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Issuing Reminders and Finance Charge memos in bulk Alex Clemons - 2023-10-17 - Comments (0) - Lasernet BC Connector General Information

## Lasernet for Dynamics 365

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

 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'.

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Customer Card   Work Date: 1/25/2024	<ul> <li>Ø</li> <li>Ø</li> <li>Ø</li> <li>Ø</li> </ul>	Ĵ ✓Saved □ 🖈
01121212 · Spotsmeyer'	s Furnishings	
New Document Approve Request App	roval Prices & Discounts Navigate Customer More options	15
General		Show more Details (0)
No	Credit Limit (LCY)	0.00 Customer Picture ~
Name Spotsmeyer's F	urnishings Blocked	~
Balance (LCY)	0.00 Total Sales · · · · · · · · ·	0.00
Balance (LCY) As Vendor	0.00 Costs (LCY)	0.00
Balance Due (LCY)	0.00	
Lasernet		C q J 3
Default Print Method · · · · · Send E-Mail	Show price on Shipment · · · •	Sell-to Customer Sales History
Lasernet E-Mail	GLN Code	Customer No. 01121212
Lasernet Fax	Use Distribution	
		Ongoing Sales Ongoing Sales Ongoing Sales

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**.

Dynamics 365 Business Central								
CRONUS Internation	al Ltd. Sales	<ul> <li>Purchasir</li> </ul>	ng ~ Invente	ory ~ Posted	Documents V Lasernet Docu	iment M	lanagement	×   - :
Setup $\vee$ Report Selection	on $\lor$ Printers $\lor$							
Connector Setup		Responsibility			<b>5</b>			
Document Layout		Center	Location Code	Phone No.	Contact			
Report Setup	er's Furnishings		YELLOW		Mr. Mike Nash	Î	() Details	🛿 Atta
Document Translation	/e Home Furnishings		YELLOW		Mr. Scott Mitchell		Call to Custo	
Bocument manaaton	cepts Furniture		YELLOW		Ms. Tammy L. McDonald		Sell-to Custo	omer Sale
Data Formats	Canada Inc.		YELLOW		Mr. Rob Young		Customer No.	
Usage Data Formats	irport on Candoxy Storage Cam Cannon Group PLC BIRMINGHAM		YELLOW YELLOW BLUE		Mr. Ryan Danner Mr. John Kane Mr. Andy Teal		Ō	
01905902 London 0							0	
10000 The Can							Ongoing Sales Quotes	Ongoing S Blanket O
20000 Selangor	rian Ltd.				Mr. Mark McArthur			

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.

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	Purchase Cree	dit Memo		12060821	FPL Purchase-Credit Memo		Sell-to (Buy-from)			^		
	Customer Sta	tement		12060810	FPL Sales-Statement							
	Issued Remin	der		12060808	FPL Sales-Reminder		Sell-to (Buy-from)	0	0			
	Sales Finance	Charge		12060809	FPL Sales-Finance Charge Memo		Sell-to (Buy-from)	0	0			
	Pick Instructio	n		12060811	FPL Sales-Pick Instruction		Sell-to (Buy-from)		0			
	Pro Forma Inv	oice		12060812	FPL Sales-Pro Forma Invoice		Sell-to (Buy-from)	2				
	Item Label			12060815	FPL Item Label							
	Work Order			12060816	FPL Sales-Work Order	2	Sell-to (Buy-from)	<b>S</b>	0			
										*		

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....**.

CRONUS	Intern	atio	nal Ltd.	Sales	S → Purchas	ing∨ Ir	nventory $\sim$	Postec
Reminders:	${\rm All} \smallsetminus$		,  ○ Search	$+\mathrm{New}$	🗎 Delete	$Process \lor$	Report $\smallsetminus$	Remin
						1 Create	Reminders	
No. 1			Customer N	0.	Name	Suggest	Perminder Line	
<u>1010</u>		1	30000		John Haddo	E Sugges	t Kenninger Line	
1011			40000		Deerfield G	Sissue		

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

Issue Reminders		2 X
Use default values from • • • • • • •	Last used options and filters	$\sim$
Options		
Print	Print	~
Replace Posting Date		
Posting Date		
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.

× No	. "	$\sim$
+ Filter		
Advanced \		
Advanced >		

## 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 Lasernet Archive.

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,o s	earch 🕴 Save PDF 🛛 🗇 Preview	PDF 🔻 Save XML 🔘 Request	Page				18 V = C
	Document Type	Document No.	Vesion	User ID	Print DateTime 2	Port Method	
	Issued Reminder	105012		ADMIN	7/11/2022 4:12 PM	Fax	a I second darbles
	Issued Reminder	105011	1	ADM N	7/11/2022 4:12 PM	E-Invoice	Laternet Archive
÷	Issued Reminder	105010	1	ADMIN	7/11/2022 4:12 PM	Send 5-Mail	Print DateTime 7/11/2022 4:12 PM
	Sales Finance Charge	106004	1	ADMIN	7/11/2022 5:52 PM	Send 5-Mail	
	Sales Finance Charge	106003	1	ADMIN	7/11/2022 3:52 PM	Fax	System
	Sales Finance Charge	106002	1	ADMIN	7/11/2022 3:51 PM	Send E-Mail	Pretty R., CAME, 702-0023-4824-8891-922AA78 Printed Based EPI Salas Barrindar
	Transfer Shipmont	108005	4	ADMIN	7/11/2022 1:54 PM	Sond E-Mail	Created by ADMIN
	Transfer Receipt	109002	2	ADMIN	7/11/2022 1:54 PM	Send 5-Mail	Print Method Send E-Mail
	Purchase Return Order	1001	6	ADM N	7/11/2022 1x45 PM	Send E-Mail	
	Purchase Return Order	1001	5	ADMIN	7/11/2022 1x43 PM	Preview	Email
	Purchase Return Order	1001	4	ADMIN	7/11/2022 1x83 PM	Save to PDF	michael.wibe@formoipe.com
	Sales Return Receipt	107004	4	ADMIN	7/11/2022 1:41 PM	Preview	Copy Recipients
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