

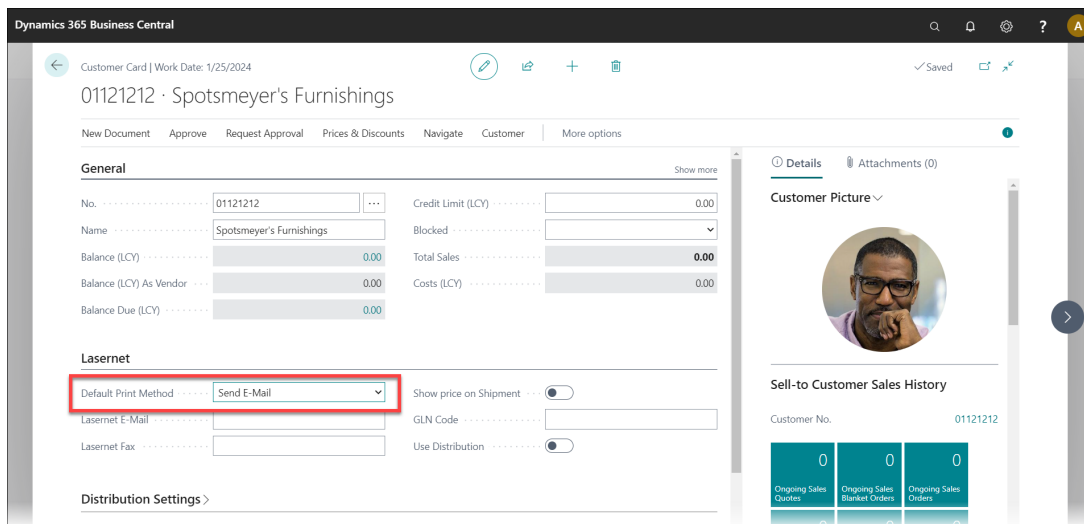
## Issuing Reminders and Finance Charge memos in bulk

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

# Lasernet for Dynamics 365

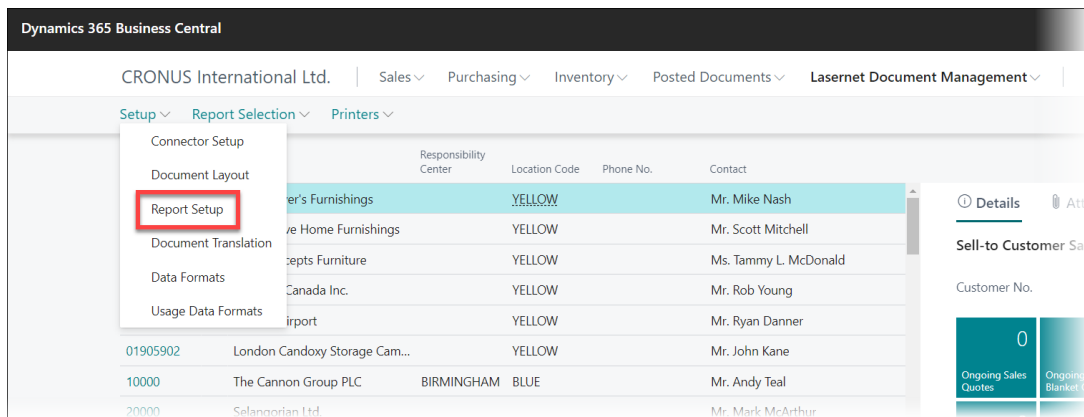
This article provides instructions on how to process multiple Reminders in one go. Follow these steps:

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'.

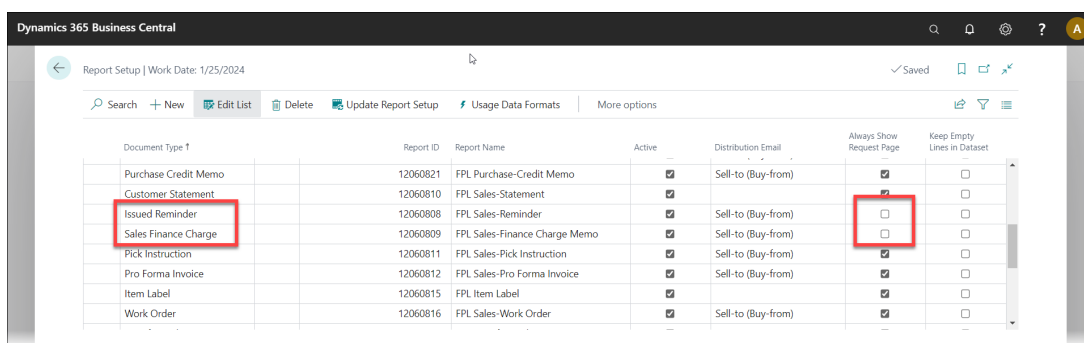


The screenshot shows the Dynamics 365 Business Central interface for a Customer Card. The card is for customer '01121212 - Spotsmeyer's Furnishings'. The 'General' section contains fields for No., Name, Credit Limit (LCY), Blocked, Total Sales, Costs (LCY), Balance (LCY), Balance (LCY) As Vendor, and Balance Due (LCY). The 'Lasernet' section is highlighted with a red box and contains a 'Default Print Method' dropdown menu set to 'Send E-Mail', along with fields for 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' and a 'Sell-to Customer Sales History' section showing three columns for Ongoing Sales Quotes, Ongoing Sales Standard Orders, and Ongoing Sales Orders, all 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.

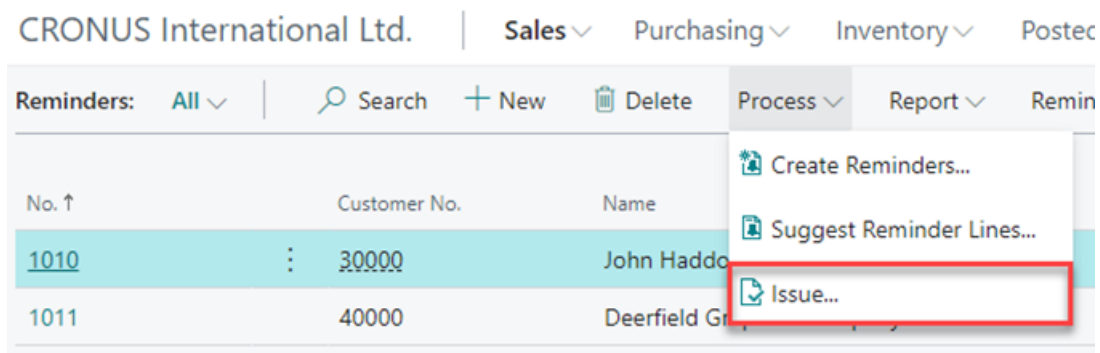


5. Close the form.

### 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**

Use default values from ..... Last used options and filters

**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.

**Filter: Reminder**

× No. .... "

+ 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 Lاسernet Archive.

Lasernet Print Archive | Work Date: 1/25/2024

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     | 106005       | 4       | ADMIN   | 7/11/2022 1:54 PM  | Send E-Mail  |
| Transfer Receipt      | 105002       | 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 No.: C448C702-00C5-4B05-B891-4224A476...

Printed Report: SPL Sales Reminder

Created by: ADMIN

Print Method: Send E-Mail

**Email**

Recipients: michaelunbe@karrnpipe.com

Copy Recipients:

Hidden Copy Recipients:

Subject: Issued Reminder 105010

Body:

Hi John Haddock Insurance Co. <sn> <sn> Please find attached your Issued Reminder 105010<sn>

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

## Related Content

- [Lasernet BC Connector 4.1.0.0](#)