

Create Invoices & Other Forms with SQL Server Reporting Services & Dynamics GP



March 25, 2021

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INTRODUCTIONS



Charles Allen

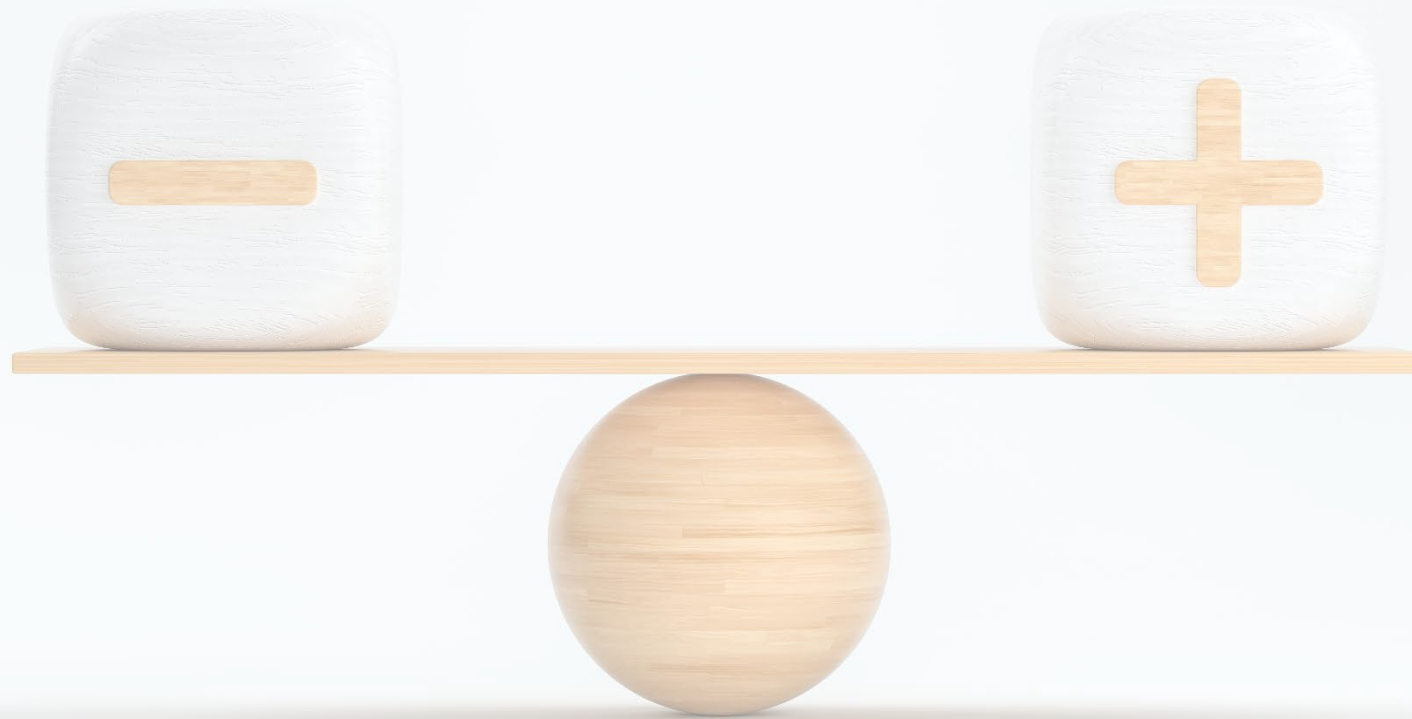
Senior Managing Consultant

- More than 27 years of experience
- Microsoft MVP

AGENDA

- SSRS vs. Word Templates
- Creating the Query
- Creating the Report
- Using the Report
- Add-Ons & Emailing
- Q&A





SSRS vs. Word Templates

SSRS vs. Word Templates

Advantages of SSRS

- Based on SQL query
- Flexibility to use any table in GP
- Ability to use data outside of GP

Disadvantages of SSRS

- Requires SSRS skills
- Requires add-on solution for emailing
- Requires add-on solution for running from within GP

SSRS vs. Word Templates

Advantages of Word Template

- Functionality built into GP & Word
- Enables you to send documents via email
- Can copy & create multiple formats

Disadvantages of Word Template

- Can require changes to Report Writer report & Word template
- Limited to tables available to Report Writer

Creating the Query

A woman with long dark hair, wearing a beige blazer, is standing in a bright office or library. She is holding a blue pen and writing in a small notebook. The background features a large window with a view of a city, a desk with a laptop, and a bookshelf. The overall atmosphere is professional and focused.

CREATING THE QUERY

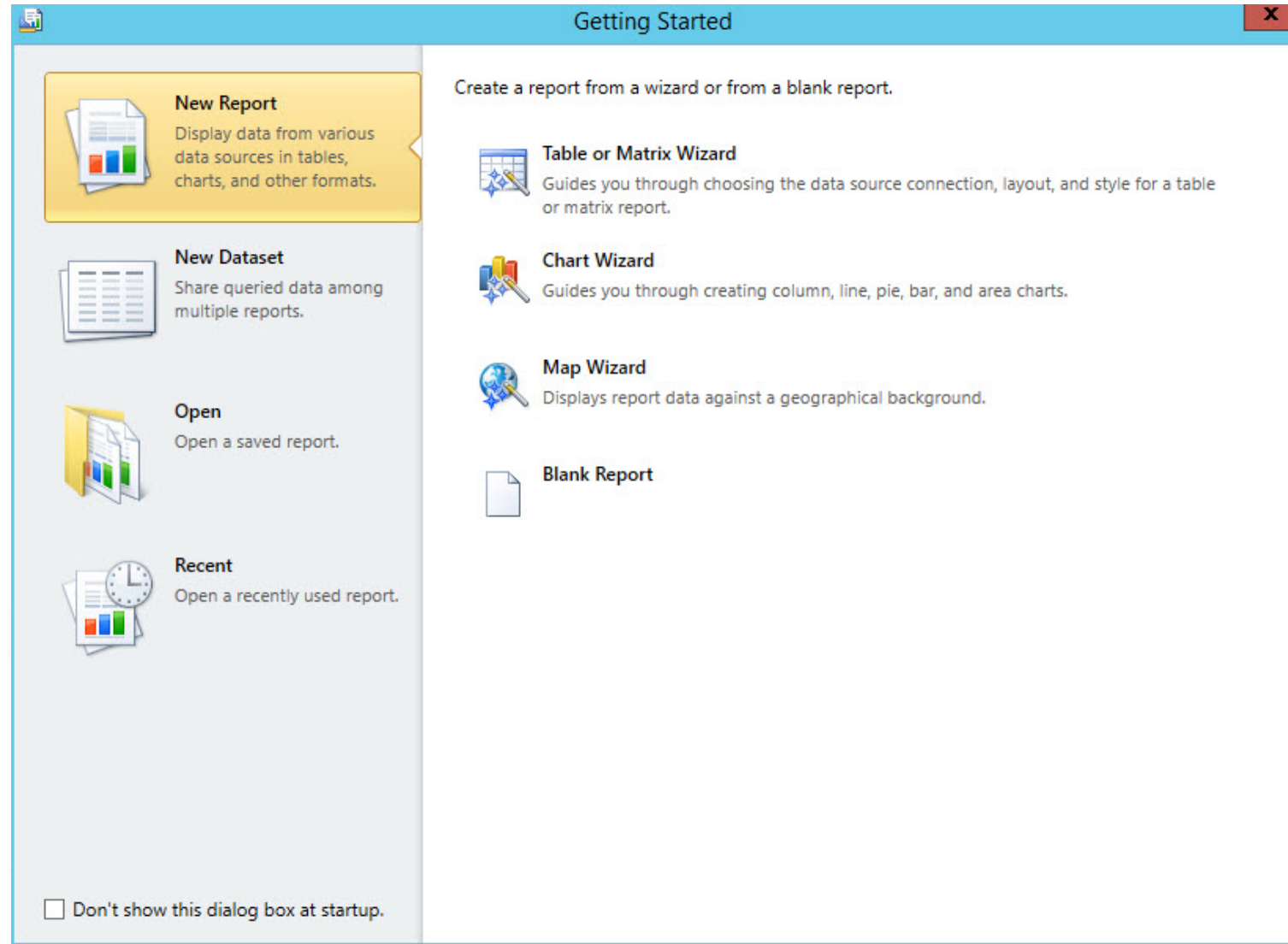
- Add the query directly to the report
- Create a SQL view for a reusable query
- Stored procedures are also an option
- Assign permissions to the query

CREATING THE QUERY

```
select a.[Customer Number], a.[Customer Name], a.[Document  
Date], a.[Subtotal], a.[Freight Amount], a.[Tax Amount],  
a.[Trade Discount Amount], a.[Shipping Method],  
a.[Salesperson ID], a.[Address 1] as ShipToAddress1,  
a.[Address 2] as ShipToAddress2, a.[Address 3] as  
ShipToAddress3, a.[City] as ShipToCity, a.[State] as  
ShipToState, a.[Zip Code] as ShipToZipCode, a.[Payment  
Terms ID], b.[Item Number], b.[Item Description], b.QTY,  
b.[Unit Price], b.[Extended Price], b.[Line Item  
Sequence], a.[Times Printed], a.[Document Status] From  
SalesTransactions a Inner Join SalesLineItems b on a.[SOP  
Type] = b.[SOP Type] and a.[SOP Number] = b.[SOP Number]  
Where a.[SOP Type] = 'Invoice' and a.[Document Date]  
between @FromDate and @ThruDate and a.[Times Printed] =  
@TimesPrinted and a.[Document Status] = @DocumentStatus  
Order by a.[SOP Number]
```

Sample Code

Creating the Report



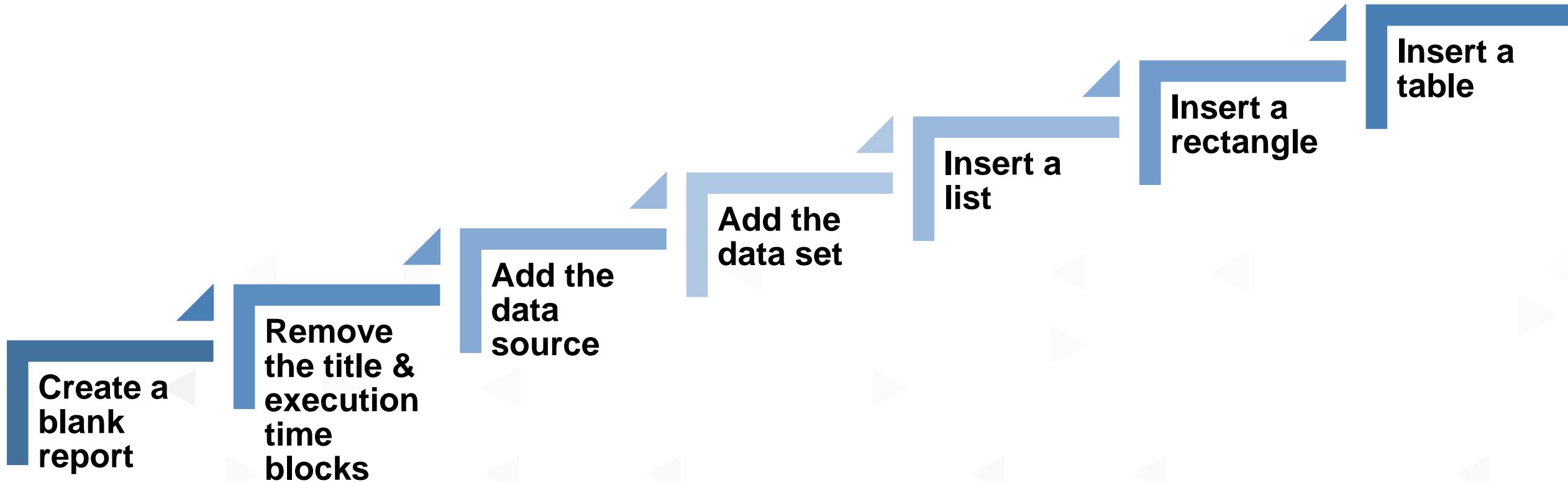
Steps to Create a Report

Create the query

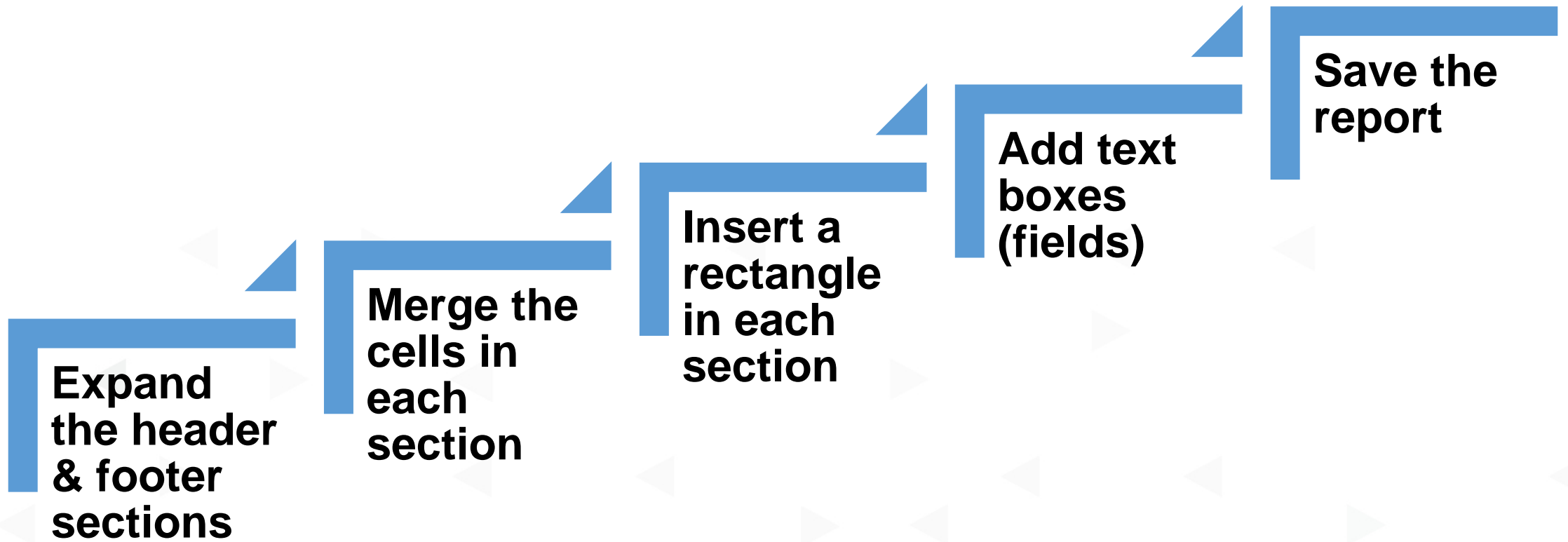
Assign permissions to the query

Create the report

Report Steps



Report Steps



Using the Report

A close-up photograph of a person's hands typing on a silver laptop keyboard. The laptop is on a light-colored wooden desk. In the background, another person is writing on a white notepad with a black pen. To the right of the laptop, there is a white coffee cup on a matching saucer. The overall scene is brightly lit, suggesting an office or workspace environment.

USING THE REPORT

- Select the report from the Reporting Services Reports menu
- Enter the parameters
- Print the report

Add-Ons & Emailing



ADD-ONS

Accountable
Software –
Forms Printer

Flexible
Solutions – GP
Reports Viewer

Rockton
Software –
Dynamics
Report Manager

RESOURCES

- Microsoft Docs (<https://docs.microsoft.com/en-us/>)





BKD TECHNOLOGIES SUPPORT CENTER

- BKD Technologies Support Center for Microsoft Dynamics GP
 - 877.253.7778 (toll-free)
 - GPsupport@bkd.com
 - Monday–Friday, 8 a.m.–5 p.m.



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- For questions, concerns, or comments regarding CPE credit, please email BKD Learning & Development Department at training@bkd.com

Thank You!

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