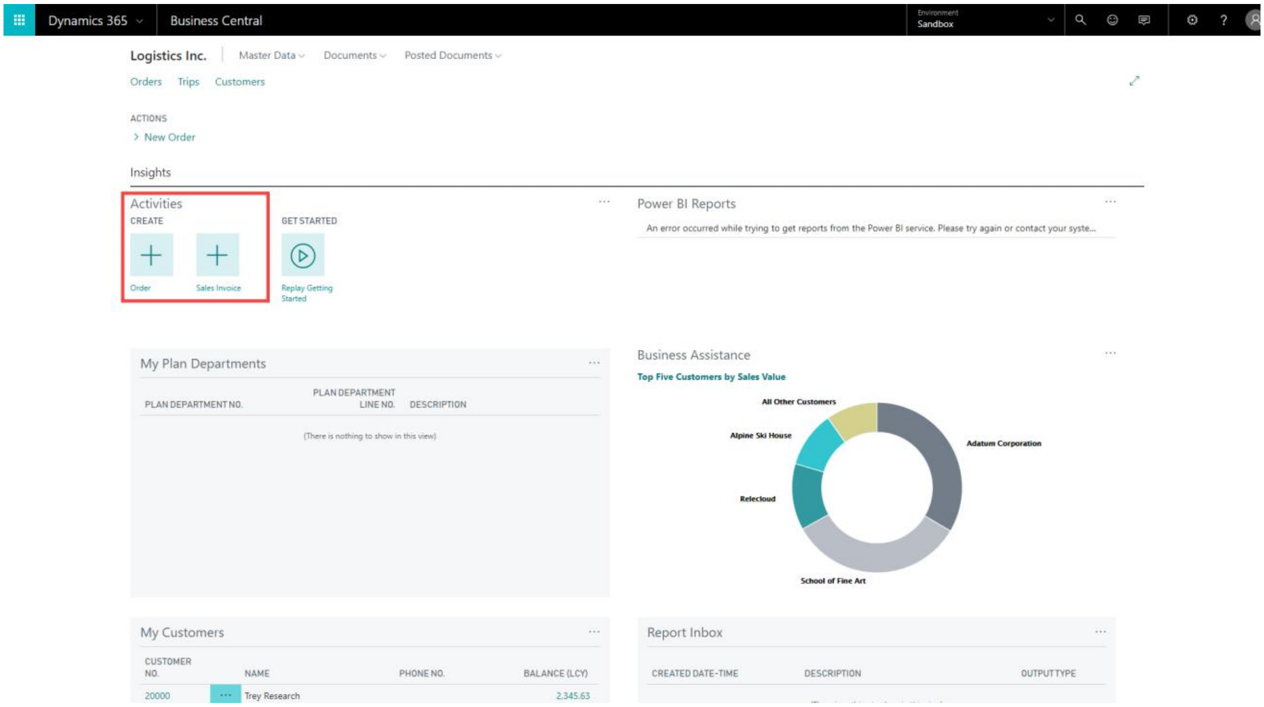
# Easily create your first order & invoice with these steps.

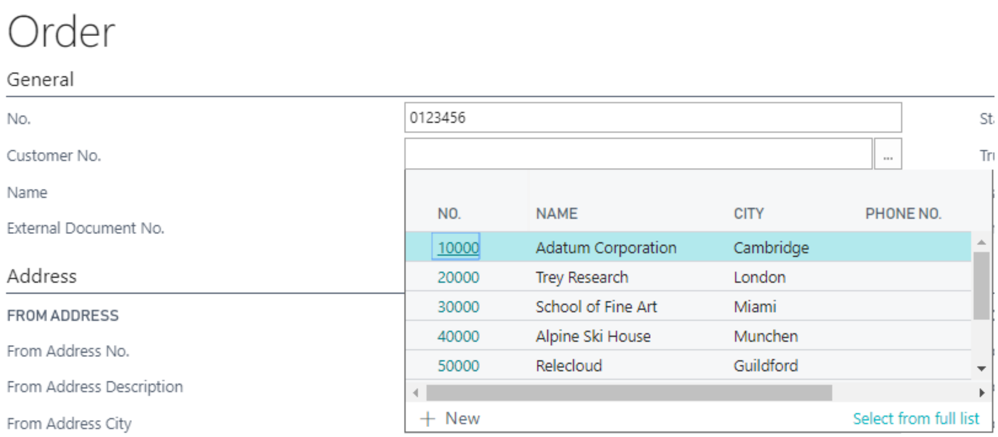
Within transportation companies, it is all about transport orders. It is your core business and therefore, order management should be as easy as possible. 365 for Transportation is built with the focus on user-friendliness and efficiency, so creating orders was never this easy.

## 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.



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.




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.

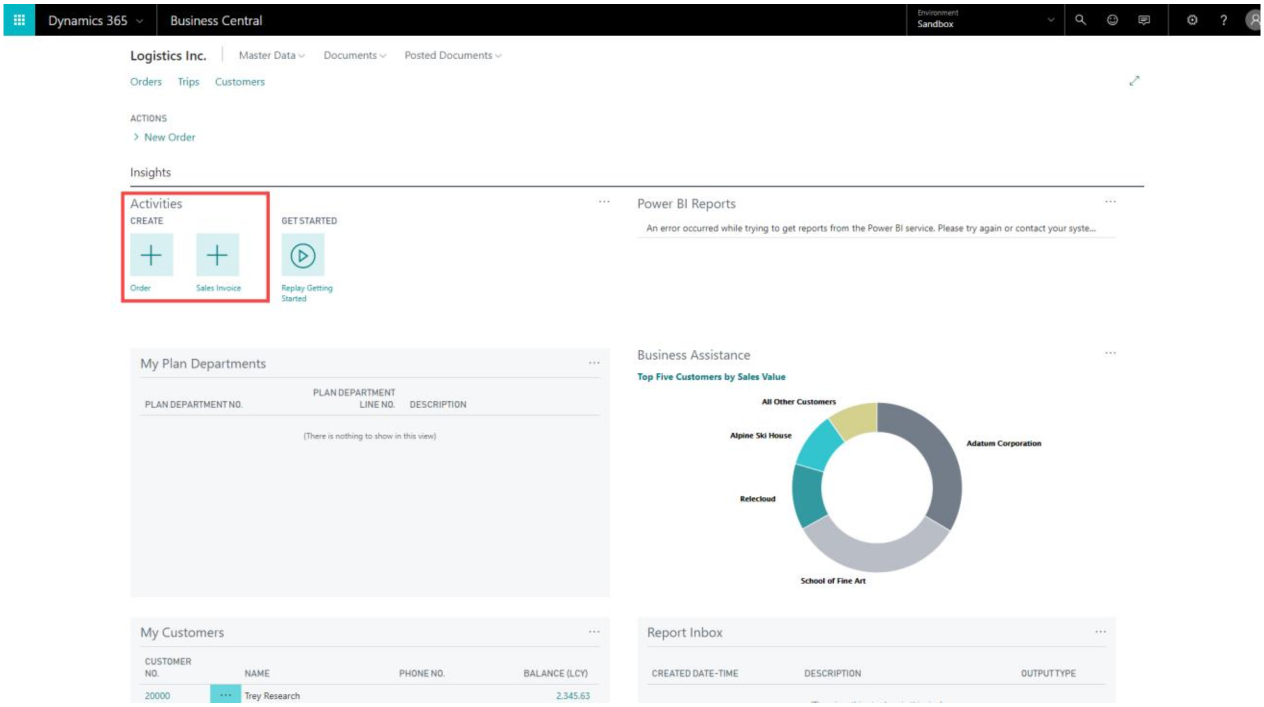

Now, the Order is released for planning. Plan the ride and the status will go to the next one, 30-PLANNED.
You have now successfully created an order.

## Next step: create your first invoice

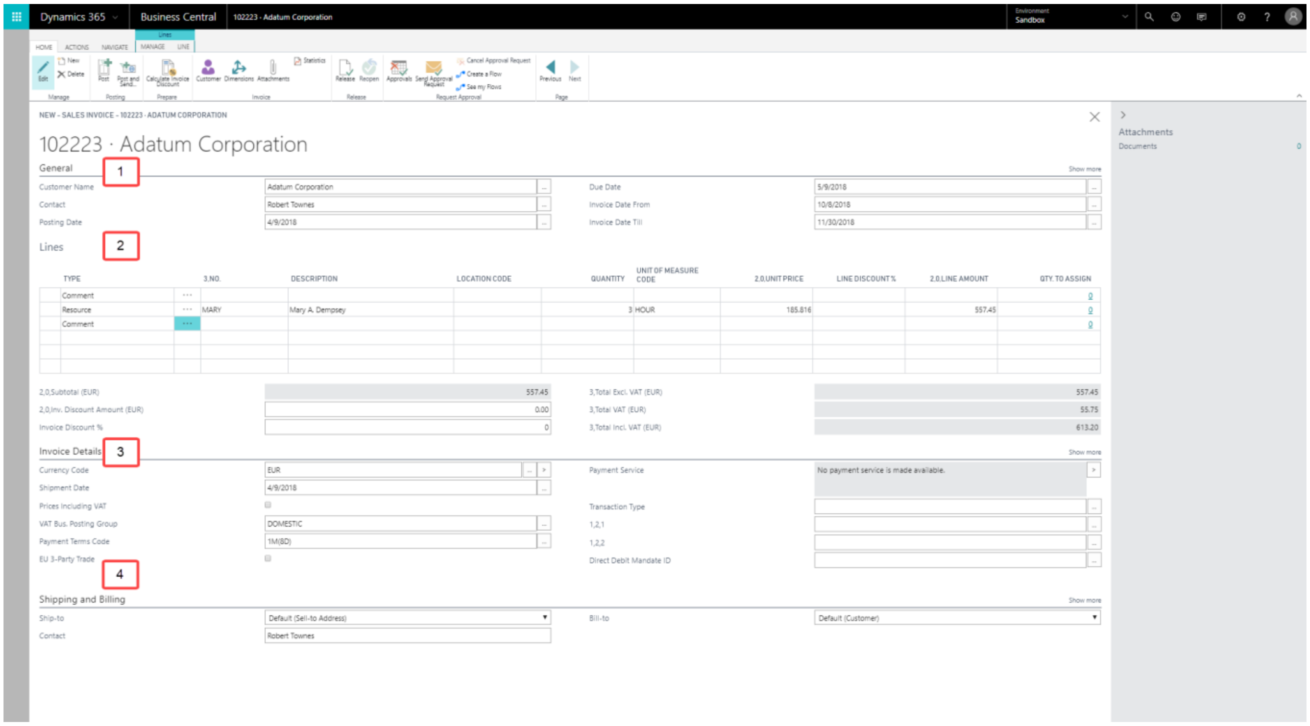
After you have created an order, the next thing you need to do is create an invoice for the regarding customer or client. 365 for Transportation is built with the focus on user-friendliness and efficiency, so invoicing is again easy and quickly done.

### 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.

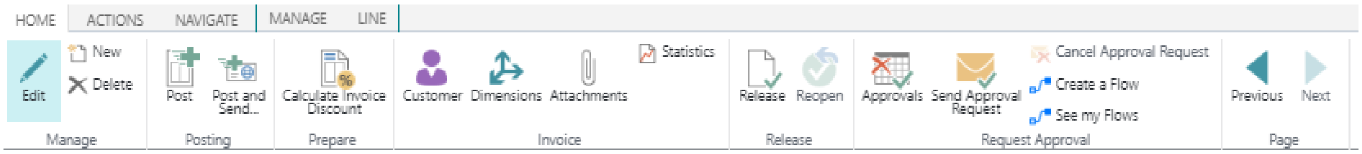



By pressing the + symbol above Sales Invoice, you will directly go to the environment to create an invoice. You will get redirected to the screen below. All you only have to do now, is fill in the blank spaces with the right data. Explanation will follow after the screenshot.




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.