



Creating a Sales Order in Business Central

Jane Doe, SDR

Creating a new customer profile

The screenshot shows the Dynamics 365 Business Central interface for user 'SG' in the 'CRONUS DE' organization. The 'Customers' tab is selected in the navigation bar. A main card displays 'The largest posted sales invoice was for €24,349' with an orange arrow pointing to the 'Customers' tab. Below this, an 'Activities' section shows four key metrics: Sales This Month (€5,026), Overdue Sales Invoice Amount (€92,728), Overdue Purch. Invoice Amount (€54,136), and Sales Invoices Predicted Overdue (0). The 'Ongoing Sales' section includes Sales Quotes (2), Sales Orders (7), and Sales Invoices (7). The 'Ongoing Purchases' section includes Purchase Orders (5), Ongoing Purch. Invoices (3), and Purch. Invoices Next Week (0). The 'Payments' section includes Unprocessed Payments (1), Average Collection Days (0.0), and Outstanding V. Invoices (13). At the bottom, there are cards for 'Incoming Documents' (0), 'Product Videos', and 'Get started'.

To create a new order, you will need a customer and an item. In the first step, we will create a new customer.

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	Alpine Ski House				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)'**.

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 Phone No.

Address Mobile Phone No.

Address 2 Email

Country/Region Code Home Page

City **Contact**

Post Code 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.

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(8T)

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.

Customer Card | Work Date: 4/12/2021

D00250 · French Bakery

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

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(8T)

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

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	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	Alpine Ski House				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.

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

Customers: A | 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
	Alpine Ski House				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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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...'**

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

Views: All

Filter list by: × No. D00250

No. ↑	Name	Post Code	Phone No.	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
6000	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

French Bakery

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. 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). A single customer, 'D00250 French Bakery', is listed. The left sidebar contains a 'Views' panel with 'All' selected, a 'Filter list by:' section with 'No.' and 'D00250' selected, and a 'Filter totals by:' section with 'Date Filter: ..04/12/21'. An orange arrow points to the 'CRONUS DE' company name in the top left corner.

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' and various menu items: Finance, Cash Management, Sales, Purchasing, and Setup & Extensions. Below this, a secondary navigation bar lists 'Customers', 'Vendors', 'Items', 'Bank Accounts', and 'Chart of Accounts'. The 'Items' menu item is highlighted with an orange arrow. The main content area displays a dashboard with a large text box stating 'The largest posted sales invoice was for €24,349'. To the right of this text is an 'Actions' menu with options: '+ Sales Quote', '+ Purchase Quote', '> New', '> Setup', '+ Sales Order', '+ Purchase Order', '> Payments', 'Excel Reports', '+ Sales Invoice', '+ Purchase Invoice', and '> Reports'. Below the dashboard, there are sections for 'Activities', 'Ongoing Sales', 'Ongoing Purchases', 'Payments', and 'Camera'. The 'Activities' section shows four metrics: 'Sales This Month' (€5,026), 'Overdue Sales Invoice Amount' (€92,728), 'Overdue Purch. Invoice Amount' (€54,136), and 'Sales Invoices Predicted Overdue' (0). The 'Ongoing Sales' section shows 'Sales Quotes' (2), 'Sales Orders' (8), and 'Sales Invoices' (7). The 'Ongoing Purchases' section shows 'Purchase Orders' (5), 'Ongoing Purch. Invoices' (3), and 'Purch. Invoices... Next Week' (0). The 'Payments' section shows 'Unprocessed Payments' (1), 'Average Collec... Days' (0.0), and 'Outstanding V... Invoices' (13). The 'Camera' section has a 'Create Incomin... from Camera' button. At the bottom, there are 'Incoming Documents' (0), 'Product Videos', and 'Get started' (Replay Getting Started) buttons. A URL is visible at the bottom left: '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	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	
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
1953-W	Gastabschnitt 1	Inventory	-49	No	Yes	STÜCK	<input checked="" type="checkbox"/>	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

No.	Description	Subst...	Assem...	Base Unit of	Cost				
1001	Software Product								
1002	License A								
1003	License B								
1004	Software License								
1005	New Inventory								
1006	Clay								
1007	Tools Set								
1008	Sun hat								
1009	Bread								
1010	Bag of Flour								
1234	Software Produkt 2								
1896-S	ATHENS Schreibtisch								
1900-S	PARIS Gästestuhl, sch								
1906-S	ATHENS Schubladene								
1908-S	LONDON Schreibtisch								
1920-S	ANTWERP Konferenzt								
1925-W	Konferenzpaket 1 bis								
1928-S	AMSTERDAM Lampe								
1929-W	Konferenzpaket 1 bis 8	Inventory	0	No	Yes	STUCK		0.00	235.
1936-S	BERLIN Gästestuhl, gelb	Inventory	100	No	No	STUCK		151.10	193.
1953-W	Gastabschnitt 1	Inventory	-49	No	Yes	STUCK		0.00	126.

Select a template for a new item

Description

- Item
- Item No Sales Tax
- Service
- Service No Sales Tax
- Office furniture
- Miscellaneous

OK Cancel

Attachments (0)

Invoicing

Planning

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

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

Item Card | Work Date: 4/12/2021

1011

Process Item Prices & Discounts Request Approval More options

Item Show more

No. Type

Description * * Base Unit of Measure

Blocked Item Category Code

Inventory Show more

Shelf No. Stockout Warning

Inventory Unit Volume

Qty. on Purch. Order Over-Receipt Code

Qty. on Sales Order

Costs & Posting Show more

Cost Details

Costing Method

Standard Cost

Unit Cost

Net Invoiced Qty.

Cost is Adjusted

Purchase Prices & Discounts

Posting Details

Gen. Prod. Posting Group

Inventory Posting Group

Default Deferral Template

Foreign Trade

Tariff No.

Details Attachments (0)

Picture

Item Attributes

Forecast

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

Item Card | Work Date: 4/12/2021

1011 · Bag of Flour Extra Large

Process 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. 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 20

Net Invoiced Qty. 0

Cost is Adjusted

Purchase Prices & Discounts Create New...

Posting Details

Gen. Post. Posting Group HANDEL

Inventory Posting Group WEITERVERK

Default Deferral Template

Foreign Trade

Tariff No.

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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.

← Item Card | Work Date: 4/12/2021

1011 : Bag of Flour Extra Large

Process 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. 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 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...*

17

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

18

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 'SG'. The top navigation bar includes 'CRONUS DE' and various menu items like '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 features a card titled 'Insight from last month' with the text 'The largest posted sales invoice was for €24,349'. To the right of this card, an 'Actions' menu is open, with an orange arrow pointing to the '+ Sales Order' option. Other actions visible include '+ Sales Quote', '+ Purchase Quote', '+ New', '+ Purchase Order', '+ Payments', '+ Setup', '+ Excel Reports', and 'Sales Create a new sales order for items or services. Reports'. Below the insight card, there is an 'Activities' section with four metrics: 'Sales This Month' (€5,026), 'Overdue Sales Invoice Amount' (€92,728), 'Overdue Purch. Invoice Amount' (€54,136), and 'Sales Invoices Predicted Overdue' (0). Each metric has a '> See more' link. 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 sections for 'Incoming Documents' (My Incoming Documents: 0), 'Product Videos', and 'Get started' (Replay Getting Started).

19

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



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

Customer Details

Customer No.

Name

Phone No.

Email

Fax No.

Credit Limit (LCY)

20

Begin by entering the customer name with whom you are making the 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	*	*					

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

Next, add the item to the order.

Open the **Description** combo box.

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 Measure Unit of Measure Unit Price					
		1009 Bread PIECE 0.00					
		1010 Bag of Flour PIECE 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	0	Ongoing Sales Blanket Orders	0	Ongoing Sales Orders	4
Ongoing Sales Invoices	0	Ongoing Sales Return Orders	0	Ongoing Sales Credit Memos	0
Posted Sales Shipments	0	Posted Sales Invoices	0	Posted Sales Return Receipts	0
Posted Sales Credit Memos	0				

Customer Details ▾

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

22

Select the item from your drop-down list.

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

Customer Details

Customer No. D00250

Name French Bakery

Phone No.

Email

Fax No.

Credit Limit (LCY) 0.00

23

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

Click **Quantity** and specify.

Enter the unit price.

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	*	*		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

← Sales Order | Work Date: 4/12/2021 ✓ Saved

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

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

Customer Details

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

businesscentral.dynamics.com/?runifram=1#

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

26

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

Click **'Post'**.

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

Sell-to Customer Sales History

Customer No. D00250

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

Customer Details

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

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	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

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 v

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

Modal Dialog:

Ship
Invoice
Ship and Invoice

OK Cancel

28

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

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	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

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 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

29

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

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. Order No. 101015

Customer French Bakery

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 Amou Excl. V.
Item	1011	Bag of Flour Extra Large	10	PIECE	20.00		200.

Invoice Discount Amount Excl. ... 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

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