Microsoft Dynamics 365

Electronic reporting

Dynamics 365 FastTrack Architecture Insights Series

Venkatesh Vadlamani

Why

1. Partners still building custom SSRS reports where it can be beneficial using ER
   a) Lack of knowledge on ER
   b) Knowledge of SSRS
2. ER is very powerful feature
   a) Design in tools which are more business user friendly and Printer friendly
   b) Modifications can be faster ALM iteration for ER can be without costly deployments
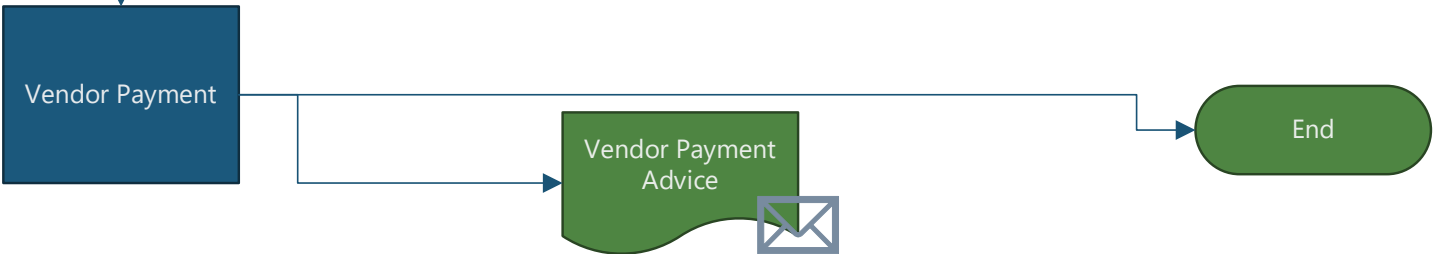
Procure to Pay

Procurement clerk

Start → Create purchase order → Confirm Purchase Order → Purchase confirmation

Lets use this

Receiving clerk

Register Goods → Receive Goods

Invoicing

Post Invoice

AP Clerk

Vendor Payment → Vendor Payment Advice

Vendor Payment → End

Scenario 1 (PO confirmation document)

1. Take the OOB ER configuration for PO confirmation
2. Start with empty word document
3. Quickly create a word template and attach it ER configuration
4. Plug it to print management

Scenario 2 (Add custom fields)

1. Start with scenario 1
2. Bring 1 customized fields to the report
3. Quickly update the word template and attach it ER configuration
4. Plug it to print management

Q & A

Thank you