Multicompany Excel Reports in a single worksheet using Excel Report Builder

Why this feature is cool!

In Microsoft Dynamics GP 2010 R2, you can now consolidate Excel reports data from multiple companies into a single Excel worksheet. Additionally, you can add a calculated field to the report to display either the Company Name or Company ID field on each line to identify the source of the data. This gives you the ability to centralize key information.

What does it look like?

List Options				-0
File Edit Tools View Options Help			sa Fabrika	n, Inc. 4/12/20
Display totals at the end of each list Multicompany report		ports into a single workbook ports into a single worksheet	🗖 Greate S	ummary Page
Companies	Summary Fields		3	
7 Fabrikam, Inc.	Field	Summary Method		
V New Company				Add
				Edit
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				Move Up
Mark All Upmark All				Move Dow
7 10			Save	Cancel

Navigation: Dynamics GP menu > Tools > SmartList Builder > Excel Report Builder > Excel Report Builder > Options button

Add Calculat File Edit	ted Field Tools View Options Help	sa Fabrikam, Inc. 4/12/2017
Field Name Field Type	Company String	
Calculation	Jung	⊴ ▼ Fields
< <company_i< th=""><th>VAME>></th><th>RM Customer MSTR Special Fields Special Fields <<<company_id>> <<<company_name>></company_name></company_id></th></company_i<>	VAME>>	RM Customer MSTR Special Fields Special Fields << <company_id>> <<<company_name>></company_name></company_id>
20		Validate Save Cancel

Navigation: Dynamics GP menu > Tools > SmartList Builder > Excel Report Builder > Excel Report Builder > Calculations button >> Add Calculated Field button

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A	A	В	С	0	
1	Customer Number	Customer Name 💌	Phone 1 💌 💌	Company 💌	
2	STPATRIC0001	St. Patrick's Hospital	03955501980000	Fabrikam, Inc.	
3	SUPERFOO0001 Super Foods Plus		31355501990000	Fabrikam, Inc.	
4 UNIFIEDW0001		Unified Wire and Cable Systems	61655501000000	Fabrikam, Inc.	
5 VANCOUVE0001 Van		Vancouver Resort Hotels	60455501020000	Fabrikam, Inc.	
6 VISIONIN0001		Vision Inc.	31755501040000	Fabrikam, Inc.	
7 VISTATRA0001		Vista Travel	30655501050000	Fabrikam, Inc.	
8 WESTCENT0001		West Central Distributors	81555501060000	Fabrikam, Inc.	
9 WESTSIDE0001		Westside Cable Service	51755501070000	Fabrikam, Inc.	
10	WORLDENT0001 World Enterprises		31355501090000	Fabrikam, Inc.	
11	SVCRETURN01	JRN01 Service		Fabrikam, Inc.	
12	BOB Bob 95FM		5555555550000	New Company	
13 CONTOSO		Contoso	5555555560000	New Company,	

Thanks to Pam Misialek for this content.