

How to Post a Purchase Invoice in Dynamics 365 Business Central

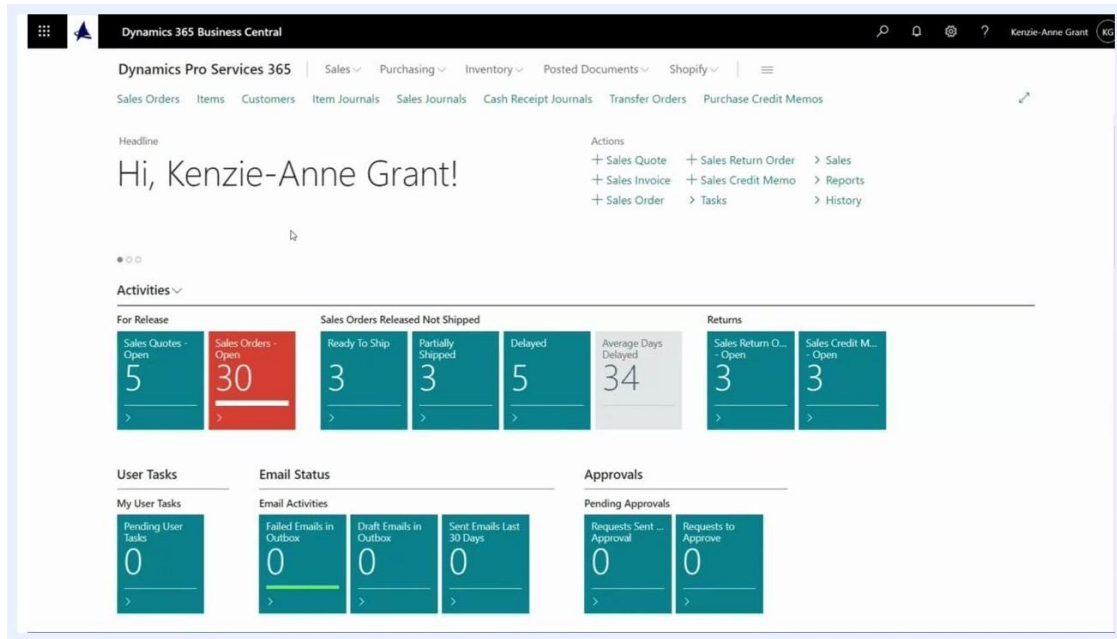
This guide walks you through how to post a purchase invoice in Dynamics 365 Business Central, from locating the Purchase Invoices page to creating a new invoice, entering vendor and line details, and finalizing the posting process. Follow these steps to record vendor expenses accurately and keep your accounts up to date.

Prerequisites

- Access to Dynamics 365 Business Central with permissions to create and post purchase invoices.
- Vendor information already set up in the system (vendor card with contact details and address).
- The vendor invoice number and expense details (such as the G/L account and amount) ready for entry.

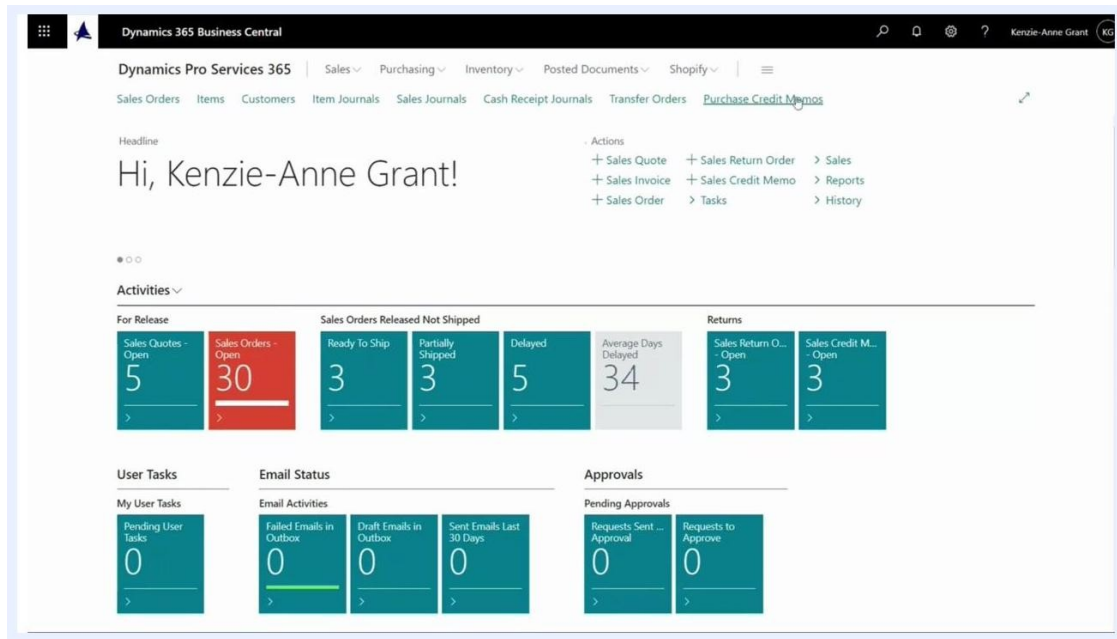
Step 1: Access the Purchase Invoices page

Open Dynamics 365 Business Central and confirm you are on the main dashboard. You should see a welcome message (for example, "Hi, Kenzie-Anne Grant!") along with activity tiles such as Sales Orders, Returns, User Tasks, Email Status, and Approvals.



Dynamics 365 Business Central main dashboard showing a welcome message, navigation menus, and activity tiles

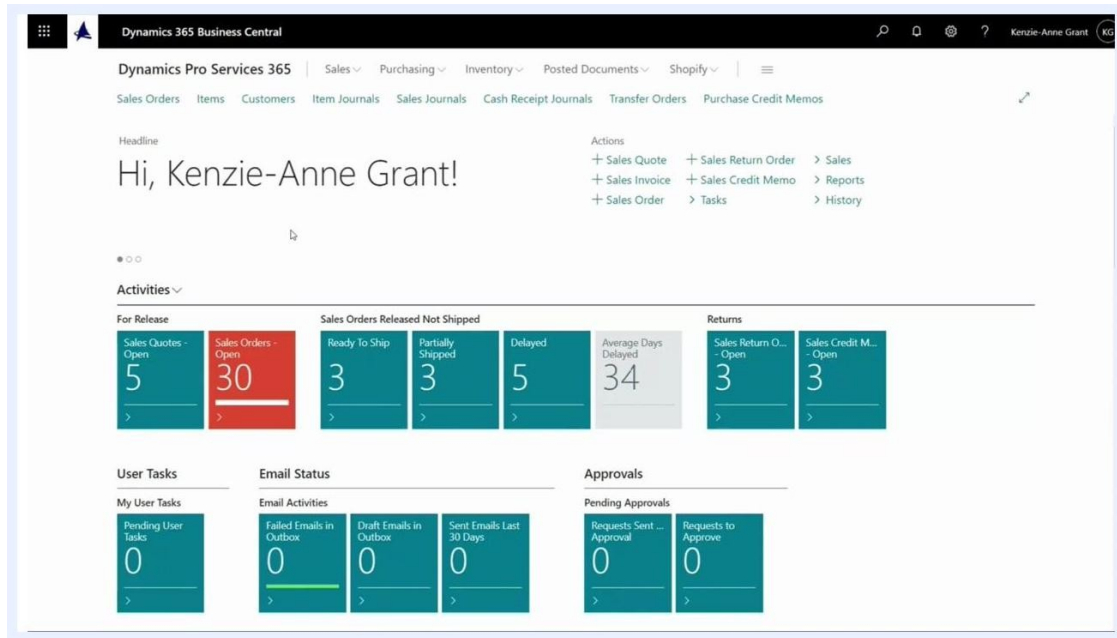
From the main menu, locate the search bar and begin typing **Purchase Invoices**. Select **Purchase Invoices** from the search results or navigation menu to open the page.



Main dashboard with the cursor near the search bar, showing the search for Purchase Invoices

Step 2: Create a new purchase invoice

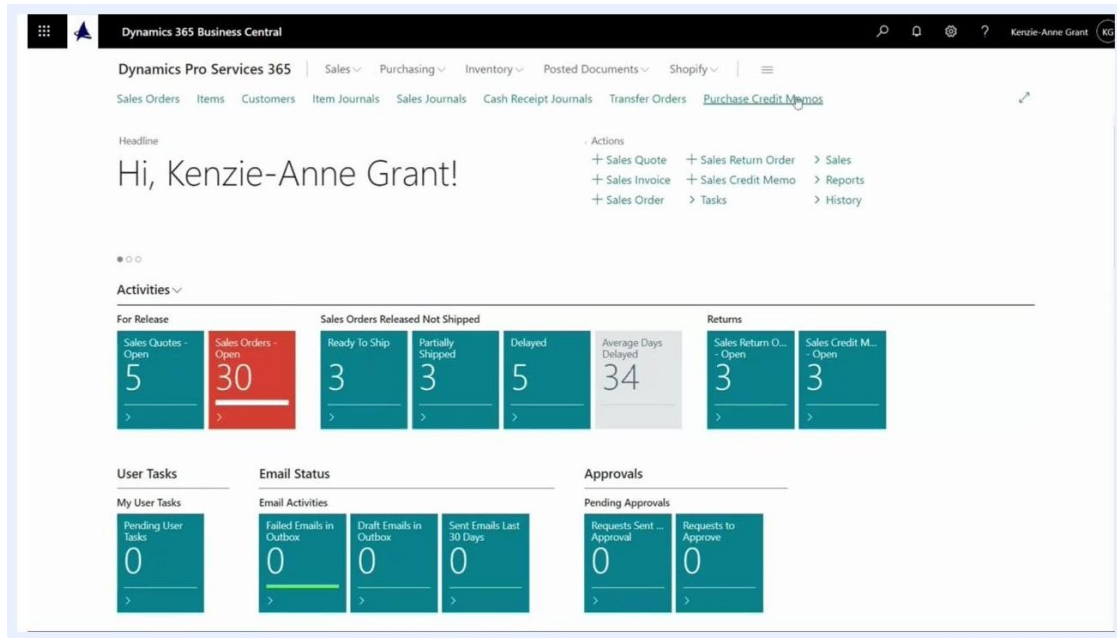
On the **Purchase Invoices** page, click **+ New** at the top of the list. This opens a new purchase invoice form where you can enter the invoice details.



Purchase Invoices list with the "+ New" button visible at the top, showing existing invoices and vendors

Step 3: Select a vendor

In the new purchase invoice form, select a vendor by choosing a **Vendor Name** or **Vendor Number**. The system automatically fills in related fields from the vendor card, such as contact details and address.



Purchase Invoice form with vendor selection fields and auto-filled vendor information

Step 4: Review the invoice details

Scroll down to view the invoice details and other tabs. Confirm that information such as the currency code and other vendor-related data has been imported correctly.

The screenshot shows the Dynamics 365 Business Central interface for a Purchase Invoice. The header includes the document number 107238 and the vendor name First Up Consultants. The form is divided into several sections: General, Posting, Request Approval, Incoming Document, Release, Navigate, and More options. The General section contains fields for Vendor No. (20000), Vendor Name (First Up Consultants), Buy-from (10155 - 102 Street, Suite 2100), Address 2, City, Province (AB), Postal/ZIP Code (T5J 4G8), Country/Region (CA), Contact No. (CT000013), Phone No., Mobile Phone No., Email (firstup.consultants@contoso.com), Contact (Evan McIntosh), Document Date (2022-09-06), Posting Date (2022-09-06), Due Date (2022-09-30), Vendor Invoice No. (marked with a red asterisk), Purchaser Code, Campaign No., Alternate Vendor Address Code, Responsibility Centre, Assigned User ID, and Status (Open). The bottom section shows a table for Line items with columns: Type, No., Description/Comment, Quantity, Unit of Measure Code, Direct Unit Cost, Ext. Tax, Line Amount, Ext. Tax, Tax Area Code, Tax Group Code, Location Code, and Line Di.

Type	No.	Description/Comment	Quantity	Unit of Measure Code	Direct Unit Cost	Ext. Tax	Line Amount	Ext. Tax	Tax Area Code	Tax Group Code	Location Code	Line Di
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Purchase Invoice form showing invoice details, including vendor, contact, posting date, and line items

Step 5: Enter the vendor invoice number

If needed, click **Show less** or **Show more** to adjust the visibility of invoice fields until the **Vendor Invoice No.** field is visible. This field is mandatory.

The screenshot shows the 'Purchase Invoice' form in Dynamics 365 Business Central. The form is titled '107238 · First Up Consultants'. The 'General' tab is active, and the 'Show less' button is visible. The form contains the following fields:

General	
Vendor No.	20000
Vendor Name	First Up Consultants
Buy-from	
Address	10155 - 102 Street, Suite 2100
Address 2	
City	
Province	AB
Postal/ZIP Code	T5J 4G8
Country/Region	CA
Contact No.	CT000013
Phone No.	
Mobile Phone No.	
Email	first.up.consultants@contoso.com
Contact	Evan McIntosh
Document Date	2022-09-06
Posting Date	2022-09-06
Due Date	2022-09-30
Vendor Invoice No.	*
Purchaser Code	
Campaign No.	
Alternate Vendor Address Code	
Responsibility Centre	
Assigned User ID	
Status	Open

Below the form, there is a table with columns: Type, No., Description/Comment, Quantity, Unit of Measure Code, Direct Unit Cost, Line Amount, Exc. Tax, Tax Area Code, Tax Group Code, Location Code, and Line Di.

Purchase Invoice form with expanded fields, highlighting the mandatory Vendor Invoice No. field

In the **Vendor Invoice No.** field, type the invoice number provided by your vendor (for example, "36542"). Confirm that the status remains **Open**.

Step 6: Enter the expense details in the invoice lines

Scroll down to the **Lines** section of the invoice form. This is where you enter the details of the expense or items being invoiced.

Purchase Invoice
107238 · First Up Consultants

Invoice | Posting | Request Approval | Incoming Document | Release | Navigate | More options

General Show more

Vendor Name: First Up Consultants | Due Date: 2022-09-30
Contact: Evan McIntosh | Vendor Invoice No.: 36542
Posting Date: 2022-09-06 | Status: Open

Lines | Manage | Line | Fewer options Show more

Type	No.	Description/Comment	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Line Amount Excl. Tax	Tax Area Code	Tax Group Code	Location Code	Line Di
→ Item										

Subtotal Excl. Tax (CAD): 0.00 | Total Excl. Tax (CAD): 0.00
Inv. Discount Amount (CAD): 0.00 | Total Tax (CAD): 0.00
Invoice Discount %: 0 | Total Incl. Tax (CAD): 0.00

Invoice Details Show more

Currency Code: | Customergroup Code: |

Purchase Invoice form with focus on the Lines section, ready for data entry

In the **Type** column, select **G/L Account** to indicate a general ledger expense. In the **No.** column, type "rent" and select **Rent Expense** from the list. This associates the invoice line with the appropriate general ledger account.

Lines section of the Purchase Invoice form with G/L Account selected and the account list open, ready to select Rent Expense

Step 7: Set the quantity and direct unit cost

In the **Quantity** field of the invoice line, enter **1**. In the **Direct Unit Cost Excl. Tax** field, enter the cost amount provided by your vendor (for example, **5,000.00**).

Confirm that **Type** is set to **G/L Account** and **No.** is set to the correct account (for example, **64450** for Rent Expenses). Check that the **Description/Comment** field is labeled appropriately (for example, **Rent expenses**).

The screenshot shows the Dynamics 365 Business Central interface for a Purchase Invoice. The header includes the invoice number 107238 and the vendor name First Up Consultants. The posting date is set to 2022-09-06. The line item table shows a single entry for 'Rent expenses' with a quantity of 1 and a direct unit cost of 5,000.00. The summary section shows a subtotal of 5,000.00 and a total including tax of 5,748.75.

Type	No.	Description/Comment	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Line Amount Excl. Tax	Tax Area Code	Tax Group Code	Location Code	Line Di
→ G/L Account	64450	Rent expenses	1		5,000.00	5,000.00	QC	TAXABLE		

Subtotal Excl. Tax (CAD)	Total Excl. Tax (CAD)
5,000.00	5,000.00
Inv. Discount Amount (CAD)	Total Tax (CAD)
0.00	748.75
Invoice Discount %	Total Incl. Tax (CAD)
0	5,748.75

Invoice Details

Currency Code	Customergroup Code
Expected Receipt Date	Payment Discount %
2022-09-06	0

Purchase Invoice form with G/L Account 64450 selected, Quantity set to 1, Direct Unit Cost Excl. Tax set to 5,000.00, and Description set to Rent expenses

Step 8: Verify the posting date

Check the **Posting Date** field at the top of the form to confirm it reflects the correct date for the expense period (for example, **2022-09-06** for September rent). Adjust the posting date if it does not fall within the correct month for the expense.

Step 9: Add a detailed description

In the **Description/Comment** field, append the month and year for clarity (for example, type [Rent expenses Sept 2023](#)).

The screenshot displays the Dynamics 365 Business Central interface for a Purchase Invoice. The header shows the invoice number 107238 and the vendor name First Up Consultants. The form is divided into several sections: Vendor Information, Line Items, and Invoice Details. The Vendor Information section includes fields for Vendor Name (First Up Consultants), Contact (Evan McIntosh), Posting Date (2022-09-06), Due Date (2022-09-30), Vendor Invoice No. (36542), and Status (Open). The Line Items section shows a table with columns for Type, No., Description/Comment, Quantity, Unit of Measure Code, Direct Unit Cost Excl. Tax, Line Amount Excl. Tax, Tax Area Code, Tax Group Code, Location Code, and Line DI. The first line item is a G/L Account (64450) with a description of 'Rent expenses Sept 2023', a quantity of 1, and a line amount of 5,000.00. The Invoice Details section includes fields for Currency Code, Customergroup Code, Expected Receipt Date (2022-09-06), and Payment Discount % (0). The bottom of the form shows a summary of tax calculations: Subtotal Excl. Tax (CAD) 5,000.00, Total Excl. Tax (CAD) 5,000.00, Inv. Discount Amount (CAD) 0.00, Total Tax (CAD) 748.75, Invoice Discount % 0, and Total Incl. Tax (CAD) 5,748.75.

Type	No.	Description/Comment	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Line Amount Excl. Tax	Tax Area Code	Tax Group Code	Location Code	Line DI
→ G/L Account	64450	Rent expenses Sept 2023	1		5,000.00	5,000.00	QC	TAXABLE		

Subtotal Excl. Tax (CAD)	Total Excl. Tax (CAD)	Inv. Discount Amount (CAD)	Total Tax (CAD)	Invoice Discount %	Total Incl. Tax (CAD)
5,000.00	5,000.00	0.00	748.75	0	5,748.75

Invoice Details

Currency Code	Customergroup Code	Expected Receipt Date	Payment Discount %
		2022-09-06	0

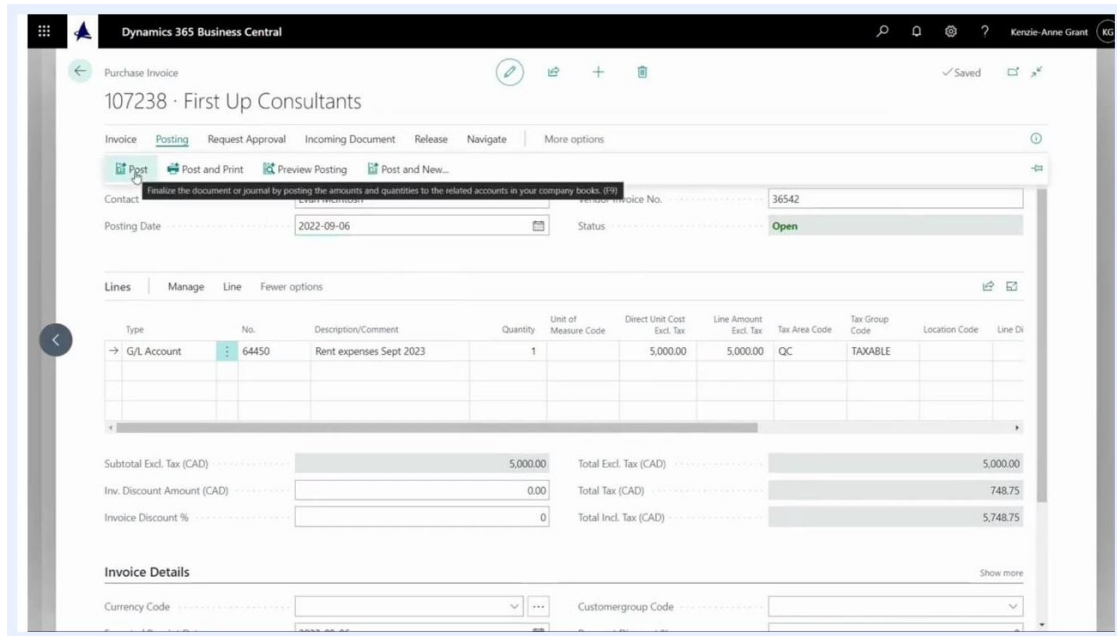
Purchase Invoice form with the Description/Comment field updated to "Rent expenses Sept 2023"

Step 10: Review all entered information

Double-check every field, including Vendor, Contact, Posting Date, Due Date, Vendor Invoice No., Status, and all line details. Confirm that the total amounts and tax calculations are correct before posting.

Step 11: Post the purchase invoice

Navigate to the top menu and click the **Posting** tab, then click **Post** to finalize the invoice. If prompted, click **Yes** to confirm posting, and click **Yes** again if prompted to open and view the posted invoice.



Cursor hovering over the Post button in the Posting tab, ready to finalize the invoice

Step 12: View the posted purchase invoice

The system displays the posted purchase invoice. Review it to confirm all details are correct, including:

- Vendor: [First Up Consultants](#)
- Contact: [Evan McIntosh](#)
- Posting Date: [2022-09-06](#)
- Due Date: [2022-09-30](#)
- Vendor Invoice No.: [36542](#)
- Line details: G/L Account [64450](#), Description [Rent expenses Sept 2023](#), Quantity [1](#), Direct Unit Cost [5,000.00](#)
- Total Excl. Tax: [5,000.00](#)
- Total Tax: [748.75](#)

- Total Incl. Tax: 5,748.75

Purchase Invoice
107238 · First Up Consultants

Invoice | Posting | Request Approval | Incoming Document | Release | Navigate | More options

Vendor Name: First Up Consultants | Due Date: 2022-09-30
 Contact: Evan McIntosh | Vendor Invoice No.: 36542
 Posting Date: 2022-09-06 | Status: Open

Type	No.	Description/Comment	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Line Amount Excl. Tax	Tax Area Code	Tax Group Code	Location Code	Line Di
→ G/L Account	64450	Rent expenses Sept 2022	1		5,000.00	5,000.00	QC	TAXABLE		

Subtotal Excl. Tax (CAD)	5,000.00	Total Excl. Tax (CAD)	5,000.00
Inv. Discount Amount (CAD)	0.00	Total Tax (CAD)	748.75
Invoice Discount %	0	Total Incl. Tax (CAD)	5,748.75

Invoice Details | Show more

Currency Code: | Customergroup Code: |
 Expected Receipt Date: 2022-09-06 | Payment Discount %: 0

Posted Purchase Invoice screen showing all entered and calculated details for verification

Summary

By following these steps, you have created, reviewed, and posted a purchase invoice for rent expenses in Dynamics 365 Business Central — selecting the vendor, completing all mandatory fields, entering the expense details, and confirming the posted results. Always verify the posted invoice for accuracy and compliance with your organization's accounting policies.