



Easily create your first order & invoice with these steps.

Within transportation companies, it is all about transport orders. It is your core business and therefore, order management should be as easy as possible. 365 for Transportation is built with the focus on user-friendliness and efficiency, so creating orders was never this easy.

How to create orders

After you have successfully logged into 365 for Transportation and chose the right Company and Role for yourself, you will see your personal Role Center. From this screen, you can directly to creating orders and invoices.


The screenshot shows the Dynamics 365 Business Central interface for 'Logistics Inc.'. The top navigation bar includes 'Dynamics 365' and 'Business Central'. The main content area is divided into several sections:

- Activities:** A section with a 'CREATE' button and two sub-buttons: 'Order' and 'Sales Invoice'. These two sub-buttons are highlighted with a red box.
- GET STARTED:** A section with a 'Play' button and the text 'Play Getting Started'.
- Power BI Reports:** A section with a message: 'An error occurred while trying to get reports from the Power BI service. Please try again or contact your syste...'
- My Plan Departments:** A table with columns 'PLAN DEPARTMENT NO.', 'PLAN DEPARTMENT LINE NO.', and 'DESCRIPTION'. It contains the text '(There is nothing to show in this view)'.

PLAN DEPARTMENT NO.	PLAN DEPARTMENT LINE NO.	DESCRIPTION
(There is nothing to show in this view)		
- Business Assistance:** A section titled 'Top Five Customers by Sales Value' with a donut chart. The chart shows segments for 'All Other Customers', 'Alpine Ski House', 'Relictcloud', 'School of Fine Art', and 'Adatum Corporation'.
- My Customers:** A table with columns 'CUSTOMER NO.', 'NAME', 'PHONE NO.', and 'BALANCE (LCY)'. It shows one customer: '20000 Trey Research' with a balance of '2,345.63'.

CUSTOMER NO.	NAME	PHONE NO.	BALANCE (LCY)
20000	Trey Research		2,345.63
- Report Inbox:** A table with columns 'CREATED DATE-TIME', 'DESCRIPTION', and 'OUTPUTTYPE'.



By pressing the + symbol above Order, you will directly go to the environment to create an order. You will get redirected to the screen below. All you only have to do now, is fill in the blank spaces with the right data. If you start doing so, the status automatically changes to 15-MODIFY. By pressing on the  icon, you will go to a drop-down option list regarding to that subject. In the example below, it is shown for Customers.

Order

General

No.	0123456	St
Customer No.		Tr
Name		
External Document No.		
Address		
FROMADDRESS		
From Address No.		
From Address Description		
From Address City		

NO.	NAME	CITY	PHONE NO.
10000	Adatum Corporation	Cambridge	
20000	Trey Research	London	
30000	School of Fine Art	Miami	
40000	Alpine Ski House	Munchen	
50000	Relecloud	Guildford	

+ New [Select from full list](#)

After filling in all the correct addresses, timeslots, and choosing your truck, driver and trailer, you can go from status 15-MODIFY to the next status, 20-RELEASED, by clicking on Next Status.



Now, the Order is released for planning. Plan the ride and the status will go to the next one, 30-PLANNED. You have now successfully created an order.



Next step: create your first invoice

After you have created an order, the next thing you need to do is create an invoice for the regarding customer or client. 365 for Transportation is built with the focus on user-friendliness and efficiency, so invoicing is again easy and quickly done.

How to create an invoice

After you have successfully logged into 365 for Transportation and chose the right Company and Role for yourself, you will see your personal Role Center. From this screen, you can directly to creating orders and invoices.

The screenshot shows the Dynamics 365 Business Central interface for 'Logistics Inc.'. The 'Activities' section is highlighted with a red box, showing 'CREATE' buttons for 'Order' and 'Sales Invoice'. The 'Sales Invoice' button is the target for the next step.

My Plan Departments

PLAN DEPARTMENT NO.	PLAN DEPARTMENT LINE NO.	DESCRIPTION
(There is nothing to show in this view)		

My Customers

CUSTOMER NO.	NAME	PHONE NO.	BALANCE (LCY)
20000	Trey Research		2,345.63

Business Assistance

Top Five Customers by Sales Value

Report Inbox

CREATED DATE-TIME	DESCRIPTION	OUTPUTTYPE
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By pressing the + symbol above Sales Invoice, you will directly go to the environment to create an invoice. You will get redirected to the screen below. All you only have to do now, is fill in the blank spaces with the right data. Explanation will follow after the screenshot.



TYPE	3.NO.	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	2.UNIT PRICE	LINE DISCOUNT %	2.LINE AMOUNT	QTY TO ASSIGN
Comment									0
Resource	MARY	Mary A. Dempsey		3	HOUR	188.816		567.45	0
Comment									0

2.0.Subtotal (EUR)		3.Total Excl. VAT (EUR)	
	557.45		557.45

2.0.Inv. Discount Amount (EUR)		3.Total VAT (EUR)	
	0.00		55.75

Invoice Discount %		3.Total Inccl. VAT (EUR)	
	0		613.20

Invoice Details		Payment Service	
Currency Code	EUR	No payment service is made available.	
Shipment Date	4/9/2018		
Prices Including VAT			
VAT Bus. Posting Group	DOMESTIC	Transaction Type	
Payment Terms Code	1M(SD)	1.2.1	
EU 3-Party Trade		1.2.2	
		Direct Debit Mandate ID	

Shipping and Billing		Bill-to	
Ship-to	Default (Sell-to Address)	Default (Customer)	
Contact	Robert Townes		

1. General: Here you can find general Customer information, which you can easily import with the icon. You also determine the beginning- and end date of the invoice.
2. Lines: Here you enter the billable items. This is what you charge the customer and what will appear on the invoice.
3. Invoice details: These are the financial details. From currency to VAT, to transaction type.
4. Shipping and Billing: To where and whom should the invoice be sent? Fill it in here.

Once you have filled in all necessary information, you can determine your next move in the options bar above. Post (and send) the invoice, calculate the discount, add attachments and so on. You can see the overview below.

If you post the invoice, you can check it before you send it or send it instantly. After sending the invoice, your customer will receive it at the (digital) address you entered in the invoice. By pressing Post and Send, you successfully created and sent your invoice.