

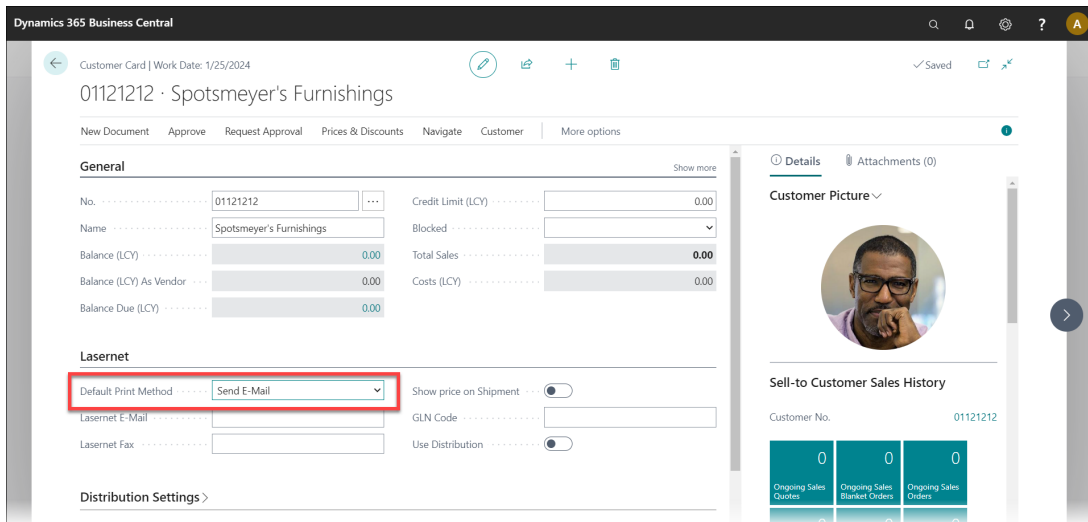
Issuing Reminders and Finance Charge memos in bulk

Alex Clemons - 2023-10-17 - Comments (0) - Lasetnet BC Connector General Information

Lasernet for Dynamics 365

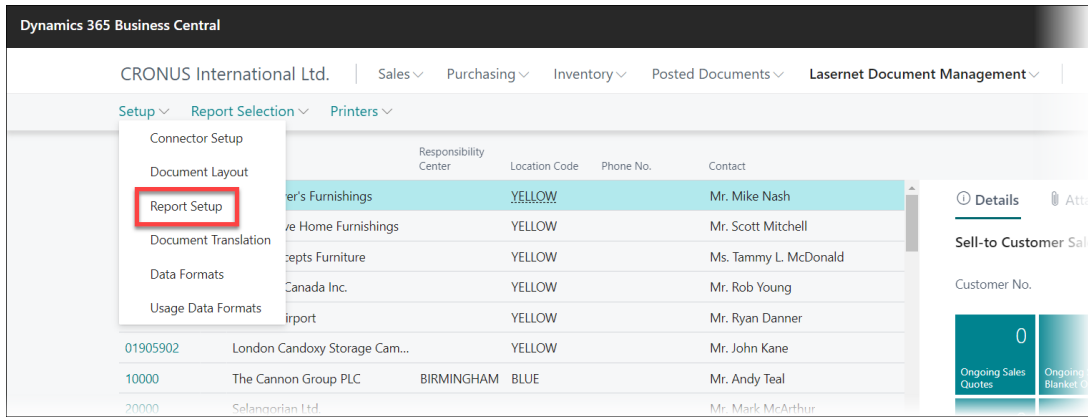
This article provides instructions on how to process multiple Reminders in one go. Follow these steps:

1. Navigate to **Sales > Customers** and double-check that every customer has a default print method by opening the Customer Card. This is to ensure you have selected the **Default Print Method** you wish the customer to use, for example 'Send E-Mail'.

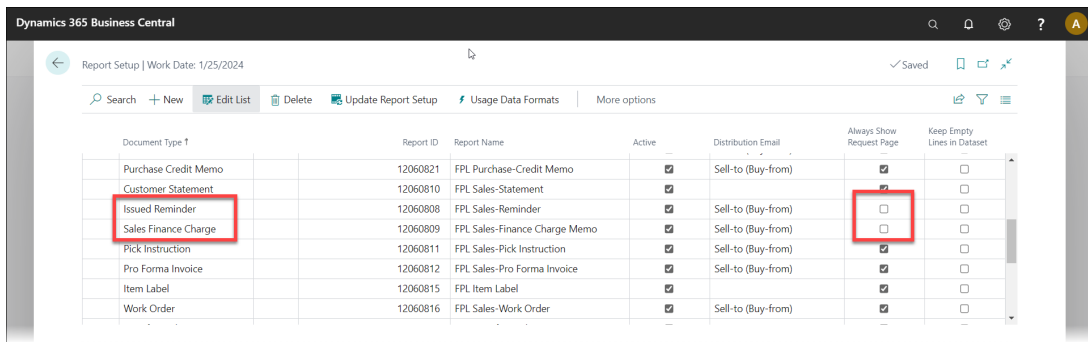


The screenshot shows the Dynamics 365 Business Central interface for a Customer Card. The customer is identified as '01121212 · Spotsmeyer's Furnishings'. The 'General' section includes fields for No., Name, Balance (LCY), Balance (LCY) As Vendor, Balance Due (LCY), Credit Limit (LCY), Blocked, Total Sales, and Costs (LCY). The 'Lasernet' section is highlighted with a red box, showing the 'Default Print Method' dropdown menu set to 'Send E-Mail'. Other fields in the Lasernet section include 'Lasernet E-Mail', 'Lasernet Fax', 'Show price on Shipment', 'GLN Code', and 'Use Distribution'. The 'Distribution Settings' section is also visible. On the right side, there is a 'Customer Picture' section with a photo of a man, and a 'Sell-to Customer Sales History' section showing 'Customer No. 01121212' and three columns for 'Ongoing Sales Quotes', 'Ongoing Sales Planned Orders', and 'Ongoing Sales Orders', each with a value of 0.

2. Ensure that you have the correct information in either the **Fax**, **GLN Code** or **E-Mail** field.
3. Return to the main menu, click the **Lasernet Document Management** dropdown, select **Setup** and then click **Report Setup**.



4. Click **Edit List** and locate the Issued Reminder or Sales Finance Charge report in the list and ensure that the “Always Show Request Page” checkboxes for these reports are cleared.

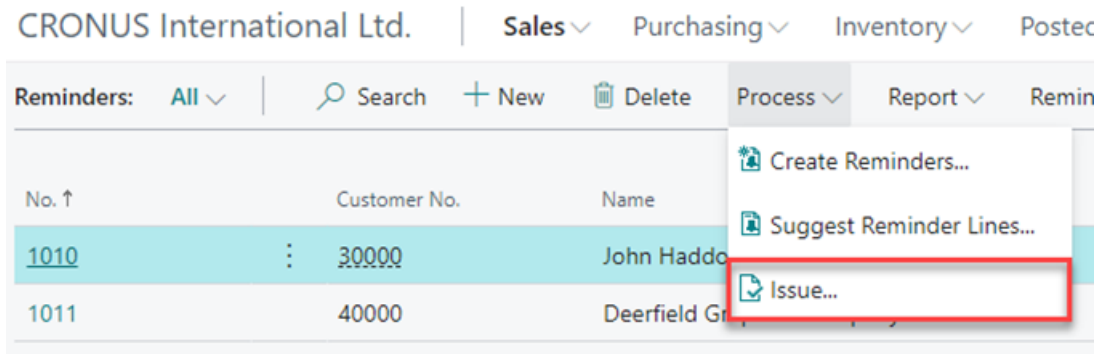


5. Close the form.

Issue the Reminder

Follow these steps to issue the reminder or charge memo:

1. Open the required form, click the **Process** dropdown menu and select **Issue.....**



2. Under **Options**, select **Print** from the dropdown.

Issue Reminders [Close] [Refresh]

Use default values from Last used options and filters [v]

Options

Print Print [v] (highlighted with red box)

Replace Posting Date

Posting Date [Calendar Icon]

Hide Email Dialog

Filter: Reminder

3. Under **Filter: Reminder**, adjust the **No.** field so it includes the right number of reminders. If you want them all you can just remove all numbers.

Filter: Reminder

× No. " [v] (highlighted with red box)

+ Filter...

Advanced >

[OK] [Cancel]

4. Click **OK**.

All reminders are processed and Lasernet will look at each individual reminder and customer card to distribute the report, for example E-Invoice, FAX or Email.

You can check the result within the Lasetnet Archive.

Lasernet Print Archive | Work Date: 1/2/2024

Search | Save PDF | Preview PDF | Save XML | Request Page

Document Type	Document No.	Version	User ID	Print Date/Time	Print Method
Issued Reminder	105012	1	ADMIN	7/11/2022 4:12 PM	Fax
Issued Reminder	105011	1	ADMIN	7/11/2022 4:12 PM	E-Invoice
→ Issued Reminder	105010	1	ADMIN	7/11/2022 4:12 PM	Send E-Mail
Sales Finance Charge	106004	1	ADMIN	7/11/2022 3:52 PM	Send E-Mail
Sales Finance Charge	106003	1	ADMIN	7/11/2022 3:52 PM	Fax
Sales Finance Charge	106002	1	ADMIN	7/11/2022 3:51 PM	Send E-Mail
Transfer Shipment	108005	4	ADMIN	7/11/2022 1:54 PM	Send E-Mail
Transfer Receipt	109002	2	ADMIN	7/11/2022 1:54 PM	Send E-Mail
Purchase Return Order	1001	6	ADMIN	7/11/2022 1:45 PM	Send E-Mail
Purchase Return Order	1001	5	ADMIN	7/11/2022 1:45 PM	Preview
Purchase Return Order	1001	4	ADMIN	7/11/2022 1:43 PM	Save to PDF
Sales Return Receipt	107004	4	ADMIN	7/11/2022 1:41 PM	Preview
Sales Return Receipt	107004	3	ADMIN	7/11/2022 1:40 PM	Preview
Sales Return Receipt	107004	2	ADMIN	7/11/2022 1:40 PM	Save to PDF
Sales Return Receipt	107004	1	ADMIN	7/11/2022 1:39 PM	Print
Sales Return Receipt	107007	3	ADMIN	7/11/2022 1:34 PM	Send E-Mail
Sales Return Receipt	107007	2	ADMIN	7/11/2022 1:14 PM	Preview
Sales Return Receipt	107007	1	ADMIN	7/11/2022 12:57 PM	Preview
Purchase Return Order	1001	3	ADMIN	7/11/2022 12:44 PM	Preview
Purchase Return Order	1001	2	ADMIN	7/11/2022 12:43 PM	Preview
Purchase Return Order	1001	1	ADMIN	7/11/2022 12:34 PM	Preview

Lasernet Archive

Print Date/Time: 7/11/2022 4:12 PM

System: Archive N... C:\ABC\702-00C3-4B01-8911-A723AA76...

Printed Report: 3PL Sales Reminder

Created by: ADMIN

Print Method: Send E-Mail

Email Recipients: michael.urb@torridge.com

Copy Recipients: Hidden Copy Recipients

Subject: Issued Reminder 105010

Body: Hi John MacDuck Insurance Co.

 Please find attached your Issued Reminder 105010

 This is a system generated mail. Please do not reply to this mail.

Related Content

- [Lasernet BC Connector 4.1.0.0](#)