Creating a Sales Order in Business Central

Jane Doe, SDR
Creating a new customer profile

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Select the ‘Customers’ tab.

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Select ‘New’ from the menu.
Select ‘Business-to-Business-Customer (Bank)’.
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.
Fill in the contact details of the customer if you have them available.
Click the ‘Back’ button to get back to the customer page.
Finding your newly added customer

To find a customer easily, click ‘Search’.
Enter the name/part of the name and the customer will be displayed.
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...’.
Enter the customer number. The customer will be suggested.
To get back to your dashboard, click the company name in the top left corner (here ‘CRONUS DE’).
After having created a new customer, it is now time to create the item which you want to include in the order.

Click ‘Items’.
To create a new item, click ‘New’.
Select ‘Item’ and click the ‘OK’ button.
Enter the name of the item in the 'Description' field.
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.
Click the 'Back' button to get back to the items page.
Again, to get back to your dashboard, click the company name in the top left corner (‘CRONUS DE’).
Creating a new sales order

To create a new sales order, select the action ‘Sales Order’. 
Begin by entering the customer name with whom you are making the sales order.
Next, add the item to the order.

Open the 'Description' combo box.
Select the item from your drop-down list.
Next, enter the number of items you want to include in the order.

Click ‘Quantity’ and specify.
Enter the unit price.
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

To post the order, click ‘Posting’.
Click ‘Post’.
Select from the three options and click the 'OK' button
If you have chosen an option containing an invoice, select whether you want to open the invoice or not.
If you have selected ‘Yes’ in the previous step, your invoice will be displayed and should look similar to this.