



COMMUNITY SUMMIT

Dynamics GP

October 11–15, 2026
Gaylord Opryland Resort



The largest independent Microsoft AI & Business Applications User Conference on the planet.



| Excel Reports – Live Design Session



@ 2026 Dynamic Communities

| John Kirsch

Good Human, Consultant, Founder – Tuned-In Partners
Green Bay, WI

26+ years of ERP experience

Email: John@TunedInPartners.com
LinkedIn: [John Kirsch](#)
Website: www.TunedInPartners.com



www.TaeMusic.com



@ 2026 Dynamic Communities

| Summit 2026 Schedule



Title	When	Location
GP Tech Medic Desk	Monday 10:45 – 12:00	Volunteer Mezzanine Foyer
Ask us anything - GP to BC migrations	Monday 3:00 – 4:30	Delta Mezzanine 4, Level M
Excel Reports – Live Design Session (GP)	Monday 4:45 – 5:45	Volunteer Mezzanine 3, Level M
GP Tech Medic Desk	Tuesday 1:30 – 2:30	Volunteer Mezzanine Foyer
GP Tech Medic Desk	Wednesday 10:30 – 12:00	Volunteer Mezzanine Foyer

| Session Agenda



In this session, we are going to spend the entire time modifying existing Excel refreshable reports or building new reports.

If you have a request for a report, please submit it prior to the session or at the beginning of the session for a live demonstration.

All reports and data objects created during the session will be shared after.

| Learning Objectives



- **Learning Objective 1**
Modify existing Excel reports
- **Learning Objective 2**
Create new Excel reports
- **Learning Objective 3**
Different data sources and uses

The largest independent Microsoft AI & Business
Applications User Conference on the planet.



Pause for report requests.....



@ 2026 Dynamic Communities

| Deploy Excel reports



| Microsoft Dynamics GP > Tools > Setup > System > Reporting Tools Setup

A screenshot of the "Reporting Tools Setup - TWO (sa)" window. The window has a standard Windows interface with a title bar, menu bar (OK, Cancel, File, Print, Tools, Help), and a toolbar. The main area is divided into sections. The "Setup" section has tabs for "Reporting Services", "Excel Reports" (selected), "Management Reporter", "Power BI", and "OData". Under "Excel Reports", there are "System Level" and "User Level" sections. The "System Level" section has a "Location" dropdown set to "Network Share", a checkbox for "Using SharePoint Online", and a "Reports Directory" text box containing "c:\Program Files (x86)\Microsoft Dynamics\GPF\ExcelReports". The "User Level" section has a "Reports Directory" text box. The "Reporting Services and Excel Reports Deployment Status" section contains a "Deployment Options" list box with two items: "Deployed: Reports for 0 companies are deployed." and "Not Deployed: Reports for 2 companies are not deployed." Below this are checkboxes for "Redeploy all reports for selected companies" and "Print status for all companies". At the bottom right are buttons for "Print Status Report" and "Deploy Reports".

Navigation List or File Path



Sales

Customers

Prospects

Salespeople

All Sales Transactions

Receivables Transactions

Sales Order Transactions

Invoicing Transactions

Receivables Batches

Report List

Microsoft Dynamics GP Reports

Excel Reports

SmartList Favorites

Other Reports

View

Print

Send in E-mail

Import/Export

Publish Report

SQL Report Manager

Edit Report Option

Edit Report

Add to My Reports

Rename

Remove from My Reports

GP Report

Excel Report

SRS Report

New

SQL Report

Print this List Reports

Export

Excel Reports (read only)

Show results

+ Add Filter

☐ Name	Option	Series	Category
☐ TWO CustomerAddress	c:\Program Files (x86)\Microsoft Dynamics\GP\ExcelReports\Data Connections	Sales	TWO
☐ TWO CustomerAddress Default	c:\Program Files (x86)\Microsoft Dynamics\GP\ExcelReports\Reports	Sales	TWO
☐ TWO CustomerAddress Default	c:\Program Files (x86)\Microsoft Dynamics\GP\ExcelReports\Data Connections	Sales	TWO
☐ TWO CustomerItems	c:\Program Files (x86)\Microsoft Dynamics\GP\ExcelReports\Data Connections	Sales	TWO
☐ TWO CustomerItems Default	c:\Program Files (x86)\Microsoft Dynamics\GP\ExcelReports\Reports	Sales	TWO
☐ TWO CustomerItems Default	c:\Program Files (x86)\Microsoft Dynamics\GP\ExcelReports\Data Connections	Sales	TWO
☐ TWO Customers	c:\Program Files (x86)\Microsoft Dynamics\GP\ExcelReports\Data Connections	Sales	TWO
☐ TWO Customers Average Days to Pay	c:\Program Files (x86)\Microsoft Dynamics\GP\ExcelReports\Reports	Sales	TWO
☐ TWO Customers Average Days to Pay	c:\Program Files (x86)\Microsoft Dynamics\GP\ExcelReports\Data Connections	Sales	TWO
☐ TWO Customers Customer Balance	c:\Program Files (x86)\Microsoft Dynamics\GP\ExcelReports\Reports	Sales	TWO
☐ TWO Customers Customer Balance	c:\Program Files (x86)\Microsoft Dynamics\GP\ExcelReports\Data Connections	Sales	TWO
☐ TWO Customers Customer Contact List	c:\Program Files (x86)\Microsoft Dynamics\GP\ExcelReports\Reports	Sales	TWO
☐ TWO Customers Customer Contact List	c:\Program Files (x86)\Microsoft Dynamics\GP\ExcelReports\Data Connections	Sales	TWO
☐ TWO Customers Customers on Hold	c:\Program Files (x86)\Microsoft Dynamics\GP\ExcelReports\Reports	Sales	TWO

| Security



- Security Setup in SSMS
- Template for Security OR
- Use AD groups for security
- Do not grant DYNGRP unless you want all access

| Best practices



- Create unique naming convention for modified or created files
- Use DNS alias for SQL server name allowing alias to be updated with server change
- Use TWO company or TOP 100 statement when creating/modifying reports – then can use , * for columns

| Let's Explore Default Reports

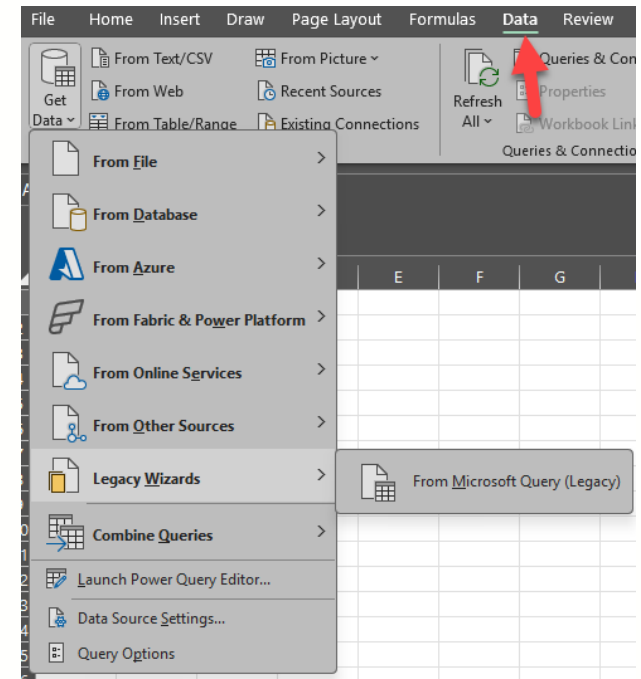
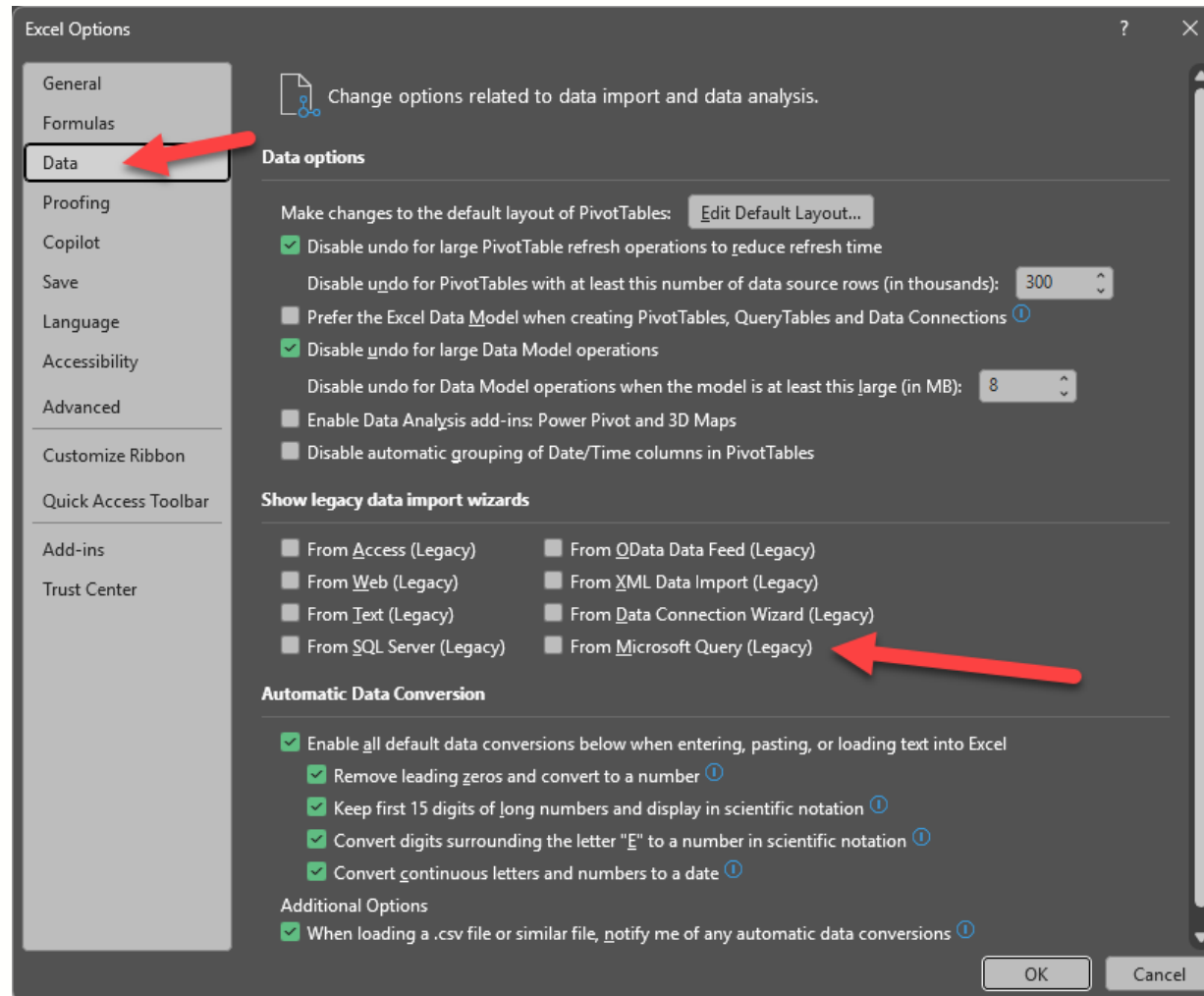
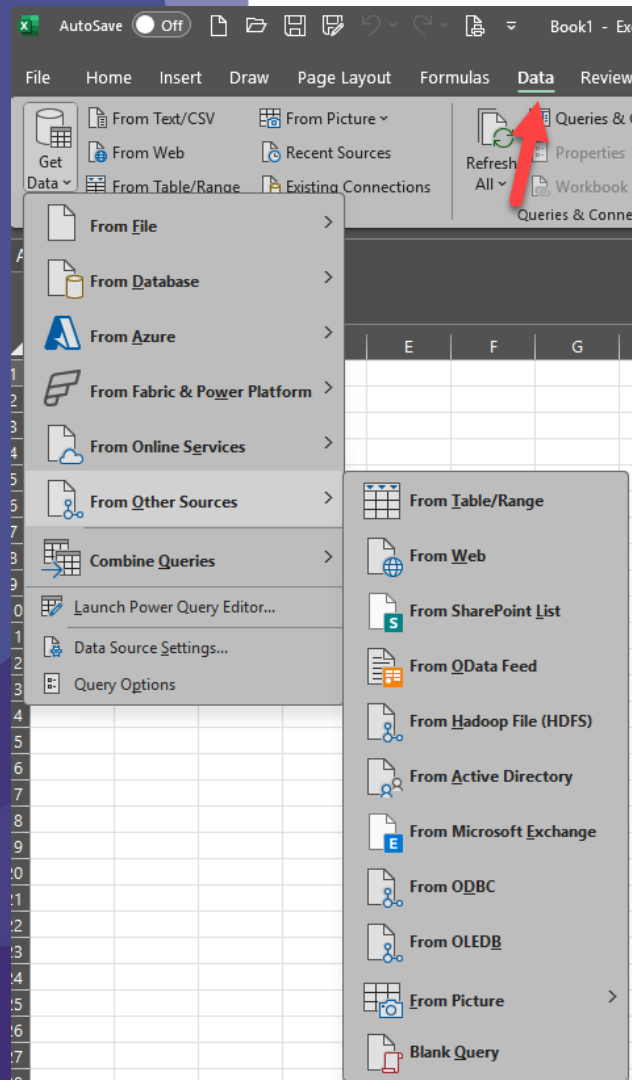


| Custom Reports



- Copy existing report and change source
- Create new report using SQL connection
- Create new report using Power Query
- Enable and utilize Microsoft Query for parameters

Enable Microsoft Query



| ****Stored Procedures**



| Report requests?



| Suggested Resources



- Resource Descriptions
Microsoft Dynamics GP > Tools > Resource Descriptions > Tables
- Table Finder - SmartList Builder
- Victoria Yudin Blog
<https://victoriayudin.com/gp-tables/>

| Existing Views



- AATransactions
- Accounts
- AccountSummary
- AccountTransactions
- BankTransactions
- AttendanceDetail
- BillofMaterials
- CertificateList
- Customers
- EmployeeBenefit
- Employees
- EmployeeSummary
- FixedAssets
- FixedAssetsBooks
- FixedAssetsPurchase
- InventoryPurchaseReceipts
- ItemQuantities
- PayrollTransactions
- PayablesTransactions
- PurchaseLineItems
- SalesLineItems
- Vendors

Thank you for attending!

| John Kirsch

Good Human, Consultant, Founder – Tuned-In Partners
Green Bay, WI

26+ years of ERP experience

Email: John@TunedInPartners.com
LinkedIn: [John Kirsch](#)
Website: www.TunedInPartners.com



www.TaeMusic.com



@ 2026 Dynamic Communities