

How do I Add Sales Invoices to CustCollectionLetter Using Document Handling?

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Lasernet for Dynamics 365


Lasernet Document Handling makes it possible to store a document in `docuref/Attachments`. This article will show users how to add sales invoices to `CustCollectionLetter` using this feature.

Note

Another solution is available to pick a file from the Lasetnet Archive. For more information, visit <https://support.formpipe.com/guides/lasetnet-fo-connector-user-guide/attachments-2>.

Add Document Handling to the Sales Invoice report - configuration

1. Select the sales invoice report and click **Setup > Document Handling**.

 2. Click **New** and add the reference table where you want the SalesInvoice to be stored in FO.

Note

If the document should be sent to the customer afterward, set the **Restriction** to **External**.

3. From the Document type dropdown, choose **Original**. This way, you only store the Original posted and no Proformas.

4. Create a **Description**, **Note**, and **Values used in notes**.

5. Print a sales invoice and view the attachments from the **CustInvoiceJour**.

The document is now stored where required.

Here you can see the Description and the value in notes showing the invoiceId:



Add CustInvoiceJour table to CustCollectionJour Query wizard

The reference table in which the attachments are stored must be added to the `CustCollectionJour` report.

From the ribbon, click **Query wizard** and add the **CustInvoiceJour** table to **CustCollectionJourTmp**.

The relations are displayed as follows:

Attach the above Sales Invoice to the Collection letter

1. Navigate to **Lasernet > Reports**, find the Collection letter and click **Attachments**.



2. Click **New** to create a new line.

3. Add the Attachment reference table, in this case the **CustInvoiceJour** table, and only include the attachments with restriction **External** (should be the same restriction as set up in the Document Handling step).



The sales invoices will be attached to your CustCollectionLetter emails as follows:



Additional information

Attachment Condition

In a Collection letter process, there are several interactions with the customer:

Collection letter 1

Collection letter 2

Collection letter 3

Etc.



Consider whether you need to include the Sales Invoices on all interactions.

If you decide to only include them in a specific interaction, add a condition on attachments as follows:

1. Choose **Query** in Condition.

2. Click the **Select** button.

The Inquiry opens.

3. Choose table **CustCollectionLetterJour** and field **CollectionLetterCode**. Choose when you want the attachments to come. You can choose one or several.

In this example, we have chosen that we only want to include the attachments on the first Collection letter to the customer.



4. Click **OK**.



The above should be completed on FreeTextInvoice as well, to save that to DocuRef.

Keep in mind that, at the setup time, the system has not yet created the invoice PDFs to DocuRef for the reports that have already been printed in the past.

You can mark them in the Invoice journal and force rerun to make them go through Lasernet Connector with the new settings, then they will get to DocuRef.

Use a filter, mark all, or several in invoice journal and resend to save time.

Attachments with LACAddAttachments()

The above setup will add attachment details on the JobInfo section of the CustCollectionLetter XML. Our Lasernet Default Configuration is configured to process attachments from this section of the XML.

However, attachments can be added on the line level of the CustCollectionLetter report using context method LACAddAttachments().

Note

Using this method for attachments will require modification of the Lasernet configuration to process the relevant sections of the XML.

1. Open the **Query wizard** for the CustCollectionLetter report.
2. Add **Docuref** to CustInvoicejour.

Note

Since we are on the line level for the Invoice numbers, several invoice attachments can be added to our CustCollectionLetter.



The relations are displayed as follows:



3. Add the field **LACAddAttachments()** to the query and then click **Finish**.

This field allows the **DocuRef** table to be added several times/per line.