

Dynamics 365

Business Central

How-to Guide: South African Sales Invoice

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1 Introduction

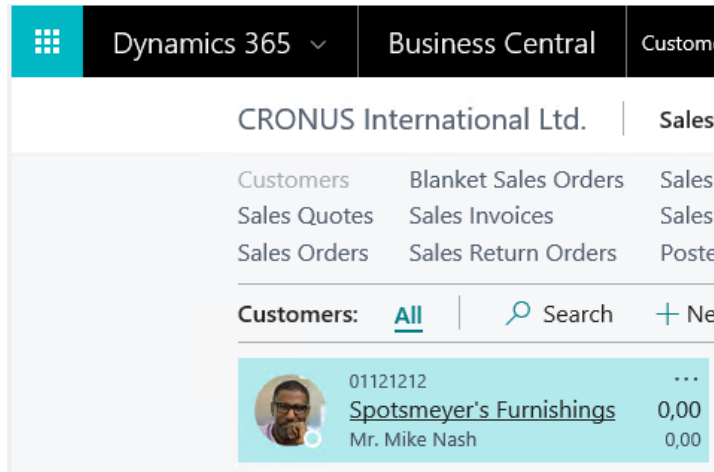
Welcome to Microsoft Dynamics 365 Business Central!

Together with Microsoft, we have expanded the Dynamics 365 Business Central sales invoice functionality to cater to South African businesses – ensuring you can view company registration numbers and external document numbers on all sales invoices.

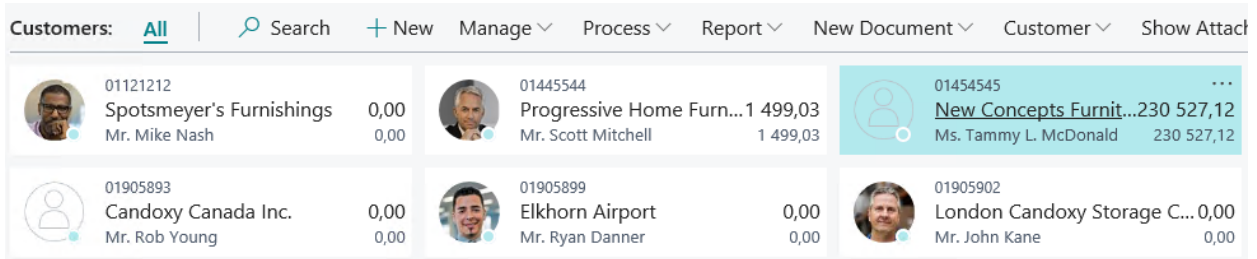
The following document outlines how to populate a customer’s registration details, creating and posting a sales order, as well as previewing the posted sales order.

2 How To Populate Your Client’s Company Registration Number

1. Navigate to ‘Customers’ by either selecting ‘Customers’ from the navigation bar on the sales menu, or alternatively by using the search functionality in the top right-hand corner.



2. Select the customer whose details you would like to update.



3. Click on the ‘Invoicing’ tab and select the ‘Company registration No.’ field.

4. Input the registration number.

Invoicing

| | | |
|--------------------------------|----------------------|-----|
| Company Registration No. | 123455678/12356/2002 | X |
| VAT Registration No. | 0987654235 | ... |
| Copy Sell-to Addr. to Qte From | Company | ▼ |

3 How To Create and Post a Sales Order

1. Navigate to the Sales Order page by either selecting 'Sales Order' from the navigation bar on the sales menu, or alternatively by using the search functionality in the top right-hand corner.

The screenshot shows the Dynamics 365 Business Central navigation bar. The 'Sales Orders' menu is expanded, showing options like Customers, Blanket Sales Orders, Sales Credit Memos, Sales Quotes, Sales Invoices, Sales Journals, Sales Orders, Sales Return Orders, and a 'Create a new entry.' button. The 'Sales Orders' section is set to 'All' and includes a search icon, a '+ New' button, and a 'Manage' dropdown.

2. Click on the '+New'
3. Input your customer name. If the customer is a 'Bill-to Customer', then the customer name related to the 'Bill-to Customer' needs to be used.

NEW - SALES ORDER - 1001

1001

General

| No. | 1001 | ... | Order Date | | | | | | | | |
|---------------|--|-------|-----------------------|-----|------|------|-----------|----------|--------------------------|-------|-----------------------|
| Customer Name | * 01121212 | X | Due Date | | | | | | | | |
| Contact | <table border="1"> <thead> <tr> <th>NO.</th> <th>NAME</th> <th>CITY</th> <th>PHONE NO.</th> </tr> </thead> <tbody> <tr> <td>01121212</td> <td>Spotsmeyer's Furnishings</td> <td>Miami</td> <td></td> </tr> </tbody> </table> | | | NO. | NAME | CITY | PHONE NO. | 01121212 | Spotsmeyer's Furnishings | Miami | |
| NO. | NAME | CITY | PHONE NO. | | | | | | | | |
| 01121212 | Spotsmeyer's Furnishings | Miami | | | | | | | | | |
| Posting Date | | | | | | | | | | | |
| Lines | <table border="1"> <tr> <td><</td> <td colspan="2"></td> <td>></td> </tr> <tr> <td>+ New</td> <td colspan="2"></td> <td>Select from full list</td> </tr> </table> | | | < | | | > | + New | | | Select from full list |
| < | | | > | | | | | | | | |
| + New | | | Select from full list | | | | | | | | |

4. Go to the 'External Document No.' field and input the external document number.

1001 · Spotsmeyer's Furnishings

General

Show more

| | | | | | |
|---------------|--------------------------|-----|-------------------------|------------|-----|
| No. | 1001 | ... | Order Date | 2020/01/23 | ... |
| Customer Name | Spotsmeyer's Furnishings | ... | Due Date | 2020/01/31 | ... |
| Contact | Mr. Mike Nash | ... | Requested Delivery Date | | ... |
| Posting Date | 2020/01/23 | ... | External Document No. | ON584735 | ✕ |

- In the 'Sales Line' field, enter the item number of the product or service being purchased.

Lines

| TYPE | NO. | DESCRIPTION | LOCATION CODE | QUANTITY | | | | | | | | |
|--|----------------------------|----------------------|-----------------------|----------|-----|-------------|----------------------|------------|--------|----------------------------|-----|--------|
| Item | * 1992-W | * | | | | | | | | | | |
| <table border="1"> <thead> <tr> <th>NO.</th> <th>DESCRIPTION</th> <th>BASE UNIT OF MEASURE</th> <th>UNIT PRICE</th> </tr> </thead> <tbody> <tr> <td>1992-W</td> <td>ALBERTVILLE Whiteboard,...</td> <td>PCS</td> <td>974,80</td> </tr> </tbody> </table> | | | | | NO. | DESCRIPTION | BASE UNIT OF MEASURE | UNIT PRICE | 1992-W | ALBERTVILLE Whiteboard,... | PCS | 974,80 |
| NO. | DESCRIPTION | BASE UNIT OF MEASURE | UNIT PRICE | | | | | | | | | |
| 1992-W | ALBERTVILLE Whiteboard,... | PCS | 974,80 | | | | | | | | | |
| Subtotal Excl. VAT (USD) | | + New | Select from full list | | | | | | | | | |

- In the 'Quantity' field, input the desired quantity requested.

Lines

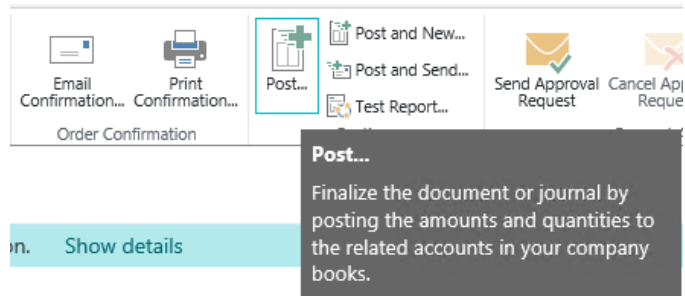
| TYPE | NO. | DESCRIPTION | LOCATION CODE | QUANTITY |
|------|--------|-------------------------------|---------------|----------|
| Item | 1992-W | ALBERTVILLE Whiteboard, green | YELLOW | * 10 |

- In the 'QTY. to Ship' field, input the quantity shipped.

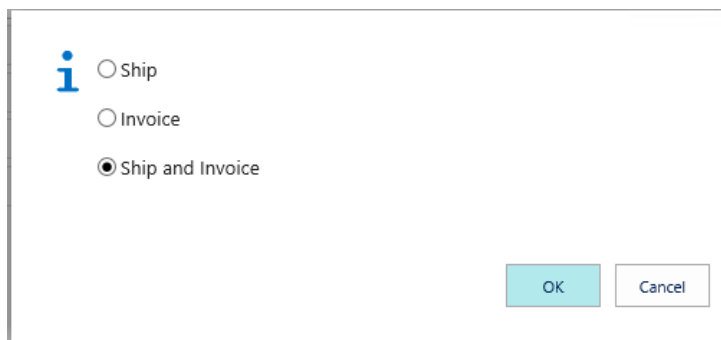
Lines

| TYPE | NO. | QTY. TO SHIP |
|------|------------|--------------|
| Item | ... 1992-W | 10 ✕ |

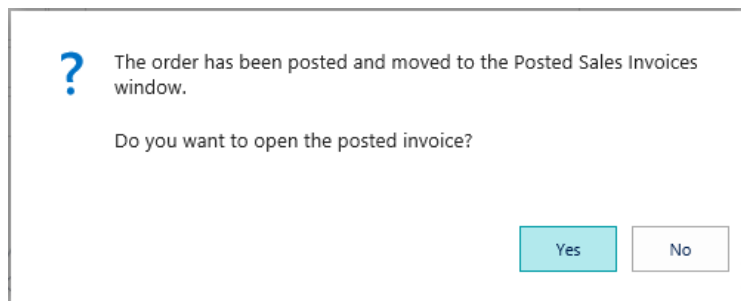
- Once you've completed the order, go to the home ribbon at the top of your screen and select the 'Post' button.



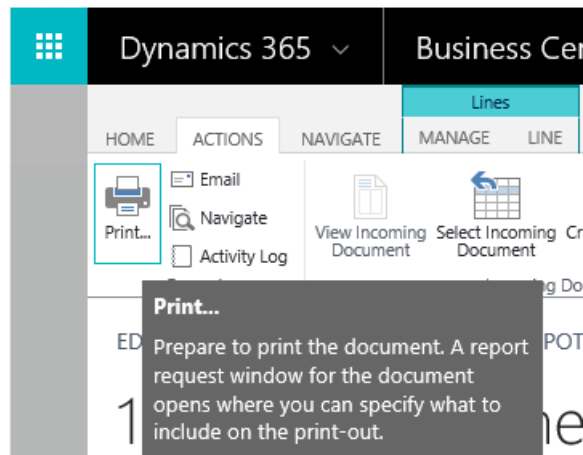
- In the pop-up window, select 'Ship and Invoice', then click 'Ok'.



- A new window will pop up, click 'Yes' to open the posted sales invoice.



11. Should you wish to print the sales invoice, under the 'Actions' ribbon at the top of the screen, select 'Print'.



4 How To View the Print Preview of Your Sales Invoice

1. Navigate to the Sales Order page by either selecting 'Sales Order' from the navigation bar on the sales menu, or alternatively by using the search functionality in the top right-hand corner.
2. Select 'Preview Report'.

A screenshot of the 'EDIT - SALES - INVOICE' form in Dynamics 365 Business Central. The form is titled 'EDIT - SALES - INVOICE' and has a refresh icon in the top right corner. It is divided into several sections: 'Saved Settings' with a dropdown menu showing 'Last used options and filters'; 'Options' with fields for 'No. of Copies' (set to 0) and checkboxes for 'Show Internal Information', 'Log Interaction' (checked), 'Show Assembly Components', and 'Show Additional Fee Note'; and 'Posted Sales Invoice' with a 'Show results:' section containing three filter rows: 'Where: No.' (dropdown) is '103032'; 'And: Sell-to Customer No.' (dropdown) is empty; and 'And: No. Printed' (dropdown) is empty. At the bottom of the form, there are four buttons: 'Send to...', 'Print', 'Preview' (highlighted in blue), and 'Cancel'.

Please Note:

Confirm that the report preview contains both the company registration and external document numbers. If the Company Registration is blank or has a different value to the figures updated on the customer card, check that the respective customer does not have an associated Bill-to Customer set up. If said customer does have a 'Bill-to Customer' set up, then you need to ensure that you update the Bill-to Customer's details with the required company registration number.

5 Support Details

Should you require any assistance with the Braintree South African Sales Invoice app, or Dynamics 365 Business Central, please contact our support team at info.braintree@voxtelecom.co.za or alternatively call us on 011 455 6248.