

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 company name "1004 · Società mercantile internaz." and the work date "23/01/2025". The "General" tab is active, showing the invoice details. The "Lines" section is expanded, and a dropdown menu is open for the first line. The dropdown menu lists two items: "DEERFIELD..." with a description "Pian. otto posti di lavoro" and "SOC. MERC..." with a description "Pian. dieci aule per conferenze". The dropdown menu also includes a "+ New" button and "Show details" and "Select from full list" options. The invoice summary at the bottom 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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