

## How to add sales invoices to CustCollectionLetter using Document Handling

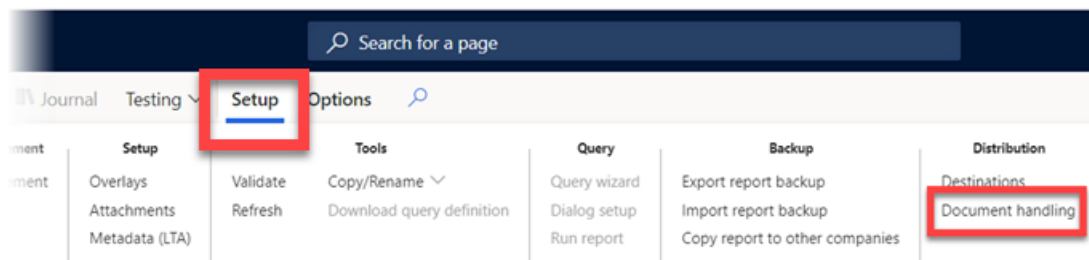
- 2021-08-25 - Comments (0) - D365 FO Connector FAQs

# 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.

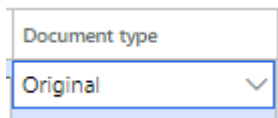
### Add Document Handling to the Sales Invoice report - configuration

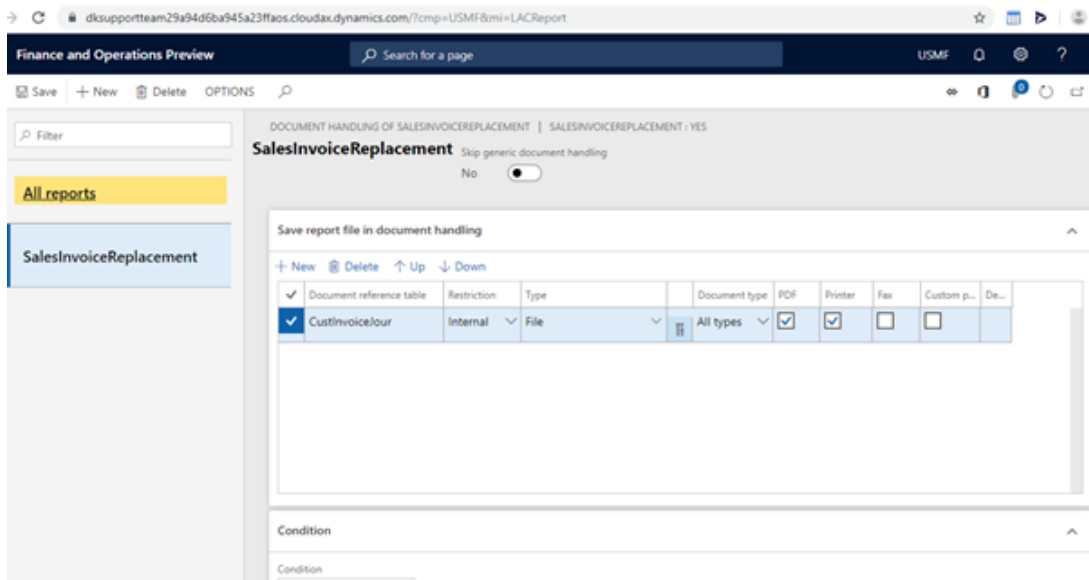
1. On the sales invoice report, click **Setup** and then **Document Handling**.



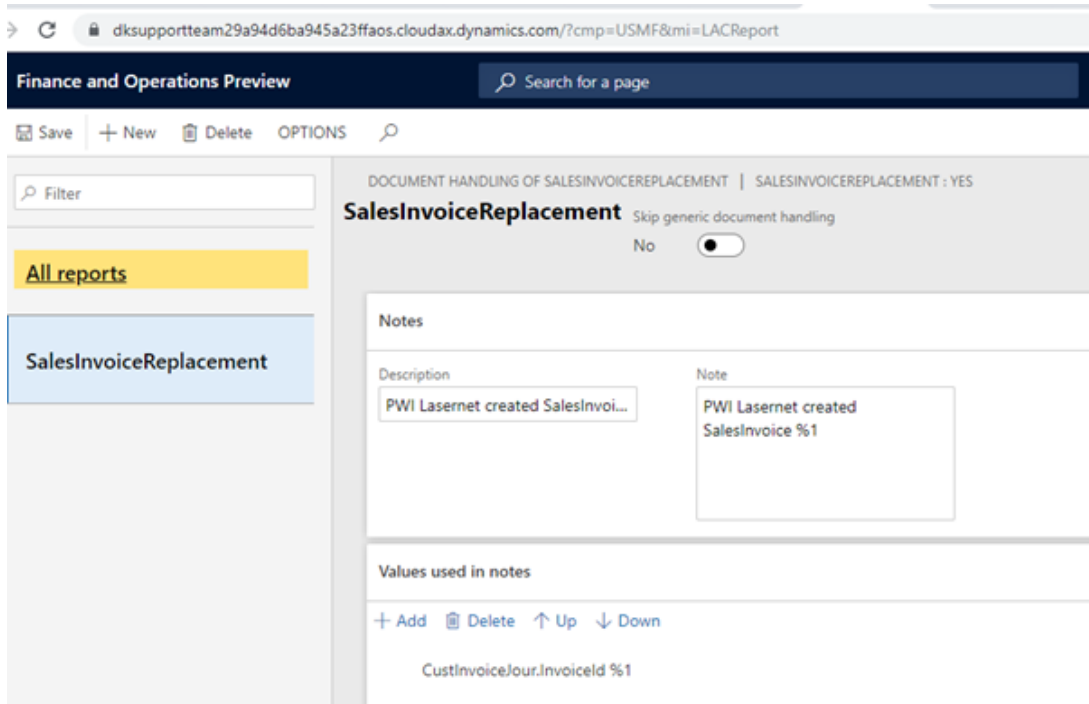
2. Click **New** and add the reference table where you want the SalesInvoice to be stored in D365FO.

If the document should be sent to the customer afterward, set the *Restriction* to **External**. In Document type - Choose **original** - so you only store the Original posted and not proformas.

A screenshot of a dropdown menu. The label 'Document type' is at the top. The dropdown is open, showing the option 'Original' selected. A small downward arrow is visible to the right of the selected option.



3. In the *Notes* panel, create a **Description**, **Note** and **values used in notes**.



4. 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:

Finance and Operations Preview Search for a page

Edit | + New | Delete | Open | Options | References | Created by | OPTIONS

---

Filter

PWI Lasernet created Sale...  
File

ATTACHMENTS FOR INVOICE: CIV-000696, US-025

Description	Type	Attached
PWI Lasetnet created SalesInvoi...	File	Yes <input checked="" type="checkbox"/>

General

DETAILS CREATE

Notes Created by

---

Finance and Operations Preview Search for a page

Edit | + New | Delete | Open | Options | References | Created by | OPTIONS

---

Filter

PWI Lasetnet created Sale...  
File

ATTACHMENTS FOR INVOICE: CIV-000696, US-025

Description	Type	Attached
PWI Lasetnet created SalesInvoi...	File	Yes <input checked="" type="checkbox"/>

400 Green Road 4 parkside  
Bluffton, WA 24701  
USA

Number: CIV-000696  
Invoice date: 12/14/2016  
Invoice account: US-025  
Year ref.:  
Our ref.: Karl Bystrom  
Sales order: 000722  
Payment: Net 30 days  
Registration: 1 1  
Page: 1 1

Item number	Description	Quantity	Unit	Unit price	Discount	Amount
D0001	Mid-Range Speaker	4.00	ea	480.00		1,920.00
L0001	Mid-Range Speaker 2	4.00	ea	500.00		2,000.00
P0001	Acoustic Foam panel	6.00	ea	37.00		222.00
D0003	Standard Speaker	6.00	ea	220.00		1,320.00
T0001	Speaker cables 15'	7.00	ea	500.00		3,500.00
D0004	High End Speaker	4.00	ea	2,000.00		8,000.00
T0004	Television M120 32" Silver	7.00	ea	350.00		2,450.00
T0002	Projector Television	6.00	ea	3,750.00		22,500.00
T0005	Television HDTV X390 52" White	2.00	ea	2,880.00		5,760.00
T0003	Surround Sound Receiver	2.00	ea	450.00		900.00
		0.00		0.00		0.00

This text is from the Sales Order Invoice form notes

More details

IDENTIFICATION

Type  
File

Company account  
usmf

## Add CustInvoiceJour table to CustCollectionJour Query wizard

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

## Selected tables

Relation/Layout [Load from report...](#)



▲ Data sources

▲ Query

▲ CustCollectionLetterJour

CustInvoiceJour

### ▲ PROPERTIES

Property	Value	A...
Name	CustInvoiceJour	
Parent	CustCollectionJourTmp	
Table name	CustInvoiceJour	
Join	OuterJoin	
Fetch	One2Many	
Layout	Nested	
Top records		⌵

Back

Next

Finish

Cancel

The relations are displayed as follows:

### Relation

Relation

Data source: CustInvoiceJour    Parent: CustCollectionJourTmp    Layout: Nested

PARAMETERS

Join: OuterJoin    Fetch: 1:n

### Fields

+ New    Delete

Related table	Related field	CustInvoiceJour
CustCollectionJourTmp	CustCollectionTrans_Invoice	InvoiceId

OK    Cancel

2. Add *Docuref* to CustInvoiceJour.

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

### Selected tables

Relation/Layout    Load from report...

- Data sources
- Query
  - CustCollectionLetterJour
  - CustCollectionJourTmp
  - CustInvoiceJour
    - DocuRef

The relations are displayed as follows:

## Relation

Relation

Data source	Parent	Layout
DocuRef	CustInvoiceJour	Nested

### PARAMETERS

Join	Fetch
OuterJoin	1:n

## Fields

+ New Delete

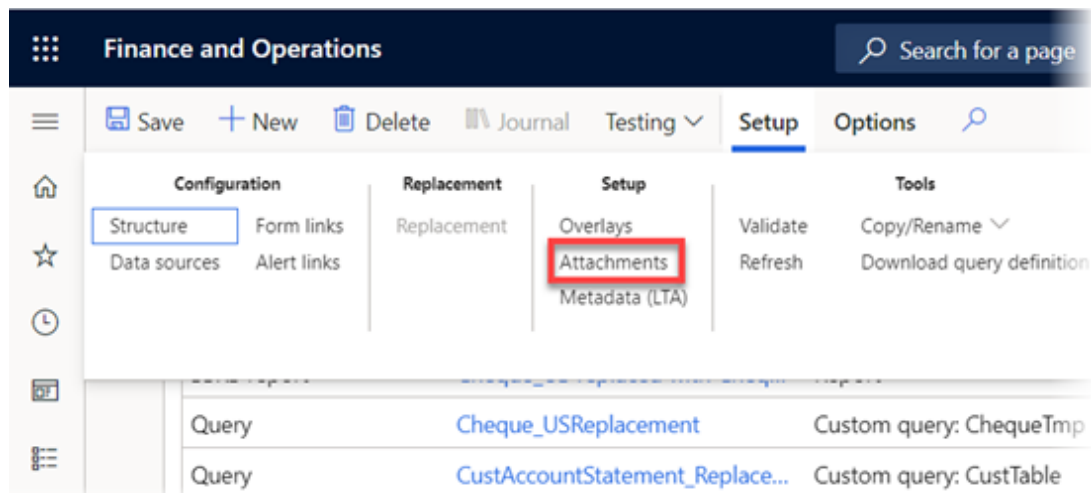
Related table	Related field	DocuRef
CustInvoiceJour	TableId	RefTableId
CustInvoiceJour	RecId	RefRecId

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

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

### 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 **DocuRef** 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 like this:

## DocumentHandling

**DL** demo lasernet  
To Pernille Wichmann

- CustCollectionJour\_3671\_20200130\_144843.PDF  
321 KB
- SalesInvoiceMIWI\_DA04DAEC7961450F9D6BB8E2E0BB82BB.PDF  
332 bytes
- SalesInvoiceMIWI\_108AA5BD587245CDA447E79CDADD8183.PDF

15.49

DocumentHandling

I

### Additional information

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

Collection letter 1

Collection letter 2

Collection letter 3

Etc.

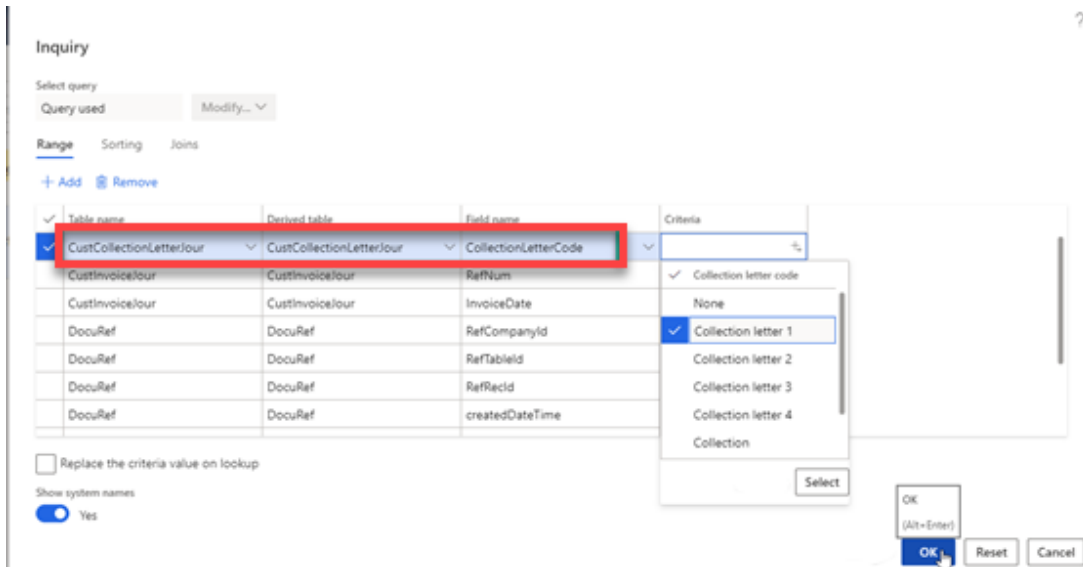
Customer account	Name	Collection le...	Date	Collection letter code	Status
US-008	Sparrow Retail	000002	9/28/2016	Collection letter 1	Posted
US-008	Sparrow Retail	000007	10/31/2016	Collection letter 2	Posted
US-008	Sparrow Retail	000011	11/30/2016	Collection letter 3	Posted

Consider if you need to include the sales invoices on all interactions.

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

1. Choose **Query** in *Condition*.
2. Click the **Select** button

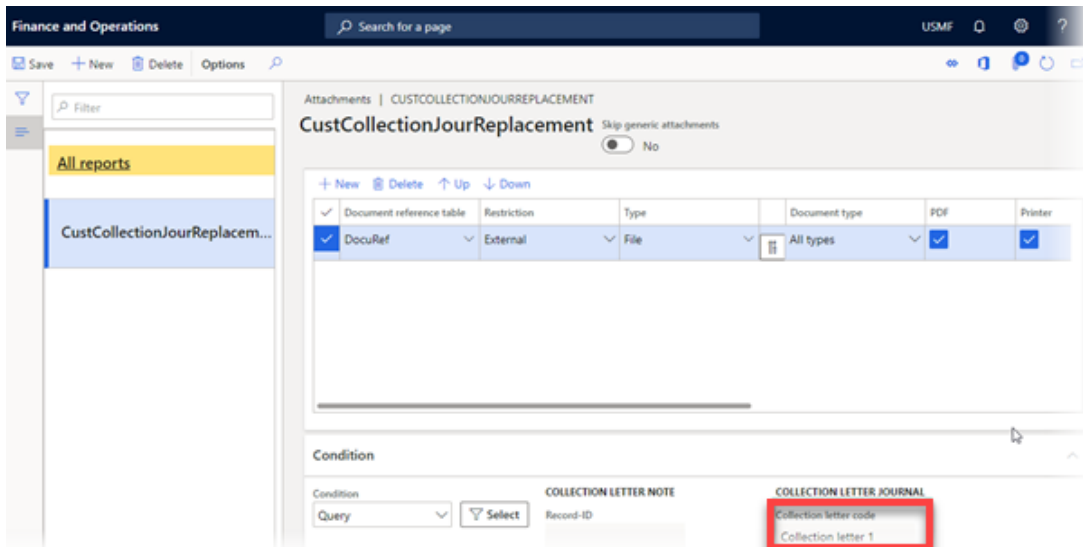
The Inquiry opens



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

In the 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 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 LAC 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.