

How Do I Set an Attachment Through a Legal Entity?

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Lasename for Dynamics 365

The Lasename Connector for Dynamics 365 Finance and Operations enables users to set an attachment to a Lasename report through a legal entity.

Follow the steps highlighted in this article to learn how to do so:

1. Open FO, then navigate to **Organization administration > Document management > Document types**.
2. Click **New** to create a document type.
3. Navigate to **Organization administration > Organizations > Legal entities**.
4. Select the legal entity that you wish to work with, then click the attachments button.
5. Click **New**, and then select the previously created document type.
6. Click **Browse** on the panel that appears, and then select the document you wish to attach.
7. Check that the file information is correct, and set the restriction that you prefer.
8. Navigate to **Lasename > Common > Reports**, select the report, and then open the **Query wizard**.
9. Navigate to the **Tables** section and ensure that the CompanyInfo and DirPartyTable tables have been added with the following relation.
10. Navigate back to **Lasename > Common > Reports**, and then click **Attachments**.
11. Click **New**, and then add a report attachment with the following settings:
 - a. **Attachment reference table**: DirPartyTable.
 - b. **Attachment from**: From attachments.

c. **Restriction:** Set this field to whichever option was set on the **Attachments for Legal entities** page.

d. **Type:** The document type you created previously.

12. Click **Save**, then run the report. The file should be attached.