



Dynamics 365 Business Central

How-to Guide:
South African Sales
Invoice Processing.

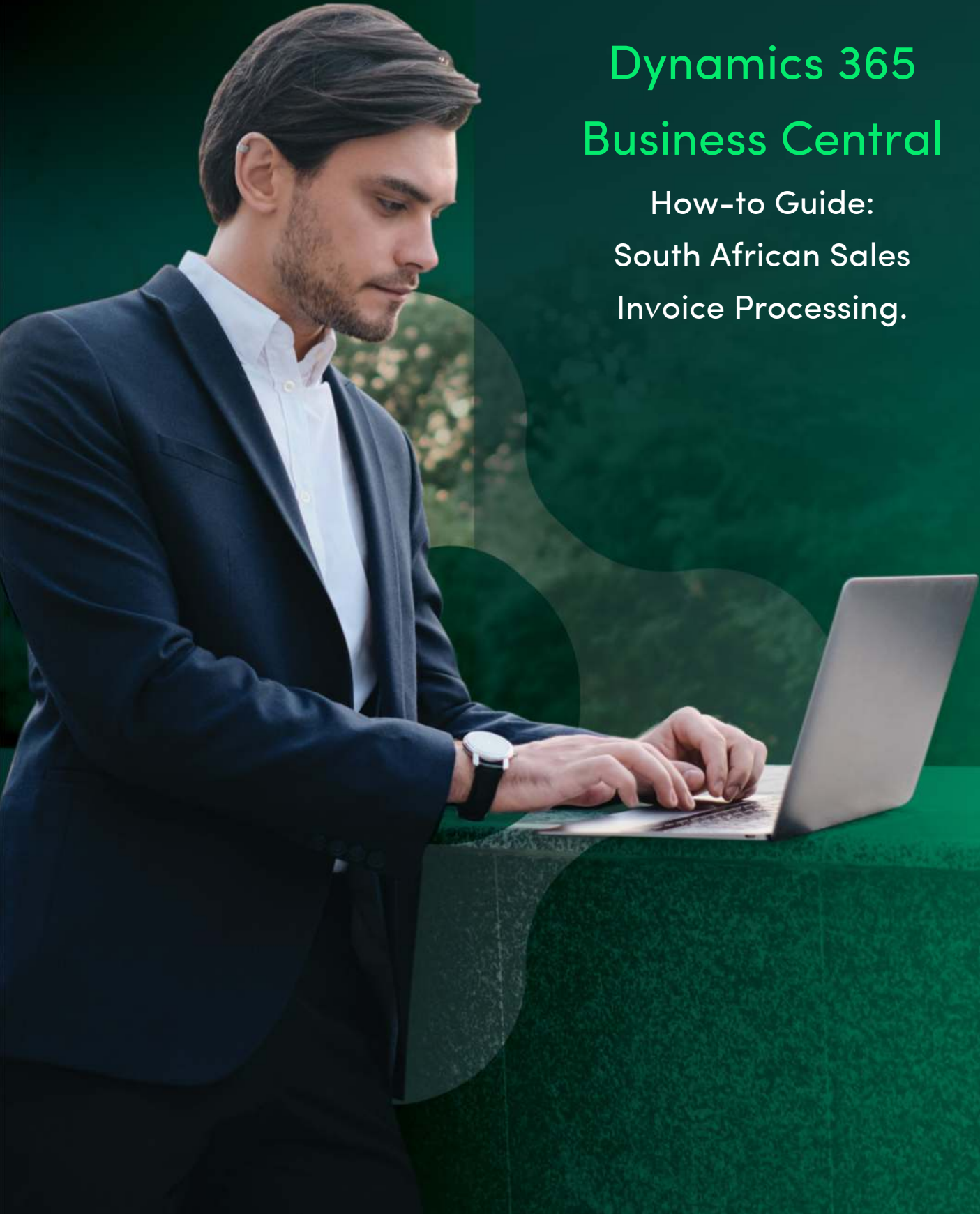


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1 Introduction

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.

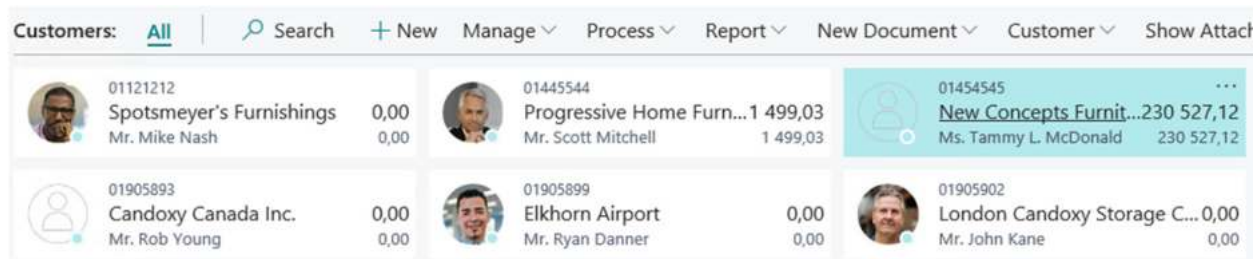
The following document outlines how to populate a customer’s registration details, creating and posting a sales order, as well as previewing the posted sales order.

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.

Dynamics 365 | **Business Central** | **Sales Orders**

CRONUS International Ltd. | **Sales** | Purchasing

Customers	Blanket Sales Orders	Sales Credit Memos
Sales Quotes	Sales Invoices	Sales Journals
Sales Orders	Sales Return Orders	Create a new entry. Invoices

Sales Orders: All | Search | **+ New** | Manage

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	<p>< + New Select from full list ></p>										

- 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	x

- 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

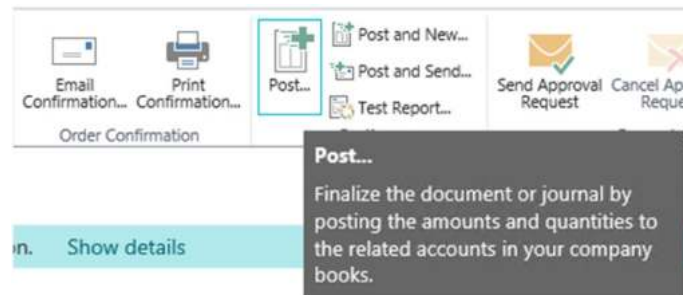
TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY
Item	1992-W	ALBERTVILLE Whiteboard, greer	YELLOW	* 10

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

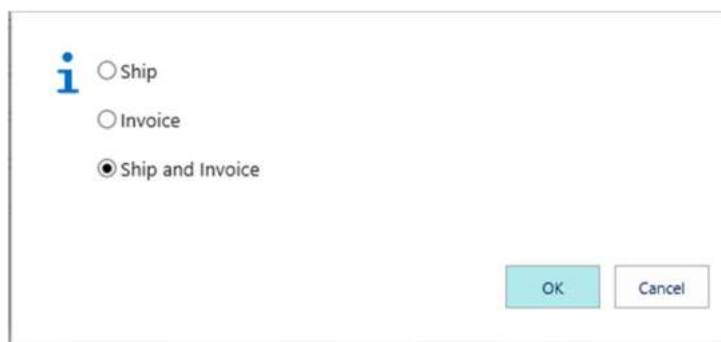
Lines

TYPE	NO.	QTY. TO SHIP
Item	... 1992-W	10 x

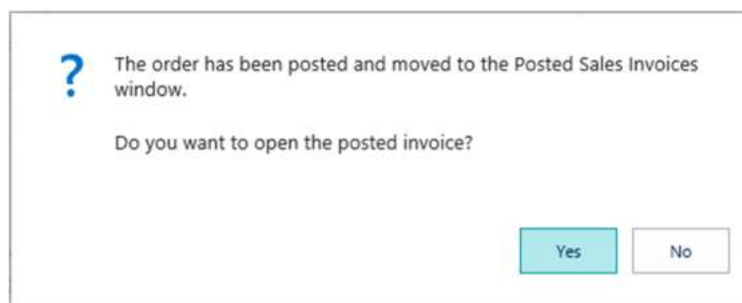
- Once you've completed the order, go to the home ribbon at the top of your screen and select the 'Post' button.



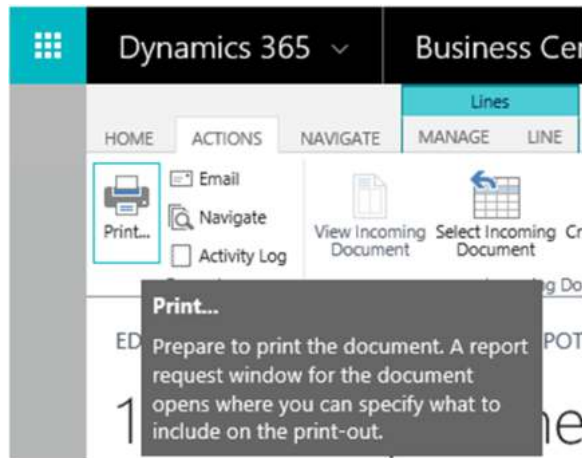
- In the pop-up window, select 'Ship and Invoice', then click 'Ok'.



- 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' report configuration window. The window title is 'EDIT - SALES - INVOICE'. It has a 'Saved Settings' section with a dropdown menu showing 'Last used options and filters'. Below that is an 'Options' section with several checkboxes: 'No. of Copies' (0), 'Show Internal Information' (unchecked), 'Log Interaction' (checked), 'Show Assembly Components' (unchecked), and 'Show Additional Fee Note' (unchecked). The 'Posted Sales Invoice' section has a 'Show results:' label and three rows of filters: 'Where: No.' (dropdown) is '103032', 'And: Sell-to Customer No.' (dropdown) is empty, and 'And: No. Printed' (dropdown) is empty. At the bottom, 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.