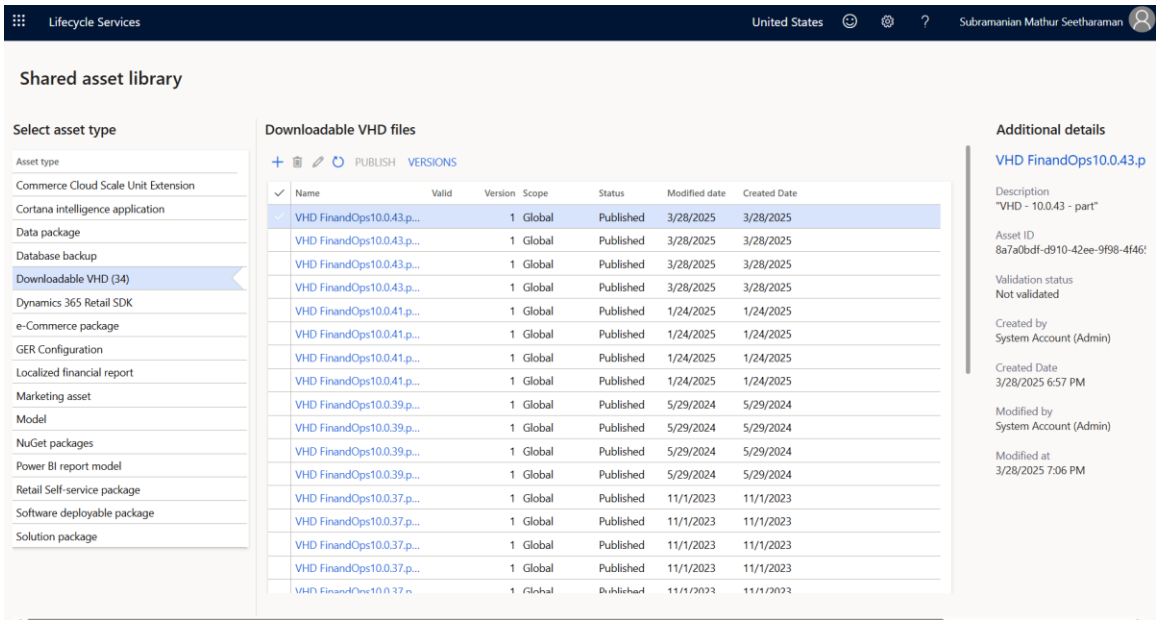
Dynamics 365 Finance & Operations – Sales Order to Invoice (Demo)

1. Environment Overview

A local Dynamics 365 Finance & Operations development environment was created using the downloadable VHD from Microsoft Lifecycle Services (LCS). The Finance and Operations VHD (version 10.0.43) was downloaded from the Downloadable VHD section in the Asset Library. All VHD parts were extracted into a single .vhd file and attached to a Hyper-V virtual machine. Once the VM started, IIS, AOSService, and SQL Server were verified as running, and the environment was opened in the browser using the USRT company.

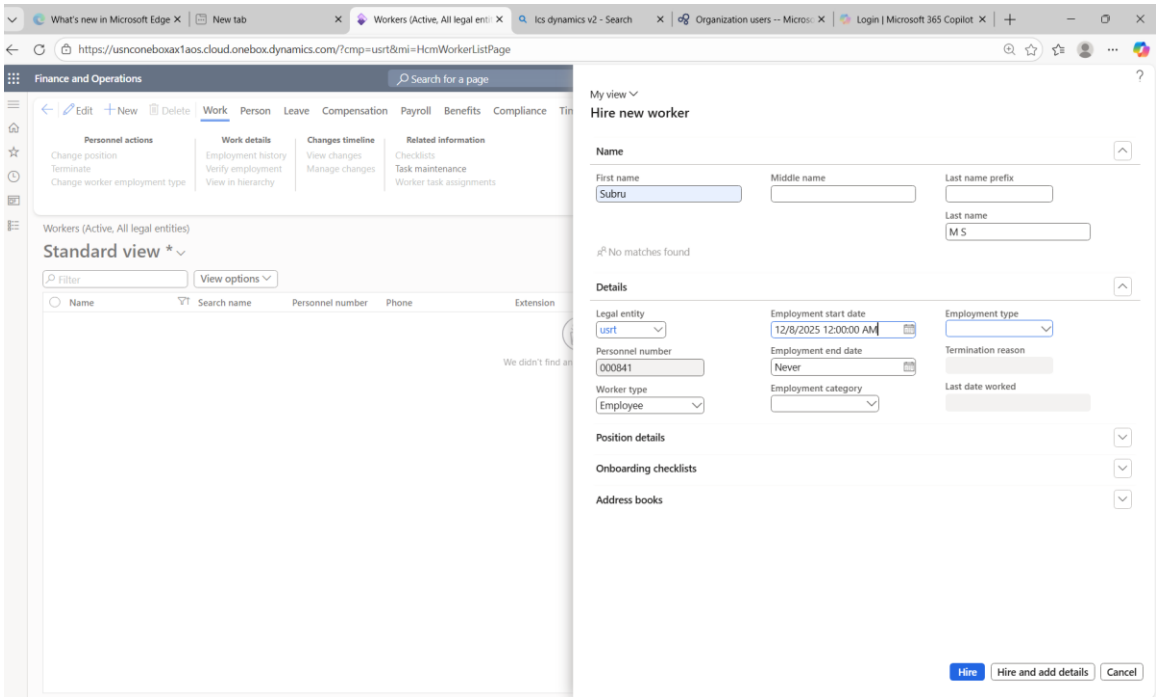


2. Worker Creation (Human Resource)

A worker record was created to represent an employee in the system.

Navigation: Human resources → Workers → Workers → New.

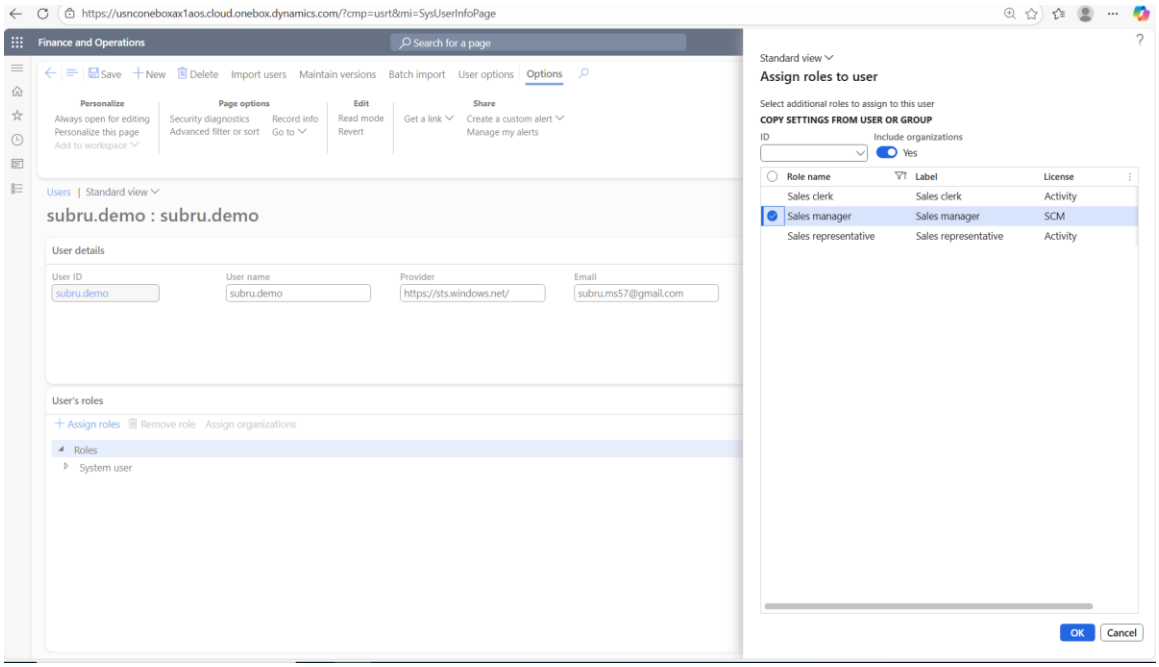
A worker named “Subru M S” was entered with employment details for the USRT legal entity.



3. User Creation & Role Assignment

A system user “subru.demo” was created and linked to the worker. The required security roles such as System user and Sales manager were then assigned.
Navigation: System administration → Users → Users → New.

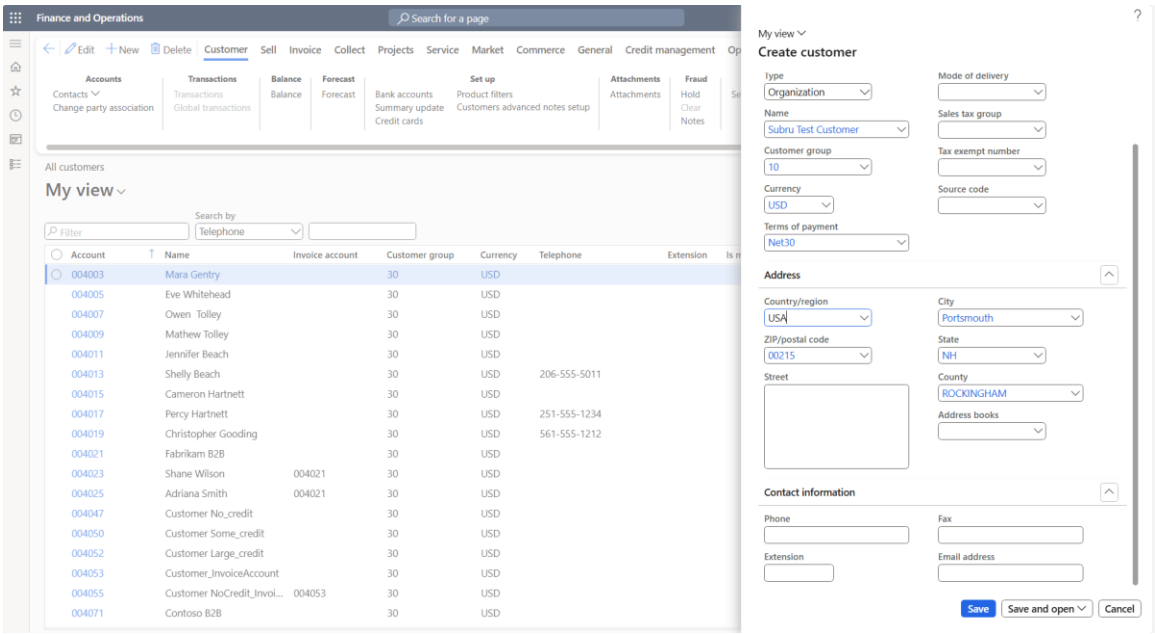
After creating the user, the required security roles were assigned by opening the user record and selecting them through the Assign roles option in the User’s roles section.



4. Customer Creation

A new customer record “Subru Test Customer” was created with address details, currency, payment terms, and other standard financial fields.

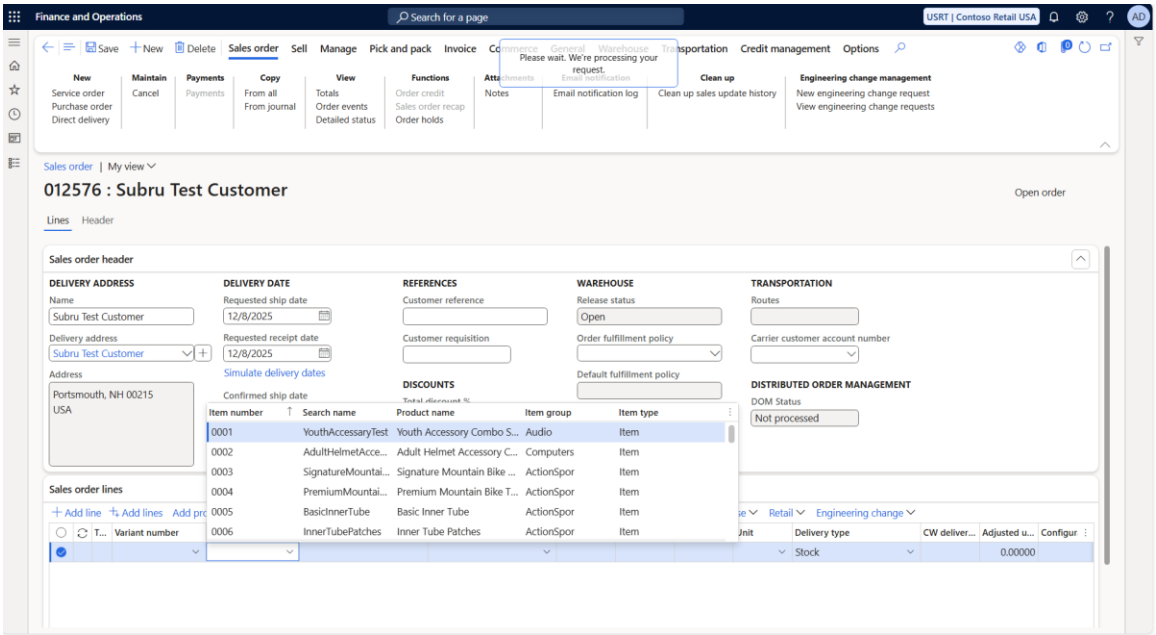
Navigation: Accounts receivable → Customers → All customers → New.



5. Sales Order Creation

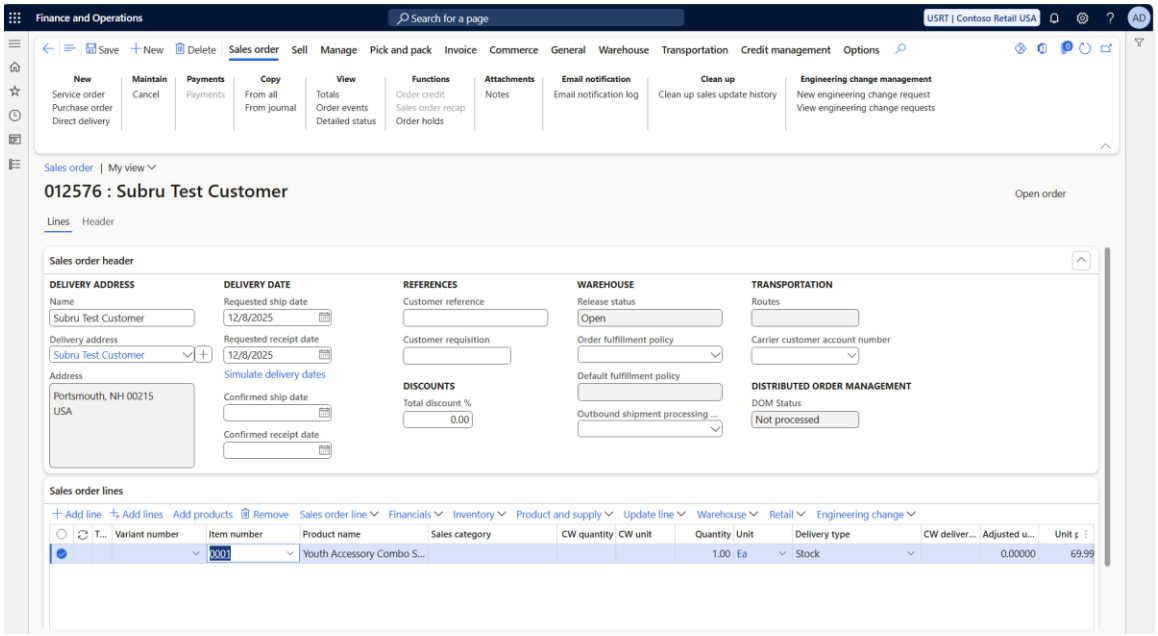
A sales order was created for the new customer. An item was added to the order lines and quantity was set.

Navigation: Sales and marketing → Sales orders → All sales orders → New.



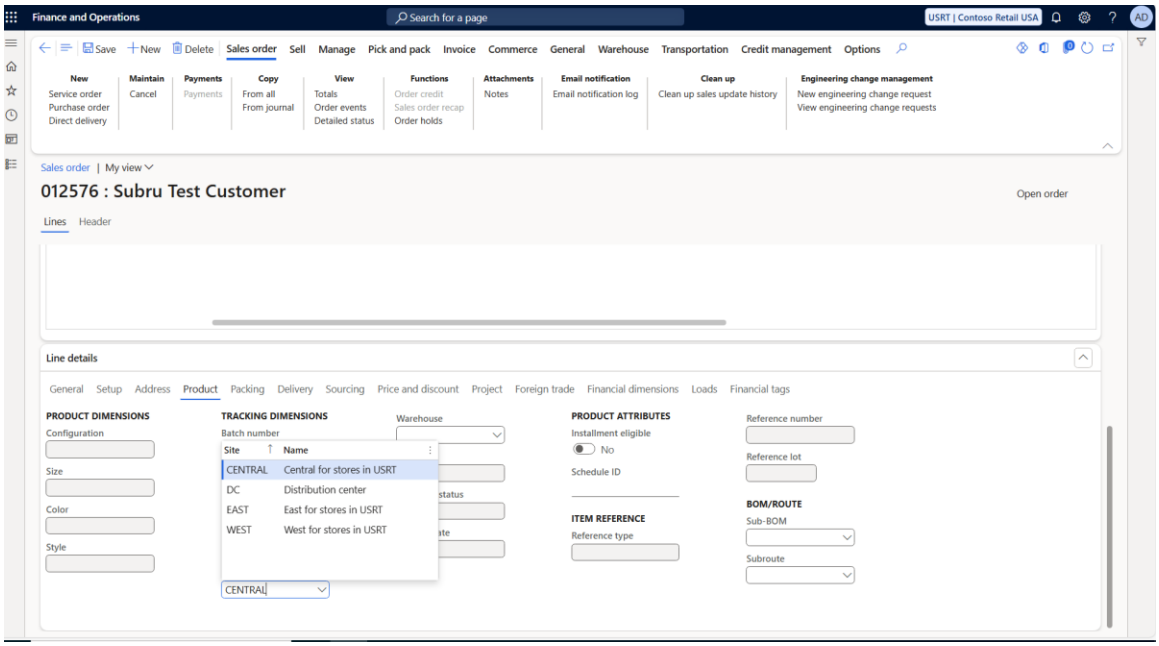
6. Site & Warehouse Selection

The correct site and warehouse were selected to ensure inventory availability for processing.



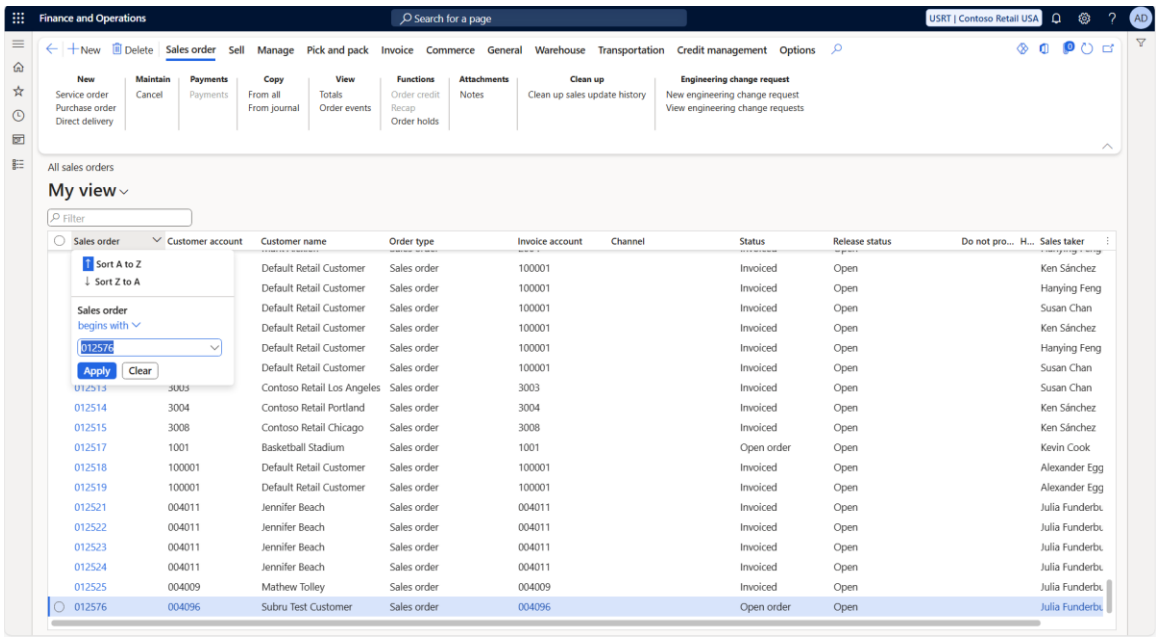
7. Retrieve Sales Order

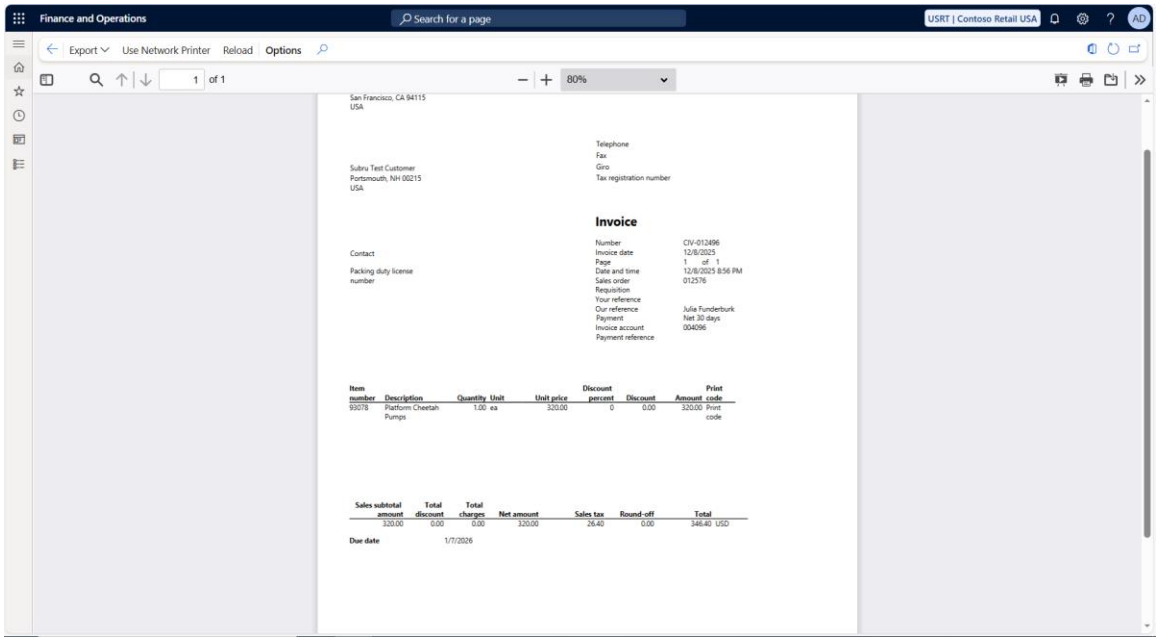
The sales order was looked up using the filtering options in the All sales orders page.



8. Pick & Pack

The order progressed through the Pick and pack stage, allowing the posting of a packing slip.



9. Invoice Posting

The invoice was posted successfully. The generated invoice document is shown below.