

How to Process and Post a Purchase Order

This guide provides a comprehensive walkthrough for processing a purchase order with item charges within your purchase documents. Follow these steps to correctly assign charges, update line items, and finalize the posting process efficiently.

Open Purchase Order

1 Click "On the Posting Date"

Views	Posting Date	Document Date	No.	Buy-from Vendor No.	Buy-from Vendor Name ↑	Location Code	Vendor Order No.
All	7/17/2026	7/17/2026	PO1002076	V000447	MARSHALL RANCH	GREEN	
Pending Confirmation	7/16/2026	7/16/2026	PO1002125	V000447	MARSHALL RANCH	GREEN	
Upcoming Orders	7/21/2026	7/21/2026	PO1002133	V000447	MARSHALL RANCH	GREEN	
Outstanding Purchase Orders	7/23/2026	7/23/2026	PO1002151	V000447	MARSHALL RANCH	GREEN	
Partially Invoiced	7/24/2026	7/24/2026	PO1002152	V000447	MARSHALL RANCH	GREEN	
Received Not Invoiced	7/17/2026	7/17/2026	PO1002126	V000470	MEYER FARMING	GREEN	
Filter list by:	7/15/2026	7/15/2026	PO1002034	V000167	NICOLAS CORTEZ	GREEN	
× Amount Received Not Invoiced (\$)	7/20/2026	7/20/2026	PO1002127	V000167	NICOLAS CORTEZ	GREEN	
>0	7/23/2026	7/23/2026	PO1002144	V000167	NICOLAS CORTEZ	GREEN	
+ Filter...	7/22/2026	7/22/2026	PO1001874	V000908	OI PACKAGING SOLUTIONS LLC	GREEN	
Filter totals by:	7/24/2026	7/24/2026	PO1001875	V000908	OI PACKAGING SOLUTIONS LLC	GREEN	
Date Filter: "...07/24/26	7/23/2026	7/23/2026	PO1001876	V000908	OI PACKAGING SOLUTIONS LLC	GREEN	
Edit	7/21/2026	7/20/2026	PO1001887	V000908	OI PACKAGING SOLUTIONS LLC	GREEN	
Reset filters	7/10/2026	7/10/2026	PO1002035	V000411	PERRY KOZLOWSKI	GREEN	
	7/22/2026	7/22/2026	PO1002143	V000671	SOLANA GOLD - JOHN KOLLING	GREEN	ORG VIN
	7/22/2026	7/22/2026	PO1002106	V000977	SUMMIT PROCUREMENT, INC.	GREEN	260708-11
	7/24/2026	7/24/2026	PO1002173	V000977	SUMMIT PROCUREMENT, INC.	GREEN	
	7/15/2026	7/15/2026	PO1001971	V001370	SUNFAIR MARKETING	GREEN	265337
	7/22/2026	7/22/2026	PO1002112	V001370	SUNFAIR MARKETING	GREEN	265379
	7/23/2026	7/23/2026	PO1002113	V001370	SUNFAIR MARKETING	GREEN	265380
	7/24/2026	7/24/2026	PO1001976	V000701	SUNRISE MFG INC	GREEN	

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Click "Change the Document Date to match the invoice date" DO NOT CHANGE THE POSTING DATE, unless the posting date is within a closed period.

General

Vendor No. V000908 Due Date 8/21/2026

Vendor Name OI PACKAGING SOLUTION Vendor Invoice No. *

Buy-from

Address PO BOX 843053 Purchaser Code ACH

Address 2

City DALLAS No. of Archived Versi... 1

State TX Order Date 11/11/2025

ZIP Code 75284-3053 Vendor Order No.

Country/Region Vendor Shipment No.

Contact No. CT000968 Vendor Authorization...

Phone No. Alternate Vendor Ad...

Mobile Phone No. Receive from Address...

Email Abraham.Ocadiz@o-i.com Assigned User ID

Contact Abraham Ocadiz Espinoza Status Open

Document Date 7/22/2026 Linked with E-Docum...

Invoice Received Date Appt. Time 7:00:00 AM

Posting Date 7/22/2026

Summary

Vendor Statistics

Vendor No. V000908

Balance (\$) 184,579.57

Balance (\$) As Customer 0.00

Outstanding Orders (\$) 1,055,499.12

Amt. Rcd. Not Invd. (\$) 66,349.50

Outstanding Invoices (\$) 0.00

Total (\$) 1,306,428.19

Overdue Amounts (\$) as o... 0.00

Invoiced Prepayment Amo... 0.00

Payments (\$) 3,554,404.99

Refunds (\$) 0.00

3

Click Enter the vendor invoice number from the invoice

General

Vendor No. V000908 Due Date 8/20/2026

Vendor Name OI PACKAGING SOLUTION Vendor Invoice No. 18457957 *

Buy-from

Address PO BOX 843053 Purchaser Code ACH

Address 2

City DALLAS No. of Archived Versi... 1

State TX Order Date 11/11/2025

ZIP Code 75284-3053 Vendor Order No.

Country/Region Vendor Shipment No.

Contact No. CT000968 Vendor Authorization...

Phone No. Alternate Vendor Ad...

Mobile Phone No. Receive from Address...

Email Abraham.Ocadiz@o-i.com Assigned User ID

Contact Abraham Ocadiz Espinoza Status Open

Document Date 7/22/2026 Linked with E-Docum...

Invoice Received Date Appt. Time 7:00:00 AM

Posting Date 7/22/2026

Summary

Vendor Statistics

Vendor No. V000908

Balance (\$) 184,579.57

Balance (\$) As Customer 0.00

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Amt. Rcd. Not Invd. (\$) 66,349.50

Outstanding Invoices (\$) 0.00

Total (\$) 1,306,428.19

Overdue Amounts (\$) as o... 0.00

Invoiced Prepayment Amo... 0.00

Payments (\$) 3,554,404.99

Refunds (\$) 0.00

4 Review Quantity Received in BC with quantity received on the packing slip

Lines <u>Manage</u> Line Functions Order									
New Line Delete Line Select items...									
Type	Quantity	Direct Unit Cost Excl. Tax	Line Amount Excl. Tax	Qty. to Receive	CW Qty. Received	Quantity Received	Qty. to Invoice	Depart Code	
→ Item	37,800	0.41401	15,649.58		0	37,800	37,800	VINEG	
Item	20	45.00	900.00		0	20	20	SOURI	
Item	20	9.00	180.00		0	20	20	SOURI	
Item	200	2.50	500.00		0	200	200	SOURI	
Comment					0	-			

5 To add a line for freight or other charges click on the 3 dots if there is a comment in the field. We don't want to delete them. If there isn't a comment, change the last free line to G/L or Charge depending on what your are adding

All

Pending Confirmation

Upcoming Order

Outstanding Payments

Partially Invoiced

Received Not Invoiced

Filter list by:

Amount Received

>0

+ Filter...

Filter totals by:

Date Filter: 7/22/2026

Edit

Reset filters

Post... Release... Create Whse. Receipt... Create Inventory Put-away/Pick... Archive Document

Document Date: 7/22/2026

Invoice Received Date: [Calendar]

Posting Date: 7/22/2026

Appt. Time: 7:00:00 AM

Linked with E-Documents

Summary Preview

Details Attachments

Vendor Statistics

Vendor No.

Balance (\$)

Balance (\$ As Customer)

Outstanding Orders (\$)

Amt. Rcd. Not Invd. (\$)

Outstanding Invoices (\$)

Total (\$)

Overdue Amounts (\$ as Customer)

Invoiced Prepayment Ar

Payments (\$)

Refunds (\$)

Last Payment Date

Incoming Document

Name

(There is nothing to display)

Lines <u>Manage</u> Line Functions Order							
New Line Delete Line Select items...							
Type	No.	Description	Loc... Code	Quantity	Direct Unit Cost Excl. Tax	Line Amount Excl. Tax	
Item	101841	32OZ EMPTY VIN GLASS BTL - ...	GREEN	37,800	0.41401	15,649.58	
Item	103098	OI GROCERY PALLET WOOD - ...	GREEN	20	45.00	900.00	
Item	103099	OI GROCERY TOP FRM WOOD - ...	GREEN	20	9.00	180.00	
Item	103100	OI GROCERY TIER SHEET - RET...	GREEN	200	2.50	500.00	
→ Comment							
New Line Delete Line Select More							

Subtotal Excl. Tax (USD) 17,229.58

Inv. Discount Amount... 0.00

Invoice Discount % 0

Total Excl. Tax (USD) 17,229.58

Total Tax (USD) 0.00

Total Incl. Tax (USD) 17,229.58

Add Charge Lines

6

In this case Charge (Item) was selected, therefore enter FRG in No. field for Freight Charges Purchases

The screenshot shows the SAP Purchase Order interface for PO1001874. The 'Manage' tab is active, displaying a table of items. The 'Charge (Item)' row is highlighted with an orange circle, and the 'No.' field is set to 'FRG'.

Type	No.	Description	Loc... Code	Quantity	Direct Unit Cost Excl. Tax	Line Amount Excl. Tax
Item	101841	32OZ EMPTY VIN GLASS BTL - ...	GREEN	37,800	0.41401	15,649.58
Item	103098	OI GROCERY PALLET WOOD - ...	GREEN	20	45.00	900.00
Item	103099	OI GROCERY TOP FRM WOOD ...	GREEN	20	9.00	180.00
Item	103100	OI GROCERY TIER SHEET - RET...	GREEN	200	2.50	500.00
Charge (Item)	FRG					

Summary:

Subtotal Excl. Tax (USD)	Total Excl. Tax (USD)	Inv. Discount Amount	Total Tax (USD)	Invoice Discount %	Total Incl. Tax (USD)
17,229.58	17,229.58	0.00	0.00	0	17,229.58

7

Enter the amount of freight being charged from the invoice and Click "Line"

The screenshot shows the SAP Purchase Order interface for PO1001874. The 'Manage' tab is active, displaying a table of items. The 'Charge (Item)' row is highlighted with an orange circle, and the 'Line' field is set to '1,208.41'.

Type	No.	Description	Loc... Code	Quantity	Direct Unit Cost Excl. Tax	Line Amount Excl. Tax
Item	101841	32OZ EMPTY VIN GLASS BTL - ...	GREEN	37,800	0.41401	15,649.58
Item	103098	OI GROCERY PALLET WOOD - ...	GREEN	20	45.00	900.00
Item	103099	OI GROCERY TOP FRM WOOD ...	GREEN	20	9.00	180.00
Item	103100	OI GROCERY TIER SHEET - RET...	GREEN	200	2.50	500.00
Charge (Item)	FRGH...	FREIGHT CHARGES PURCHASES	GREEN	1	1,208.41	1,208.41

Assign Item Charges

8 Open Item Charge Assignment for the selected charge line.

The screenshot shows the Dynamics 365 Business Central interface. On the left, there's a sidebar with 'Views' and a filter list. The main area displays a 'Purchase Order' for 'MANZANA' with PO number 'PO100187'. The 'Lines' tab is active, showing a table of items. A specific line is selected, and the 'Item Charge Assignment' window is open. This window has a 'Manage' tab and a table with columns: 'Applies-to Doc. Type', 'Applies-to Doc. No.', 'Applies-to Doc. Line No.', 'Item No.', 'Description', 'Qty. to Assign', and 'Qty. to H...'. The table lists four items: 101841 (32OZ EMPTY VIN GLASS BTL - ...), 103098 (OI GROCERY PALLET WOOD - ...), 103099 (OI GROCERY TOP FRM WOOD ...), and 103100 (OI GROCERY TIER SHEET - RET...). The 'Delete Line' button is circled in red.

Type	No.	Description	Loc... Code	Quantity	Unit Cost Excl. Tax	Line Amount Excl. Tax
Item	101841	32OZ EMPTY VIN GLASS BTL - ...	GREEN	37,800	0.41401	15,649.58
Item	103098	OI GROCERY PALLET WOOD - ...	GREEN	20	45.00	900.00
Item	103099	OI GROCERY TOP FRM WOOD ...	GREEN	20	9.00	180.00
Item	103100	OI GROCERY TIER SHEET - RET...	GREEN	200	2.50	500.00
→ Charge (Item)	FRGH...	FREIGHT CHARGES PURCHASES	GREEN	1	1,208.41	1,208.41

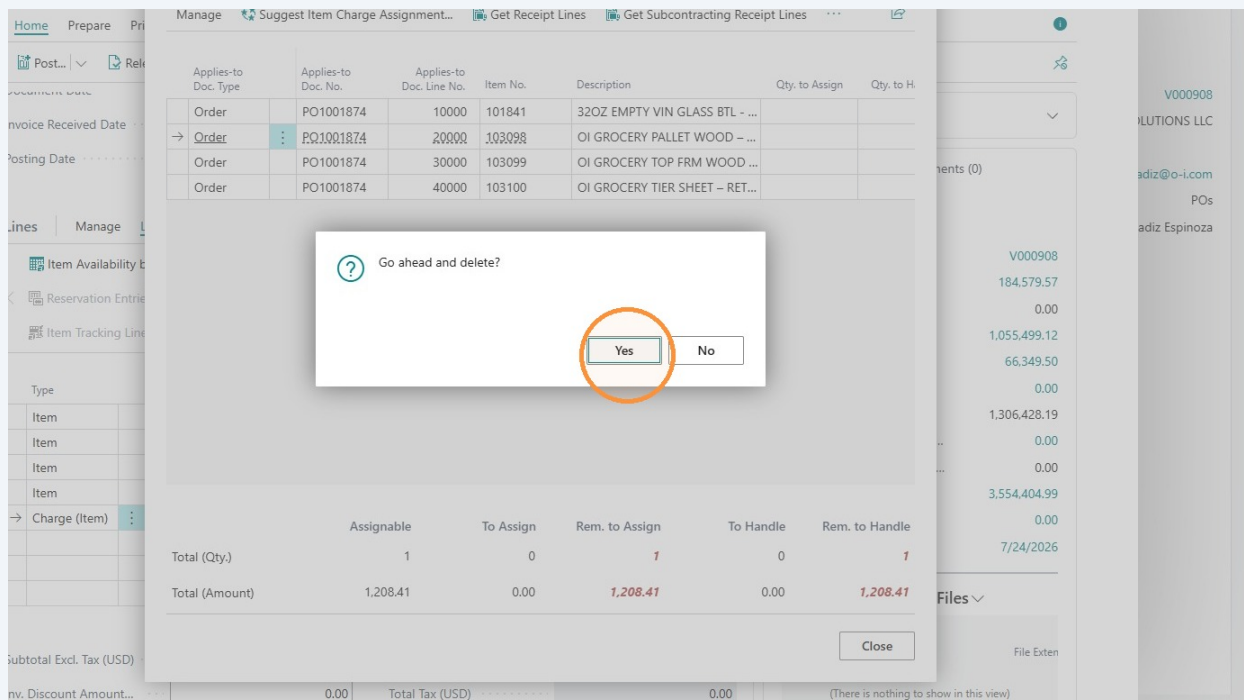
Subtotal Excl. Tax (US...) 18,437.99 Total Excl. Tax (USD) 18,437.99

9 Click Delete lines individually that are for pallet items, top frame and tier sheets.

The screenshot shows the Dynamics 365 Business Central interface. On the left, there's a sidebar with 'Views' and a filter list. The main area displays a 'Purchase Order' for 'MANZANA' with PO number 'PO100187'. The 'Lines' tab is active, showing a table of items. A specific line is selected, and the 'Item Charge Assignment (Purch) - FRGHT- PUR FREIGHT CHARGES PURCHASES' window is open. This window has a 'Manage' tab and a table with columns: 'Applies-to Doc. Type', 'Applies-to Doc. No.', 'Applies-to Doc. Line No.', 'Item No.', 'Description', 'Qty. to Assign', and 'Qty. to H...'. The table lists four items: 101841 (32OZ EMPTY VIN GLASS BTL - ...), 103098 (OI GROCERY PALLET WOOD - ...), 103099 (OI GROCERY TOP FRM WOOD ...), and 103100 (OI GROCERY TIER SHEET - RET...). The 'Delete Line' button is circled in red.

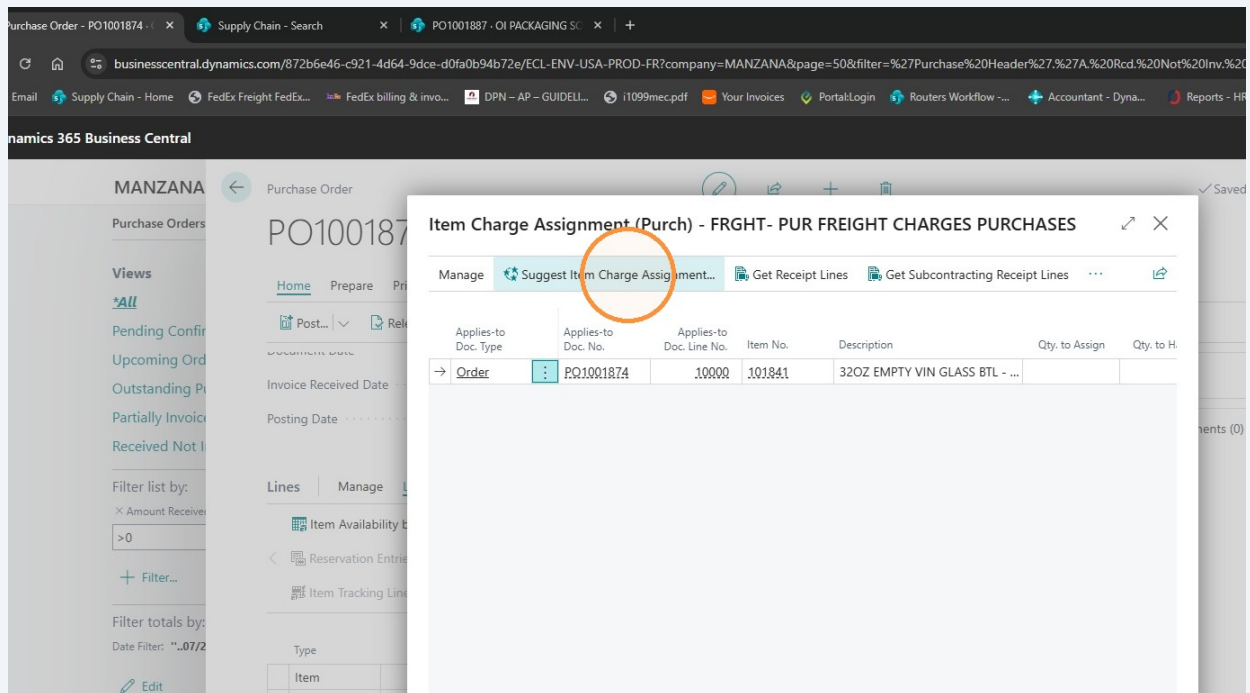
Applies-to Doc. Type	Applies-to Doc. No.	Applies-to Doc. Line No.	Item No.	Description	Qty. to Assign	Qty. to H...
Order	PO1001874	10000	101841	32OZ EMPTY VIN GLASS BTL - ...		
→ Order	PO1001874	20000	103098	OI GROCERY PALLET WOOD - ...		
Order	PO1001874	30000	103099	OI GROCERY TOP FRM WOOD ...		
Order	PO1001874	40000	103100	OI GROCERY TIER SHEET - RET...		

10 Click "Yes"

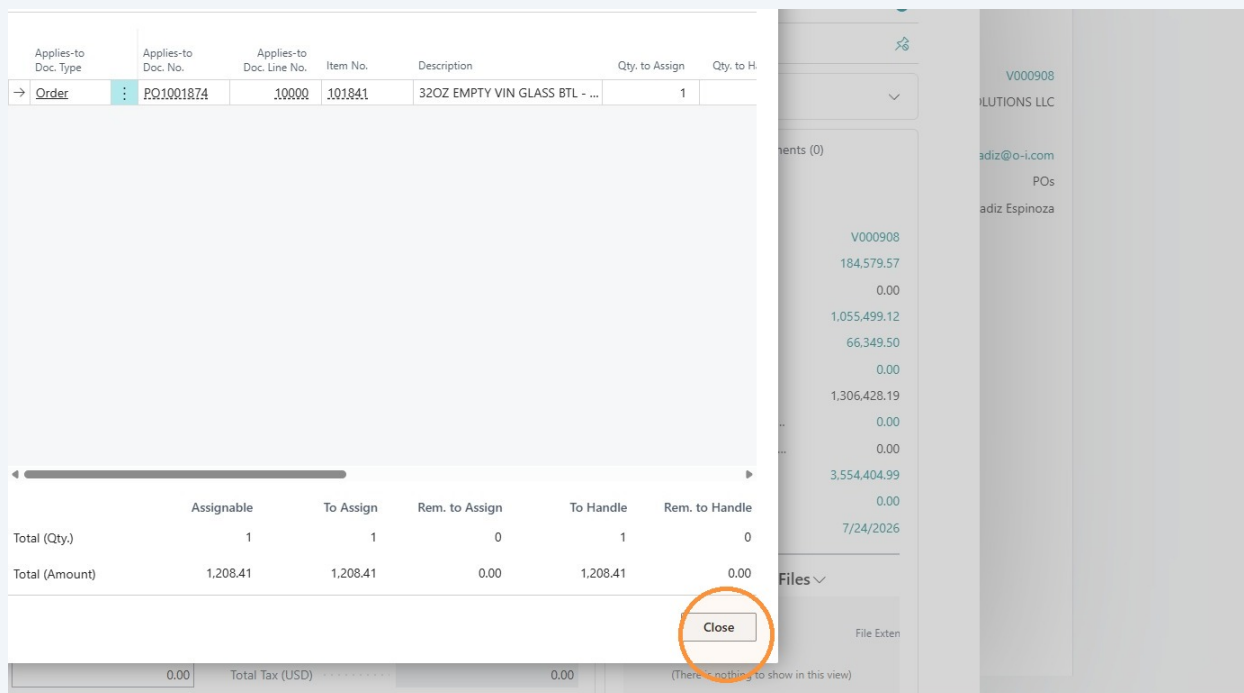


Suggest Assignment

11 Click on Suggest an item charge assignment.



12 Click "Close"



13 Click "Order"

The screenshot shows the Dynamics 365 Business Central interface for a Purchase Order (PO1001874) for OI PACKAGING SOLUTIONS LLC. The 'Order' button in the top navigation bar is circled in orange. The interface includes a left sidebar with navigation options, a main content area with tabs for Home, Prepare, Print/Send, Request Approval, Order, and EDI. The 'Order' tab is active. Below the tabs, there are sections for Document Date, Invoice Received Date, Posting Date, and Appt. Time. A table of lines is visible at the bottom, showing item details and quantities.

Type	No.	Description	Loc... Code	Quantity	Direct Unit Cost Excl. Tax	Line Amount Excl. Tax
Item	101841	32OZ EMPTY VIN GLASS BTL - ...	GREEN	37.800	0.41401	15,649.58

14 Open Purchase Order Statistics.

The screenshot shows the Dynamics 365 Business Central interface for the same Purchase Order (PO1001874) for OI PACKAGING SOLUTIONS LLC. The 'Statistics' button in the top navigation bar is circled in orange. The interface is similar to the previous screenshot, but the 'Statistics' button is highlighted. The 'Order' tab is still active, and the table of lines is visible at the bottom.

Type	No.	Description	Loc... Code	Quantity	Direct Unit Cost Excl. Tax	Line Amount Excl. Tax
Item	101841	32OZ EMPTY VIN GLASS BTL - ...	GREEN	37.800	0.41401	15,649.58

15 Verify the Total Excl Tax matches the total on the invoice, Click "Close"

General

Amount Excl. Tax	18,437.99	Quantity	38,041
Inv. Discount Amount	0.00	Parcels	0
Total Excl. Tax	18,437.99	Net Weight	0
Tax Amount	0.00	Gross Weight	0
Total Incl. Tax	18,437.99	Volume	0
Purchase (\$)	18,437.99	No. of Tax Lines	1

Invoicing

Amount Excl. Tax	18,437.99	Quantity	38,041
Inv. Discount Amount	0.00	Parcels	0
Total Excl. Tax	18,437.99	Net Weight	0
Tax Amount	0.00	Gross Weight	0
Total Incl. Tax	18,437.99	Volume	0
Purchase (\$)	18,437.99	No. of Tax Lines	1

Close

16 To Post Click "Home"

Purchase Order

PO1001874 · OI PACKAGING SOLUTIONS LLC

Home Prepare Print/Send Request Approval Order EDI More options

Dimensions Comments Approvals Vendor Prepayment Invoices

Statistics Attachments Invoices Receipts Prepayment Credit Memos

Document Date: 7/22/2026

Invoice Received Date: [Date]

Posting Date: 7/22/2026

Appt. Time: 7:00:00 AM

Summary Preview

Details Attachments

Vendor Statistics

Vendor No. Balance (\$) Balance (\$) As Customer Outstanding Orders (\$) Amt. Rcd. Not Invd. (\$) Outstanding Invoices (\$)

Post Purchase Order

17 Open the Post menu.

The screenshot shows the Dynamics 365 Business Central interface for a Purchase Order (PO1001874) for OI PACKAGING SOLUTIONS LLC. The 'Post' menu option is circled in orange. The interface includes a top navigation bar with tabs for Home, Prepare, Print/Send, Request Approval, Order, EDI, and More options. The main area displays the Purchase Order details, including the Invoice Received Date, Posting Date (7/22/2026), and Appt. Time (7:00:00 AM). A table of lines is visible, showing items like 32OZ EMPTY VIN GLASS BTL - ... and their quantities and prices.

18 Confirm posting as Receive and Invoice.

The screenshot shows the Dynamics 365 Business Central interface for the same Purchase Order (PO1001874). A dialog box is open, asking to confirm posting as Receive, Invoice, or Receive and Invoice. The 'Receive and Invoice' option is selected and circled in orange. The dialog box has 'OK' and 'Cancel' buttons. The background shows the Purchase Order details, including the Invoice Received Date, Posting Date (7/22/2026), and Appt. Time (7:00:00 AM). A table of lines is visible, showing items like 32OZ EMPTY VIN GLASS BTL - ... and their quantities and prices.