

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 header shows the invoice number 1004 and the company name 'Società mercantile internaz.'. The 'General' tab is active, showing various fields like 'Società mercantile internaz.', '20/01/2025', '20/01/2025', '20/01/2025', 'IT-FN-VEN', and 'Open'. Below the header, the 'Lines' section is visible, with a 'Manage' button and a 'Line' button. A table of lines is shown, with columns for 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. A dropdown menu is open for the 'Job No.' field, showing a list of planning lines. The first line is 'DEERFIELD...' with a description 'Pian. otto posti di lavoro', a customer code of 40000, and a starting date of 13/01/2025. The second line is 'SOC. MERC...' with a description 'Pian. dieci aule per conferenze', a customer code of 50000, and a starting date of 01/01/2025. The 'Total Incl. VAT (EUR)' is 2.200,00.

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	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)	Inv. Discount Amount Excl. VAT (EUR)	Invoice Discount %	Total Incl. VAT (EUR)
2.200,00	0,00	0	2.200,00

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