



Frequently Asked Questions: Purchase Orders in Microsoft Dynamics AX

What should I do if a Purchase Order has been sent to the incorrect user for approval?

If the Purchase Order has been workflowed to the wrong user for approval, or if the user is away on leave and has not delegated their approval to another user, you can submit a request to the Dynamics AX system admin through the IT help desk and ServiceNow.

Note that the user must have Dynamics AX access to be able to approve a Purchase Order, and not all managers will have system access. Speak to your direct manager about what the approval process should be for this Purchase Order.

How do I cancel a Purchase Order?

If you need to cancel an entire Purchase Order, select the Purchase Order then click on the 'Cancel' button in the menu at the top of the screen. A pop-up will appear on the screen confirming whether you want to cancel the Purchase Order. Go ahead and select 'Yes'.

The Purchase Order will then change to Draft status and the order will be cancelled.

You must submit the Purchase Order cancellation to be approved by the same user who approved the original order.

Quick Tip

If you have received a portion of the goods or services that you ordered but have determined that you don't need the remainder, you can cancel the remainder of the order by cancelling each individual Purchase Order line with the remaining quantities.

Quick Tip

When your Purchase Order is ready to be sent to a supplier, you can set it up to automatically be emailed from the system, or you can print to PDF if you need to attach other documents before sending it to the supplier.



What should I do if I have incorrectly received a Purchase Order?

Incorrect receipting against Purchase Orders can be corrected by cancelling the Purchase Order receipt before the invoice is posted for the receipt.

To cancel the incorrect Purchase Order receipt, select the Purchase Order for which the Purchase Order receipt needs to be cancelled, then select the 'Receive' tab at the top of the screen. Then click on 'Product receipt' which will open the 'Product receipts' form. You can then select the Purchase Order receipt that needs to be cancelled, and click on 'Cancel'.

Note that the correct Purchase Order receipt can be re-entered once cancelled if required.

Why does my Purchase Order need to be sent to a purchase pool approver before being approved by the purchase owner?

As outlined in the Delegation of Authority Policy, some types of operating expenditure categories will first require approval by a nominated category owner, or purchase pool, before the expenditure is approved by the relevant approver. This is so that specific types of purchases can be monitored by specific positions, such as IT expenditure.

Purchase pool selection is mandatory on the Purchase Order header to ensure the purchase is channelled to the correct area for oversight of purchases made on behalf of the organisation.

Pool	Name
BUDGET	Budgeted Expenses
CAPEX	Capital Expenditure
DONATIO...	Donations to External Parties
ESAFE	ESAFE
INSURAN...	Insurance Renewal Policy
ITCAPEX	IT Capital Expense
ITOPEX	IT Operating Expense
LEGAL ADV	Legal Advice
MARKETI...	Marketing Expenditure
PROF SRV...	Professional Services (excluding legal)
PROPERTY	Property Legal Services Other than Disputes

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