

# PURCHASE ORDER SPEND CONTROL

MICROSOFT DYNAMICS AX 2012 R3/ AND DYNAMICS 365



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## Objectives

- Explain what is change management
- Discuss scenarios for using change management
- Review a sample workflow for change management
- Create a new workflow for change management
- Enable change management parameters
- Create and process a purchase order with a workflow

# ABOUT CHANGE ORDER MANAGEMENT

# About Change Order Management

Purchase orders have an approval status.

Track changes for purchase orders.

Purchase order confirmation is still required.

Unsupported features:

- Intercompany orders
- Master planning
- Purchase orders created from production orders

## Approval Statuses

Approval status	Description	Change requests allowed
<b>Draft</b>	The purchase order is a draft and has not been submitted for approval in the purchase order workflow.	No
<b>In review</b>	The purchase order was submitted for approval in the purchase order workflow. Approval is pending.	No
<b>Rejected</b>	The purchase order was rejected during the approval process.	No
<b>Approved</b>	The purchase order was approved.	Yes
<b>Confirmed</b>	The purchase order was confirmed. A purchase order cannot be confirmed until it has been approved.	Yes
<b>Finalized</b>	The purchase order was made final. It is financially closed and can no longer be changed.	No

## Change Management Roles

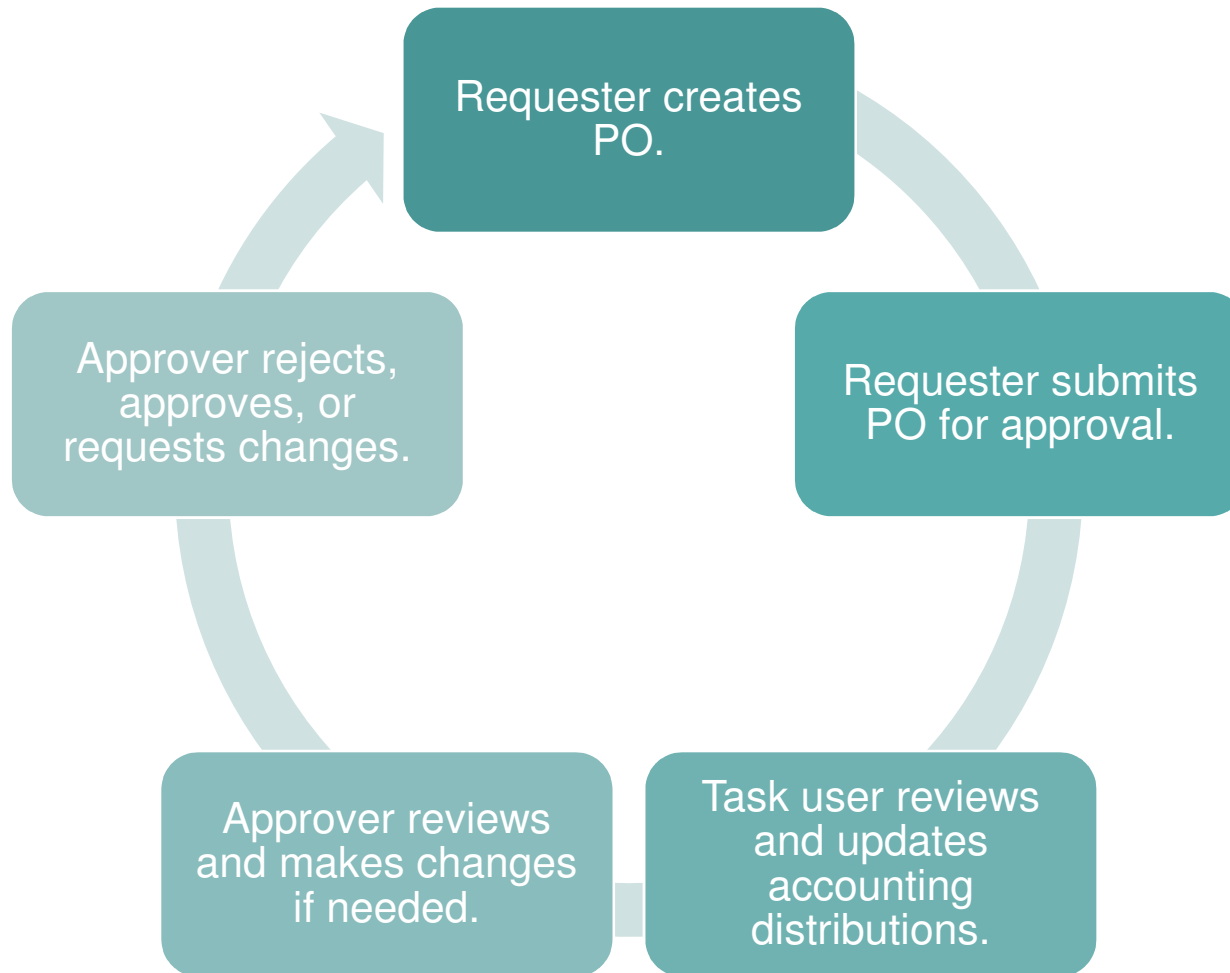
Requester

Approver

Task user  
(optional)

Administrator

# Change Management Process





# SET UP CHANGE ORDER MANAGEMENT

# Change Management Parameters



## Demonstration

- Enable change management.
- Create a workflow for change management.

# CREATE AND PROCESS A PURCHASE ORDER WITH CHANGE MANAGEMENT

## Demonstration

- Create and process a purchase order with change management.

THANK YOU FOR  
YOUR TIME AND  
ATTENTION



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