com/licensing/how-to-buy/how-to-buy/spx">http://www.microsoft.com/licensing/how-to-buy/how-to-buy/spx</a>.

Figure 8: Licenses for Additional Software are not included with Microsoft Dynamics NAV licenses



Figure 9: Windows Server and SQL Server Licenses

In this example, five individuals are accessing the Microsoft Dynamics ERP solution, which is connecting to a SQL Server database, through three Microsoft Dynamics Concurrent CALs. Windows Server and SQL Server are being licensed through a server/CAL model, so the customer requires the appropriate number of Windows Server and SQL Server licenses and CALs. Because Windows Server and SQL Server CALs are also licensed on a Named User (or device) basis, each individual user (or device) requires a Windows Server and a SQL Server CAL along with the Microsoft Dynamics CAL.



For more information about licensing Windows Server and SQL Server, refer to http://www.microsoft.com/en-us/server-cloud/pricing-and-licensing.aspx.

Licenses for other products required for the solution must be acquired separately in accordance with the applicable licensing requirements for these products.

# Additional Resources

# **Microsoft Dynamics Website**

Learn about what Microsoft Dynamics solutions can do for your organization and how to get started. http://www.microsoft.com/dynamics/en/us/default.aspx

#### **Software License Terms**

Get specific product license terms. http://go.microsoft.com/fwlink/?LinkID=627433&clcid=0x409

## 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.) http://www.microsoft.com/dynamics/en/us/customersource.aspx

# Appendix A: Limited User Included Tables

The following tables do not count towards the maximum of three permitted for Limited Users in Microsoft Dynamics NAV 2016

| Table #    | Table Name  | Dated Added               |
|------------|---|---------------------------|
| 18         | Customer  | 6-Oct-2015                |
| 19         | Cust. Invoice Disc.                                     | 6-Oct-2015                |
| 23         | Vendor  | 6-Oct-2015                |
| 24         | Vendor Invoice Disc.                                    | 6-Oct-2015                |
| 36         | Sales Header  | 26-Jan-2015               |
| 37         | Sales Line  | 6-Oct-2015                |
| 38         | Purchase Header   | 26-Jan-2015               |
| 39         | Purchase Line   | 6-Oct-2015                |
| 43         | Purch. Comment Line                                     | 20-Nov-2012               |
| 44         | Sales Comment Line                                      | 20-Nov-2012               |
| 51         | User Time Register                                      | 1-Oct-2012                |
| 97         | Comment Line  | 1-Oct-2012                |
| 130        | Incoming Document                                       | 6-Oct-2015                |
| 133        | Incoming Document Attachment                            | 6-Oct-2015                |
| 222        | Ship-to Address   | 6-Oct-2015                |
| 224        | Order Address   | 6-Oct-2015                |
| 225        | Post Code   | 6-Oct-2015                |
| 249        | VAT Registration Log                                    | 6-Oct-2015                |
| 308        | No. Series  | 6-Oct-2015                |
| 309        | No. Series Line   | 1-Oct-2012                |
| 336        | Tracking Specification                                  | 20-Nov-2012               |
| 337        | Reservation Entry                                       | 1-Oct-2012                |
| 348        | Dimension   | 6-Oct-2015                |
| 355        | Dimension Ledger Entry                                  | 1-Oct-2012                |
| 356        | Journal Line Dimension                                  | 1-Oct-2012                |
| 357        | Document Dimension                                      | 1-Oct-2012                |
| 358        | Production Document Dimension                           | 1-Oct-2012                |
| 359        | Posted Document Dimension                               | 1-Oct-2012                |
| 361        | G/L Budget Dimension                                    | 1-Oct-2012                |
| 389        | Service Contract Dimension                              | 1-Oct-2012                |
| 405        | Change Log Entry  | 1-Oct-2012                |
| 454        | Approval Entry  | 6-Oct-2015                |
| 455        | Approval Comment Line                                   | 20-Nov-2012               |
| 480        | Dimension Set Entry                                     | 1-Oct-2012                |
| 481        | Dimension Set Tree Node                                 | 1-Oct-2012                |
| 487        | Business Chart User Setup                               | 15-Aug-2015               |
| 760<br>762 | Trailing Sales Orders Setup                             | 6-Oct-2015                |
|            | Account Schedules Chart Setup                           | 15-Aug-2015               |
| 763<br>770 | Acc. Sched. Chart Setup Line                            | 6-Oct-2015<br>15-Aug-2015 |
| 770<br>771 | Analysis Report Chart Setup  Analysis Report Chart Line | 6-Oct-2015                |
| 869        | Cash Flow Chart Setup                                   | 15-Aug-2015               |
| 900        | Assembly Header   | 6-Oct-2015                |
| 900        | Assembly Header Assembly Line                           | 6-Oct-2015<br>6-Oct-2015  |
| 901        | Assembly Line Assemble-to-Order Link                    | 6-Oct-2015<br>6-Oct-2015  |
| 904        | Assembly Comment Line                                   | 6-Oct-2015                |
| 950        | Time Sheet Header                                       | 6-Oct-2015                |
| 950        | Time Sheet Header Time Sheet Line                       | 6-Oct-2015                |
| 951        | Time Sheet Detail                                       | 1-Oct-2012                |
| 952        | Time Sheet Detail                                       | 1-Oct-2012                |
| 953        | Time Sheet Header Archive                               | 6-Oct-2015                |
| 955        | Time Sheet Line Archive                                 | 6-Oct-2015                |
| 900        | THIRE SHEET LINE ALCHIVE                                | 0-001-2013                |

| Table #      | Table Name                                    | Date Added                 |
|--------------|---|----------------------------|
| 5065         | Interaction Log Entry                         | 1-Oct-2012                 |
| 5072         | Campaign Entry                                | 1-Oct-2012                 |
| 5075         | Logged Segment                                | 1-Oct-2012                 |
| 5078         | Segment History                               | 1-Oct-2012                 |
| 5080         | To-do   | 1-Oct-2012                 |
| 5086         | Cont. Duplicate Search String                 | 1-Apr-2012                 |
| 5092         | Opportunity                                   | 17-Sep-2015                |
| 5093         | Opportunity Entry                             | 17-Sep-2015                |
| 5106         | Document Dimension Archive                    | 1-Oct-2012                 |
| 5107         | Sales Header Archive                          | 1-Oct-2012                 |
| 5108         | Sales Line Archive                            | 1-Oct-2012                 |
| 5109         | Purchase Header Archive                       | 1-Oct-2012                 |
| 5110         | Purchase Line Archive                         | 1-Oct-2012                 |
| 5123         | Inter. Log Entry Comment Line                 | 1-Oct-2012                 |
| 5125         | Purch. Comment Line Archive                   | 1-Oct-2012                 |
| 5126         | Sales Comment Line Archive                    | 1-Oct-2012                 |
| 5127         | Deferral Header Archive                       | 6-Oct-2015                 |
| 5128         | Deferral Line Archive                         | 6-Oct-2015                 |
| 5150         | Integration Page                              | 1-Oct-2012                 |
| 5151         | Integration Record                            | 1-Oct-2012                 |
| 5199         | Attendee                                      | 1-Oct-2012                 |
| 5200         | Employee                                      | 1-Jan-2014                 |
| 5201         | Alternative Address                           | 1-Jan-2014                 |
| 5203         | Employee Qualifications                       | 1-Jan-2014                 |
| 5205         | Employee Relative                             | 1-Jan-2014                 |
| 5207         | Employee Absence                              | 1-Jan-2014                 |
| 5214         | Misc. Article Information                     | 1-Jan-2014                 |
| 5648         | FA Allocation Dimension                       | 1-Oct-2012                 |
| 5765         | Warehouse Request                             | 6-Oct-2015                 |
| 5766         | Warehouse Activity Header                     | 1-Oct-2012                 |
| 5772         | Registered Whse. Activity Hdr.                | 1-Oct-2012                 |
| 5773         | Registered Whse. Activity Line                | 1-Oct-2012                 |
| 5806         | Contact Duplicate Search                      | 1-Apr-2014                 |
| 5809         | Item Charge Assignment (Sales)                | 6-Oct-2015                 |
| 5814         | Inventory Period                              | 20-Nov-2012                |
| 6550         | Whse. Item Tracking Line                      | 1-Oct-2012                 |
| 7002         | Sales Price Sales Line Discount               | 6-Oct-2015                 |
| 7004         | Dates Enterprisedunt                          | 6-Oct-2015                 |
| 7012         | Purchase Price                                | 6-Oct-2015                 |
| 7014         | Purchase Line Discount                        | 6-Oct-2015                 |
| 7135         | Item Budget Dimension Warehouse Journal Batch | 1-Oct-2012<br>20-Nov-2012  |
| 7310         | Warehouse Journal Line                        | 20-Nov-2012<br>20-Nov-2012 |
| 7311         | Warehouse Entry                               | 1-Oct-2012                 |
| 7312<br>7313 | Warehouse Entry Warehouse Register            | 1-Oct-2012                 |
| 7313         | Posted Whse. Receipt Header                   | 1-Oct-2012                 |
| 7319         | Posted Whse. Receipt Line                     | 1-Oct-2012                 |
| 7319         | Warehouse Shipment Header                     | 1-Oct-2012                 |
| 7320         | Warehouse Shipment Line                       | 1-Oct-2012                 |
| 7321         | Posted Whse. Shipment Header                  | 1-Oct-2012                 |
| 7323         | Posted Whse. Shipment Line                    | 1-Oct-2012                 |
| 7324         | Whse. Put-away Request                        | 1-Oct-2012                 |
| 1524         | vviise. rut-away Kequest                      | 1-001-2012                 |

| 956  | Time Sheet Detail Archive      | 6-Oct-2015  |
|------|--------------------------------|-------------|
| 957  | Time Sheet Cmt. Line Archive   | 6-Oct-2015  |
| 959  | Time Sheet Chart Setup         | 15-Aug-2015 |
| 1311 | Mini Last Used Chart           | 6-Oct-2015  |
| 1319 | Sales by Cust. Grp.Chart Setup | 15-Aug-2015 |
| 1504 | Workflow Step Instance         | 6-Oct-2015  |
| 1506 | Workflow Table Relation Value  | 6-Oct-2015  |
| 1511 | Notification Entry             | 6-Oct-2015  |
| 1522 | Workflow Event Queue           | 6-Oct-2015  |
| 1523 | Workflow Step Argument         | 6-Oct-2015  |
| 1524 | Workflow Rule                  | 6-Oct-2015  |
| 1530 | Workflow Step Instance Archive | 6-Oct-2015  |
| 1550 | Restricted Record              | 6-Oct-2015  |
| 1701 | Deferral Header                | 6-Oct-2015  |
| 1702 | Deferral Line                  | 6-Oct-2015  |
| 5050 | Contact                        | 1-Oct-2012  |
| 5051 | Contact Alt. Address           | 1-Oct-2012  |
| 5052 | Contact Alt. Addr. Date Range  | 1-Oct-2012  |
| 5053 | Business Relation              | 6-Oct-2015  |
| 5054 | Contact Business Relation      | 1-Oct-2012  |
| 5056 | Contact Mailing Group          | 15-Aug-2015 |
| 5058 | Contact Industry Group         | 15-Aug-2015 |
| 5061 | Rlshp. Mgt. Comment Line       | 1-Oct-2012  |
| 5062 | Attachment                     | 1-Oct-2012  |
|      |                                |             |

| 7325         Whse. Pick Request         1-Oct-2012           7326         Whse. Worksheet Line         20-Nov-2012           7331         Whse. Internal Put-away Header         20-Nov-2012           7332         Whse. Internal Put-away Line         20-Nov-2012           7354         Bin         1-Oct-2012           9050         Warehouse Basic Cue         6-Oct-2015           9051         Warehouse WMS Cue         6-Oct-2015           9052         Service Cue         6-Oct-2015           9053         Sales Cue         6-Oct-2015           9054         Finance Cue         6-Oct-2015           9055         Purchase Cue         6-Oct-2015           9150         My Customer         6-Oct-2015           9151         My Vendor         6-Oct-2015           9152         My Item         6-Oct-2015           9150         Email Item         6-Oct-2015           9500         Email Item         6-Oct-2015           99000850         Planning Assignment         1-Apr-2014           2000000067         User Default Style Sheet         1-Oct-2012           2000000073         User Personalization         1-Oct-2012           20000000075         User Metadata         1-O |            |                                |             |
|---|------------|--------------------------------|-------------|
| 7331         Whse. Internal Put-away Header         20-Nov-2012           7332         Whse. Internal Put-away Line         20-Nov-2012           7354         Bin         1-Oct-2012           9050         Warehouse Basic Cue         6-Oct-2015           9051         Warehouse WMS Cue         6-Oct-2015           9052         Service Cue         6-Oct-2015           9053         Sales Cue         6-Oct-2015           9054         Finance Cue         6-Oct-2015           9055         Purchase Cue         6-Oct-2015           9150         My Customer         6-Oct-2015           9151         My Vendor         6-Oct-2015           9152         My Item         6-Oct-2015           9150         Email Item         6-Oct-2015           9500         Email Item         6-Oct-2015           99000850         Planning Assignment         1-Apr-2014           2000000067         User Default Style Sheet         1-Oct-2012           2000000073         User Personalization         1-Oct-2012           2000000075         User Metadata         1-Oct-2012  | 7325       | Whse. Pick Request             | 1-Oct-2012  |
| 7332         Whse. Internal Put-away Line         20-Nov-2012           7354         Bin         1-Oct-2012           9050         Warehouse Basic Cue         6-Oct-2015           9051         Warehouse WMS Cue         6-Oct-2015           9052         Service Cue         6-Oct-2015           9053         Sales Cue         6-Oct-2015           9054         Finance Cue         6-Oct-2015           9055         Purchase Cue         6-Oct-2015           9150         My Customer         6-Oct-2015           9151         My Vendor         6-Oct-2015           9152         My Item         6-Oct-2015           9180         Generic Chart Setup         15-Aug-2015           9500         Email Item         6-Oct-2015           99000850         Planning Assignment         1-Apr-2014           2000000067         User Default Style Sheet         1-Oct-2012           2000000073         User Personalization         1-Oct-2012           2000000075         User Metadata         1-Oct-2012  | 7326       | Whse. Worksheet Line           | 20-Nov-2012 |
| 7354         Bin         1-Oct-2012           9050         Warehouse Basic Cue         6-Oct-2015           9051         Warehouse WMS Cue         6-Oct-2015           9052         Service Cue         6-Oct-2015           9053         Sales Cue         6-Oct-2015           9054         Finance Cue         6-Oct-2015           9055         Purchase Cue         6-Oct-2015           9150         My Customer         6-Oct-2015           9151         My Vendor         6-Oct-2015           9152         My Item         6-Oct-2015           9180         Generic Chart Setup         15-Aug-2015           9500         Email Item         6-Oct-2015           99000850         Planning Assignment         1-Apr-2014           2000000067         User Default Style Sheet         1-Oct-2012           2000000073         User Personalization         1-Oct-2012           2000000075         User Metadata         1-Oct-2012  | 7331       | Whse. Internal Put-away Header | 20-Nov-2012 |
| 9050         Warehouse Basic Cue         6-Oct-2015           9051         Warehouse WMS Cue         6-Oct-2015           9052         Service Cue         6-Oct-2015           9053         Sales Cue         6-Oct-2015           9054         Finance Cue         6-Oct-2015           9055         Purchase Cue         6-Oct-2015           9150         My Customer         6-Oct-2015           9151         My Vendor         6-Oct-2015           9152         My Item         6-Oct-2015           9180         Generic Chart Setup         15-Aug-2015           9500         Email Item         6-Oct-2015           99000850         Planning Assignment         1-Apr-2014           2000000067         User Default Style Sheet         1-Oct-2012           2000000073         User Personalization         1-Oct-2012           2000000075         User Metadata         1-Oct-2012  | 7332       | Whse. Internal Put-away Line   | 20-Nov-2012 |
| 9051         Warehouse WMS Cue         6-Oct-2015           9052         Service Cue         6-Oct-2015           9053         Sales Cue         6-Oct-2015           9054         Finance Cue         6-Oct-2015           9055         Purchase Cue         6-Oct-2015           9150         My Customer         6-Oct-2015           9151         My Vendor         6-Oct-2015           9152         My Item         6-Oct-2015           9180         Generic Chart Setup         15-Aug-2015           9500         Email Item         6-Oct-2015           99000850         Planning Assignment         1-Apr-2014           2000000067         User Default Style Sheet         1-Oct-2012           2000000073         User Personalization         1-Oct-2012           2000000075         User Metadata         1-Oct-2012  | 7354       | Bin                            | 1-Oct-2012  |
| 9052         Service Cue         6-Oct-2015           9053         Sales Cue         6-Oct-2015           9054         Finance Cue         6-Oct-2015           9055         Purchase Cue         6-Oct-2015           9150         My Customer         6-Oct-2015           9151         My Vendor         6-Oct-2015           9152         My Item         6-Oct-2015           9180         Generic Chart Setup         15-Aug-2015           9500         Email Item         6-Oct-2015           99000850         Planning Assignment         1-Apr-2014           2000000067         User Default Style Sheet         1-Oct-2012           2000000073         User Personalization         1-Oct-2012           2000000075         User Metadata         1-Oct-2012  | 9050       | Warehouse Basic Cue            | 6-Oct-2015  |
| 9053         Sales Cue         6-Oct-2015           9054         Finance Cue         6-Oct-2015           9055         Purchase Cue         6-Oct-2015           9150         My Customer         6-Oct-2015           9151         My Vendor         6-Oct-2015           9152         My Item         6-Oct-2015           9180         Generic Chart Setup         15-Aug-2015           9500         Email Item         6-Oct-2015           99000850         Planning Assignment         1-Apr-2014           2000000067         User Default Style Sheet         1-Oct-2012           2000000073         User Personalization         1-Oct-2012           2000000075         User Metadata         1-Oct-2012  | 9051       | Warehouse WMS Cue              | 6-Oct-2015  |
| 9054         Finance Cue         6-Oct-2015           9055         Purchase Cue         6-Oct-2015           9150         My Customer         6-Oct-2015           9151         My Vendor         6-Oct-2015           9152         My Item         6-Oct-2015           9180         Generic Chart Setup         15-Aug-2015           9500         Email Item         6-Oct-2015           99000850         Planning Assignment         1-Apr-2014           200000067         User Default Style Sheet         1-Oct-2012           2000000068         Record Link         1-Oct-2012           2000000073         User Personalization         1-Oct-2012           2000000075         User Metadata         1-Oct-2012   | 9052       | Service Cue                    | 6-Oct-2015  |
| 9055         Purchase Cue         6-Oct-2015           9150         My Customer         6-Oct-2015           9151         My Vendor         6-Oct-2015           9152         My Item         6-Oct-2015           9180         Generic Chart Setup         15-Aug-2015           9500         Email Item         6-Oct-2015           99000850         Planning Assignment         1-Apr-2014           200000067         User Default Style Sheet         1-Oct-2012           2000000068         Record Link         1-Oct-2012           2000000073         User Personalization         1-Oct-2012           2000000075         User Metadata         1-Oct-2012   | 9053       | Sales Cue                      | 6-Oct-2015  |
| 9150         My Customer         6-Oct-2015           9151         My Vendor         6-Oct-2015           9152         My Item         6-Oct-2015           9180         Generic Chart Setup         15-Aug-2015           9500         Email Item         6-Oct-2015           99000850         Planning Assignment         1-Apr-2014           2000000067         User Default Style Sheet         1-Oct-2012           2000000073         User Personalization         1-Oct-2012           2000000075         User Metadata         1-Oct-2012   | 9054       | Finance Cue                    | 6-Oct-2015  |
| 9151         My Vendor         6-Oct-2015           9152         My Item         6-Oct-2015           9180         Generic Chart Setup         15-Aug-2015           9500         Email Item         6-Oct-2015           99000850         Planning Assignment         1-Apr-2014           2000000067         User Default Style Sheet         1-Oct-2012           2000000073         User Personalization         1-Oct-2012           2000000075         User Metadata         1-Oct-2012   | 9055       | Purchase Cue                   | 6-Oct-2015  |
| 9152         My Item         6-Oct-2015           9180         Generic Chart Setup         15-Aug-2015           9500         Email Item         6-Oct-2015           99000850         Planning Assignment         1-Apr-2014           2000000067         User Default Style Sheet         1-Oct-2012           2000000068         Record Link         1-Oct-2012           2000000073         User Personalization         1-Oct-2012           2000000075         User Metadata         1-Oct-2012   | 9150       | My Customer                    | 6-Oct-2015  |
| 9180         Generic Chart Setup         15-Aug-2015           9500         Email Item         6-Oct-2015           99000850         Planning Assignment         1-Apr-2014           2000000067         User Default Style Sheet         1-Oct-2012           2000000068         Record Link         1-Oct-2012           2000000073         User Personalization         1-Oct-2012           2000000075         User Metadata         1-Oct-2012   | 9151       | My Vendor                      | 6-Oct-2015  |
| 9500         Email Item         6-Oct-2015           99000850         Planning Assignment         1-Apr-2014           200000067         User Default Style Sheet         1-Oct-2012           200000068         Record Link         1-Oct-2012           2000000073         User Personalization         1-Oct-2012           2000000075         User Metadata         1-Oct-2012  | 9152       | My Item                        | 6-Oct-2015  |
| 99000850         Planning Assignment         1-Apr-2014           2000000067         User Default Style Sheet         1-Oct-2012           2000000068         Record Link         1-Oct-2012           2000000073         User Personalization         1-Oct-2012           2000000075         User Metadata         1-Oct-2012   | 9180       | Generic Chart Setup            | 15-Aug-2015 |
| 2000000067         User Default Style Sheet         1-Oct-2012           2000000068         Record Link         1-Oct-2012           2000000073         User Personalization         1-Oct-2012           2000000075         User Metadata         1-Oct-2012   | 9500       | Email Item                     | 6-Oct-2015  |
| 2000000068         Record Link         1-Oct-2012           2000000073         User Personalization         1-Oct-2012           2000000075         User Metadata         1-Oct-2012  | 99000850   | Planning Assignment            | 1-Apr-2014  |
| 2000000073         User Personalization         1-Oct-2012           2000000075         User Metadata         1-Oct-2012  | 200000067  | User Default Style Sheet       | 1-Oct-2012  |
| <b>2000000075</b> User Metadata 1-Oct-2012  | 2000000068 | Record Link                    | 1-Oct-2012  |
|   | 200000073  | User Personalization           | 1-Oct-2012  |
| <b>2000000080</b> Page Data Personalization 1-Oct-2012  | 200000075  | User Metadata                  | 1-Oct-2012  |
|   | 2000000080 | Page Data Personalization      | 1-Oct-2012  |
| <b>2000000111</b> Session Event 20-Nov-2012   | 200000111  | Session Event                  | 20-Nov-2012 |
|   |            |                                |             |

# Appendix B: Microsoft Dynamics NAV 2013, 2013 R2, 2015, and 2016 Functionality Map

# **Starter Pack**

#### **Financial Management**

Basic General Ledger (3010) Allocations (3020) Budgets (3030) Accounts Schedules (3040) Consolidation (3050) Basic XBRL (3070) Change Log (3080) Cash Flow Forecast (3200)

Basic Fixed Assets (5260) Insurance (5270)

Maintenance (5280) Fixed Assets – Allocat

Fixed Assets – Allocations (5290) Reclassification (5300)

Bank Management (5010)

Check Writing (5020)

Bank Account Reconciliation (5030)\*

Electronic Payment / Direct Debit

Reconciliation of Bank Transactions
Deferrals

#### Project Managemen

Basic Resources (4260) Jobs Suite (4540)

- Jobs (4510)

- Capacity Management (4270)

- Multiple Costs (4290)

Budgets / Estimates (4520)

Phases / Tasks / Steps (4530)

Time Sheet (5780)

#### Basic CRM

Contact Management (5110) Task Management (5150) Outlook Client Integration (5195)

Contact Classification (5120) Campaign Management (5130)

Opportunity Management (5140)

Interaction/Document Management (5160)

Mail Logging for MS Exchange (5180)

**Dynamics CRM integration** 

#### Supply Chain Management

Basic Receivables (3260) Sales Invoicing (3270)

Sales Order Management (3280)

Sales Invoice Discounts (3290) Alternative Ship-To Addresses (3310)

Shipping Agents (3340)

Sales Return Order Management (3350)

Sales Line Discounting (3370)

Sales Line Pricing (3380) Sales Tax (3410)

Basic Payables (3510)

Purchase Invoicing (3520)

Purchase Order Management (3530)

Purchase Invoice Discounts (3540) Requisition Management (3550)

Alternative Order Addresses (3560)

Purchase Return Order Management (3570)

Purchase Line Discounting (3580)

Purchase Line Pricing (3590)

Drop Shipments (3770)

Salespeople/Purchasers (3780) Basic Inventory (4010)

Multiple Locations (4040)

Stock keeping Units (4045)

Alternative Vendors (4050)

Assembly Management (4060)

Location Transfers (4100)

Item Substitutions (4110)

Item Cross References (4120)

Nonstock Items (4130)

Item Tracking (4140)

Item Charges (4150)

Bin (4170)

Pick (4200)

Analysis Reports (4230)

Item Budgets (4240)

Workflow

E-services

Document Management, Document Capture and OCR

#### Racic HR Management

Basic Human Resources (5760)

#### Other

Unlimited Companies (1140) Subsidiary (Each) (1150) Per Database License (2020) Multiple Currencies (3760) Intrastat (3790) Extended Text (3800) Job Queue (3810)

Basic Dimensions (4760)

Reason Codes (4770) Advanced Dimensions (4780)

Commerce Gateway (99008510)

Dynamics NAV Server (9100)

Connector for Microsoft Dynamics (5980)

Word reporting/Document reporting Simplified UX

Upgrade Toolkit

#### Languages

Multiple Document Languages (4020) Multiple Languages (4801...4999)

#### Configurations

Report Designer (100 Reports) (7115) Table Designer (10 Tables) (7130) Query Designer (100 Query) (7160) XML Port (100 XMLports) (7140) Page Designer (100 Pages) (7125) Codeunits (10 codeunits) (8100)

Available with Microsoft Dynamics NAV 2013, 2013 R2, 2015, and 2016

Not available with Microsoft Dynamics NAV 2013

Only available with Microsoft Dynamics NAV 2015 and 2016

Discontinued functionality and not available with Microsoft Dynamics NAV 2015

Functionality moved from the Extended Pack with the launch of Microsoft Dynamics NAV 2015. A license key refreshed after 1 October 2014 is required for this change to apply Microsoft Dynamics NAV 2013 and 2013 R2 customers

Only available with Microsoft Dynamics NAV 2016

Functionality moved from the Extended Pack with the launch of Microsoft Dynamics 2016. Functionality still part of Extended Pack for versions prior to NAV 2016

# **Extended Pack**

# Adv. Financial Management

Responsibility Centers (3060) Inter-company Postings (3090) Cost Accounting (3220)

## Manufacturing

Production Orders (5410)
Production Bill of Materials (5420)
Version Management (5430)
Agile Manufacturing (5805)
Basic Supply Planning (5810)
Demand Forecasting (5820)
Basic Capacity Planning (6010)
Machine Centers (6020)
Finite Loading (6030)

## **Warehouse Management**

Order Promising (3320)
Calendars (3360)
Campaign Pricing (3390)
Cycle Counting (4160)
Put Away (4180)
Warehouse Receipt (4190)
Warehouse Shipment (4210)
Standard Cost Worksheet (4220)
Warehouse Management Systems (4620)
Internal Picks and Put Aways (4630)
Automated Data Capture System (4640)
Bin Set-Up (4660)

### Other

Commerce Gateway Unlimited (99008520)

Available with Microsoft Dynamics NAV 2013, 2013 R2, 2015, and 2016

Not available with Microsoft Dynamics NAV 2013

Discontinued functionality and not available with Microsoft Dynamics NAV 2015

# Adv. CRM

Service Order Management (5911) Service Price Management (5912) Service Item Management (5921) Service Contract Management (5931) Planning and Dispatching (5941)

# Configurations

Table (10 tables) (8200)
Pages (100 pages) (8350)
Codeunits (10 codeunits) (8100)
XML Port (100 XMLports) (8750)

# **Configuration Components**

Application Builder\*
Solution Developer\*

Table (10 tables)
Pages (100 pages)
Reports (100 reports)
Codeunits (10 codeunits)
XML Port (100 XMLports)
Queries (100 queries)

\* Not available in Subscription Licensing

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