



MICROSOFT DYNAMICS AX:
AX FOR DUMMIES - PURCHASE ORDERS

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If you are new to AX or need a refresher, this tip sheet will feature an overview of purchase orders in AX for beginners.

This content is adapted from a webinar produced by Kelly Kane, system administrator at Algood Food Company. The majority of all D365UG/AXUG content is produced by Dynamics 365 & AX end-users providing unique insight into product usage and best practices.

To view additional webinars and educational content visit, WWW.AXUG.COM.

ABOUT THE USER GROUP FOR DYNAMICS 365 & AX (D365UG/AXUG)

The User Group for Dynamics 365 & AX is an independent community focused on end-user education, training and networking. D365UG/AXUG is recognized by Microsoft as the official user group for Dynamics 365 & AX.

EDUCATION AND TRAINING

Each year, D365UG/AXUG offers hundreds of recorded, virtual, and live educational opportunities focused on all versions of Dynamics 365 & AX. In addition, D365UG/AXUG provides industry and role-based education, new product release training and additional solutions available to optimize your Dynamics 365 or AX environment.

PEER-TO-PEER NETWORKING

The connections formed through virtual and in-person networking are invaluable and rated as the #1 benefit by D365UG/AXUG Members. Members use their peers within the community to resolve issues, learn best practices and gain tips that propel their use of Dynamics 365 & AX. Whether it is through the 24/7 online forum, local chapter meetings or national events, the connections made are proven to save time and money by tapping into the expertise of other users.

POWER OF THE MOB

D365UG/AXUG is independent from Microsoft. However, the close working relationship positions D365UG/AXUG to be a collective voice to Microsoft on user concerns, needs, and requests.



WHERE TO FIND PURCHASE ORDERS

- Procurement and sourcing
 - Common
 - Purchase orders
 - Many options of how to view purchase orders!
- Accounts Payable
 - Common
 - Purchase orders
 - + All purchase orders

SETTING UP A VENDOR

- Start by selecting New Vendor in the ribbon of the All Vendors grid
- In the form, you will enter the appropriate fields
- Save and open the vendor for further review, or open into Purchase Order
- Enter information into fields on Vendor record to auto populate when that vendor is entered on a Purchase Order

TYPES OF PURCHASE ORDERS

- Journal
- Purchase Order
- Returned order

PURCHASE ORDER TYPE: JOURNAL

- Can be used as a draft or a template
- Journals cannot be processed because they won't have any inventory transactions against them.
- Don't get counted in Master Planning
- Often the case in data imports from legacy systems

PURCHASE ORDER TYPE: PURCHASE ORDER

- This is the standard purchase order type used when a vendor wants to confirm an order, and by far the most commonly used
- This order will reach a status of invoiced and can be closed


PURCHASE ORDER TYPE: RETURNED ORDER

- Returned orders are created manually from the new Purchase order form

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D365UG/AXUG Members benefit from user-led and produced training on Microsoft Dynamics 365 & AX. In addition, Membership includes valuable networking and collaboration opportunities both virtually and in-person.



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