

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.

Lifecycle Services

United States

Subramanian Mathur Seetharaman

Shared asset library

Select asset type

Asset type

Commerce Cloud Scale Unit Extension

Cortana intelligence application

Data package

Database backup

Downloadable VHD (34)

Dynamics 365 Retail SDK

e-Commerce package

GER Configuration

Localized financial report

Marketing asset

Model

NuGet packages

Power BI report model

Retail Self-service package

Software deployable package

Solution package

Downloadable VHD files

+ PUBLISH VERSIONS

✓	Name	Valid	Version	Scope	Status	Modified date	Created Date
<input checked="" type="checkbox"/>	VHD FinandOps10.0.43.p...		1	Global	Published	3/28/2025	3/28/2025
<input checked="" type="checkbox"/>	VHD FinandOps10.0.43.p...		1	Global	Published	3/28/2025	3/28/2025
<input checked="" type="checkbox"/>	VHD FinandOps10.0.43.p...		1	Global	Published	3/28/2025	3/28/2025
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<input checked="" type="checkbox"/>	VHD FinandOps10.0.41.p...		1	Global	Published	1/24/2025	1/24/2025
<input checked="" type="checkbox"/>	VHD FinandOps10.0.41.p...		1	Global	Published	1/24/2025	1/24/2025
<input checked="" type="checkbox"/>	VHD FinandOps10.0.41.p...		1	Global	Published	1/24/2025	1/24/2025
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<input checked="" type="checkbox"/>	VHD FinandOps10.0.39.p...		1	Global	Published	5/29/2024	5/29/2024
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<input checked="" type="checkbox"/>	VHD FinandOps10.0.37.p...		1	Global	Published	11/1/2023	11/1/2023
<input checked="" type="checkbox"/>	VHD FinandOps10.0.37.p...		1	Global	Published	11/1/2023	11/1/2023
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<input checked="" type="checkbox"/>	VHD FinandOps10.0.37.p...		1	Global	Published	11/1/2023	11/1/2023

Additional details

VHD FinandOps10.0.43.p

Description

"VHD - 10.0.43 - part"

Asset ID

8a7a0bdf-d910-42ee-9f98-4f46

Validation status

Not validated

Created by

System Account (Admin)

Created Date

3/28/2025 6:57 PM

Modified by

System Account (Admin)

Modified at

3/28/2025 7:06 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.

Finance and Operations

Search for a page

My view ▾

Hire new worker

Name

First name: Middle name: Last name prefix:

Last name:

0 matches found

Details

Legal entity: Employment start date: Employment type:

Personnel number: Employment end date: Termination reason:

Worker type: Employment category:

Position details

Onboarding checklists

Address books

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.

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Search for a page

Standard view ▾

Assign roles to user

Select additional roles to assign to this user

COPY SETTINGS FROM USER OR GROUP

ID: Include organizations: ☒ Yes

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.

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Search for a page

My view

Create customer

Type: Organization

Name: Subru Test Customer

Customer group: 10

Currency: USD

Terms of payment: Net30

Mode of delivery:

Sales tax group:

Tax exempt number:

Source code:

Address

Country/region: USA

City: Portsmouth

State: NH

ZIP/postal code: 00215

County: ROCKINGHAM

Address books:

Contact information

Phone:

Fax:

Extension:

Email address:

Save Save and open Cancel

All customers

My view

Filter: Telephone

Account	Name	Invoice account	Customer group	Currency	Telephone	Extension
004003	Mara Gentry		30	USD		
004005	Eve Whitehead		30	USD		
004007	Owen Tolley		30	USD		
004009	Matthew Tolley		30	USD		
004011	Jennifer Beach		30	USD		
004013	Shelly Beach		30	USD	206-555-5011	
004015	Cameron Hartnett		30	USD		
004017	Percy Hartnett		30	USD	251-555-1234	
004019	Christopher Gooding		30	USD	561-555-1212	
004021	Fabrikam B2B		30	USD		
004023	Shane Wilson	004021	30	USD		
004025	Adriana Smith	004021	30	USD		
004047	Customer No_credit		30	USD		
004050	Customer Some_credit		30	USD		
004052	Customer Large_credit		30	USD		
004053	Customer_InvoiceAccount		30	USD		
004055	Customer NoCredit_Invol...	004053	30	USD		
004071	Contoso B2B		30	USD		

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.

Finance and Operations

Search for a page

USRT | Contoso Retail USA

Sales order

My view

012576 : Subru Test Customer

Open order

Sales order header

DELIVERY ADDRESS

Name: 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

WAREHOUSE

Release status: Open

Order fulfillment policy:

Default fulfillment policy:

TRANSPORTATION

Routes:

Carrier customer account number:

DISTRIBUTED ORDER MANAGEMENT

DOM Status: Not processed

Sales order lines

Item number	Search name	Product name	Item group	Item type
0001	YouthAccessoryTest	Youth Accessory Combo S...	Audio	Item
0002	AdultHelmetAcce...	Adult Helmet Accessory C...	Computers	Item
0003	SignatureMountai...	Signature Mountain Bike ...	ActionSpor	Item
0004	PremiumMountai...	Premium Mountain Bike T...	ActionSpor	Item
0005	BasicInnerTube	Basic Inner Tube	ActionSpor	Item
0006	InnerTubePatches	Inner Tube Patches	ActionSpor	Item

Variant number

Quantity

Unit

Delivery type

Adjusted u...

6. Site & Warehouse Selection

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

Finance and Operations

Search for a page

USRT | Contoso Retail USA

New Save + New Delete Sales order Sell Manage Pick and pack Invoice Commerce General Warehouse Transportation Credit management Options

New Service order Cancel Payments Copy From all From journal View Totals Order events Detailed status Functions Order credit Sales order recap Order holds Attachments Notes Email notification Email notification log Clean up Clean up sales update history Engineering change management New engineering change request View engineering change requests

Sales order | My view

012576 : Subru Test Customer

Open order

Lines Header

Sales order header

DELIVERY ADDRESS

Name 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

Simulate delivery dates

Confirmed ship date

Confirmed receipt date

REFERENCES

Customer reference

Customer requisition

DISCOUNTS

Total discount % 0.00

WAREHOUSE

Release status Open

Order fulfillment policy

Default fulfillment policy

Outbound shipment processing

TRANSPORTATION

Routes

Carrier customer account number

DISTRIBUTED ORDER MANAGEMENT

DOM Status Not processed

Sales order lines

+ Add line + Add lines Add products Remove Sales order line Financials Inventory Product and supply Update line Warehouse Retail Engineering change

	Variant number	Item number	Product name	Sales category	CW quantity	CW unit	Quantity	Unit	Delivery type	CW deliver...	Adjusted u...	Unit p...
		0001	Youth Accessory Combo S...				1.00	Ea	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.

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Search for a page

USRT | Contoso Retail USA

New Save + New Delete Sales order Sell Manage Pick and pack Invoice Commerce General Warehouse Transportation Credit management Options

New Service order Cancel Payments Copy From all From journal View Totals Order events Detailed status Functions Order credit Sales order recap Order holds Attachments Notes Email notification Email notification log Clean up Clean up sales update history Engineering change management New engineering change request View engineering change requests

Sales order | My view

012576 : Subru Test Customer

Open order

Lines Header

Line details

General Setup Address Product Packing Delivery Sourcing Price and discount Project Foreign trade Financial dimensions Loads Financial tags

PRODUCT DIMENSIONS

Configuration

Size

Color

Style

TRACKING DIMENSIONS

Batch number

Site

DC

EAST

WEST

Warehouse

Central for stores in USRT

Distribution center

East for stores in USRT

West for stores in USRT

PRODUCT ATTRIBUTES

Installment eligible

Schedule ID

ITEM REFERENCE

Reference type

Reference number

Reference lot

BOM/ROUTE

Sub-BOM

Subroute

8. Pick & Pack

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

Finance and Operations

Search for a page

USRT | Contoso Retail USA

[New](#)
[Delete](#)
[Sales order](#)
[Sell](#)
[Manage](#)
[Pick and pack](#)
[Invoice](#)
[Commerce](#)
[General](#)
[Warehouse](#)
[Transportation](#)
[Credit management](#)
[Options](#)

[New](#)
[Maintain](#)
[Payments](#)
[Copy](#)
[View](#)
[Functions](#)
[Attachments](#)
[Clean up](#)
[Engineering change request](#)

[Service order](#)
[Cancel](#)
[Payments](#)
[From all](#)
[Totals](#)
[Order credit](#)
[Notes](#)
[Clean up sales update history](#)
[New engineering change request](#)

[Direct delivery](#)
[From journal](#)
[Order events](#)
[Recap](#)
[Order holds](#)
[View engineering change requests](#)

All sales orders

My view

Filter

☐ Sales order
 ☐ Customer account

Sort A to Z
Sort Z to A

Sales order begins with

012576

Apply Clear

		Customer name	Order type	Invoice account	Channel	Status	Release status	Do not pro...	H...	Sales taker
		Default Retail Customer	Sales order	100001		Invoiced	Open			Ken Sánchez
		Default Retail Customer	Sales order	100001		Invoiced	Open			Hanying Feng
		Default Retail Customer	Sales order	100001		Invoiced	Open			Susan Chan
		Default Retail Customer	Sales order	100001		Invoiced	Open			Ken Sánchez
		Default Retail Customer	Sales order	100001		Invoiced	Open			Hanying Feng
		Default Retail Customer	Sales order	100001		Invoiced	Open			Susan Chan
		Contoso Retail Los Angeles	Sales order	3003		Invoiced	Open			Susan Chan
		Contoso Retail Portland	Sales order	3004		Invoiced	Open			Ken Sánchez
		Contoso Retail Chicago	Sales order	3008		Invoiced	Open			Ken Sánchez
		Basketball Stadium	Sales order	1001		Open order	Open			Kevin Cook
		Default Retail Customer	Sales order	100001		Invoiced	Open			Alexander Egg
		Default Retail Customer	Sales order	100001		Invoiced	Open			Alexander Egg
		Jennifer Beach	Sales order	004011		Invoiced	Open			Julia Funderbu
		Jennifer Beach	Sales order	004011		Invoiced	Open			Julia Funderbu
		Jennifer Beach	Sales order	004011		Invoiced	Open			Julia Funderbu
		Jennifer Beach	Sales order	004011		Invoiced	Open			Julia Funderbu
		Jennifer Beach	Sales order	004011		Invoiced	Open			Julia Funderbu
		Mathew Tolley	Sales order	004009		Invoiced	Open			Julia Funderbu
		Subru Test Customer	Sales order	004096		Open order	Open			Julia Funderbu

9. Invoice Posting

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

Finance and Operations

Search for a page

USRT | Contoso Retail USA

[Export](#)
[Use Network Printer](#)
[Reload](#)
[Options](#)

1 of 1

80%

San Francisco, CA 94115
USA

Subru Test Customer
Portsmouth, NH 00215
USA

Telephone
Fax
Giro
Tax registration number

Contact
Packing duty license
number

Number: CV-012486
 Invoice date: 12/8/2025
 Page: 1 of 1
 Date and time: 12/8/2025 8:56 PM
 Sales order: 012576
 Requisition:
 Your reference:
 Our reference: Julia Funderburk
 Payment: Net 30 days
 Invoice account: 004096
 Payment reference:

Item number	Description	Quantity	Unit	Unit price	Discount percent	Discount	Amount	Print code
99078	Platform Cheaper Pumps	1.00	ea	320.00	0	0.00	320.00	Print code

Sales subtotal	amount	discount	Total charges	Net amount	Sales tax	Round-off	Total
320.00	0.00	0.00	320.00	26.40	0.00		346.40 USD

Due date: 1/7/2026