

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 shows the Dynamics 365 Business Central interface for a Sales Invoice. The header includes the company name "1004 · Società mercantile internaz." and the work date "23/01/2025". The "General" tab is active, showing fields for "Società mercantile internaz.", "20/01/2025", "20/01/2025", "20/01/2025", "IT-FN-VEN", and "Open".

The "Lines" section is expanded, showing a table with columns: Type, Tax Group Code, Line Discount %, Line Amount Excl. VAT, Qty. to Assign, Job No., Job Task No., Department Code, Project Code, Customer Code, Area Code, Businessgroup Code, and Salescampaign Code. The first line is a "G/L Account" with a line amount of 2,200.00 and a quantity of 0. A dropdown menu is open for the "Job No." field, showing a list of planning lines with columns: No., Description, Bill-to Customer No., Starting Date, and Status. The list includes "DEERFIELD..." and "SOC. MERC...".

The bottom of the screen shows the "Invoice Details" section with fields for "Subtotal Excl. VAT (EUR)", "Inv. Discount Amount Excl. VAT (EUR)", "Invoice Discount %", and "Total Incl. VAT (EUR)".

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