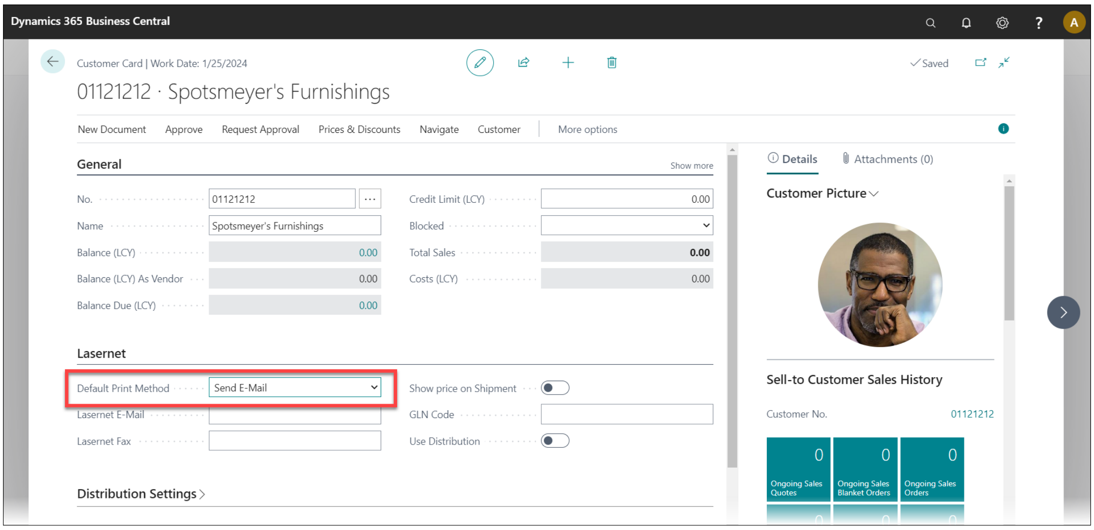
Issuing Reminders and Finance Charge memos in bulk

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

Lasernet for Dynamics 365

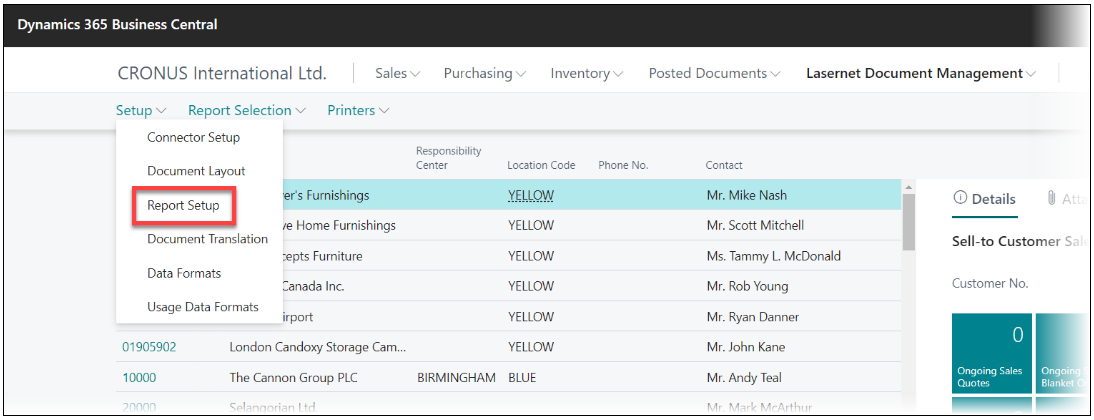
This article provides instructions on how to process multiple Reminders in one go. Follow these steps:

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'.

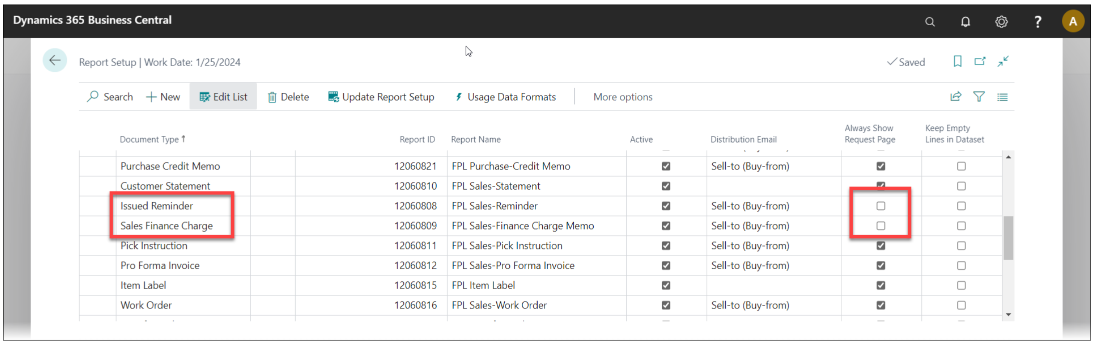


2. Ensure that you have the correct information in either the **Fax**, **GLN Code** or **E-Mail** field.

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.

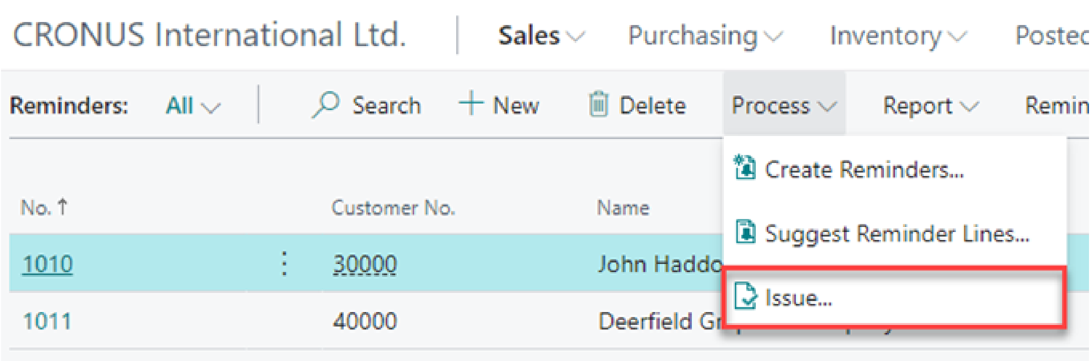


5. Close the form.

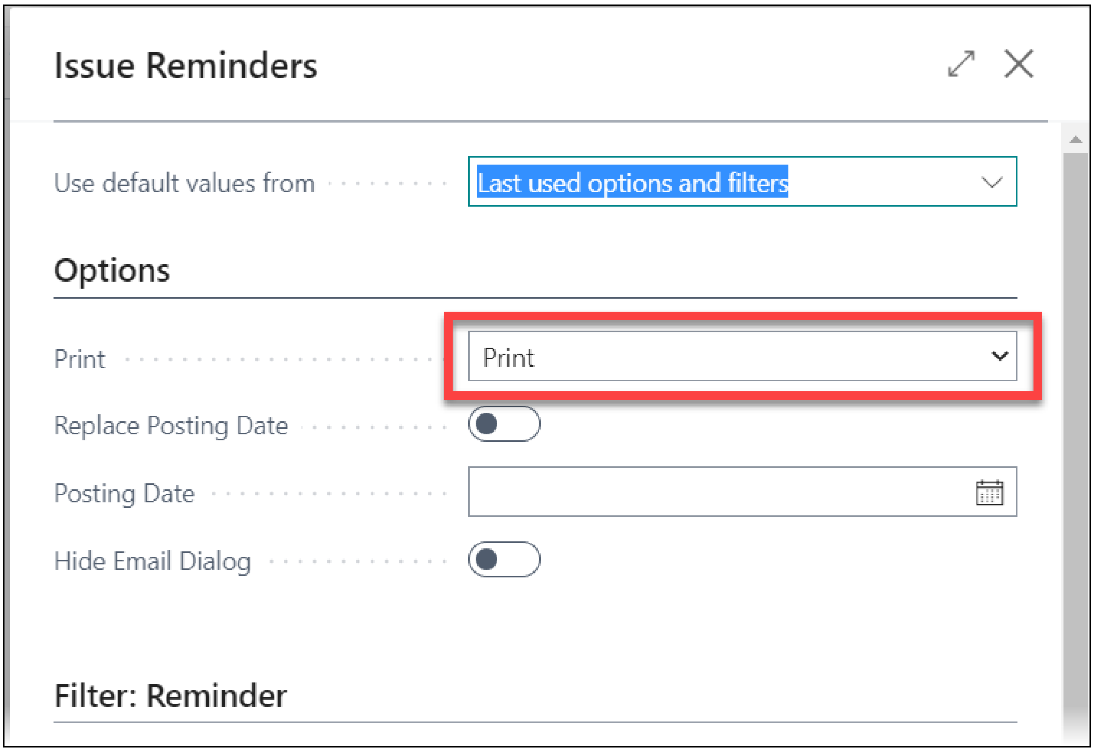
Issue the Reminder

Follow these steps to issue the reminder or charge memo:

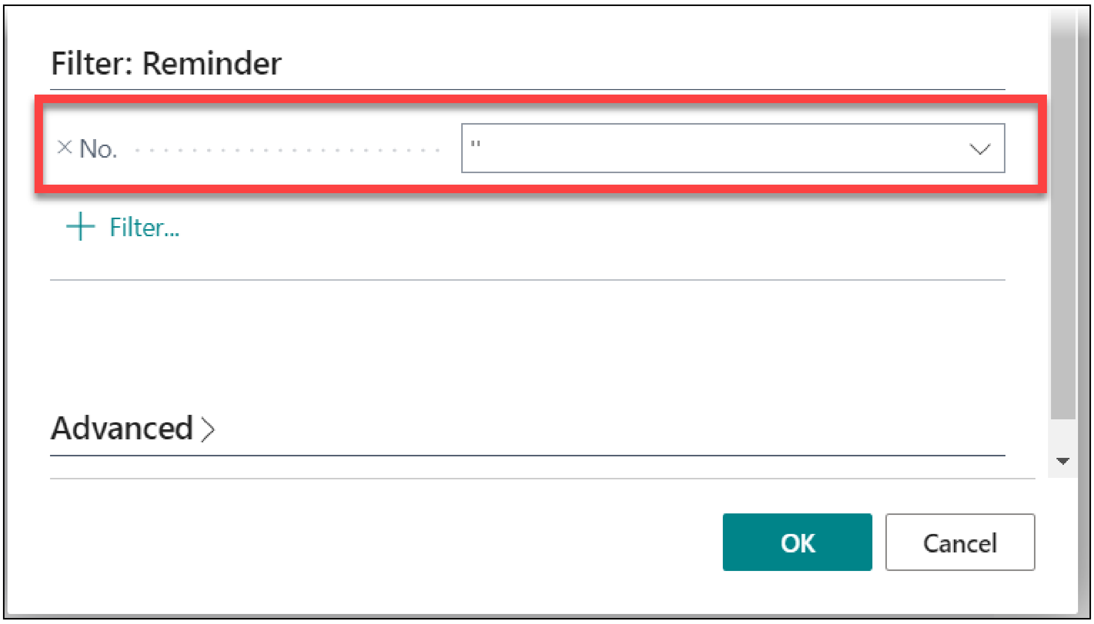
1. Open the required form, click the **Process** dropdown menu and select **Issue....**.



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



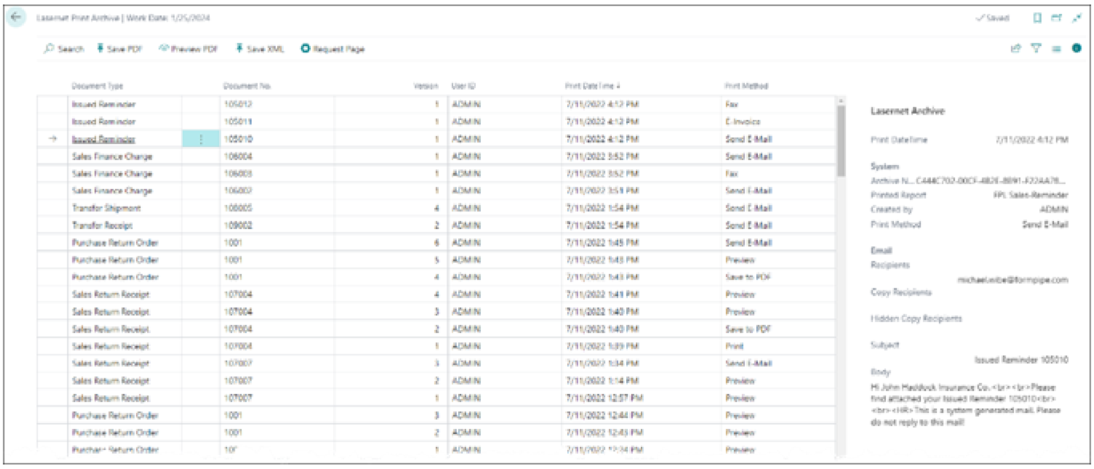
3. Under **Filter: Reminder**, adjust the **No.** field so it includes the right number of reminders. If you want them all you can just remove all numbers.



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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