

How do I Create a Replacement Report in Dynamics 365?

- 2024-03-27 - Comments (0) - Lasename 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 > Lasename > 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.

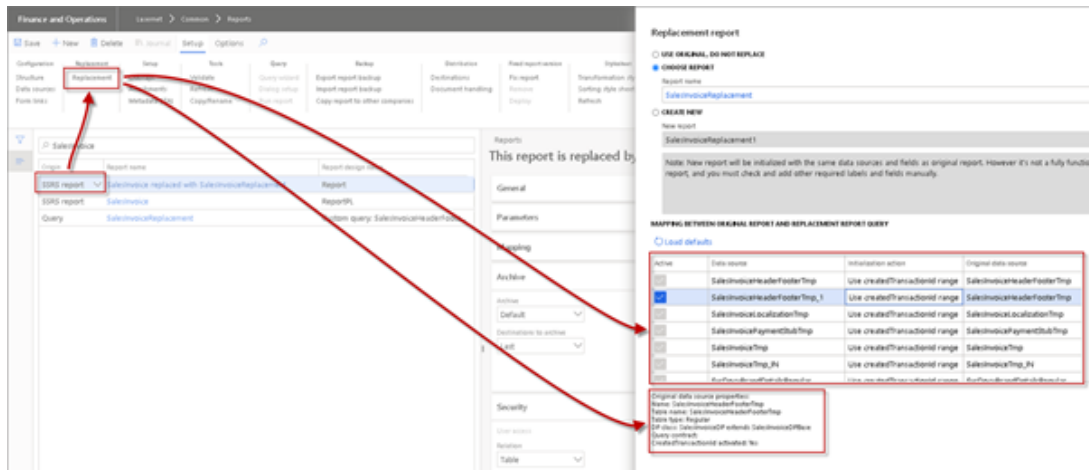


While creating a replacement report, it is possible to adjust how tables used in the replacement report are to be initialized.

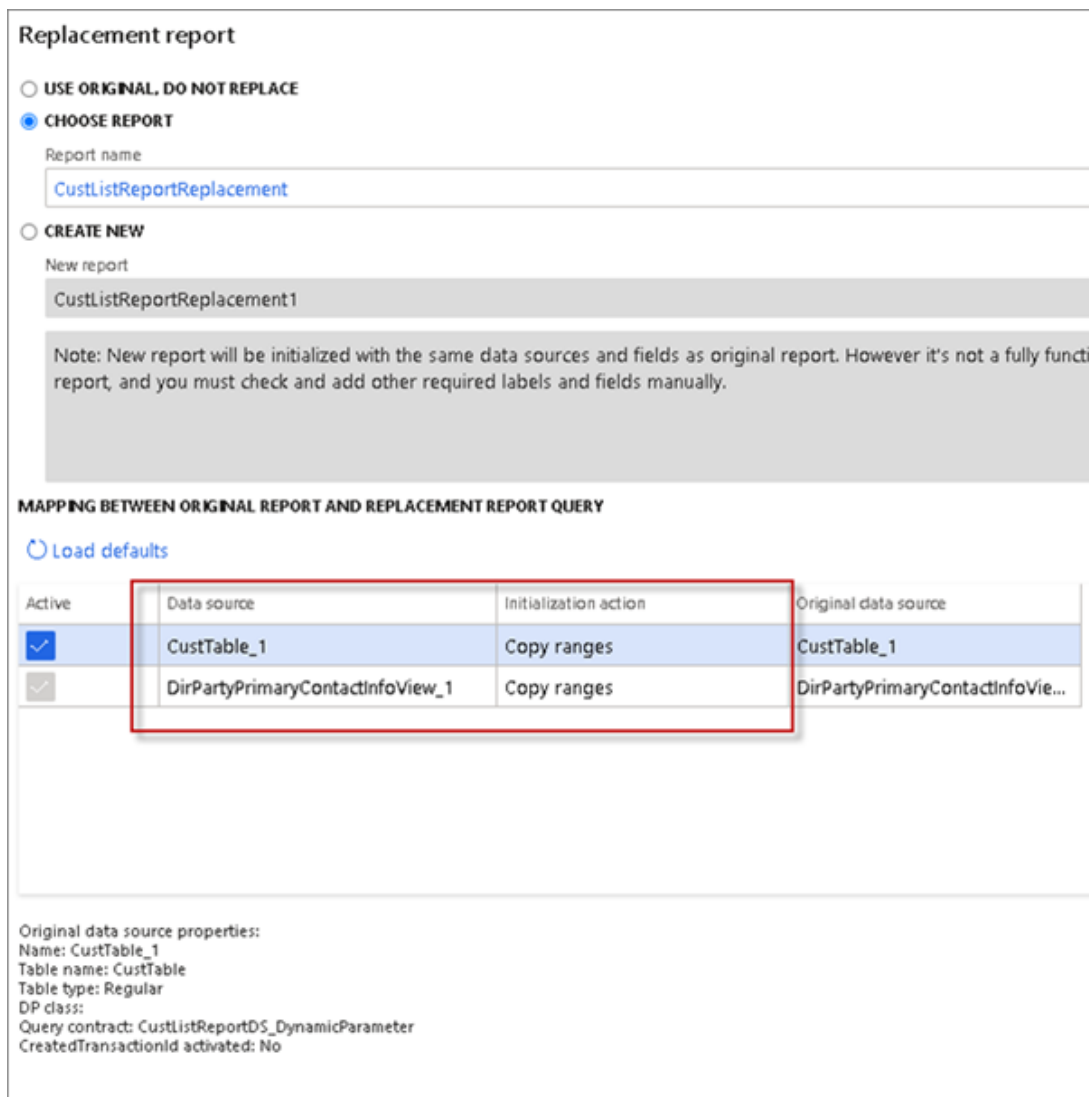
Using the same TMP tables multiple times for the replacement report used to be a problem. The new enhancement allows using the same TMP table multiple times.

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.

Replacement report

USE ORIGINAL, DO NOT REPLACE
 CHOOSE REPORT

Report name

CREATE NEW
 New report

Note: New report will be initialized with the same data sources and fields as original report. However it's not a fully full report, and you must check and add other required labels and fields manually.

MAPPING BETWEEN ORIGINAL REPORT AND REPLACEMENT REPORT QUERY

[Load defaults](#)

Active	Data source	Initialization action	Original data source
<input type="checkbox"/>	CustTable_1	Copy ranges	CustTable_1
<input checked="" type="checkbox"/>	DirPartyPrimaryContactInfoView_1	Copy ranges	DirPartyPrimaryContactInfoView_1

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.

MAPPING BETWEEN ORIGINAL REPORT AND REPLACEMENT REPORT QUERY

[Load defaults](#)

Active	Data source	Initialization action	Original data source
<input type="checkbox"/>	CustTable_1	Copy ranges	CustTable_1
<input checked="" type="checkbox"/>	DirPartyPrimaryContactInfoView_1	Copy ranges	DirPartyPrimaryContactInfoView_1

Original data source properties:
 Name: CustTable_1
 Table name: CustTable
 Table type: Regular
 DP class:
 Query contract: CustListReportDS_DynamicParameter
 CreatedTransactionId activated: No

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

MAPPING BETWEEN ORIGINAL REPORT AND REPLACEMENT REPORT QUERY

[Load defaults](#)

Active	Data source	Initialization action	Original data source
<input checked="" type="checkbox"/>	CustTable	Copy ranges	CustTable
<input type="checkbox"/>	FormLetterRemarks	Copy ranges	FormLetterRemarks
<input type="checkbox"/>	InventDim	Copy ranges	InventDim
<input type="checkbox"/>	ReturnAcknowledgmentAndDocumen...	Reuse TempDB name	ReturnAcknowledgmentAndDocumen...
<input type="checkbox"/>	ReturnDispositionCode	Copy ranges	ReturnDispositionCode

Original data source properties:

Name: CustTable
 Table name: CustTable
 Table type: Regular
 DP class: ReturnAcknowledgmentAndDocumentDP extends SrsReportDataProviderBase
 Query contract: ReturnAcknowledgmentA_DynamicParameter
 CreatedTransactionId activated: No

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

MAPPING BETWEEN ORIGINAL REPORT AND REPLACEMENT REPORT QUERY

[Load defaults](#)

Active	Data source	Initialization action	Original data source
<input checked="" type="checkbox"/>	SalesInvoiceHeaderFooterTmp	Use createdTransacti...	SalesInvoiceHeaderFooterTmp
<input type="checkbox"/>	SalesInvoiceHeaderFooterTmp_1	Use createdTransacti...	SalesInvoiceHeaderFooterTmp
<input type="checkbox"/>	SalesInvoiceLocalizationTmp	Use createdTransacti...	SalesInvoiceLocalizationTmp
<input type="checkbox"/>	SalesInvoicePaymentStubTmp	Use createdTransacti...	SalesInvoicePaymentStubTmp
<input type="checkbox"/>	SalesInvoiceTmp	Use createdTransacti...	SalesInvoiceTmp

Original data source properties:

Name: SalesInvoiceHeaderFooterTmp
 Table name: SalesInvoiceHeaderFooterTmp
 Table type: Regular
 DP class: SalesInvoiceDP extends SalesInvoiceDPBase
 Query contract:
 CreatedTransactionId activated: Yes

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