How do I Create a Replacement Report in Dynamics 365?

- 2024-03-27 - Comments (0) - Lasernet FO Connector FAQs

Lasernet for Dynamics 365

To create a replacement report, ensure you have the prerequisite described:

1. Add the SSRS report you wish to replace in **Lasernet** > **Common** > **Reports**.

2. Navigate to the Action pane > **Setup** > **Tools** and click **Refresh** to refresh the SSRS report and load the data sources and fields.

To create a replacement report, follow these steps:

1. Navigate to **Modules** > **Lasernet** > **Common** > **Reports** and open a list of reports.

2. Select the report for which you want a replacement, and then click the **Replacement** button in the Replacement group of the Setup tab.

3. The **Replacement report** pane will open. Click the **Create New** radio button, and then type a report name (it helps identify the replacement). Once you are done, click **OK**.

As a result, the replacement report is shown in the report list. It may be empty.

4. Locate it in the list, and then launch the **Query wizard** to check everything. To this end, click **Query wizard** in the **Query** group of the **Setup** tab.

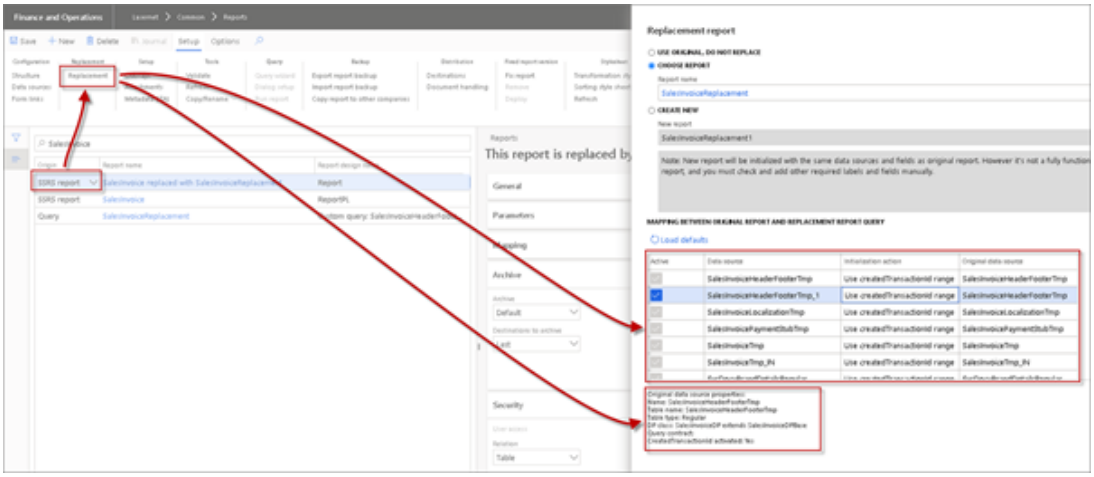
5. Navigate to the **Tables** tab, and then to the **Select fields** tab to make sure all tables and fields you need are defined. At this point, you can make any changes needed. Once you are done, click **Finish** to save the changes and refresh the report style sheet.

While creating a replacement report, it is possible to adjust how tables used in the replacement report are to be initialized.

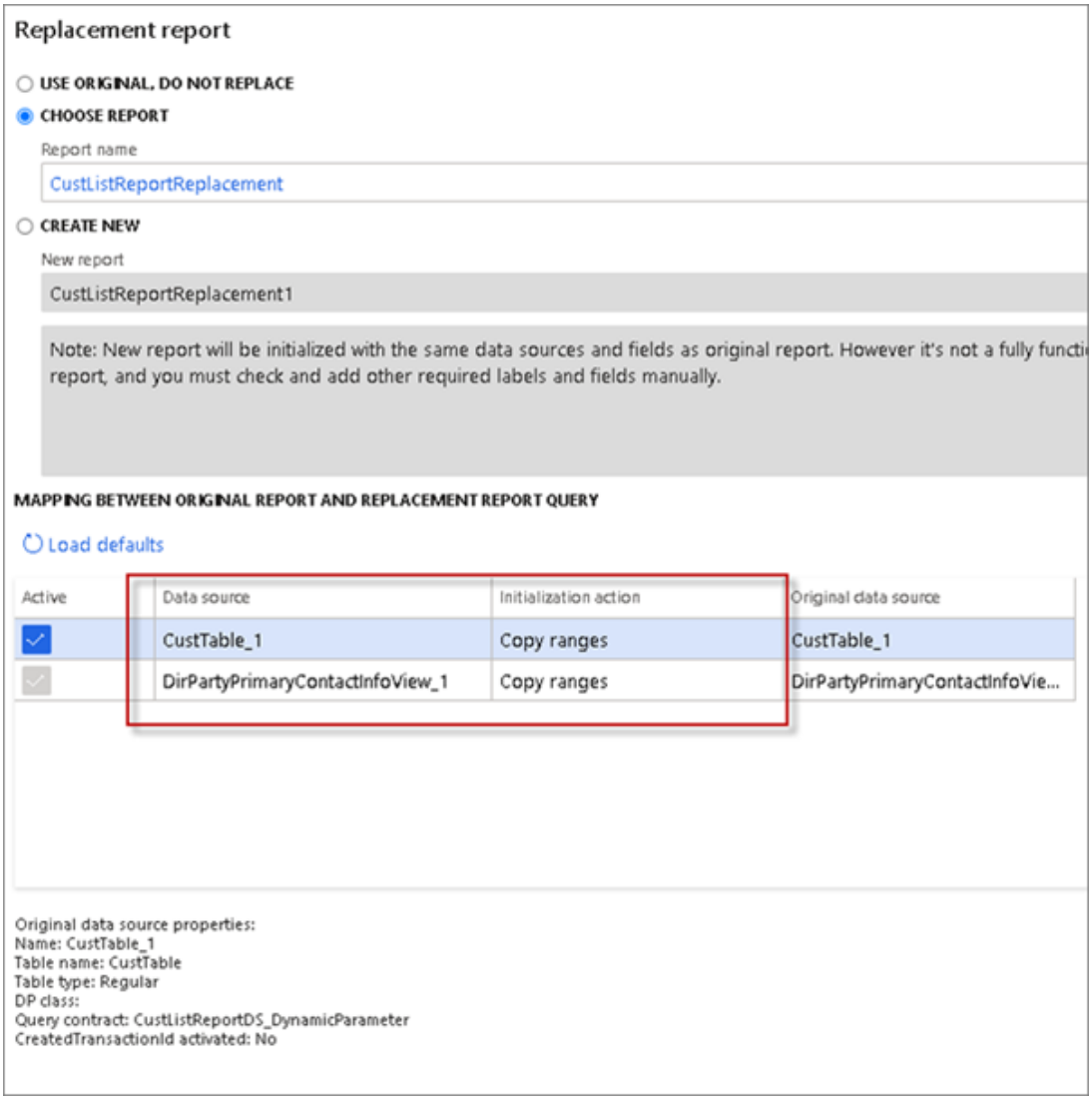
Using the same TMP tables multiple times for the replacement report used to be a problem. The new enhancement allows using the same TMP table multiple times.

The following example illustrates the settings of the replacement report being created for a

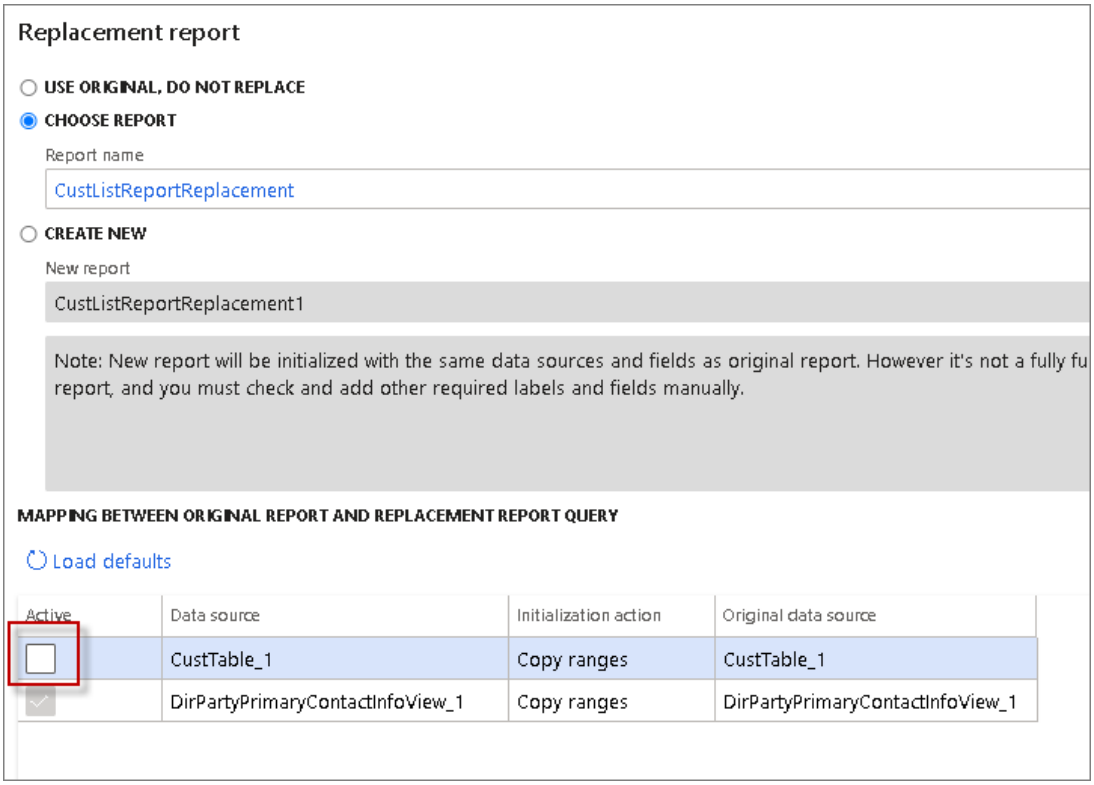
Formletter report like **SalesInvoice** (SSRS) which uses **createdTransactionId** for the range:



The following image illustrates the settings of the replacement report (Query) being created for the **CustListReport** SSRS report using (copying) the same ranges used for the SSRS report:

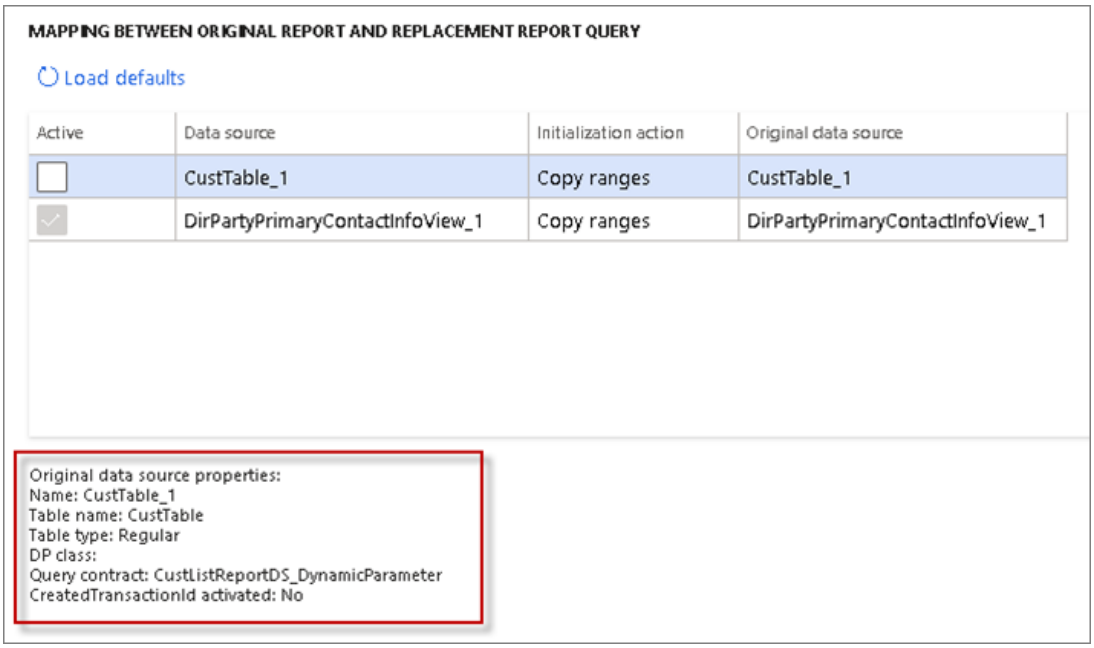


Initialization of ranges can be disabled by clearing the **Active** check box within the required record.

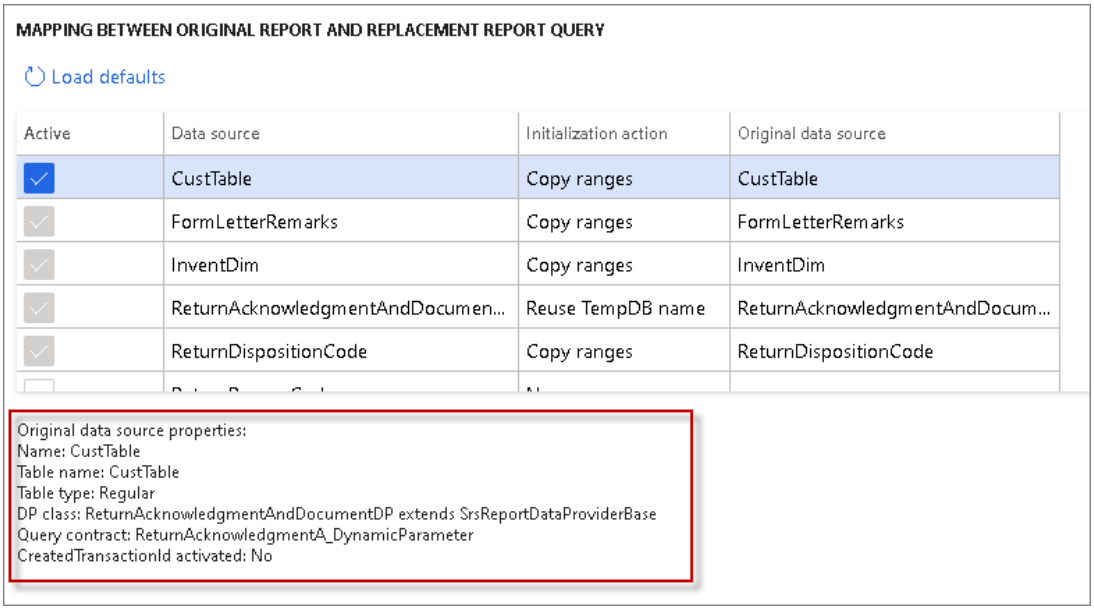


Disabling the copy range action for the **CustTable_1** data source as well as for the **CustListReport** report allows adding all customers to the output as the Account numbers are not added to the ranges when the report is initialized.

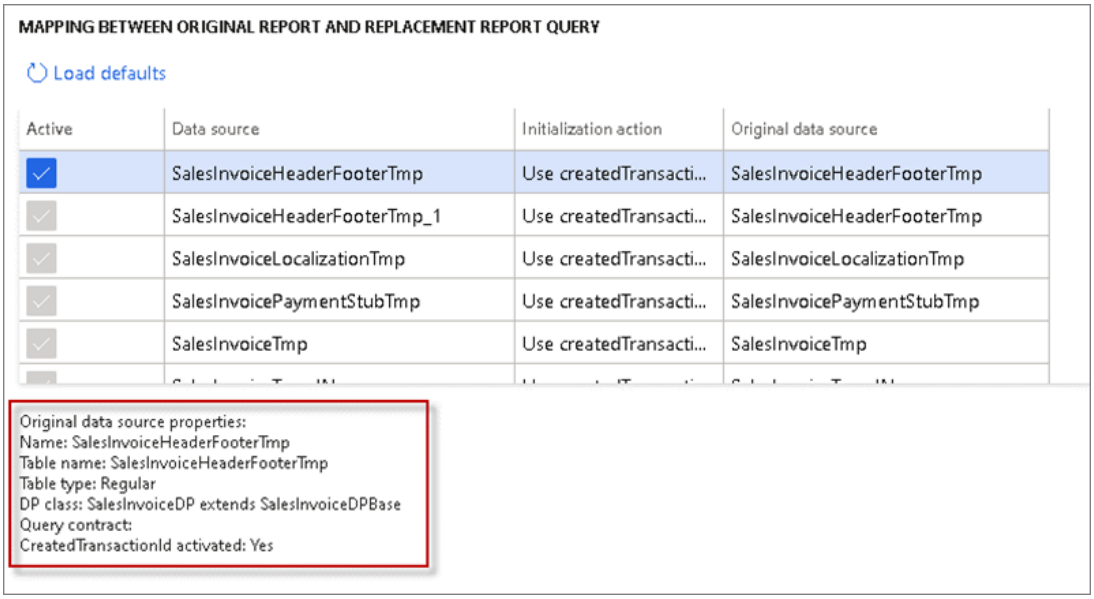
Information about a table type and a data provider is now shown in the replacement form. This information may be useful to ensure the proper combination of the table type and the extension in the DP class.



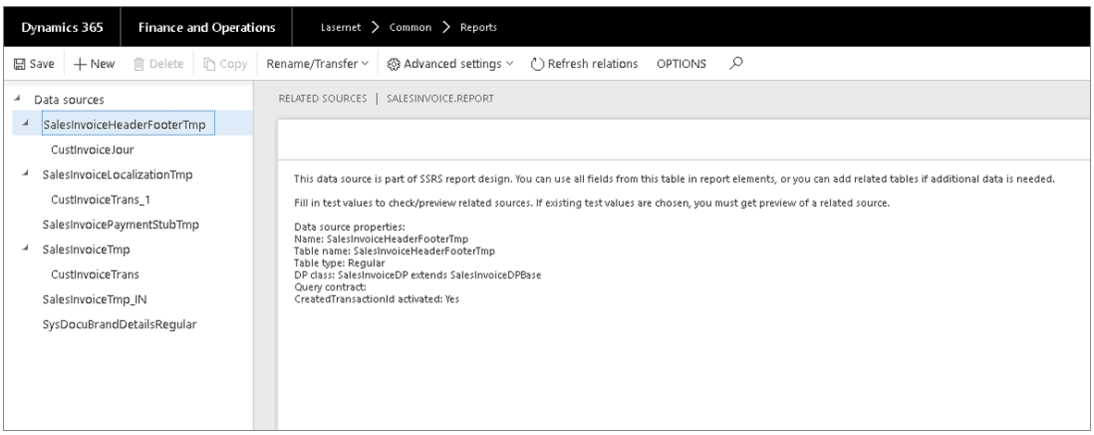
In the following image, you can see information shown when a replacement is selected for the **ReturnAcknowledgementAndDocument** report.



In the following image, you can see information shown when a replacement is selected for the **SalesInvoice** report:



The same information is shown for the SSRS report under **Data sources**.


Dynamics 365
Finance and Operations
Lasernet
Common
Reports
Save
New
Delete
Copy
Rename/Transfer
Advanced settings
Refresh relations
OPTIONS
Data sources
SalesInvoiceHeaderFooterTmp
CustInvoiceJour
SalesInvoiceLocalizationTmp
CustInvoiceTrans_1
SalesInvoicePaymentStubTmp
SalesInvoiceTmp
CustInvoiceTrans
SalesInvoiceTmp_IN
SysDocuBrandDetailsRegular
RELATED SOURCES | SALESINVOICE.REPORT
This data source is part of SSRS report design. You can use all fields from this table in report elements, or you can add related tables if additional data is needed.
Fill in test values to check/preview related sources. If existing test values are chosen, you must get preview of a related source.
Data source properties:
Name: SalesInvoiceHeaderFooterTmp
Table name: SalesInvoiceHeaderFooterTmp
Table type: Regular
DP class: SalesInvoiceDP extends SalesInvoiceDPBase
Query contract:
CreatedTransactionId activated: Yes