
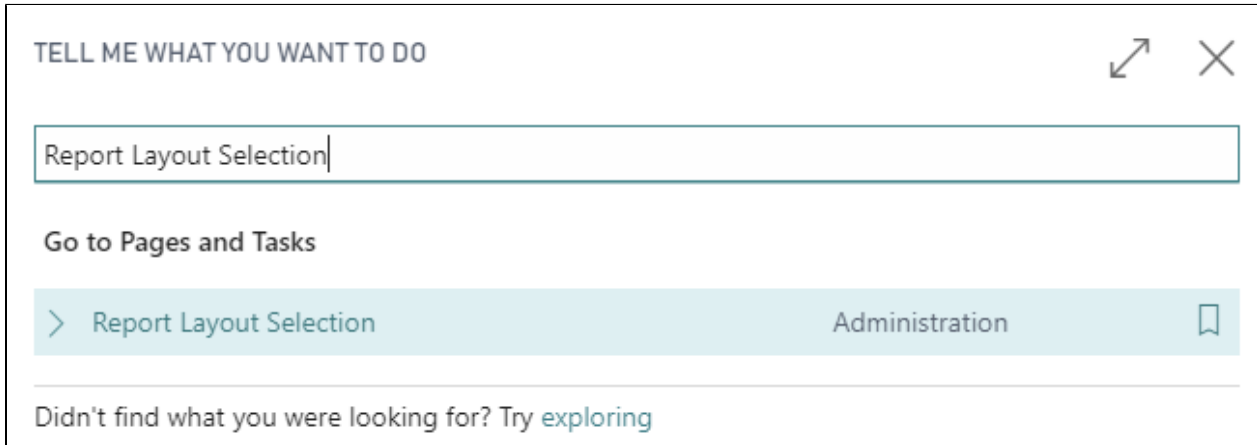


Word Document Layout

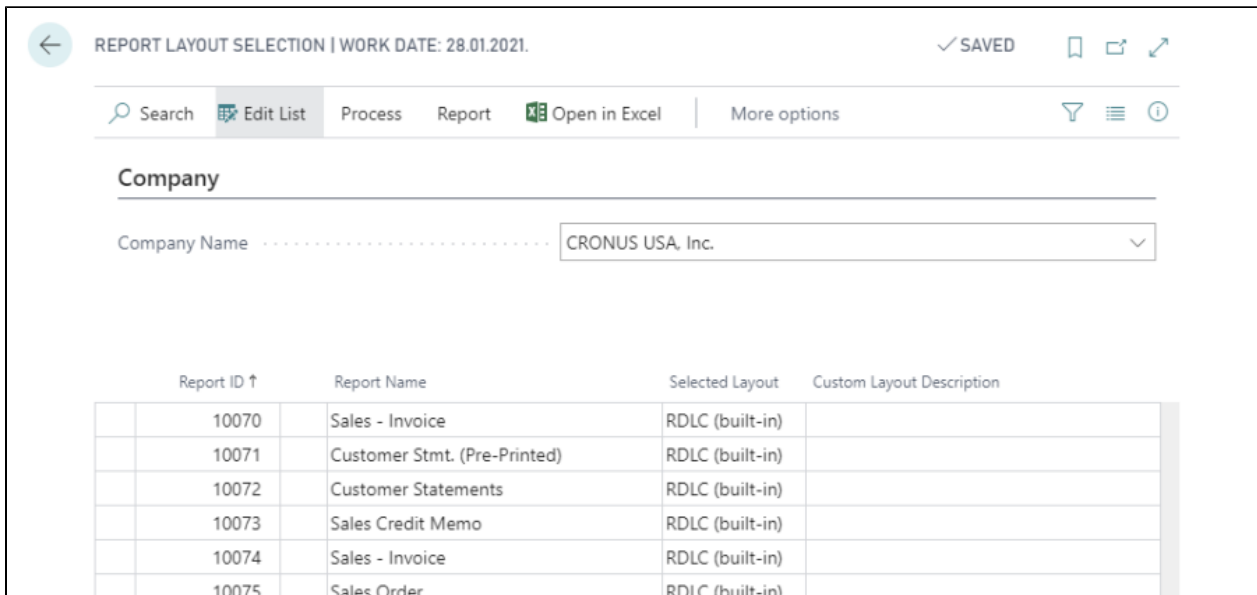
Word Report Layout

Microsoft Dynamics 365 Business Central has a possibility to utilize word for report layouts. In this way it can be quite easy to design sales invoice, credit memo, or any other report with specific layout.

To start working with word layout, go to Search  and type Report Layout Selection and select the related link:



New page will open with the list of all reports available in the system:



Go to Search in top left corner and search for the report you want to customize:

REPORT LAYOUT SELECTION | WORK DATE: 28.01.2021. ✓ SAVED

Search: Sales - conf Edit List Process Report Open in Excel More options

Company Name: CRONUS USA, Inc.

Report ID ↑	Report Name	Selected Layout	Custom Layout Description
→ 1305	Sales - Confirmation	Custom Layout	US Sales Order - Blue

Select the report you want to modify and go to Process Custom Layouts:

REPORT LAYOUT SELECTION | WORK DATE: 28.01.2021. ✓ SAVED

Search: Sales Order Edit List Process Report Open in Excel More options

Custom Layouts ⇄

Company Name: CRONUS USA, Inc.

BC will display all custom layouts for this report, existing in the system:

CUSTOM REPORT LAYOUTS - 1305 SALES - CONFIRMATION | WORK DATE: 28. 1. 2021. ✓ SAVED


Search New Edit List Delete Process Layout Open in Excel More options

Report ID ↑	Report Name	Description	Company Name ↑	Built-In	Type ↑
→ 1305	Sales - Confirmation	US Sales Order - Blue		<input checked="" type="checkbox"/>	Word
1305	Sales - Confirmation	US Sales Order - Default		<input checked="" type="checkbox"/>	Word
1305	Sales - Confirmation	US Sales Order - Default Email ...		<input checked="" type="checkbox"/>	Word
1305	Sales - Confirmation	US Sales Order - Modern		<input checked="" type="checkbox"/>	Word
1305	Sales - Confirmation	US Sales Order - Red		<input checked="" type="checkbox"/>	Word
1305	Sales - Confirmation	US Sales Order - Timeless		<input checked="" type="checkbox"/>	Word

Select the layout you want to modify and go to Layout > Export Layout. After this action, Word file will be downloaded to your PC. Open the file and enable Developer tab in Word. The file should look similar like this one:

DocumentTitle

Document No



CustomerAddress1	ShipToAddress_Lbl ShipToAddress1	CompanyAddress1
CustomerAddress2	ShipToAddress2	CompanyAddress2
CustomerAddress3	ShipToAddress3	CompanyAddress3
CustomerAddress4	ShipToAddress4	CompanyAddress4
CustomerAddress5	ShipToAddress5	CompanyAddress5
CustomerAddress6	ShipToAddress6	CompanyAddress6
CustomerAddress7	ShipToAddress7	
CustomerAddress8	ShipToAddress8	

DocumentDate_Lbl	Salesperson_Lbl2	QuoteNo_Lbl	ShipmentMethodDescription_Lbl
DocumentDate	SalesPersonName	QuoteNo	ShipmentMethodDescription

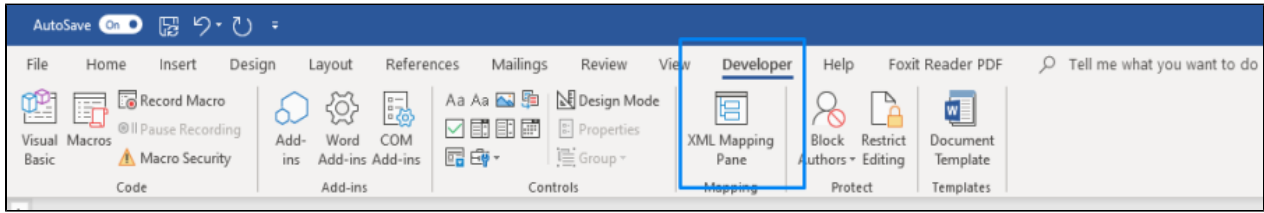
PONumber_Lbl	PaymentTermsDescription_Lbl	ShipmentDate_Lbl
ExtDocNo_SalesHeaderWorkDescriptionLine	PaymentTermsDescription	ShipmentDate

ItemNo_Line_Lbl	Description_Line_Lbl	Quantity_Line_Lbl	Unit_Lbl	UnitPrice_Lbl2	LineAmount_Lbl
ItemNo_Line	Description_Line	Quantity_Line	UnitOf Measure	UnitPrice	LineAmount_Line
				Description_ReportTotalsLine	Amount_ReportTotalsLine
				TotalText	TotalAmountIncludingVAT

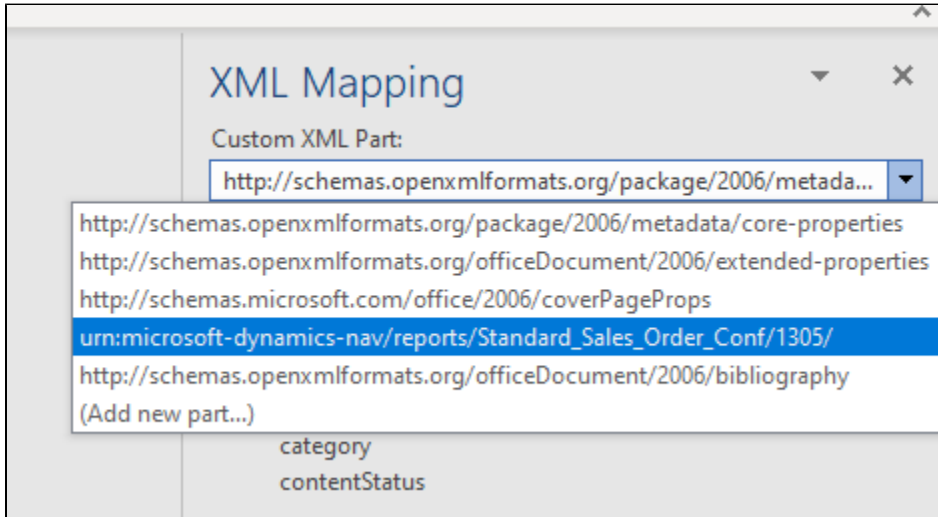
AmountSubjectToSalesTaxLbl	AmountSubjectToSalesTax
AmountExemptFromSalesTaxLbl	AmountExemptFromSalesTax

HomePage_Lbl CompanyHomePage	CompanyPhoneNo_Lbl CompanyPhoneNo	EMail_Lbl CompanyEMail	CompanyVATRegNo_Lbl CompanyVATRegNo
---	--	---	--

Go to Developer tab, and select option XML Mapping Pane:



XML Mapping will be displayed on the right side of the Word window. In Custom XML Part select the report you want to customize:



After this, data items and fields for the report will be displayed. The next step is to replace all placeholders in downloaded file with actual fields from the report. You can also change the layout of the report if necessary. After fields are mapped, resulting layout looks like below:



From: Cloudrelia LLC
5877 Obama Blvd.
Los Angeles, CA 90016

Phone No: CompanyPhoneNo
Email: CompanyEMail

To: CustomerAddress1
CustomerAddress2
CustomerAddress3
CustomerAddress4

Phone No: SellToPhoneNo
Email:

SALES ORDER

Sales Order No DocumentNo

Service / Product Title	Quantity	UoM	Unit Price (USD)	Amount (USD)
Description_Line	Quantity_Line	UnitOfMeasure	UnitPrice	LineAmount_Line
			Subtotal	Amount_ReportTotalsLine
			Sales Tax (0.00%)	TotalVATAmount
			Total	TotalAmountIncludingVAT

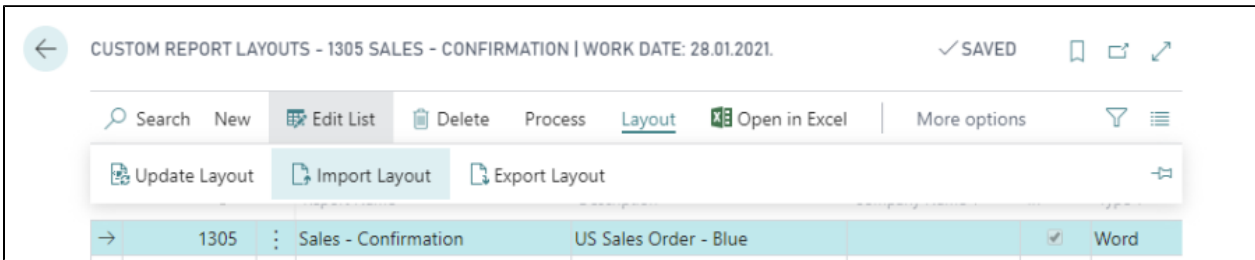
Sales Order terms

1. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus lacus sem, fermentum non lorem eget, porttitor luctus nunc. Donec sit amet convallis dolor, eget rutrum sapien. Mauris non viverra felis, sed tincidunt justo.
2. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus lacus sem, fermentum non lorem eget, porttitor luctus nunc. Donec sit amet convallis dolor, eget rutrum sapien. Mauris non viverra felis, sed tincidunt justo.
3. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus lacus sem, fermentum non lorem eget, porttitor luctus nunc. Donec sit amet convallis dolor, eget rutrum sapien. Mauris non viverra felis, sed tincidunt justo.

Signed By:

Customer Signature:

After that, save the file, go back to BC where you exported the file, select the layout you want to import and go to Layout Import Layout:



After import is completed, go back to Report Layout Selection, and select the layout you just uploaded:

