

How to create a Sales Order in Business Central

team FlowShare

Dynamics 365 Business Central

CRONUS DE | Finance | Cash Management | Sales | Purchasing | Setup & Extensions

Customers | Vendors | Items | Bank Accounts | Chart of Accounts

The largest posted sales invoice was for €24,349

Actions

- + Sales Quote
- + Sales Order
- + Sales Invoice
- + Purchase Quote
- + Purchase Order
- + Purchase Invoice
- > New
- > Payments
- > Reports
- > Setup
- Excel Reports

Activities

Sales This Month	Overdue Sales Invoice Amount	Overdue Purch. Invoice Amount	Sales Invoices Predicted Overdue
€5,026	€92,728	€54,136	0
> See more	> See more	> See more	> See more

Ongoing Sales

Sales Quotes	Sales Orders	Sales Invoices
2	7	7
>	>	>

Ongoing Purchases

Purchase Orders	Ongoing Purch. Invoices	Purch. Invoices Next Week
5	3	0
>	>	>

Payments

Unprocessed Payments	Average Collection Days	Outstanding V. Invoices
1	0.0	13
>	>	>

Camera

Create Incoming... from Camera

Incoming Documents

My Incoming Documents

0

Product Videos

Replay Getting Started

https://businesscentral.dynamics.com/?runiframe=1#

Select the 'Customers' tab.

No. ↑	Name	Responsibility Center	Location Code	Phone No.	Contact	Balance (LCY)	Balance Due (LCY)	Sales (LCY)	Payments (LCY)
10000	Adatum Corporation				Jakob Otto	10,837.93	10,837.93	224,711.30	256,568.54
1500	Fridge Retail				Person 5	0.00	0.00	0.00	0.00
20000	Trey Research				Brigitte Werner	15,155.96	14,003.44	58,952.70	54,997.71
2500	Fruit Imports					0.00	0.00	0.00	0.00
30000	School of Fine Art				Meagan Bond	54,084.40	52,169.00	224,417.70	170,333.30
3500	Tools				Tool Contact	0.00	0.00	0.00	0.00
40000					Ian DeBerry	9,224.30	9,224.30	71,803.30	62,579.00
4500	Flower Pots				Flower Contact	0.00	0.00	0.00	0.00
50000	Relecloud				Izaak Schroder	9,969.82	6,492.88	84,376.90	90,438.69
5500	HousePlant Soil				Soil	0.00	0.00	0.00	0.00
6000	Ink Company				Lara Smith	0.00	0.00	0.00	0.00
6500	Colourful Flowers				Flower Contact	0.00	0.00	0.00	0.00
65000	Flooring by Fred				Fred Floor	0.00	0.00	0.00	0.00
7000	Smith Window Frames				Jane Doe	0.00	0.00	0.00	0.00
7500	Insurance Company				Insurance Person	0.00	0.00	0.00	0.00
8000	Table Wood				Dean Scott	0.00	0.00	0.00	0.00
8500	Radion Australia				Sydney Talks	0.00	0.00	0.00	0.00
8700	FlaxSeed Oilfactory				Ms Seed	0.00	0.00	0.00	0.00
8900	Kitchen Appliances				Mr Pan	0.00	0.00	0.00	0.00
9000	Coffee Factory				Jimmy Richards	0.00	0.00	0.00	0.00
9500	Specialty Faucets				Faucet Contact	0.00	0.00	0.00	0.00
D00020	Customer C				Eine Person	0.00	0.00	3,000.00	3,570.00



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Select 'New' from the menu

Dynamics 365 Business Central

CRONUS DE | Finance | Cash Management | Sales | Purchasing | Setup & Extensions

Customers: All | Search | + New | Delete | Process | Report | New Document | Customer | Navigate | Prices & Discounts | Page

No.	Name	Responsibility Center	Location Code	Phone No.	Contact	Balance (LCY)	Balance Due (LCY)	Sales (LCY)	Payments (LCY)
10000	Adatum Corporation							224,711.30	256,568.54
1500	Fridge Retail							0.00	0.00
20000	Trey Research							58,952.70	54,997.71
2500	Fruit Imports							0.00	0.00
30000	School of Fine Art							224,417.70	170,333.30
3500	Tools							0.00	0.00
40000	Alpine Ski House							71,803.30	62,579.00
4500	Flower Pots							0.00	0.00
50000	Relecloud							84,376.90	90,438.69
5500	HousePlant Soil							0.00	0.00
6000	Ink Company							0.00	0.00
6500	Colourful Flowers							0.00	0.00
65000	Flooring by Fred							0.00	0.00
7000	Smith Window Frame							0.00	0.00
7500	Insurance Company							0.00	0.00
8000	Table Wood							0.00	0.00
8500	Radion Australia							0.00	0.00
8700	FlaxSeed Oilfactory							0.00	0.00
8900	Kitchen Appliances							0.00	0.00
9000	Coffee Factory				Jimmy Richards	0.00	0.00	0.00	0.00
9500	Specialty Faucets				Faucet Contact	0.00	0.00	0.00	0.00
D00020	Customer C				Eine Person	0.00	0.00	3,000.00	3,570.00

Select a template for a new customer

Description

- Business-to-Business-Customer (Bank)
- Cash-Payment/Retail Customer (Cash)

OK Cancel

https://businesscentral.dynamics.com/?runifram=1#

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Select 'Business-to-Business-Customer (Bank)'.

Dynamics 365 Business Central

Customer Card | Work Date: 4/12/2021

D00250

New Document Approve Request Approval Prices & Discounts Navigate Customer Actions Related Reports Fewer options

General

Show more

No. Credit Limit (LCY)

Name * Blocked

Balance (LCY) Total Sales

Balance Due (LCY) Costs (LCY)

Address & Contact

Show more

Address

Address

Address 2

Country/Region Code

City

Post Code

Phone No.

Mobile Phone No.

Email

Home Page

Contact

Contact Name

Show on Map

Invoicing >


Payments >

Shipping >

Details

Attachments (0)

Customer Picture



Sell-to Customer Sales History

Customer No.

0	0	0
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
0	0	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
0	0	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0		
Posted Sales Credit Memos		

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The only mandatory information is the name of the customer but more information can be entered.

Click 'Name' and enter the name of the customer.

Dynamics 365 Business Central

Customer Card | Work Date: 4/12/2021

D00250

New Document Approve Request Approval Prices & Discounts Navigate Customer Actions Related Reports Fewer options

General Show more

No. D00250 Credit Limit (LCY) 0.00

Name * French Bakery Blocked

Balance (LCY) 0.00 Total Sales 0.00

Balance Due (LCY) 0.00 Costs (LCY) 0.00

Fill in

Address & Contact Show more

Address Phone No.

Address Mobile Phone No.

Address 2 Email

Country/Region Code DE Home Page

City Contact

Post Code Contact Name

Show on Map

Invoicing INLAND INLAND

Payments 1M(BT)

Shipping Partial

Details Attachments (0)

Customer Picture

Sell-to Customer Sales History

Customer No.

0	0	0
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
0	0	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
0	0	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0		
Posted Sales Credit Memos		

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Fill in the contact details of the customer if you have them available.

Dynamics 365 Business Central

Customer Card | Work Date: 4/12/2021

D00250 · French Bakery

Navigation: New Document, Approve, Request Approval, Prices & Discounts, Navigate, Customer, Actions, Related, Reports, Fewer options

General

No.	D00250	Credit Limit (LCY)	0.00
Name	French Bakery	Blocked	
Balance (LCY)	0.00	Total Sales	0.00
Balance Due (LCY)	0.00	Costs (LCY)	0.00

Address & Contact

Address	Phone No.
Address	Mobile Phone No.
Address 2	Email
Country/Region Code: DE	Home Page
City	Contact
Post Code	Contact Name

Invoicing

INLAND INLAND

Payments

1M(BT)


Shipping

Partial

Details

Attachments (0)

Customer Picture



Sell-to Customer Sales History

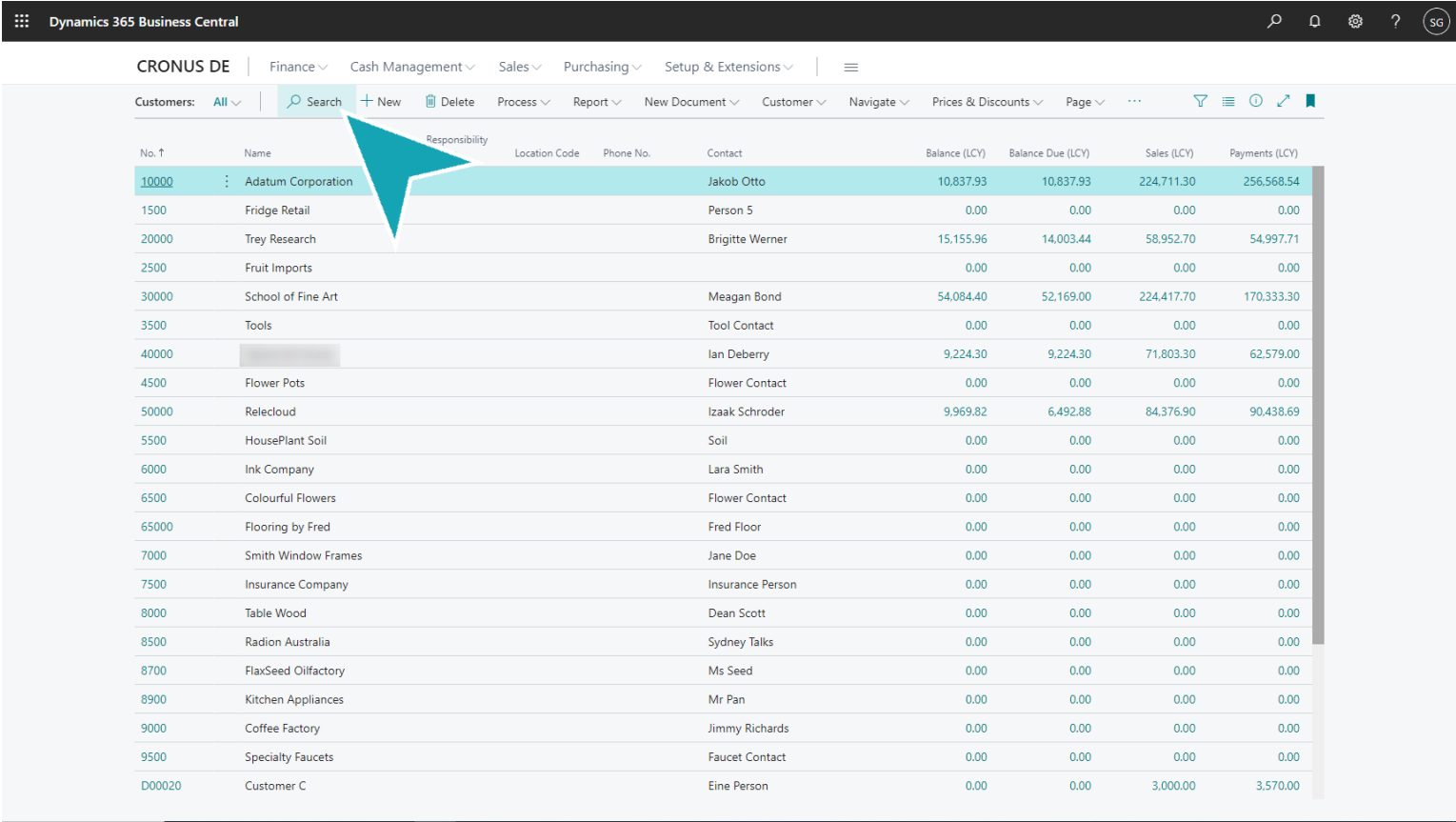
Customer No. D00250

0	0	0
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
0	0	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
0	0	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0		
Posted Sales Credit Memos		

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Click the 'Back' button to get back to the customer page.

Finding your newly added customer



The screenshot shows the Dynamics 365 Business Central interface for the company 'CRONUS DE'. The top navigation bar includes 'Finance', 'Cash Management', 'Sales', 'Purchasing', and 'Setup & Extensions'. Below this, a secondary navigation bar contains 'Customers: All', a search icon, a '+ New' button, and other options like 'Delete', 'Process', 'Report', 'New Document', 'Customer', 'Navigate', 'Prices & Discounts', and 'Page'. A table of customers is displayed below, with columns for 'No.', 'Name', 'Responsibility', 'Location Code', 'Phone No.', 'Contact', 'Balance (LCY)', 'Balance Due (LCY)', 'Sales (LCY)', and 'Payments (LCY)'. A red arrow points to the search icon in the secondary navigation bar.

No.	Name	Responsibility	Location Code	Phone No.	Contact	Balance (LCY)	Balance Due (LCY)	Sales (LCY)	Payments (LCY)
10000	Adatum Corporation				Jakob Otto	10,837.93	10,837.93	224,711.30	256,568.54
1500	Fridge Retail				Person 5	0.00	0.00	0.00	0.00
20000	Trey Research				Brigitte Werner	15,155.96	14,003.44	58,952.70	54,997.71
2500	Fruit Imports					0.00	0.00	0.00	0.00
30000	School of Fine Art				Meagan Bond	54,084.40	52,169.00	224,417.70	170,333.30
3500	Tools				Tool Contact	0.00	0.00	0.00	0.00
40000					Ian DeBerry	9,224.30	9,224.30	71,803.30	62,579.00
4500	Flower Pots				Flower Contact	0.00	0.00	0.00	0.00
50000	Relecloud				Izaak Schroder	9,969.82	6,492.88	84,376.90	90,438.69
5500	HousePlant Soil				Soil	0.00	0.00	0.00	0.00
6000	Ink Company				Lara Smith	0.00	0.00	0.00	0.00
6500	Colourful Flowers				Flower Contact	0.00	0.00	0.00	0.00
65000	Flooring by Fred				Fred Floor	0.00	0.00	0.00	0.00
7000	Smith Window Frames				Jane Doe	0.00	0.00	0.00	0.00
7500	Insurance Company				Insurance Person	0.00	0.00	0.00	0.00
8000	Table Wood				Dean Scott	0.00	0.00	0.00	0.00
8500	Radion Australia				Sydney Talks	0.00	0.00	0.00	0.00
8700	FlaxSeed Oilfactory				Ms Seed	0.00	0.00	0.00	0.00
8900	Kitchen Appliances				Mr Pan	0.00	0.00	0.00	0.00
9000	Coffee Factory				Jimmy Richards	0.00	0.00	0.00	0.00
9500	Specialty Faucets				Faucet Contact	0.00	0.00	0.00	0.00
D00020	Customer C				Eine Person	0.00	0.00	3,000.00	3,570.00

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To find a customer easily, click 'Search'.

Dynamics 365 Business Central

CRONUS DE | Finance | Cash Management | Sales | Purchasing | Setup & Extensions

Customers: All | Bakery | + New | Delete | Process | Report | New Document | Customer | Navigate

A	Name	Responsibility Center	Location Code	Phone No.	Contact	Balance (LCY)	Balance Due (LCY)	Sales (LCY)	Payments (LCY)
D00250	French Bakery					0.00	0.00	0.00	0.00

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Enter the name/part of the name and the customer will be displayed.

Dynamics 365 Business Central

CRONUS DE | Finance | Cash Management | Sales | Purchasing | Setup & Extensions

Customers: A 1 Search + New Delete Process Report New Document Customer Navigate Prices & Discounts Page

No. ↑	Name	Responsibility Center	Location Code	Phone No.	Contact	Balance (LCY)	Balance Due (LCY)	Sales (LCY)	Payments (LCY)
	Adatum Corporation				Jakob Otto	10,837.93	10,837.93	224,711.30	256,568.54
	Fridge Retail				Person 5	0.00	0.00	0.00	0.00
	Trey Research				Brigitte Werner	15,155.96	14,003.44	58,952.70	54,997.71
	Fruit Imports					0.00	0.00	0.00	0.00
	School of Fine Art				Meagan Bond	54,084.40	52,169.00	224,417.70	170,333.30
	Tools				Tool Contact	0.00	0.00	0.00	0.00
					Ian Deberry	9,224.30	9,224.30	71,803.30	62,579.00
4500	Flower Pots				Flower Contact	0.00	0.00	0.00	0.00
50000	Relecloud				Izaak Schroder	9,969.82	6,492.88	84,376.90	90,438.69
5500	HousePlant Soil				Soil	0.00	0.00	0.00	0.00
6000	Ink Company				Lara Smith	0.00	0.00	0.00	0.00
6500	Colourful Flowers				Flower Contact	0.00	0.00	0.00	0.00
65000	Flooring by Fred				Fred Floor	0.00	0.00	0.00	0.00
7000	Smith Window Frames				Jane Doe	0.00	0.00	0.00	0.00
7500	Insurance Company				Insurance Person	0.00	0.00	0.00	0.00
8000	Table Wood				Dean Scott	0.00	0.00	0.00	0.00
8500	Radion Australia				Sydney Talks	0.00	0.00	0.00	0.00
8700	FlaxSeed Oilfactory				Ms Seed	0.00	0.00	0.00	0.00
8900	Kitchen Appliances				Mr Pan	0.00	0.00	0.00	0.00
9000	Coffee Factory				Jimmy Richards	0.00	0.00	0.00	0.00
9500	Specialty Faucets				Faucet Contact	0.00	0.00	0.00	0.00
D00020	Customer C				Eine Person	0.00	0.00	3,000.00	3,570.00

2

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1. Alternatively, you can find any customer easily by applying a filter to the contact name, balance etc. In this case, we are applying a filter to the customer number. Click on 'No.'

2. Click 'Filter...'

No. ↑	Name	Responsibility Center	Location Code	Phone No.	Contact	Balance (LCY)	Balance Due (LCY)
10000	Adatum Corporation				Jakob Otto	10,837.93	10,837.93
1500	Fridge Retail				Person 5	0.00	0.00
20000	Trey Research				Brigitte Werner	15,155.96	14,003.44
2500	Fruit Imports					0.00	0.00
					Meagan Bond	54,084.40	52,169.00
					Tool Contact	0.00	0.00
					Ian Deberry	9,224.30	9,224.30
					Flower Contact	0.00	0.00
					Izaak Schroder	9,969.82	6,492.88
					Soil	0.00	0.00
6010	Ink Company				Lara Smith	0.00	0.00
6500	Colourful Flowers				Flower Contact	0.00	0.00
65000	Flooring by Fred				Fred Floor	0.00	0.00
7000	Smith Window Frames				Jane Doe	0.00	0.00
7500	Insurance Company				Insurance Person	0.00	0.00
8000	Table Wood				Dean Scott	0.00	0.00
8500	Radion Australia				Sydney Talks	0.00	0.00
8700	FlaxSeed Oilfactory				Ms Seed	0.00	0.00
8900	Kitchen Appliances				Mr Pan	0.00	0.00
9000	Coffee Factory				Jimmy Richards	0.00	0.00
9500	Specialty Faucets				Faucet Contact	0.00	0.00

Views: All

Filter list by:

× No.

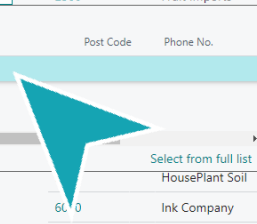
D00250

No. ↑ Name Post Code Phone No.

→ D00250 French Bakery

+ New

Select from full list



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Enter the customer number. The customer will be suggested.

The screenshot shows the Dynamics 365 Business Central interface. At the top left, the company name 'CRONUS DE' is displayed. A teal arrow points to this name. The main area shows a list of customers with columns for No., Name, Responsibility Center, Location Code, Phone No., Contact, Balance (LCY), and Balance Due (LCY). The first row is highlighted in teal and contains the data: D00250, French Bakery, 0.00, and 0.00. On the left side, there is a 'Views' pane with 'All' selected, and a 'Filter list by:' section with a dropdown menu set to 'D00250'. Below that, there is a 'Filter totals by:' section with a 'Date Filter' set to '..04/12/21' and an 'Edit' button. At the bottom left, the URL 'https://businesscentral.dynamics.com/?runiframe=1#' is visible.

No.	Name	Responsibility Center	Location Code	Phone No.	Contact	Balance (LCY)	Balance Due (LCY)
D00250	French Bakery					0.00	0.00

||

To get back to your dashboard, click the company name in the top left corner (here 'CRONUS DE').

Creating a new item

The screenshot shows the Dynamics 365 Business Central interface for a user named 'SG'. The top navigation bar includes 'Dynamics 365 Business Central', search, notification, settings, and help icons. The main navigation menu lists 'CRONUS DE', 'Finance', 'Cash Management', 'Sales', 'Purchasing', and 'Setup & Extensions'. Below this, a secondary menu shows 'Customers', 'Vendors', 'Items' (highlighted with a red arrow), 'Bank Accounts', and 'Chart of Accounts'. A large teal arrow points to the 'Items' link.

The main content area displays a dashboard with the following sections:

- Insight from last month:** 'The largest posted sales invoice was for €24,349'.
- Actions:** A list of actions including '+ Sales Quote', '+ Sales Order', '+ Sales Invoice', '+ Purchase Quote', '+ Purchase Order', '+ Purchase Invoice', '> New', '> Payments', '> Reports', '> Setup', and 'Excel Reports'.
- Activities:** A section with four cards: 'Sales This Month' (€5,026), 'Overdue Sales Invoice Amount' (€92,728), 'Overdue Purch. Invoice Amount' (€54,136), and 'Sales Invoices Predicted Overdue' (0). Each card has a '> See more' link.
- Ongoing Sales:** Three cards for 'Sales Quotes' (2), 'Sales Orders' (8), and 'Sales Invoices' (7).
- Ongoing Purchases:** Three cards for 'Purchase Orders' (5), 'Ongoing Purch. Invoices' (3), and 'Purch. Invoices... Next Week' (0).
- Payments:** Two cards for 'Unprocessed Payments' (1) and 'Average Collec... Days' (0.0).
- Outstanding V... Invoices:** A card showing 13.
- Camera:** A card with a camera icon and the text 'Create Incomin... from Camera'.
- Incoming Documents:** A card showing 0 'My Incoming Documents'.
- Product Videos:** A card with a play button icon and the text 'Product Videos'.
- Get started:** A card with a play button icon and the text 'Replay Getting Started'.

The URL at the bottom of the page is <https://businesscentral.dynamics.com/?runiframe=1#>.

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After having created a new customer, it is now time to create the item which you want to include in the order.

Click 'Items'.

Dynamics 365 Business Central

CRONUS DE | Finance | Cash Management | Sales | Purchasing | Setup & Extensions

Items: All | Search | **New** | Delete | Process | Report | Item | Prices & Discounts | Request Approval | Inventory | Attributes

No. ↑	Description	Inventory	Substi... Exist	Assem... BOM	Base Unit of Measure	Cost is Adj...	Unit Cost	Unit Pri
1001	Software Product	Inventory	-5	No	No	STÜCK	0.00	50
1002	License A	Inventory	0	No	No	STÜCK	0.00	
1003	License B	Inventory	0	No	No	STÜCK	0.00	
1004	Software License	Inventory	-1	No	No	STÜCK	0.00	11
1005	New Inventory	Inventory	0	No	No	SCHACHTEL	0.00	
1006	Clay	Inventory	0	No	No	STÜCK	0.00	
1007	Tools Set	Inventory	0	No	No	STÜCK	0.00	
1008	Sun hat	Inventory	0	No	No	STÜCK	0.00	
1009	Bread	Inventory	0	No	No	PIECE	0.00	
1010	Bag of Flour	Inventory	0	No	No	PIECE	10.00	
1234	Software Produkt 2	Inventory	-1	No	No	STÜCK	0.00	50
1896-S	ATHENS Schreibtisch	Inventory	4	No	No	STÜCK	784.60	1.00
1900-S	PARIS Gästestuhl, schwarz	Inventory	0	No	No	STÜCK	151.10	19
1906-S	ATHENS Schubladenelement	Inventory	5	No	No	STÜCK	339.90	43
1908-S	LONDON Schreibtischstuhl, blau	Inventory	3	No	No	STÜCK	148.90	19
1920-S	ANTWERP Konferenztisch	Inventory	10	No	No	STÜCK	508.00	65
1925-W	Konferenzpaket 1 bis 6	Inventory	0	No	Yes	STÜCK	0.00	18
1928-S	AMSTERDAM Lampe	Inventory	8	No	No	STÜCK	43.10	5
1929-W	Konferenzpaket 1 bis 8	Inventory	0	No	Yes	STÜCK	0.00	23
1936-S	BERLIN Gästestuhl, gelb	Inventory	100	No	No	STÜCK	151.10	19
1953-W	Gastabschnitt 1	Inventory	-49	No	Yes	STÜCK	0.00	12

Details | Attachments (0)

Item Details - Invoicing

Item No. 1001

Costing Method FIFO

Cost is Adjusted Yes

Cost is Posted to G/L Yes

Standard Cost 0.00

Unit Cost 0.00

Overhead Rate 0.00

Indirect Cost % 0

Last Direct Cost 0.00

Profit % 0

Unit Price 500.00

Item Details - Planning

Item No. 1001

Reordering Policy

Reorder Point 0

Reorder Quantity 0

Maximum Inventory 0

Overflow Level 0

Time Bucket

Lot Accumulation Period

Reorder Point Period

https://businesscentral.dynamics.com/?runiframe=1#

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To create a new item, click 'New'.

Dynamics 365 Business Central

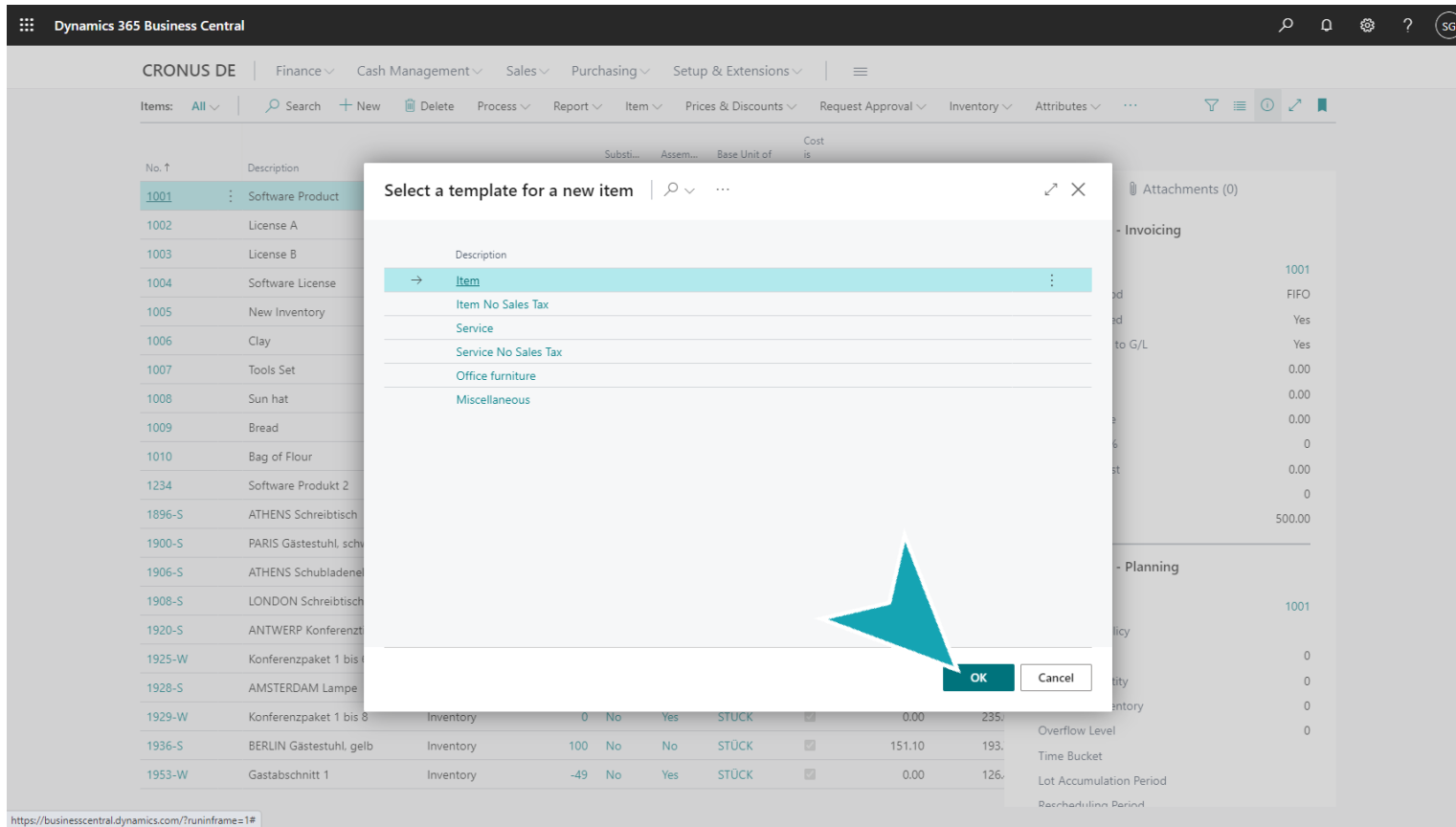
CRONUS DE | Finance | Cash Management | Sales | Purchasing | Setup & Extensions

Items: All | Search | + New | Delete | Process | Report | Item | Prices & Discounts | Request Approval | Inventory | Attributes

Select a template for a new item

Description
→ Item
Item No Sales Tax
Service
Service No Sales Tax
Office furniture
Miscellaneous

OK Cancel



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Select 'Item' and click the 'OK' button.

Dynamics 365 Business Central

Item Card | Work Date: 4/12/2021

1011

Process Item Prices & Discounts Request Approval More options

Item Show more

No. 1011 Type Inventory

Description * Base Unit of Measure PIECE

Blocked Item Category Code

Inventory Show more

Shelf No. Stockout Warning Default (Yes)

Inventory 0 Unit Volume 0

Qty. on Purch. Order 0 Over-Receipt Code

Qty. on Sales Order 0

Costs & Posting Show more

Cost Details

Costing Method FIFO

Standard Cost 0.00

Unit Cost 0.00

Net Invoiced Qty. 0

Cost is Adjusted

Purchase Prices & Discounts Create New...

Posting Details

Gen. Prod. Posting Group HANDEL

Inventory Posting Group WEITERVERK

Default Deferral Template

Foreign Trade

Tariff No.

Details Attachments (0)

Picture

Item Attributes

Attribute	Value
(There is nothing to show in this view)	

Forecast

Status

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Enter the name of the item in the 'Description' field.

Dynamics 365 Business Central

Item Card | Work Date: 4/12/2021

2 Bag of Flour Extra Large

Item Prices & Discounts Request Approval More options

Item Show more

No. 1011 Type Inventory

Description Bag of Flour Extra Large Base Unit of Measure PIECE

Blocked Item Category Code

Inventory Show more

Shelf No. Leave empty

Inventory 0

Qty. on Purch. Order 0

Qty. on Sales Order 0

Stockout Warning Default (Yes) 1

Unit Volume 0

Over-Receipt Code

Costs & Posting Show more

Cost Details

Costing Method FIFO

Standard Cost 0.00

Unit Cost 20

Net Invoiced Qty. 0

Cost is Adjusted

Posting Details

Gen. Prod. Posting Group HANDEL

Inventory Posting Group WEITERVERK

Default Deferral Template

Foreign Trade

Tariff No.

Details Attachments (0)

Picture

Item Attributes

Attribute	Value
(There is nothing to show in this view)	

Forecast

Status *Sales forecast not available f...*

Warten auf dc.services.visualstudio.com...

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1. It might be useful to already determine the price per unit of your item in this step. This can also be done in a later step when placing the order.

Click 'Unit Cost' and enter a price.

2. Click the 'Back' button to get back to the items page.

Dynamics 365 Business Central

CRONUS DE | Finance | Cash Management | Sales | Purchasing | Setup & Extensions

Items: All Search + New Delete Process Report Item Prices & Discounts Request Approval Inventory Attributes

No. ↑	Description	Type	Inventory	Substi... Exist	Assem... BOM	Base Unit of Measure	Cost is Adj...	Unit Cost	Unit Pri
1001	Software Product	Inventory	-5	No	No	STÜCK	<input checked="" type="checkbox"/>	0.00	50
1002	License A	Inventory	0	No	No	STÜCK	<input checked="" type="checkbox"/>	0.00	
1003	License B	Inventory	0	No	No	STÜCK	<input checked="" type="checkbox"/>	0.00	
1004	Software License	Inventory	-1	No	No	STÜCK	<input checked="" type="checkbox"/>	0.00	11
1005	New Inventory	Inventory	0	No	No	SCHACHTEL	<input checked="" type="checkbox"/>	0.00	
1006	Clay	Inventory	0	No	No	STÜCK	<input checked="" type="checkbox"/>	0.00	
1007	Tools Set	Inventory	0	No	No	STÜCK	<input checked="" type="checkbox"/>	0.00	
1008	Sun hat	Inventory	0	No	No	STÜCK	<input checked="" type="checkbox"/>	0.00	
1009	Bread	Inventory	0	No	No	PIECE	<input checked="" type="checkbox"/>	0.00	
1010	Bag of Flour	Inventory	0	No	No	PIECE	<input checked="" type="checkbox"/>	10.00	
1011	Bag of Flour Extra Large	Inventory	0	No	No	PIECE	<input checked="" type="checkbox"/>	20.00	
1234	Software Produkt 2	Inventory	-1	No	No	STÜCK	<input checked="" type="checkbox"/>	0.00	50
1896-S	ATHENS Schreibtisch	Inventory	4	No	No	STÜCK	<input checked="" type="checkbox"/>	784.60	1.00
1900-S	PARIS Gästestuhl, schwarz	Inventory	0	No	No	STÜCK	<input checked="" type="checkbox"/>	151.10	19
1906-S	ATHENS Schubladenelement	Inventory	5	No	No	STÜCK	<input checked="" type="checkbox"/>	339.90	43
1908-S	LONDON Schreibtischstuhl, blau	Inventory	3	No	No	STÜCK	<input checked="" type="checkbox"/>	148.90	19
1920-S	ANTWERP Konferenztisch	Inventory	10	No	No	STÜCK	<input checked="" type="checkbox"/>	508.00	65
1925-W	Konferenzpaket 1 bis 6	Inventory	0	No	Yes	STÜCK	<input checked="" type="checkbox"/>	0.00	18
1928-S	AMSTERDAM Lampe	Inventory	8	No	No	STÜCK	<input checked="" type="checkbox"/>	43.10	5
1929-W	Konferenzpaket 1 bis 8	Inventory	0	No	Yes	STÜCK	<input checked="" type="checkbox"/>	0.00	23
1936-S	BERLIN Gästestuhl, gelb	Inventory	100	No	No	STÜCK	<input checked="" type="checkbox"/>	151.10	19

Details Attachments (0)

Item Details - Invoicing

Item No. 1001

Costing Method FIFO

Cost is Adjusted Yes

Cost is Posted to G/L Yes

Standard Cost 0.00

Unit Cost 0.00

Overhead Rate 0.00

Indirect Cost % 0

Last Direct Cost 0.00

Profit % 0

Unit Price 500.00

Item Details - Planning

Item No. 1001

Reordering Policy

Reorder Point 0

Reorder Quantity 0

Maximum Inventory 0

Overflow Level 0

Time Bucket

Lot Accumulation Period

Reorder Point Period

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Again, to get back to your dashboard, click the company name in the top left corner ('CRONUS DE').

Creating a new sales order

The screenshot shows the Dynamics 365 Business Central interface for user 'CRONUS DE'. The top navigation bar includes 'Finance', 'Cash Management', 'Sales', 'Purchasing', and 'Setup & Extensions'. Below the navigation bar, there are links for 'Customers', 'Vendors', 'Items', 'Bank Accounts', and 'Chart of Accounts'. The main content area displays 'Insight from last month' with a card stating 'The largest posted sales invoice was for €24,349'. To the right of this card, an 'Actions' menu is open, showing options: '+ Sales Quote', '+ Purchase Quote', '> New', '> Setup', '+ Sales Order', '+ Purchase Order', '> Payments', and 'Excel Reports'. A teal arrow points to the '+ Sales Order' option, which has a tooltip that reads 'Sales: Create a new sales order for items or services.' Below the insight card, there is an 'Activities' section with four cards: 'Sales This Month' (€5,026), 'Overdue Sales Invoice Amount' (€92,728), 'Overdue Purch. Invoice Amount' (€54,136), and 'Sales Invoices Predicted Overdue' (0). Further down, there are sections for 'Ongoing Sales' (Sales Quotes: 2, Sales Orders: 10, Sales Invoices: 7), 'Ongoing Purchases' (Purchase Orders: 5, Ongoing Purch. Invoices: 3, Purch. Invoices Next Week: 0), 'Payments' (Unprocessed Payments: 1, Average Collection Days: 0.0, Outstanding V. Invoices: 13), and 'Camera' (Create Incoming from Camera). At the bottom, there are 'Incoming Documents' (My Incoming Documents: 0), 'Product Videos', and 'Get started' (Replay Getting Started).

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To create a new sales order, select the action 'Sales Order'.

Dynamics 365 Business Central

Sales Order

Process Release Posting Prepare Order Request Approval Print/Send Navigate More options

General Show more

Customer Name * French Bakery  Due Date

Contact Requested Delivery Date

Posting Date External Document No.

Order Date Status **Open**

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code
→ Item	:						

Subtotal Excl. VAT (EUR) 0.00 Total Excl. VAT (EUR) 0.00

Inv. Discount Amount Excl. VAT... 0.00 Total VAT (EUR) 0.00

Invoice Discount % 0 Total Incl. VAT (EUR) 0.00

Invoice Details >

Shipping and Billing >

Details Attachments (0)

Sell-to Customer Sales History

Customer No.

Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
Posted Sales Credit Memos		

Customer Details ▾

Customer No.

Name

Phone No.

Email

Fax No.

Credit Limit (LCY)

19

Begin by entering the customer name with whom you are making the sales order.

Dynamics 365 Business Central

Sales Order | Work Date: 4/12/2021

101015 · French Bakery

Process Release Posting Prepare Order Request Approval Print/Send Navigate More options

General Show more

Customer Name: French Bakery Due Date: 5/12/2021
 Contact: Requested Delivery Date:
 Posting Date: 4/12/2021 External Document No.:
 Order Date: 4/12/2021 Status: **Open**

Lines | Manage | More options

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code
→ Item	*	*					

Subtotal Excl. VAT (EUR): 0.00 Total Excl. VAT (EUR): 0.00
 Inv. Discount Amount Excl. VAT: 0.00 Total VAT (EUR): 0.00
 Invoice Discount %: 0 Total Incl. VAT (EUR): 0.00

Invoice Details > 1M(8T)

Shipping and Billing > 4/12/2021

Details | Attachments (0)

Sell-to Customer Sales History

Customer No. D00250

Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
0	0	4
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
0	0	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0	0	0
Posted Sales Credit Memos		
0		

Customer Details >

Customer No. D00250
 Name: French Bakery
 Phone No.
 Email
 Fax No.
 Credit Limit (LCY): 0.00

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Next, add the item to the order.

Open the 'Description' combo box.

Dynamics 365 Business Central

Sales Order | Work Date: 4/12/2021

101015 · French Bakery

Process Release Posting Prepare Order Request Approval Print/Send Navigate More options

General Show more

Customer Name: French Bakery Due Date: 5/12/2021

Contact: Requested Delivery Date:

Posting Date: 4/12/2021 External Document No.:

Order Date: 4/12/2021 Status: Open

Lines | Manage | More options

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code
→ Item	*	*					
	No. ↑	Description		Unit of Measure	Unit Price		
	1009	Bread			0.00		
	1010	Bag of Flour			0.00		
Subtotal Excl. VAT (EUR)	1011	Bag of Flour Extra Large		PIECE	0.00		0.00
Inv. Discount Amount Excl. VAT...	1234	Software Produkt 2		STÜCK	500.00		0.00
Invoice Discount %	1896-S	ATHENS Schreibtisch		STÜCK	1,005.80		0.00
	+ New	Select from full list					

Invoice Details > 1M(8T)

Shipping and Billing > 4/12/2021

Details Attachments (0)

Sell-to Customer Sales History

Customer No. D00250

Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
0	0	4
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
0	0	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0	0	0
Posted Sales Credit Memos		
0		

Customer Details

Customer No. D00250

Name: French Bakery

Phone No.:

Email:

Fax No.:

Credit Limit (LCY): 0.00

21

Select the item from your drop-down list.

Dynamics 365 Business Central

Sales Order | Work Date: 4/12/2021

101015 · French Bakery

Process Release Posting Prepare Order Request Approval Print/Send Navigate More options

General Show more

Customer Name: French Bakery Due Date: 5/12/2021
 Contact: Requested Delivery Date:
 Posting Date: 4/12/2021 External Document No.:
 Order Date: 4/12/2021 Status: **Open**

Lines | Manage | More options

Type	No.	Description	Location Code	Quantity	Assemble to Order	Reserved Quantity	Unit of Measure Code
Item	1011	Bag of Flour Extra Large		*			PIECE *

Subtotal Excl. VAT (EUR): 0.00 Total Excl. VAT (EUR): 0.00
 Inv. Discount Amount Excl. VAT...: 0.00 Total VAT (EUR): 0.00
 Invoice Discount %: 0 Total Incl. VAT (EUR): 0.00

Invoice Details > 1M(8T)

Shipping and Billing > 4/12/2021

Details | Attachments (0)

Sell-to Customer Sales History

Customer No. D00250

Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
0	0	4
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
0	0	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0	0	0
Posted Sales Credit Memos		
0		

Customer Details >

Customer No. D00250
 Name: French Bakery
 Phone No.
 Email
 Fax No.
 Credit Limit (LCY): 0.00

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Next, enter the number of items you want to include in the order.

Click 'Quantity' and specify.

Dynamics 365 Business Central

Sales Order | Work Date: 4/12/2021

101015 · French Bakery

✕ The available inventory for item 1011 is lower than the entered quantity at this location. Show details | Don't show again

Process Release Posting Prepare Order Request Approval Print/Send Navigate More options

General Show more

Customer Name: French Bakery Due Date: 5/12/2021
 Contact: Requested Delivery Date:
 Posting Date: 4/12/2021 External Document No.:
 Order Date: 4/12/2021 Status: **Open**

Lines | Manage | More options

Type	Reserved Quantity	Unit of Measure Code	Unit Price	Line Discount %	Line Amount Excl. VAT	Qty. to Ship	Quantity Shipped	Qty. to Invoice
→ Item	-	PIECE	*	*		10		10

Subtotal Excl. VAT (EUR) 0.00 Total Excl. VAT (EUR) 0.00
 Inv. Discount Amount Excl. VAT... 0.00 Total VAT (EUR) 0.00
 Invoice Discount % 0 Total Incl. VAT (EUR) 0.00

Invoice Details > 1M(8T)
Shipping and Billing > 4/12/2021

Details | Attachments (0)

Sell-to Customer Sales History

Customer No. D00250

0	0	4
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
0	0	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
0	0	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0		
Posted Sales Credit Memos		

Customer Details ▾

Customer No. D00250
 Name French Bakery
 Phone No.
 Email

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Enter the unit price.

Dynamics 365 Business Central

Sales Order | Work Date: 4/12/2021

101015 · French Bakery

✕ The available inventory for item 1011 is lower than the entered quantity at this location. Show details | Don't show again

Process Release Posting Prepare Order Request Approval Print/Send Navigate More options

General Show more

Customer Name: French Bakery Due Date: 5/12/2021
 Contact: Requested Delivery Date:
 Posting Date: 4/12/2021 External Document No.:
 Order Date: 4/12/2021 Status: **Open**

Lines Manage More options

Type	Reserved Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Qty. to Ship	Quantity Shipped	Qty. to Invoice
→ Item		PIECE	*	20	*	10		10

Subtotal Excl. VAT (EUR) 0.00 Total Excl. VAT (EUR) 0.00
 Inv. Discount Amount Excl. VAT... 0.00 Total VAT (EUR) 0.00
 Invoice Discount % 0 Total Incl. VAT (EUR) 0.00

Invoice Details > 1M(8T)
 Shipping and Billing > 4/12/2021

Details Attachments (0)

Sell-to Customer Sales History

Customer No. D00250

0	0	4
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
0	0	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
0	0	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0		
Posted Sales Credit Memos		

Customer Details v

Customer No. D00250
 Name French Bakery
 Phone No.
 Email

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Enter the line amount, i.e. the total sum of the order, without VAT. If you click on 'Line Amount Excl. VAT' the total price will be calculated automatically.

Posting a sales order

Sales Order | Work Date: 4/12/2021

101015 · French Bakery

Process Release **Posting** Prepare Order Request Approval Print/Send Navigate More options

General Show more

Customer Name: French Bakery Due Date: 5/12/2021
Contact: Requested Delivery Date:
Posting Date: 4/12/2021 External Document No.:
Order Date: 4/12/2021 Status: **Open**

Lines | Manage | More options

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code
→ Item	1011	Bag of Flour Extra Large		10			PIECE

Subtotal Excl. VAT (EUR): 200.00 Total Excl. VAT (EUR): 200.00
Inv. Discount Amount Excl. VAT...: 0.00 Total VAT (EUR): 38.00
Invoice Discount %: 0 Total Incl. VAT (EUR): 238.00

Invoice Details > 1M(8T)

Shipping and Billing > 4/12/2021

Details | Attachments (0)

Sell-to Customer Sales History

Customer No. D00250

Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
0	0	4
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
0	0	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0	0	0
Posted Sales Credit Memos		
0		

Customer Details ▾

Customer No. D00250
Name French Bakery
Phone No.
Email
Fax No.
Credit Limit (LCY) 0.00

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To post the order, click **Posting**.

Dynamics 365 Business Central

Sales Order | Work Date: 4/12/2021

101015 · French Bakery

Process Release **Posting** Prepare Order Request Approval Print/Send Navigate More options

Post... Post and New... Post and Send... Preview Posting

Customer Name: French Bakery Due Date: 5/12/2021
 Contact: Requested Delivery Date:
 Posting Date: 4/12/2021 External Document No.:
 Order Date: 4/12/2021 Status: **Open**

Lines Manage More options

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code
→ Item	1011	Bag of Flour Extra Large		10			PIECE

Subtotal Excl. VAT (EUR) 200.00 Total Excl. VAT (EUR) 200.00
 Inv. Discount Amount Excl. VAT... 0.00 Total VAT (EUR) 38.00
 Invoice Discount % 0 Total Incl. VAT (EUR) 238.00

Invoice Details > 1M(8T)

Shipping and Billing > 4/12/2021

<https://businesscentral.dynamics.com/?runifram=1#>

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Click **Post**.

Dynamics 365 Business Central

Sales Order | Work Date: 4/12/2021

101015 · French Bakery

Process Release Posting Prepare Order Request Approval Print/Send Navigate More options

General

Customer Name: French Bakery Due Date: 5/12/2021
Contact: Requested Delivery Date:
Posting Date: 4/12/2021 External Document No.:
Order Date: 4/12/2021 Status: Open

Lines

Type	No.	Description	Unit
→ Item	1011	Bag of Flour Extra Large	

Subtotal Excl. VAT (EUR): 200.00 Total Excl. VAT (EUR): 200.00
Inv. Discount Amount Excl. VAT: 0.00 Total VAT (EUR): 38.00
Invoice Discount %: 0 Total Incl. VAT (EUR): 238.00

Invoice Details

1M(8T)

Shipping and Billing

4/12/2021

Ship
 Invoice
 Ship and Invoice

OK Cancel

Details

Attachments (0)

Sell-to Customer Sales History

Customer No. D00250

Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
0	0	4
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
0	0	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0	0	0
Posted Sales Credit Memos		
0		

Customer Details

Customer No. D00250
Name: French Bakery
Phone No.
Email
Fax No.
Credit Limit (LCY): 0.00

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Select from the three options and click the 'OK' button

Dynamics 365 Business Central

Sales Order | Work Date: 4/12/2021

101015 · French Bakery

Process Release Posting Prepare Order Request Approval Print/Send Navigate More options

General Show more

Customer Name: French Bakery Due Date: 5/12/2021

Contact: Requested Delivery Date:

Posting Date: 4/12/2021 External Document No.:

Order Date: 4/12/2021

Lines Manage More options

Type	Location Code	Quantity	Qty. to Assemble to Order	Amount	Excl. VAT
→ Item	:	10		200.00	

Subtotal Excl. VAT (EUR): 200.00 Total Excl. VAT (EUR): 200.00

Inv. Discount Amount Excl. VAT: 0.00 Total VAT (EUR): 38.00

Invoice Discount %: 0 Total Incl. VAT (EUR): 238.00

Invoice Details > 1M(8T)

Shipping and Billing > 4/12/2021

Details Attachments (0)

Sell-to Customer Sales History

Customer No. D00250

0	0	4
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
0	0	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
0	0	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0		
Posted Sales Credit Memos		

Customer Details v

Customer No. D00250

Name: French Bakery

Phone No.:

Email:

Fax No.:

Credit Limit (LCY): 0.00

Select

The order is posted as number 103219 and moved to the Posted Sales Invoices window.

Do you want to open the posted invoice?

Yes No

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If you have chosen an option containing an invoice, select whether you want to open the invoice or not.

Dynamics 365 Business Central

Posted Sales Invoice | Work Date: 4/12/2021

103219 · French Bakery

Process Invoice Correct Print/Send Navigate More options

General Show more

No. 103219 Quote No.
 Customer French Bakery Order No. 101015
 Contact Canceled No
 Posting Date 4/12/2021 Closed
 Due Date 5/12/2021

Lines | Manage More options

Type	No.	Description	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT
Item	1011	Bag of Flour Extra Large	10	PIECE	20.00		200.00

Invoice Discount Amount Excl. VAT 0.00 Total VAT (EUR) 38.00
 Total Excl. VAT (EUR) 200.00 Total Incl. VAT (EUR) 238.00

Invoice Details > 4/12/2021 1M(8T)
Shipping and Billing > French Bakery

Details Attachments (0)
Incoming Document Files
 Name Type
 (There is nothing to show in this view)

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If you have selected 'Yes' in the previous step, your invoice will be displayed and should look similar to this.