

# Automatic creation of Planning Line from Sales Invoice

Sometimes you need to create and post a new Sales Invoice linked to a Job / Job Task.

Usually the fields "Job No." and "Job Task No." are read only in Sales Invoice Page because you need to create first the related Job Planning Line.

With this function the fields are now editable and the Planning Line is created automatically with type "Billable"

The screenshot displays the Dynamics 365 Business Central interface for a Sales Invoice. The page title is "Sales Invoice | Work Date: 23/01/2025" and the company name is "1004 · Società mercantile internaz.". The "General" tab is active, showing the invoice details. A dropdown menu is open over the "Job No." and "Job Task No." fields, displaying a list of planning lines. The list includes columns for "No.", "Description", "Bill-to Customer No.", "Starting Date", and "Stat". Two items are visible: "DEERFIELD..." with description "Pian. otto posti di lavoro" and "SOC. MERC..." with description "Pian. dieci aule per conferenze". Below the list, there are options for "+ New", "Show details", and "Select from full list". The invoice summary shows a subtotal of 2,200.00 EUR, an invoice discount of 0, and a total including VAT of 2,200.00 EUR.

Type	Tax Group Code	Line Discount %	Line Amount Excl. VAT	Qty. to Assign	Job No.	Job Task No.	Department Code	Project Code	Customergro... Code	Area Code	Businessgroup Code	Salescampaign Code
G/L Account			2,200,00	0			VENDITE		MEDIO	30	UFFICIO	

No.	Description	Bill-to Customer No.	Starting Date	Stat
DEERFIELD...	Pian. otto posti di lavoro	40000	13/01/2025	Op
SOC. MERC...	Pian. dieci aule per conferenze	50000	01/01/2025	Op

Subtotal Excl. VAT (EUR) ..... 2,200,00  
Inv. Discount Amount Excl. VAT (EUR) ..... 0,00  
Invoice Discount % ..... 0  
Total Incl. VAT (EUR) ..... 2,200,00

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