

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.

The screenshot shows the LCS interface for managing assets. On the left, a sidebar lists various asset types, with 'Downloadable VHD (34)' selected. The main area displays a table of 'Downloadable VHD files' with columns for Name, Valid, Version, Scope, Status, Modified date, and Created Date. One row is highlighted: 'VHD FinandOps10.0.43.p...' (Version 1, Global, Published, 3/28/2025, 3/28/2025). To the right, a panel provides 'Additional details' for this specific VHD, including its description ('VHD - 10.0.43 - part'), asset ID ('8a7a0bdf-d910-42ee-9f98-4f46...'), validation status ('Not validated'), and creation/modification details by 'System Account (Admin)' on 3/28/2025 at 6:57 PM.

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.

Role name	Label	License
Sales clerk	Sales clerk	Activity
Sales manager	Sales manager	SCM
Sales representative	Sales representative	Activity

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.

The screenshot shows the 'Finance and Operations' module. On the left, there's a grid of 'All customers' with columns for Account, Name, Invoice account, Customer group, Currency, Telephone, Extension, and Is inactive. One row is selected for 'Mara Gentry'. On the right, the 'Create customer' form is displayed with various fields: Type (Organization), Name (Subru Test Customer), Mode of delivery, Sales tax group, Customer group (10), Tax exempt number, Currency (USD), Source code, Terms of payment (Net30), Address (Country/region USA, ZIP/postal code 00215, City Portsmouth, State NH, County ROCKINGHAM), Contact information (Phone, Fax, Email address), and a 'Save' button at the bottom.

5. Sales Order Creation

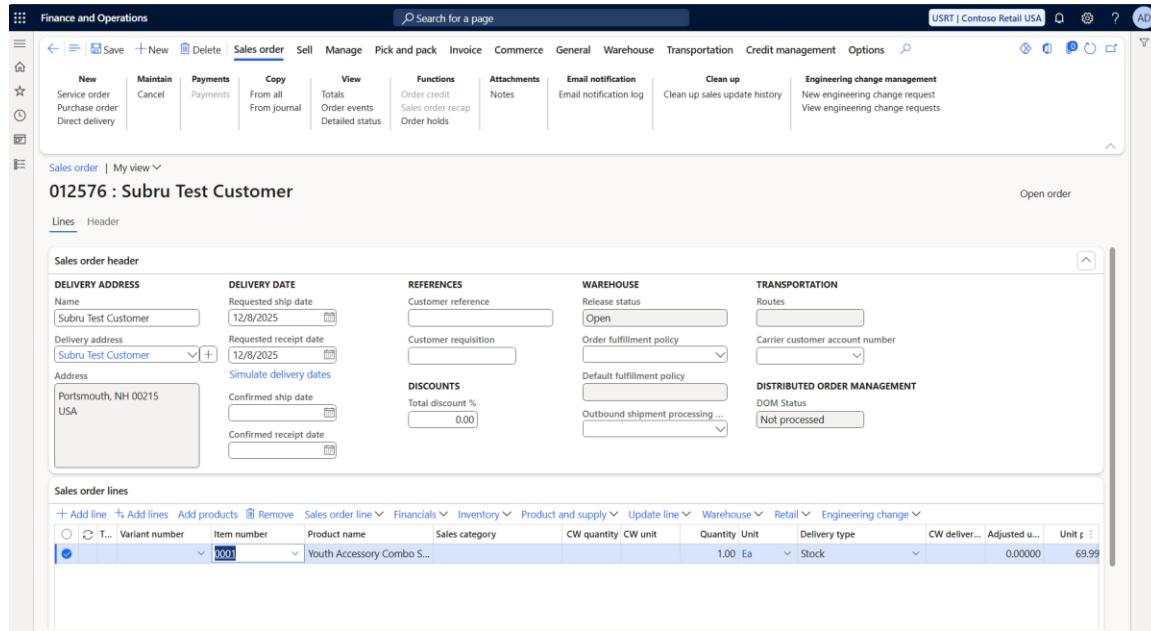
A sales order was created for the new customer. An item was added to the order lines and quantity was set.

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

The screenshot shows the 'Sales order' screen. At the top, there are tabs for Sales order, Sell, Manage, Pick and pack, Invoice, Commerce, General, Warehouse, Transportation, Credit management, and Options. The 'Sales order' tab is selected. Below the tabs, it says 'Please wait. We're processing your request.' A message 'Email notification log' is visible. The main area shows a 'Sales order header' with sections for DELIVERY ADDRESS, REFERENCES, WAREHOUSE, and TRANSPORTATION. Under 'DELIVERY ADDRESS', 'Name' is set to 'Subru Test Customer' and 'Delivery address' is also 'Subru Test Customer'. Under 'WAREHOUSE', 'Release status' is 'Open'. Under 'TRANSPORTATION', 'Carrier customer account number' is listed. In the 'DISTRIBUTED ORDER MANAGEMENT' section, 'DOM Status' is 'Not processed'. Below the header, there's a table for 'Sales order lines' with columns for Item number, Search name, Product name, Item group, Item type, and Total discounted. Several items are listed, including YouthAccessoryTest, AdultHelmetAccess..., SignatureMountai..., PremiumMountain..., BasicInnerTube, and InnerTubePatches. The total discounted value is 0.00000.

6. Site & Warehouse Selection

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



Sales order header details:

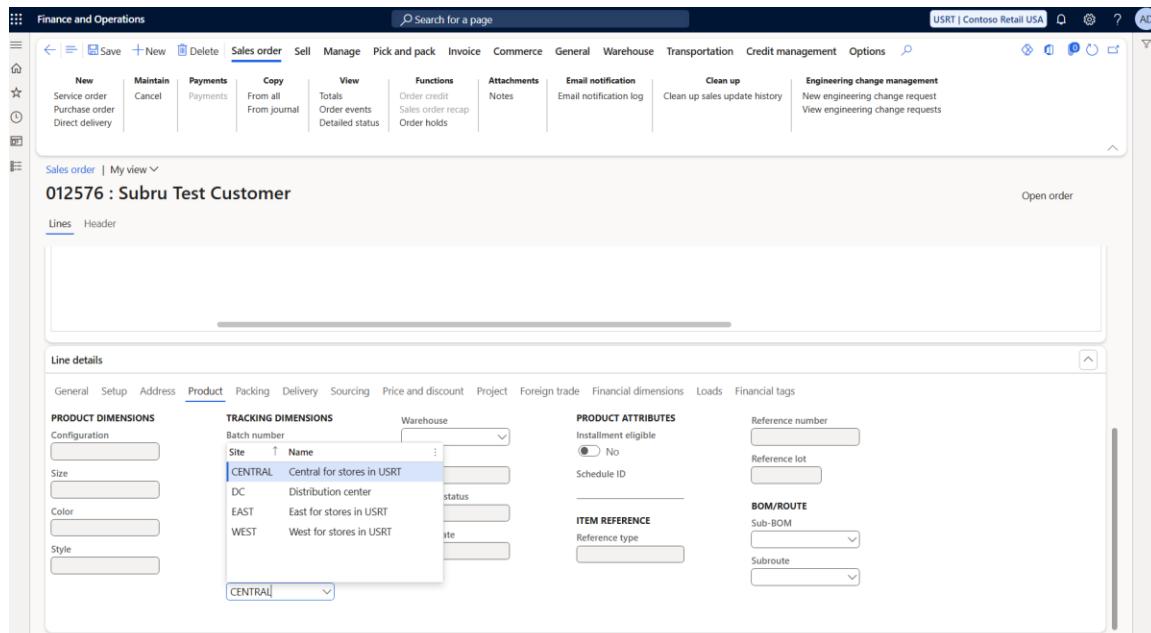
- Delivery Address: Subru Test Customer, Delivery address: Subru Test Customer, Address: Portsmouth, NH 00215 USA
- Delivery Date: Requested ship date: 12/8/2025, Requested receipt date: 12/8/2025
- References: Customer reference, Customer requisition
- Warehouses: Release status: Open, Order fulfillment policy: [dropdown]
- Transportation: Routes, Carrier customer account number
- Discounts: Total discount %: 0.00
- Distributed Order Management: DOM Status: Not processed

Sales order lines:

Variant number	Item number	Product name	Sales category	CW quantity	CW unit	Quantity / Unit	Delivery type	CW deliver...	Adjusted u...	Unit p...
	1001	Youth Accessory Combo S...		1.00	Ea	1.00	Stock		0.00000	69.99

7. Retrieve Sales Order

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



Sales order header details:

- Delivery Address: Subru Test Customer, Delivery address: Subru Test Customer, Address: Portsmouth, NH 00215 USA
- Delivery Date: Requested ship date: 12/8/2025, Requested receipt date: 12/8/2025
- References: Customer reference, Customer requisition
- Warehouses: Release status: Open, Order fulfillment policy: [dropdown]
- Transportation: Routes, Carrier customer account number
- Discounts: Total discount %: 0.00
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8. Pick & Pack

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

The screenshot shows the Microsoft Dynamics 365 Finance and Operations Sales Order screen. The top navigation bar includes tabs for Sales order, Sell, Manage, Pick and pack, Invoice, Commerce, General, Warehouse, Transportation, Credit management, and Options. Below the navigation is a toolbar with buttons for New, Maintain, Payments, Copy, View, Functions, Attachments, Clean up, and Engineering change request. A search bar at the top right says "Search for a page". The main area displays a grid of sales orders with columns for Sales order number, Customer account, Customer name, Order type, Invoice account, Channel, Status, Release status, Do not pro..., H..., Sales take..., and a timestamp. A filter bar at the top of the grid allows sorting by Sales order and applying filters like "Sort A to Z", "Sort Z to A", and "begins with" followed by the value "012576".

9. Invoice Posting

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

The screenshot shows the Microsoft Dynamics 365 Finance and Operations Invoice screen. The top navigation bar includes tabs for Sales order, Sell, Manage, Pick and pack, Invoice, Commerce, General, Warehouse, Transportation, Credit management, and Options. Below the navigation is a toolbar with buttons for Export, Use Network Printer, Reload, and Options. The main area displays an invoice document for "Subru Test Customer" from "San Francisco, CA 94115 USA". The document includes sections for Contact information, packing duty license number, and an invoice summary. The invoice summary table has columns for Sales subtotal amount, Total discount, Total charge, Net amount, Sales tax, Round-off, and Total. The total amount is listed as \$46.40 USD.