

How to Create a Purchase Order in Business Central

This guide walks you through how to create a purchase order in Business Central, from opening the dashboard to posting a completed order. You'll learn how vendor and item selections automatically populate order details, and how to review totals before finalizing the transaction.

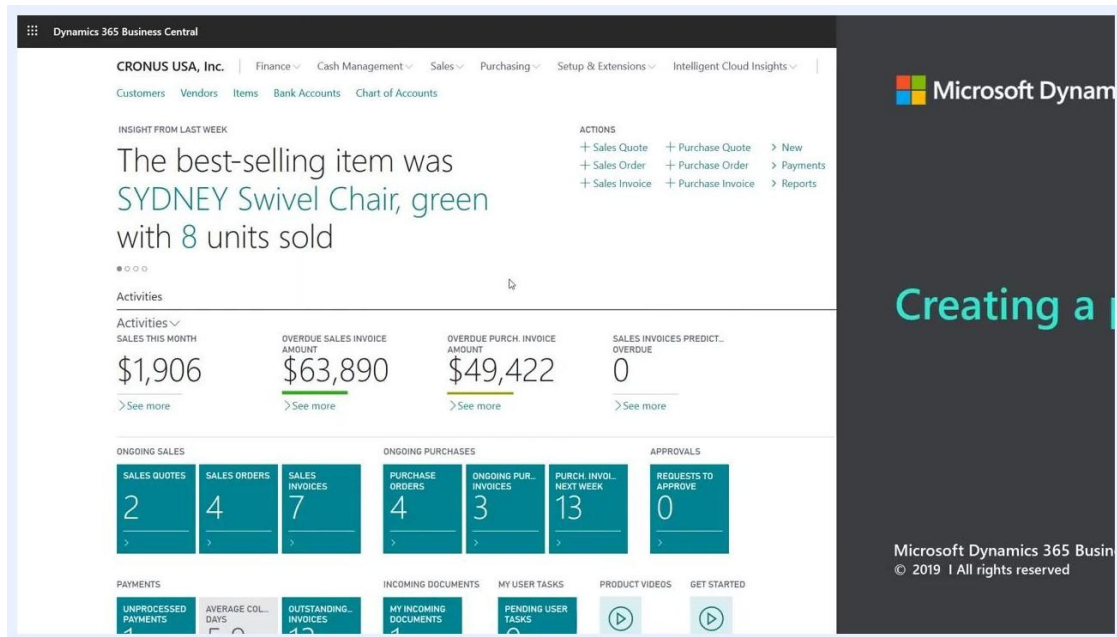
Prerequisites

Before you begin, make sure you have access to Microsoft Dynamics 365 Business Central with permissions to create purchasing documents. You should also know which vendor and items you intend to purchase.

Step 1: Access the Business Central dashboard

Open Microsoft Dynamics 365 Business Central and confirm you are on the main dashboard. Here you'll see company information (such as CRONUS USA, Inc.), navigation menus including Finance, Cash Management, Sales, and Purchasing, along with activity summaries for sales, purchases, and overdue invoices.

The right side of the screen displays insights such as best-selling items and quick action links for sales and purchase documents.



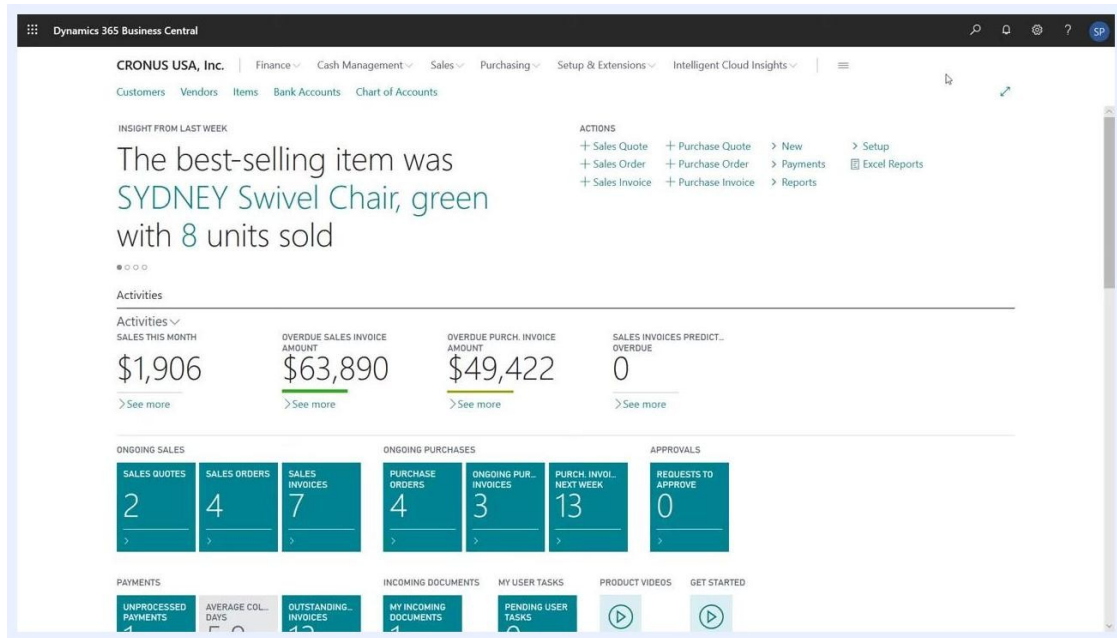
Business Central dashboard showing company information, navigation menus, activity summaries, and quick action links

Step 2: Understand purchase document types

Business Central offers two main purchase documents: Purchase Invoices and Purchase Orders. Use a purchase order when the supplier will only partially ship your order. Both document types are similar, but this partial-shipment capability is the key distinction.

Step 3: Search for purchase orders

Use the search function at the top of the dashboard and type Purchase Orders into the search bar. In the search results, select the Purchase Orders link to navigate to the purchase orders list.



Dashboard displaying search results and navigation options for purchase orders

Step 4: Create a new purchase order

On the Purchase Orders page, click New to start a new purchase order.

Step 5: Select the vendor

In the new purchase order form, choose the vendor you are buying from. When you select a vendor, Business Central automatically fills in the purchase header fields using information from the vendor card, including:

- Vendor name (for example, Graphic Design Institute)
- Contact (for example, Bryce Jasso)
- Address (for example, 33 Hitech Drive, Miami, FL, 37125, US)
- Payment terms and posting details

You can edit any of these fields if necessary.

The screenshot shows the Dynamics 365 Business Central interface for a Purchase Order. The header indicates the work date is 4/8/2019 and the order is not saved. The form is titled 'Graphic Design Institute' and includes a navigation bar with options like Process, Release, Posting, Order, Request Approval, Print/Send, Navigate, and More options.

The 'General' tab is active, displaying various fields for vendor and order information. The 'Vendor Statistics' section on the right provides a summary of financial data for Vendor No. 30000.

Vendor Statistics	
Vendor No.	30000
Balance (\$)	6,979.57
Outstanding Orders (\$)	3,880.45
Amt. Rcd. Not Invt. (\$)	0.00
Outstanding Invoices (\$)	4,508.39
Total (\$)	15,368.41
Overdue Amounts (\$)	6,979.57
Invoiced Prepayment Amount	0.00
Payments (\$)	76,172.85
Refunds (\$)	0.00
Last Payment Date	2/14/2019

The 'Buy-from Vendor History' section shows a table with Vendor No. 30000 and a grid of counts for various document types.

Vendor No.	Quoties	Blanket Orders	Orders
30000	0	0	1

The 'Lines' section at the bottom shows a table with columns for Type, No., Description, Location Code, Bin Code, Quantity, and Reserved. A single line is visible with a red asterisk in the 'No.' column.

Purchase order form with vendor details auto-filled, including vendor name, contact, address, and other fields

Step 6: Review the automatically filled fields

Check that the following fields are populated based on the work date and vendor information:

- Document Date (for example, 4/8/2019)
- Posting Date (for example, 4/8/2019)
- Order Date (for example, 4/8/2019)
- Due Date, calculated from the document date and payment terms (for example, 4/30/2019)

Adjust any of these fields as needed before proceeding.

General

Vendor No. 30000 Due Date 4/30/2019

Vendor Name Graphic Design Institute

BUY-FROM Purchaser Code

Address 33 Hitech Drive

Address 2

City Miami

State FL

ZIP Code 37125

Country/Region US

Contact No. CT000015

Contact Bryce Jasso

Document Date 4/8/2019

Posting Date 4/8/2019

Order Date 4/8/2019

Quote No.

Vendor Order No.

Vendor Shipment No.

Alternate Vendor Address

Responsibility Center

Assigned User ID

Status Open

Vendor Statistics

Vendor No.	30000
Balance (\$)	6,979.57
Outstanding Orders (\$)	3,880.45
Amt. Rcd. Not Invd. (\$)	0.00
Outstanding Invoices (\$)	4,508.39
Total (\$)	15,368.41
Overdue Amounts (\$)	6,979.57
Invoiced Prepayment Amount	0.00
Payments (\$)	76,172.85
Refunds (\$)	0.00
Last Payment Date	2/14/2019

Buy-from Vendor History

Vendor No.	30000
Quotes	0
Blanket Orders	0
Orders	1
Invoices	1
Return Orders	0
Credit Memos	0
Post. Return	0
	58
	58

Purchase order form showing populated dates and vendor details

Step 7: Add purchase lines

Scroll to the Lines section of the purchase order and click to add a new line. A dropdown will appear for the line type. Business Central supports five types of purchase lines:

- Comment
- General Ledger (G/L) Account
- Item
- Fixed Asset
- Charge (Item)

Select the type that matches your purchase. For example, choose Comment if you want to add a message to your vendor in the description field.

The screenshot shows the 'Purchase Order' form in Dynamics 365 Business Central. The header includes the title '106006 · Graphic Design Institute' and a navigation bar with options like 'Process', 'Release', 'Posting', 'Order', 'Request Approval', 'Print/Send', 'Navigate', and 'More options'. The 'General' tab is active, displaying various fields for vendor information, including 'Vendor No.' (30000), 'Vendor Name' (Graphic Design Institute), 'Address', 'City' (Miami), 'State' (FL), 'ZIP Code' (37125), 'Country/Region' (US), 'Contact No.' (CT000015), 'Contact' (Bryce Jasso), 'Document Date' (4/8/2019), and 'Posting Date' (4/8/2019). The 'Details' tab is also visible, showing 'Vendor Statistics' and 'Buy-from Vendor History'. The 'Buy-from Vendor History' section includes a table with columns for 'Vendor No.', 'Quoties', 'Market Orders', 'Orders', 'Invoices', 'Return Orders', 'Credit Memos', and 'Post. Return'.

Type	No.	Description	Location Code	Bin Code	Quantity	Reserved
→ Item	*					

Purchase order lines section with dropdown showing line types: Comment, G/L Account, Item, Fixed Asset, Charge (Item)

Step 8: Choose the line type for your item purchase

Click the dropdown under the Type column in the Lines section and select Item from the list. Use G/L Account instead if you are purchasing services or non-inventory items. For this example, select Item to purchase an inventory item.

106006 · Graphic Design Institute

Process: Release Posting Order Request Approval Print/Send Navigate More options

Document Date: 4/8/2019 Assigned User ID: Status: Open

Posting Date: 4/8/2019

Lines Manage More options

Type	No.	Look up value	Description	Location Code	Bin Code	Quantity	Reserved
→ Item	*						

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

Invoice Details

Currency Code: Shipment Method Code: Expected Receipt Date: Payment Reference:

Vendor Statistics

Vendor No.: 30000
Balance (\$): 6,979.57
Outstanding Orders (\$): 3,880.45
Amt. Rcd. Not Invd. (\$): 0.00
Outstanding Invoices (\$): 4,508.39
Total (\$): 15,368.41
Overdue Amounts (\$): 6,979.57
Invoiced Prepayment Amount: 0.00
Payments (\$): 76,172.85
Refunds (\$): 0.00
Last Payment Date: 2/14/2019

Buy-from Vendor History

Vendor No.: 30000		
0	0	1
Quoties	Blanket Orders	Orders
1	0	0
Invoices	Return Orders	Credit Memos
0	58	58
Ptd. Return		

Purchase order line type dropdown open, with "Item" selected among the available options

Step 9: Select the item to purchase

In the No. field, click the lookup button to open the list of available items. Browse or search for the item you want to purchase, then click to select it (for example, "1908-S LONDON Swivel Chair, blue"). Business Central automatically fills in related fields such as Description, Base Unit of Measure, and Unit Price.

The screenshot displays the Dynamics 365 Business Central interface for a Purchase Order. The header shows the order number '106006' and the company 'Graphic Design Institute'. The 'Lines' table contains one line item: '1908-S Blue armless swivel chair'. A dropdown menu is open for the 'No.' field, showing a list of items with their descriptions, base units of measure, and unit prices. The item '1908-S LONDON Swivel Chair, blue' is highlighted. The right sidebar shows 'Vendor Statistics' for Vendor No. 30000, including balance, outstanding orders, and invoices. Below that is the 'Buy-from Vendor History' table.

No.	Description	Base Unit of Measure	Unit Price
1896-S	ATHENS Desk	PCS	1,000.80
1900-S	PARIS Guest Chair, black	PCS	192.80
1908-S	LONDON Swivel Chair, blue	PCS	190.10
1920-S	ANTWERP Conference Table	PCS	647.80

Vendor No.	Quoties	Market Orders	Orders
30000	0	0	1

Vendor No.	Invoices	Return Orders	Credit Memos
30000	1	0	0

Vendor No.	Post. Return	58	58
30000	0	58	58

Item selection dropdown showing item numbers, descriptions, units, and prices, with "1908-S LONDON Swivel Chair, blue" highlighted

Step 10: Review and complete the line details

Confirm that the following fields are auto-filled based on the selected item:

- Description (for example, "Blue armless swivel chair")
- Unit of Measure Code (for example, "PCS")
- Direct Unit Cost Excl. Tax (for example, "148.10")
- Tax Area Code (for example, "ATLANTA, GA")
- Tax Group Code (for example, "FURNITURE")

Enter the desired quantity in the Quantity field (for example, "3"), and double-check that the unit cost and other details are correct.

The screenshot shows the 'Purchase Order' form in Dynamics 365 Business Central. The header includes the company name '106006 · Graphic Design Institute' and the work date '4/8/2019'. The form is divided into several sections: 'Process' (Release, Posting, Order, Request Approval, Print/Send, Navigate, More options), 'Details' (Document Date, Posting Date, Assigned User ID, Status), 'Lines' (Manage, More options), 'Vendor Statistics', 'Buy-from Vendor History', and 'Invoice Details'.

The 'Lines' section is the primary focus, showing a table with columns for 'Type', 'No.', 'Look up value', 'Description', 'Location Code', 'Bin Code', 'Quantity', and 'Reserved'. A dropdown menu is open for the 'Look up value' field, displaying a list of items with their descriptions, base units of measure, and unit prices. The items listed are:

No.	Description	Base Unit of Measure	Unit Price
1896-S	ATHENS Desk	PCS	1,000.80
1900-S	PARIS Guest Chair, black	PCS	192.80
1906-S	ATHENS Mobile Pedestal	PCS	433.60
1908-S	LONDON Swivel Chair, blue	PCS	190.10
1920-S	ANTWERP Conference Table	PCS	647.80

The 'Vendor Statistics' section on the right provides a summary of the vendor's financial data, including Vendor No. (30000), Balance (\$), Outstanding Orders (\$), Amt. Rcd. Not Invd. (\$), Outstanding Invoices (\$), Total (\$), Overdue Amounts (\$), Invoiced Prepayment Amounts (\$), Payments (\$), Refunds (\$), and Last Payment Date (2/14/2019).

The 'Buy-from Vendor History' section shows a grid of counts for various document types: Quoties (0), Market Orders (0), Orders (1), Invoices (1), Return Orders (0), Credit Memos (0), and Ptd. Return (0).

Purchase order line filled with item details, including type, description, unit of measure, direct unit cost, tax area, tax group, and a quantity field ready for input

Step 11: Add additional items (optional)

To purchase more items, add new lines by clicking below the existing line. Repeat the process: select Item as the type, choose the item, and enter the quantity. Each new line is auto-filled with the relevant item details.

The screenshot shows the Dynamics 365 Business Central interface for a Purchase Order. The header includes the company name '106006 · Graphic Design Institute' and the date '4/8/2019'. The 'Posting' tab is active, showing fields for Document Date, Posting Date, and Status (Open). The 'Lines' section contains two item lines with columns for Type, Quantity, Reserved Quantity, Unit of Measure Code, Direct Unit Cost Excl. Tax, Tax Area Code, and Tax Group Code. The first line has a quantity of 3 and a unit of measure of PCS. The second line is a new entry. The 'Summary' section shows Subtotal Excl. Tax (USD) as 444.30, Total Excl. Tax (USD) as 444.30, Total Tax (USD) as 26.66, and Total Incl. Tax (USD) as 470.96. The 'Invoice Details' section includes fields for Currency Code, Expected Receipt Date, Shipment Method Code, and Payment Reference. The right-hand pane displays 'Vendor Statistics' and 'Buy-from Vendor History' for Vendor No. 30000.

Type	Quantity	Reserved Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Tax Group Code
Item	3		PCS	148.10	ATLANTA, GA	FURNITURE
→ Item						

Subtotal Excl. Tax (USD)	Total Excl. Tax (USD)	Inv. Discount Amount (USD)	Total Tax (USD)	Invoice Discount %	Total Incl. Tax (USD)
444.30	444.30	0.00	26.66	0	470.96

Vendor No.	Quoties	Blanket Orders	Orders	Invoices	Return Orders	Credit Memos	Prod. Return
30000	0	0	1	1	0	0	0
	0	58	58				

Purchase order with two item lines, each showing quantity, unit of measure, direct unit cost, and tax details

Step 12: Review the purchase order summary

Before posting, check the summary fields at the bottom of the form:

- Subtotal Excl. Tax (USD) (for example, "444.30")
- Total Excl. Tax (USD) (for example, "444.30")
- Total Tax (USD) (for example, "26.66")
- Total Incl. Tax (USD) (for example, "470.96")

Confirm that other invoice details, such as currency code and expected receipt date, are correct.

Step 13: Post the purchase order

Once all lines and details are correct, click Posting at the top of the screen. Choose the appropriate action, such as Post or Post and Print, to finalize the purchase order. The screen will clear or update to confirm the order has been posted.

PURCHASE ORDER | WORK DATE: 4/8/2019

106006 · Graphic Design Institute

Process Release **Posting** Order Request Approval Print/Send Navigate More options

Document Date: 4/8/2019 Status: Open

Posting Date: 4/8/2019

Type	Quantity	Reserved Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Tax Group Code	Line
Item	3		PCS	148.10	ATLANTA, GA	FURNITURE	

Subtotal Excl. Tax (USD) 444.30 Total Excl. Tax (USD) 444.30

Inv. Discount Amount (USD) 0.00 Total Tax (USD) 26.66

Invoice Discount % 0 Total Incl. Tax (USD) 470.96

Invoice Details

Currency Code: Shipment Method Code:

Expected Receipt Date: Payment Reference:

Vendor Statistics

Vendor No. 30000

Balance (\$) 6,979.57

Outstanding Orders (\$) 3,880.45

Amt. Rcd. Not Invd. (\$) 0.00

Outstanding Invoices (\$) 4,508.39

Total (\$) 15,368.41

Overdue Amounts (\$) as of 0... 6,979.57

Invoiced Prepayment Amount... 0.00

Payments (\$) 76,172.85

Refunds (\$) 0.00

Last Payment Date 2/14/2019

Buy-from Vendor History

Vendor No. 30000

Vendor No.	0	0	1
Quotes	0	0	1
Invoices	1	0	0
Post. Return	0	58	58

Purchase order form with multiple item lines, summary totals, and the "Posting" menu highlighted at the top

Summary

By following these steps, you have successfully created and posted a purchase order in Microsoft Dynamics 365 Business Central. Your vendor details, item lines, and order totals are now accurately recorded in the system.