

# Avanade Text Management User Guide

## Dynamics 365 for Operations



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## Document Information

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# 1. Introduction

Microsoft Dynamics 365 for operations contains Document management functionality, which improves the use of homogenous texts in the application. However, the standard application does not provide the ability to change the text in multiple languages. In addition, we cannot store any template centrally, through which we can change the text for every single note.

In order to manage the text templates centrally and to manage the text of templates in multiple languages, Avanade has expanded the standard document management asset with the "Text Management" module. This functionality also provides the printing control possibilities. This document provides information on how to configure and use the features included in the Text Management.

## 2. Audience

This document's audience is end users, typically employees who are involved in the document management activities. As text management is an extended feature of standard document management of Dynamics 365 for Operations, any user who is involved with the document management activities will find it helpful.

## 3. Scope of services

The 'text management' is a self-contained module, which is attached to the document management. The user has the possibility to select text templates from an archive with standard texts and copy it into notes in the document management, or to generate links to texts.

Features in detail:

- Text templates can be recorded in several languages.

  - Text templates can be configured for several areas like Purchase, Sales, and Items.

  - Tables are allocated to the individual areas. Depending on the table from which the text management is accessed, it is filtered according to the relevant area.

- Text templates can selectively be copied or linked.

  - Linked text templates can be managed centrally. That means that changes will be transferred to all linked notes.

- A text template can also be inserted in an existing note at the beginning or end.

  - It can also be determined, on which paper a note should be printed. In addition, the position on the report (top or bottom) can be determined.

  - Notes can be copied from various modules. For example, it is possible that the notes of a debtor are taken over automatically (or after confirmation) in the sales order at the generation of a sales order.

  - Notes can be defined as warning messages. Thereby notes, e.g. at the generation of a sales order, are displayed as warning messages.

## 4. Setup Text Management

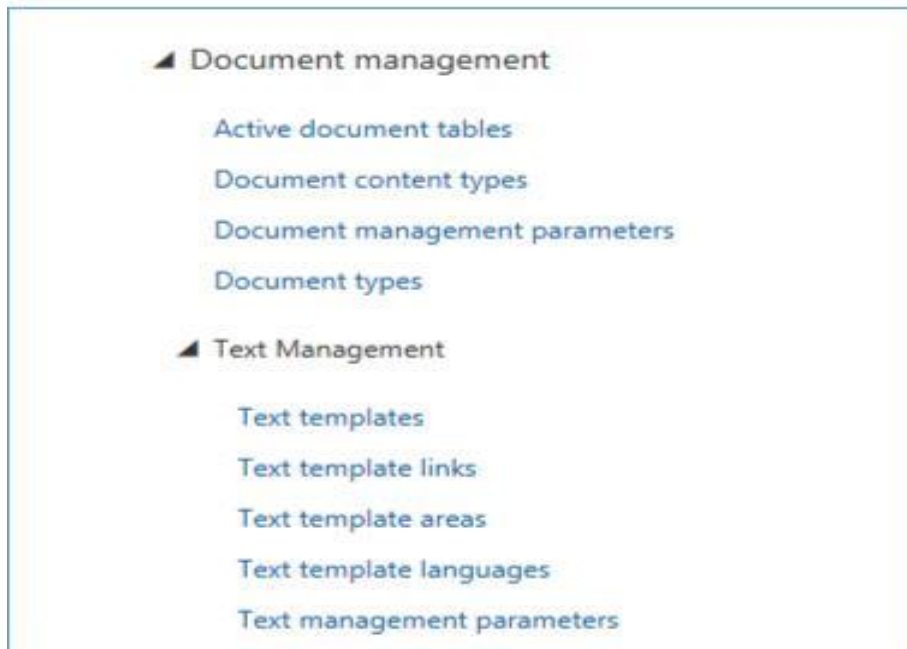
This chapter describes the configurations and functions of the text management module. The menu option is available at below path:

Organization administration ➡ Document management.

### 4.1 Text Management

In the following chapter, every menu option in the Text Management module is explained.

*Path: Organization administration ➡ Document Management ➡ Text Management*



## 4.1.1 Text templates

On the left side of this window, you see the saved text templates as well as the different languages of them. With a click on a text template, you can see the text template area.

Path: Organization administration ➡ Document Management ➡ Text Management ➡ Text templates

The screenshot shows the Dynamics 365 interface for Text templates. On the left, a list of templates is shown with checkboxes for different languages. The right pane displays the details for 'TextTemplate3' in the 'en-us' language. The 'General' tab provides information about the template, including its name, area, and the number of linked notes.

IDENTIFICATION	AREA	CREATED	MODIFIED	LINKS
Text template number TT3	Category	Created date and time 1/24/2017 09:44:21 AM	Modified date 1/24/2017	Number of linked notes 8
Name TextTemplate3	Name	Created by sushma.devigubbala	Modified time 09:44:32 AM	User ID sushma.devigubbala

You have the possibility, in the menu Text templates, to display the language text by selecting the according language code. The menu General provides general information about the text template as well as the number of linked notes.

Path: Organization administration ➡ Document Management ➡ Text Management ➡ Text templates

This screenshot is similar to the previous one, showing the Dynamics 365 interface for Text templates. A red box highlights the 'Text template' section and the 'General' tab, indicating the area where the language text can be displayed and general information about the template can be viewed.

If you click on the button Show links, a new window will open. In this window, all the links of the text template are displayed. With this function, you will have the overview, where the template is used. By clicking on the Reference record ID, the related table will open and the linked record will be shown.

The first screenshot shows the 'Text templates' view in Dynamics 365. The left sidebar contains a list of text templates, with 'TextTemplate3' selected. The main pane displays the details for 'TextTemplate3', including its name, area, and a list of links. The 'Show links' button is highlighted in the top navigation bar.

The second screenshot shows the 'Text template links' submenu for 'TextTemplate3'. The submenu is titled 'Text template links' and contains a table of links. The table has three columns: 'Reference table name', 'Reference record ID', and 'Language'. The 'Sales orders' link is highlighted.

Reference table name	Reference record ID	Language
Sales orders	68719503300	en-us
Sales orders	68719504046	en-us
Sales order confirmations	68719481382	en-us
Sales order confirmations	68719481383	en-us
Items	22565437142	en-us
Purchase orders	52565463734	en-us
Purchase orders	68719484308	en-us
Customers	22565421812	en-us

## 4.1.2 Text template links

This view shows all text templates, which have at least one linked record. If you click on a text template, all links of the specific text template will be shown in the submenu References. You have the possibility to display the linked record by clicking on the Reference record ID.

*Path: Organization administration → Document Management → Text Management → Text template links*

Dynamics 365 Operations Organization administration > Document management > Text Management > Text template links

Text template links

TEXT TEMPLATE LINKS

Text template	Modified date	User ID
testtemp1	1/30/2017	sushma.dev.gubbala
testnote1	1/30/2017	Admin
test notes	1/30/2017	Admin
test notes	1/30/2017	Admin
TextTemplate1	1/20/2017	utsab.basu
TextTemplate2	1/20/2017	utsab.basu
TextTemplate3	1/24/2017	sushma.dev.gubbala
note2	2/1/2017	Admin
note3	2/1/2017	Admin

REFERENCES

Reference table name	Reference record	Language
Sales orders	68719503298	
Sales orders	68719503300	
Sales orders	68719503300	
Order lines	68719675132	
Sales quotation	35637147663	
Inventory order	68719479188	
Inventory order	68719479188	
Items	22565421523	
Items	22565421797	
Items	22565434098	
Items	22565436388	
Items	22565436388	

### 4.1.3 Text template areas

Text templates are divided into several areas for the ease of use. You have the possibility to select tables for each area. This selection corresponds to a filter: e.g. on the form PurchTable, only the text templates whose area has PurchTable in Selected tables list will be shown. The user will also get an option to change this filter, where user can select text templates from other areas.

Path: Organization administration → Document Management → Text Management → Text template areas

Dynamics 365 Operations Organization administration > Document management > Text Management > Text template areas

Click the edit button to make changes.

Filter

C1 Sales

C2 Purchase

Text template areas

Category Label

C1 Sales

Selected tables

+ Add tables - Remove

CustTable

On clicking “Add tables” link, list of all tables will be populated & user can select the appropriate tables as per the Text template area.



The screenshot shows the Dynamics 365 'Text template areas' page. On the left, there's a sidebar with a filter and a list of categories: C1 (Sales) and C2 (Purchase). The main area shows 'Selected tables' with a '+ Add tables' button and a 'Remove' button. An 'Add tables' pane is open on the right, displaying a list of tables with columns 'Name' and 'Label'.

Name	Label
Accountant_BR	Accountants
AccountantLogisticsLocation_BR	Accountant location relationships
AccountantLogisticsLocationRol...	Accountant location roles
AccountantStaging	Accountants
AccountingDistribution	Accounting distributions
AccountingDistributionEventTmp	accounting distribution
AccountingDistributionTemplate	Accounting distribution template
AccountingDistributionTemplat...	Accounting distribution templat...
AccountingDistributionTmp	AccountingDistributionTmp
AccountingDistributionTmpJour...	accounting distribution
AccountingDistributionTmpTax	AccountingDistributionTmpTax
AccountingEvent	Accounting event
AccountingEventDateTmp	Accounting event
AccountingEventTmp	Accounting event
AccountingSourceExplorerTmp	Accounting source explorer
ACOCostCenterAttributeValue_BR	Cost center type
ACOCostCenterTypeStaging	Cost center type
ACOLJournalName_BR	Journal names
ACOLJournalNameStaging	Absorption costs journal names
ACOLJournalTable_BR	Journals
ACOLJournalTransOverHead_BR	Journal lines
ACOPParameters_BR	Cost absorption parameters
ACOPProdCostTable_BR	Production - costing
ACOPProdOverHeadCostTrans_BR	Absorbed costs

Buttons at the bottom of the 'Add tables' pane: Import, Close.

## 4.1.4 Text template languages

All language codes, which will be used for at least one text template, must be added in the text template languages. Once a language code has been added, it will appear on the text template form. Only defined language codes can be used in text templates.

*Path: Organization administration ➡ Document Management ➡ Text Management ➡ Text template languages*

The screenshot shows the Dynamics 365 'Text template languages' page. It features a sidebar with a filter and a list of languages. The main area is titled 'Text template languages'.

Language T	Language name
da	Danish
de	German
en-in	English (India)
en-us	English (United States)

*Path: Organization administration ➡ Document Management ➡ Text Management ➡ Text template*

Dynamics 365 | Operations | Organization administration > Document management > Text Management > Text templates

Save | + New | Delete | Copy to note | Link to note | Create note | Show links | OPTIONS

Filter

Only my texts

Area

Name T | en-us | de

note2 | ☒ | ☐

note3 | ☒ | ☐

test notes | ☐ | ☐

test notes | ☐ | ☐

test1001 | ☒ | ☐

testnote1 | ☐ | ☐

testtemp | ☐ | ☐

TextTemplate1 | ☒ | ☒

TextTemplate2 | ☒ | ☒

TextTemplate3 | ☒ | ☒

Text templates

Text template number Name Area

T1 TextTemplate1 Sales

Text template

Language

en-us

en-us

de

de

en-in

TextTemplate1 Sales en-us

General

IDENTIFICATION

Text template number T1

Name TextTemplate1

AREA

Category C1

Name Sales

CREATED

Created date and time 1/20/2017 01:31:38 PM

Created by utsab.basu

MODIFIED

Modified date 1/20/2017

Modified time 01:32:54 PM

User ID utsab.basu

LINKS

Number of linked notes 5

## 4.1.5 Text management parameters

This section explains the setup of parameters for Text Management module.

*Path: Organization administration → Document Management → Text Management → Text management parameters*

Dynamics 365 | Operations | Organization administration > Document management > Text Management > Text management parameters

Save | OPTIONS

Text management parameters

General

Number sequences

Set up general options for text management

STANDARD DOCUMENT TYPE

Document type for text templates Note

VIEW AND EDIT

Show All

Edit User

SYNCHRONIZE LANGUAGE

Quotation Yes

Sales order Yes

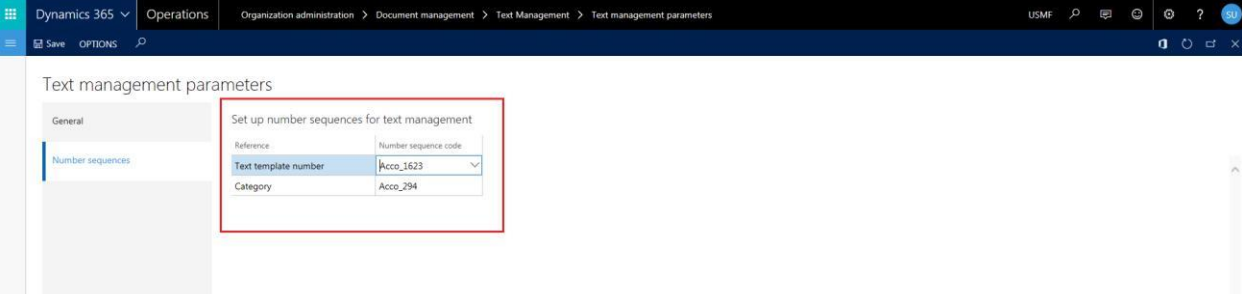
Request for quotation Yes

Purchase order Yes

<div><div>STANDARD DOCUMENT TYPE</div><div>SYNCHRONIZE LANGUAGE</div><div>Request for quotation</div><div>Document type for text templates</div><div>Quotation</div><div>Yes</div><div>Yes</div><div>Purchase order</div><div>Type ↑</div><div>Name</div><div>Group ▾</div><div>Note</div><div>test</div><div>test</div><div>Note</div><div>Note</div></div>	<p>This setup controls the standard document type for new created text templates. It is possible to override this setup.</p>
<div><div>VIEW AND EDIT</div><div>Show</div><div>All</div><div>Edit</div><div>All</div><div>All</div><div>User</div></div>	<p>This setup controls the display and editing of text templates. Here All means every user will have privilege to see &amp; edit the text templates. User option suggests that only that particular user (who has created the text template) will have the ability to see &amp; edit the text template.</p>
<div><div>SYNCHRONIZE LANGUAGE</div><div>Quotation</div><div>Yes</div><div>Sales order</div><div>Yes</div><div>Request for quotation</div><div>Yes</div><div>Purchase order</div><div>Yes</div></div>	<p>If text templates are in different languages, then as per the selected area, under this section, the language of the template is synchronized.</p> <p><b>Note:</b> User has to take care of the fact that he/she is attaching the text template of the same language as mentioned in the setup section of sales order, purchase order, item, vendor or customer.</p>

This form will be used to define the number sequences for Text Template number & Category.

**Path:** Organization administration → Document Management → Text Management → Text management parameters



Dynamics 365 | Operations | Organization administration > Document management > Text Management > Text management parameters

Text management parameters

General

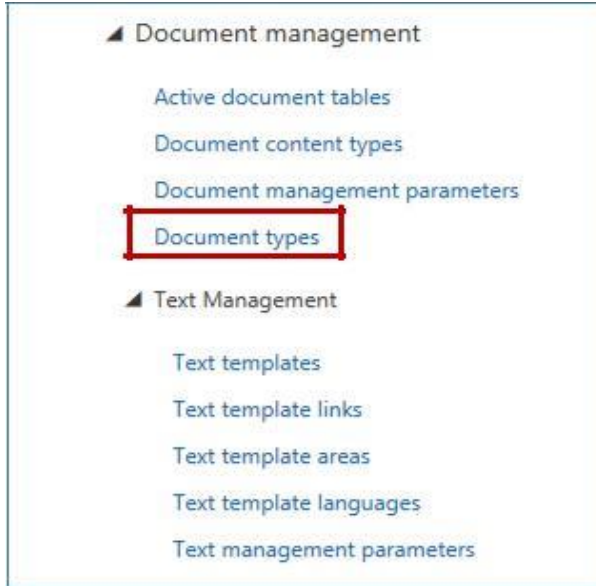
Number sequences

Set up number sequences for text management

Reference	Number sequence code
Text template number	Acco_1623
Category	Acco_294

## 4.2 Document types

Path: Organization administration ➡ Document Management



In the menu document types, there is one control option added as Text management. The following section explains this feature.

Path: Organization administration ➡ Document Management ➡ Document Type

The screenshot displays the 'Document types' form in Dynamics 365. The left sidebar shows a list of document types: File, Image, Note, and URL. The main area is titled 'Document types' and contains several sections. The 'Text Management' section is highlighted with a red box and contains the following settings:

Text Management			
<strong>RESTRICTION DEFAULT</strong>			
Restriction for new notes	Print with packing slip	Print with project invoice	From vendor to purchase order
<input type="radio"/> Internal	<input type="radio"/> No	<input type="radio"/> No	<input type="radio"/> No
<strong>PRINTING DEFAULTS</strong>			
Print with quotation	Print with invoice	Print with work report	From item to sales
<input type="radio"/> No	<input type="radio"/> No	<input type="radio"/> No	<input type="radio"/> No
Print with confirmation	Print with request for quote	Print with purchase order	From item to request for quote
<input type="radio"/> No	<input type="radio"/> No	<input type="radio"/> No	<input type="radio"/> No
Print with picking list	Print with production	Position for new notes	Remove link
<input type="radio"/> No	<input type="radio"/> No	<input type="radio"/> Top	<input type="radio"/> No
<strong>POSITION DEFAULT</strong>			
Position for new notes			
<input type="radio"/> Top			
<strong>COPY</strong>			
From customer to sales order			
<input type="radio"/> No			
From item to purchase			
<input type="radio"/> No			
From item to production			
<input type="radio"/> No			

<p><b>Text Management</b></p> <p><b>RESTRICTION DEFAULT</b></p> <p>Restriction for new notes</p> <div> <div>External</div> <div>Internal</div> <div>External</div> </div>	<p>Controls the printing of notes:  Internal: only internal papers  External: will be printed on external papers (e.g. invoices)</p>
<p><b>RESTRICTION DEFAULT</b></p> <p>Restriction for new notes</p> <div> <div>External</div> </div> <p><b>PRINTING DEFAULTS</b></p> <p>Print with quotation  Yes <input checked="" type="checkbox"/></p> <p>Print with confirmation  Yes <input checked="" type="checkbox"/></p> <p>Print with picking list  Yes <input checked="" type="checkbox"/></p> <p>Print with packing slip  Yes <input checked="" type="checkbox"/></p> <p>Print with invoice  Yes <input checked="" type="checkbox"/></p> <p>Print with request for quote  Yes <input checked="" type="checkbox"/></p> <p>Print with purchase order  Yes <input checked="" type="checkbox"/></p> <p>Print with production  Yes <input checked="" type="checkbox"/></p> <p>Print with project invoice  Yes <input checked="" type="checkbox"/></p> <p>Print with work report  Yes <input checked="" type="checkbox"/></p> <p><b>POSITION DEFAULT</b></p> <p>Position for new notes</p> <div> <div>Top</div> </div> <p><b>COPY</b></p> <p>From customer to sales order  Yes <input checked="" type="checkbox"/></p> <p>From vendor to purchase order  Yes <input checked="" type="checkbox"/></p>	<p>This setup validates the display of the text in different papers as per the selection. User can override this setup while creating a new text template.</p>
<p><b>POSITION DEFAULT</b></p> <p>Position for new notes</p> <div> <div>Top</div> <div>Top</div> <div>Bottom</div> </div>	<p>Controls the printing position of the notes.  E.g., User can print the note either on the invoice header (top) or in the invoice footer (bottom). User can override this setup while creating a new text template.</p>
<p>Print with purchase order  Yes <input checked="" type="checkbox"/></p> <p>Print with production  Yes <input checked="" type="checkbox"/></p> <p>Print with project invoice  Yes <input checked="" type="checkbox"/></p> <p>Print with work report  Yes <input checked="" type="checkbox"/></p> <p><b>POSITION DEFAULT</b></p> <p>Position for new notes</p> <div> <div>Top</div> </div> <p><b>COPY</b></p> <p>From customer to sales order  Yes <input checked="" type="checkbox"/></p> <p>From vendor to purchase order  Yes <input checked="" type="checkbox"/></p> <p>From item to sales  Yes <input checked="" type="checkbox"/></p> <p>From item to request for quote  Yes <input checked="" type="checkbox"/></p> <p>From item to purchase  Yes <input checked="" type="checkbox"/></p> <p>From item to production  Yes <input checked="" type="checkbox"/></p> <p>From item to project  Yes <input checked="" type="checkbox"/></p> <p>From sales to work  Yes <input checked="" type="checkbox"/></p> <p>Remove link  Yes <input checked="" type="checkbox"/></p>	<p>Controls the inheritance of the notes from one area to another.</p>

## 4.3 Form Note

In the form note section of accounts receivable or accounts payable setup, user can also specify the from date & to date of the form note. In this case, that particular form note will be valid within the specified time period. This is a customization of the standard Dynamics AX feature.

*Path: Accounts receivable ⇒ Setup ⇒ Forms ⇒ Form notes*

Form	Language	From date	To date
Sales order - quotation	en-us	1/25/2017	Never

Form note

Sales order quotation form note

## 5. Tutorial

### 5.1 Text templates

#### 5.1.1 Create new text templates

Perform the following steps to make a new text template while creating a new text note:

Click on the attach button in the top right corner of the screen of any customer, vendor, purchase order, sales order or item.

000017: US-104 - Fabrikam Supplier

Purchase order header

DELIVERY

Delivery date: 12/13/2015

DISCOUNTS

Total discount %: 0.00

REPLENISHMENT

Service category

CROSS DOCKING DATES

Delivery date: 12/13/2015

Local delivery date

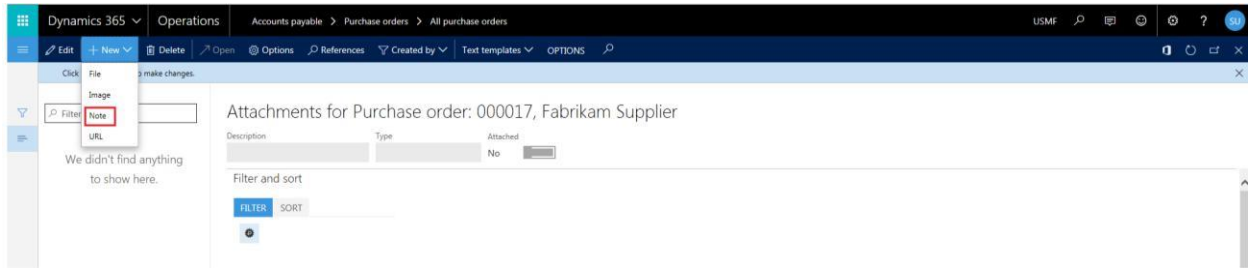
Sales date

PRODUCT/ORDER CREATION

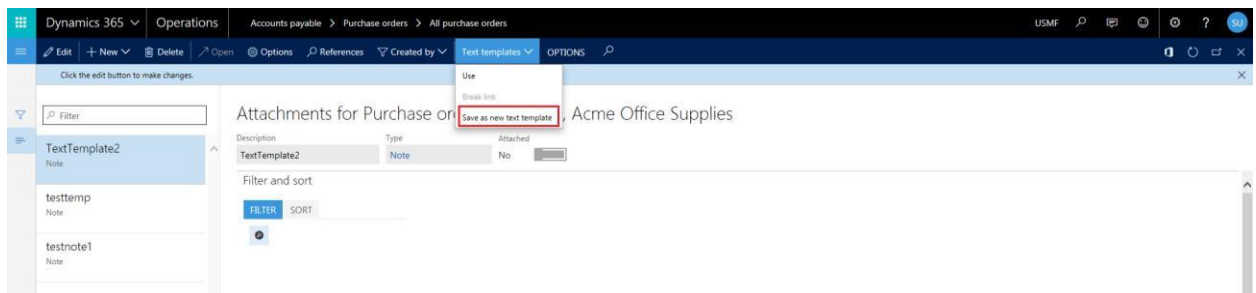
Auto created: No

Origin: Purchase

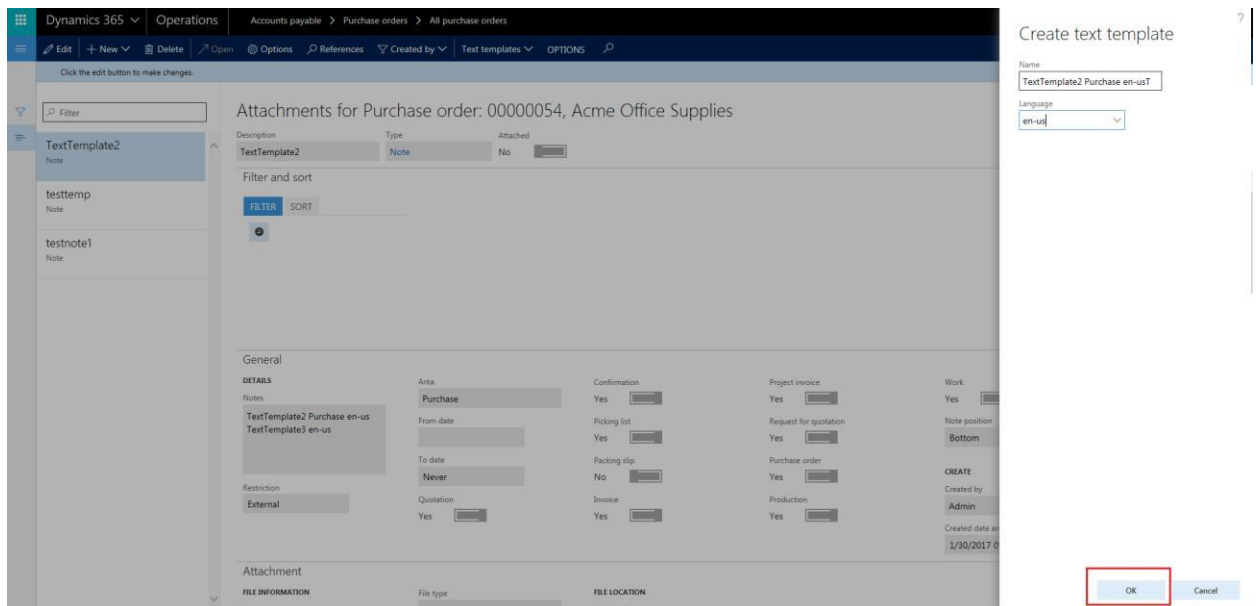
A new screen will get opened & then click on the Note in the New button to create a new note.



After creation of the note, click the Text templates button & select “Save as new text template” to save the newly created note as a text template.



Click on the Ok button to create new text template.



The application navigates to Text templates screen where the note is saved as a new text template. The user will also be able to select the area & language of the template.

The screenshot shows the Dynamics 365 interface for managing text templates. On the left, a list of templates is displayed, with 'TextTemplate2 Purchase-en-us' highlighted. The main area shows the details for this template, including its name, area (Purchase), and language (en-us). The 'General' tab is active, showing identification details like text template number (USMF-00004) and name (TextTemplate2 Purchase-en-usT).

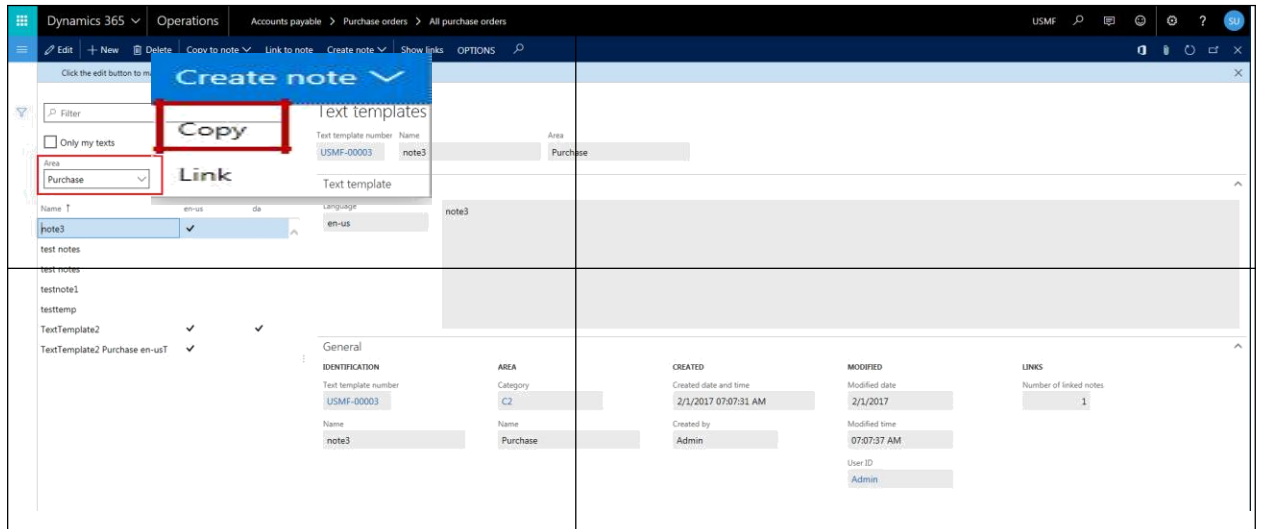
## 5.1.2 How to use text templates

To use any existing text template first click on the attachment & then click on the Text templates button & click on Use.

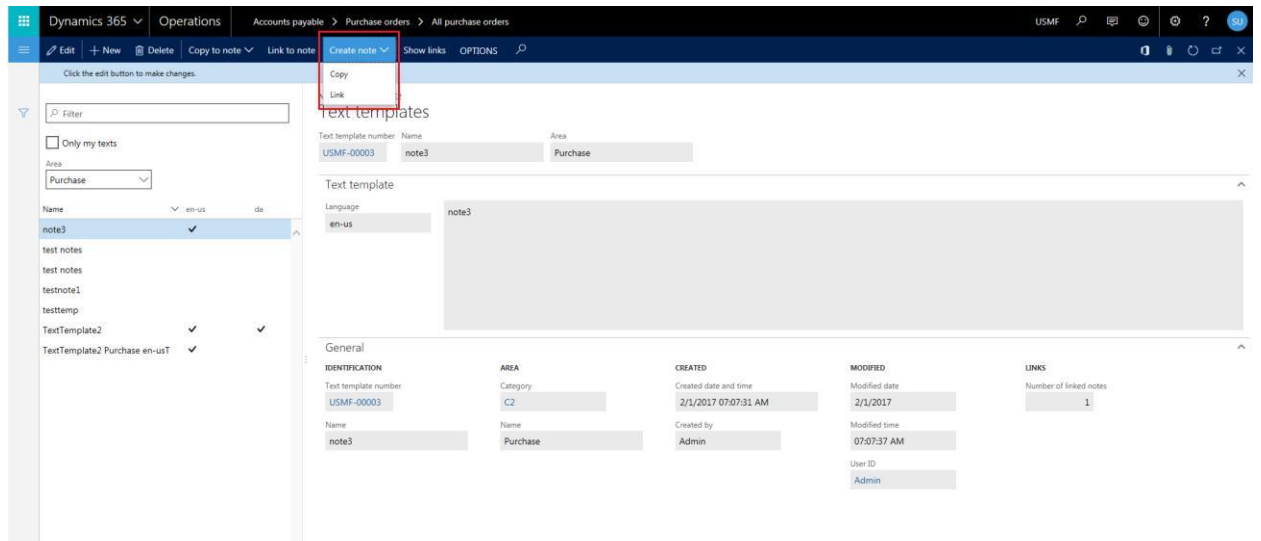
The screenshot shows the Dynamics 365 interface for managing attachments for a purchase order. The 'Text templates' button is highlighted, and a dropdown menu is shown with the 'Use' option selected. The main pane shows a list of attachments for the purchase order, with 'TextTemplate2' selected.

The application navigates to Text templates form and user will be able to see all text templates for the particular area from where he/she has clicked on the attachment button. If the user clicks on the attachment button from Purchase Orders & the Purchase Area is defined in the text template areas for PurchTable, then only text templates related to Purchase area will get opened. The user also has the ability to see all text templates using the filter button.

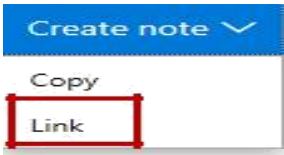




User will click on the Create note button & can click on copy or link as required. User will have the possibility to create a copy or to create a link of the text template.



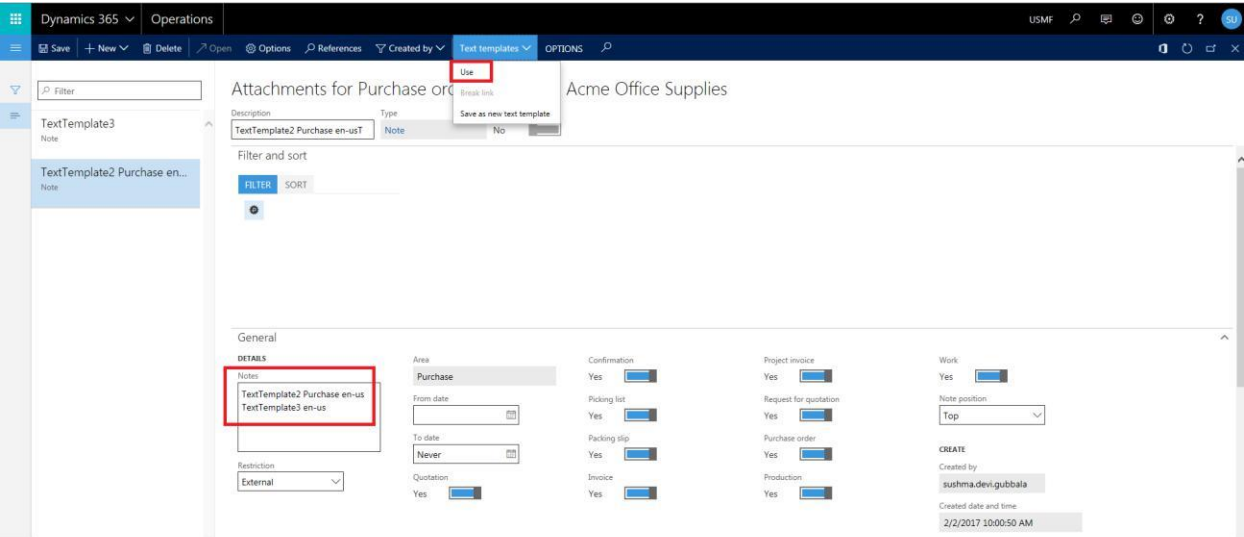
Application creates copy of the text template. You have the possibility to change the text directly in the created note. Changes of the text of a copy will not have an influence on the original text of the text template.



The created note represents a link to the text template. The only way to change the text of the note is over the text template. The application synchronizes text of the linked note with the text of the text template, so if you make changes on the text template, they will be taken to the linked notes.

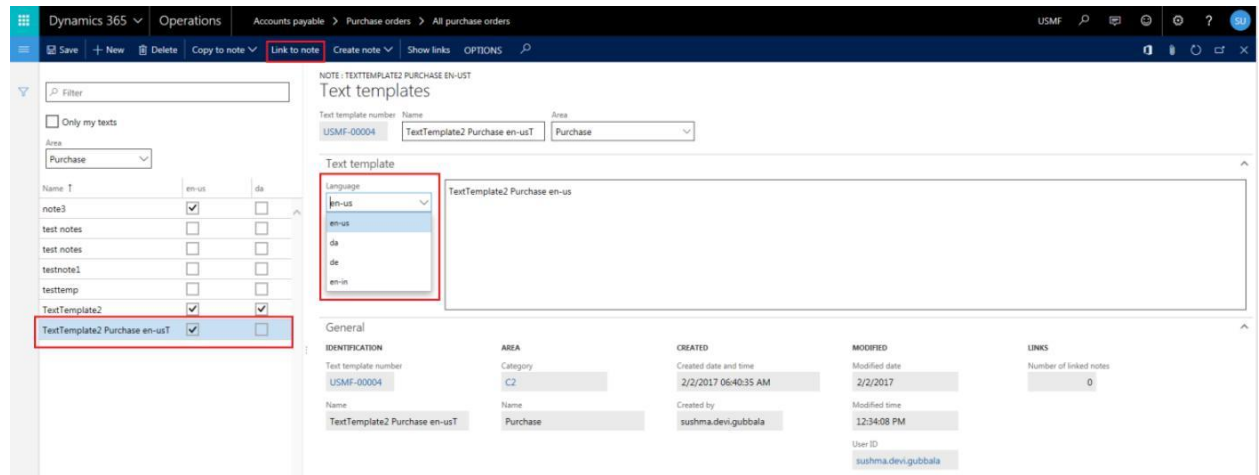
### 5.1.2.1 Change copied notes into links

Click on the Text templates button from an existing copied note & then click on the Use button.

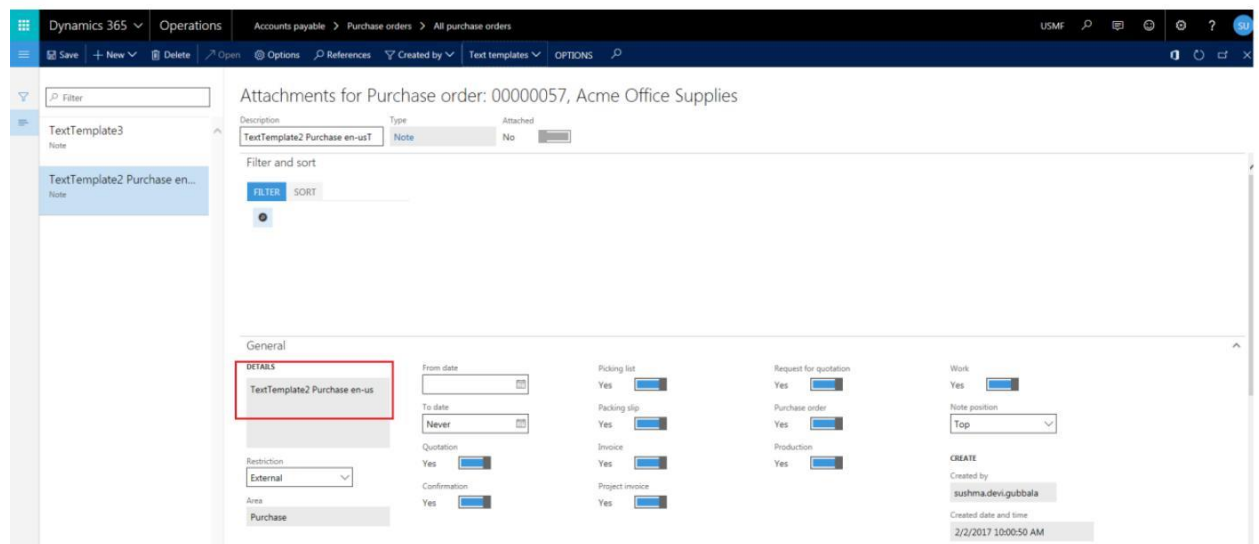


Click on the text template and choose in the field Language, the Language code of the actual note (attention: you have to be on the correct text template). Click on the button Link to note to change the copy into a link.

**Attention:** If you change a copied note into a link, it will take over the text of the template. All changes that were made at the copied note will be lost. From now on, text changes only can be made in the text templates.



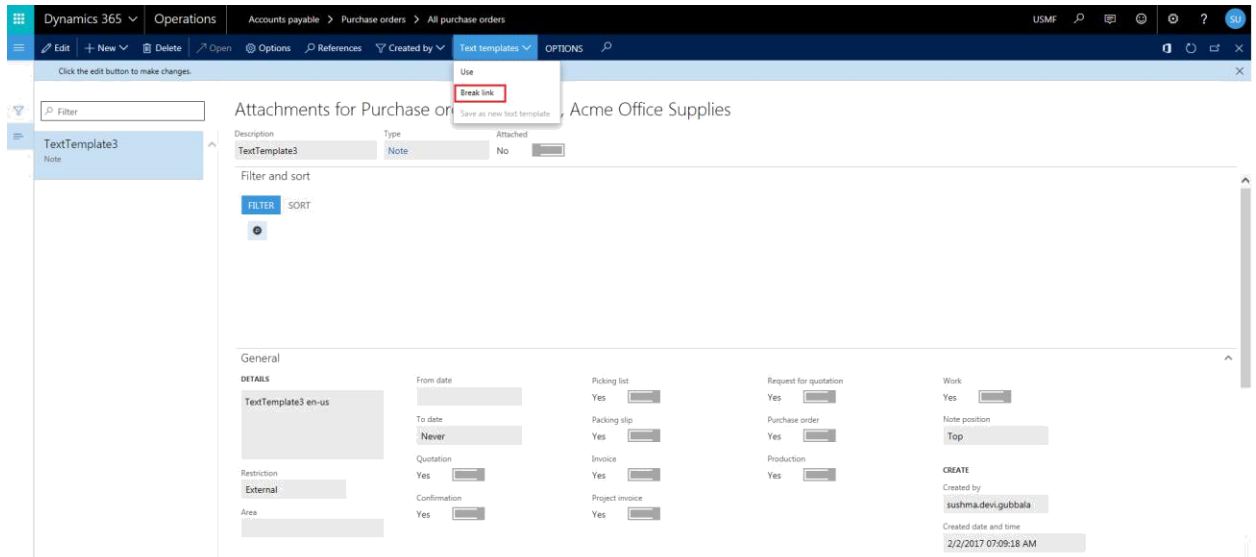
The screenshot shows the 'Text templates' form in Dynamics 365. The left pane lists several templates, with 'TextTemplate2 Purchase en-usT' selected and highlighted with a red box. The main pane shows the details for this template. The 'Language' dropdown is open, showing options: 'en-us' (selected), 'da', 'de', and 'en-in'. The 'Text template' field contains the text 'TextTemplate2 Purchase en-us'. Below this, the 'General' section displays various fields: 'Text template number' (USMF-00004), 'Area' (C2), 'Created date and time' (2/2/2017 06:40:35 AM), 'Modified date' (2/2/2017), 'Name' (TextTemplate2 Purchase en-usT), 'Created by' (sushma.devi.gubbala), and 'User ID' (sushma.devi.gubbala).



The screenshot shows the 'Attachments for Purchase order: 00000057, Acme Office Supplies' form. The left pane shows a list of attachments, with 'TextTemplate2 Purchase en-us' selected and highlighted with a red box. The main pane shows the details for this attachment. The 'Description' field contains 'TextTemplate2 Purchase en-usT'. The 'Type' is 'Note'. The 'Attached' checkbox is checked. Below this, the 'Filter and sort' section is visible. The 'General' section displays various fields: 'From date', 'To date', 'Picking list', 'Picking slip', 'Quotation', 'Confirmation', 'Request for quotation', 'Purchase order', 'Production', 'Work', 'Note position', 'Created by', 'Created date and time', and 'Area'.

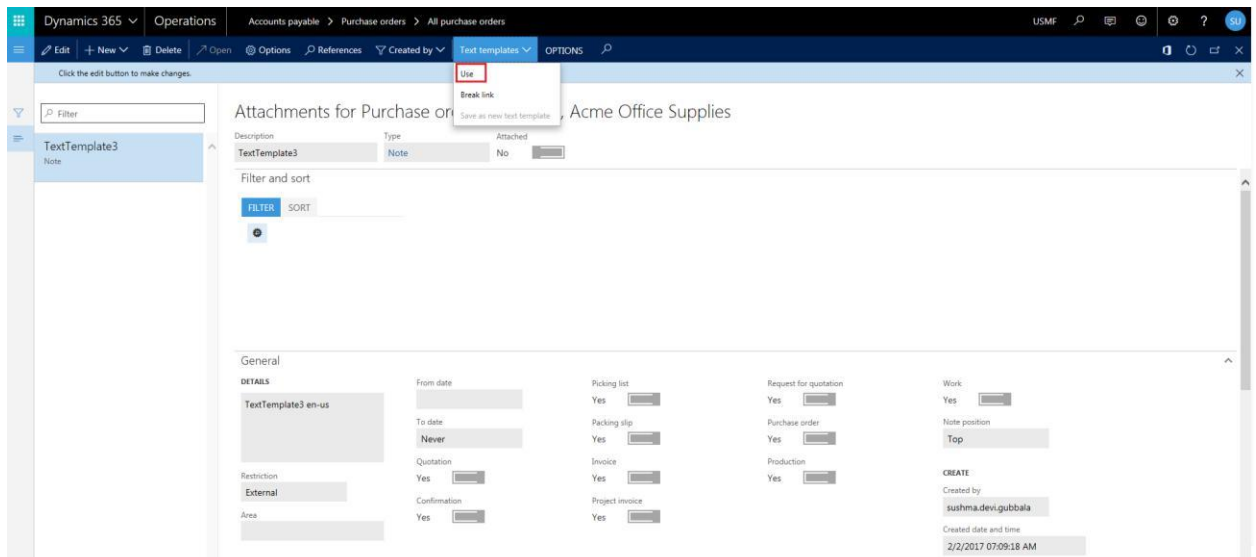
## 5.1.2.2 Change linked text templates into copies

The user cannot change the text of a linked note. In order to change the link into a copy, you just have to click on Text templates – Break link. User now has the possibility to change the text of the copied note. However, those changes will not transfer to the text template.



### 5.1.3 Insert/replace text templates into existing notes

User has the possibility to insert the text of a text template into an existing note. Click on an existing note on Text templates → Use and a new screen is displayed.



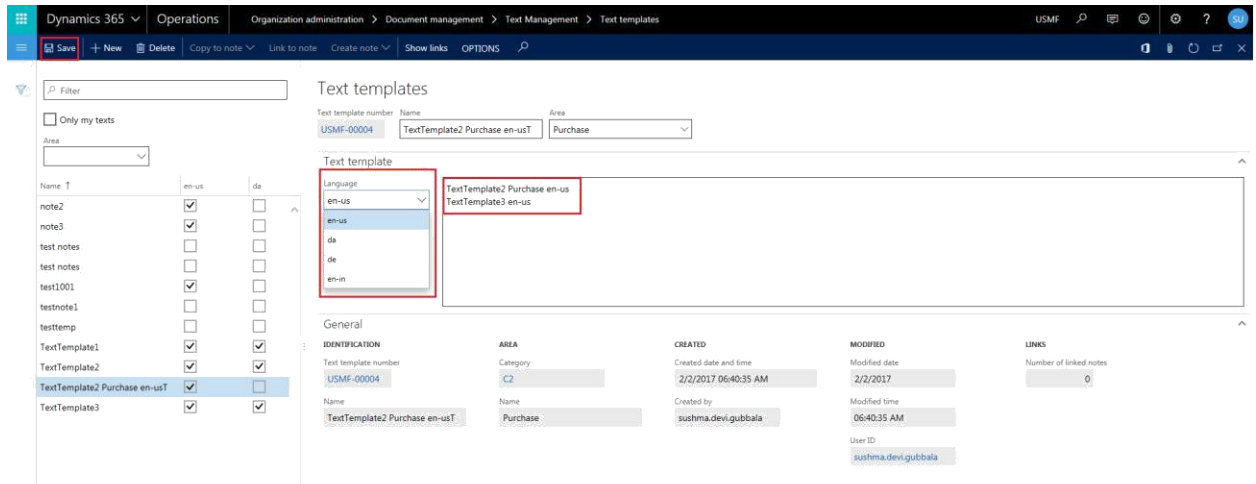
With a click on the button Copy to note you can paste the text of the text template before or after the text of the existing note. User also has the possibility to replace the note text with the text of the template.

The screenshot shows the Dynamics 365 interface for Text templates. The top navigation bar includes 'Dynamics 365', 'Operations', 'Accounts payable', 'Purchase orders', and 'All purchase orders'. The left sidebar has a search bar and a list of text templates. The main area displays the details for 'TextTemplate2 Purchase en-usT'. A red box highlights the 'Copy to note' dropdown menu, which includes options like 'Copy before', 'Paste after', and 'Replace'.

## 5.1.4 Edit text templates

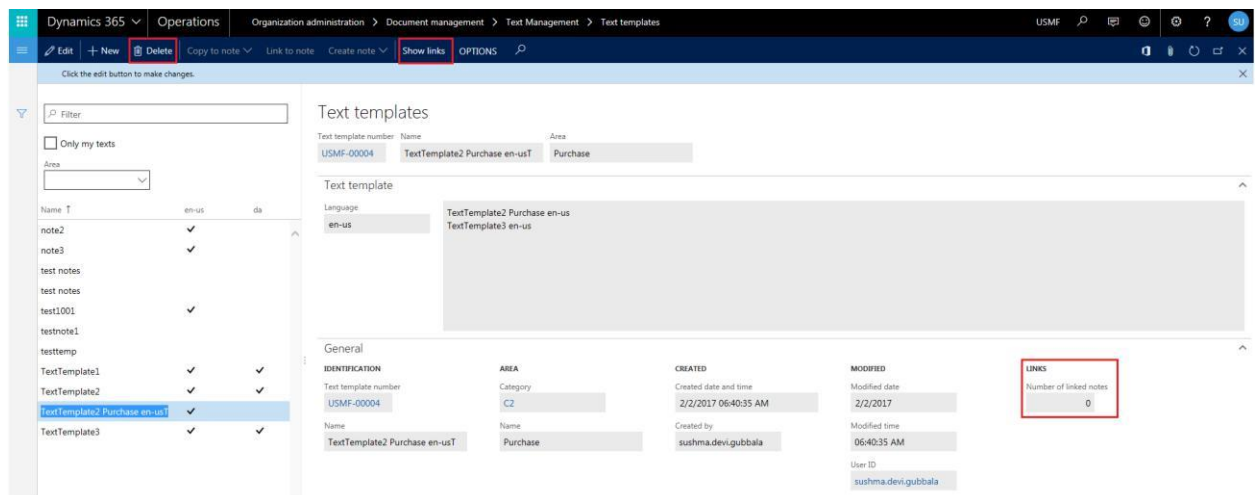
To edit text templates, user just has to overwrite the text. If user wants to change the text of another language, just select the according language code & then he/she can edit the language text.

The screenshot shows the Dynamics 365 interface for Text templates. The top navigation bar includes 'Dynamics 365', 'Operations', 'Organization administration', 'Document management', 'Text Management', and 'Text templates'. The left sidebar has a search bar and a list of text templates. The main area displays the details for 'TextTemplate2 Purchase en-usT'. A red box highlights the 'Edit' button in the top navigation bar.



## 5.1.5 Delete text templates

To delete a text template, just click on the button Delete. User can delete only those templates for which there are no links. If user wants to delete a linked text template anyway, then he/she has to delete all links of the relative text template first. If user wants to see all existing links, he/she can click onto the button Show links.



## 5.2 Warning notes

Warning notes are special variants of notes. User can click on the attachment button of the customer, vendor or item and can create a new note. To create a warning note, just set the flag on the check box Warning note. The remaining settings are unimportant. Please note that the column Warning note is visible only in the CustTable, VendTable and InventTable.

Dynamics 365 > Operations > Accounts payable > Vendors > All vendors

Attachments for Vendor account: 1001, Acme Office Supplies

TextTemplate3  
Note

Filter and sort  
FILTER SORT

General

DETAILS

TextTemplate3 en-us

Restriction  
External

Area

From date  
To date  
Never

Quotation  
Yes

Confirmation  
Yes

Picking list  
Yes

Packing slip  
Yes

Invoice  
Yes

Project invoice  
Yes

Request for quotation  
Yes

Purchase order  
Yes

Production  
Yes

Work  
Yes

Note position  
Top

Warning note  
Yes

CREATE

Created by  
sushma.devi.gubbala

Created date and time  
2/2/2017 07:06:00 AM

The user will be able to see the note as a warning message while creating a sales order or purchase order of that particular item.

Dynamics 365 > Operations > Accounts payable > Vendors > All vendors

CREATE CHARGES TAX CALCULATE PREPAY GENERATE ACTIONS ACCOUNTING JOURNALS VENDOR COLLABORATION

Credit note Maintain charges Allocate charges Sales tax Multiline discount Total discount Supplementary items Prepayment Remove prepayment Purchase inquiry Confirmation Pro forma confirmation Confirm Finalize Distribute amounts View distributions Purchase inquiry Purchase order confirmations Send for confirmation Purchase orders sent for confirmation View response on latest sent order Purchase order vendor confirmation history

TextTemplate3 en-us

PURCHASE ORDER 00000056 : 1001 - Acme Office Supplies

Purchase order header

DELIVERY  
Delivery date  
2/2/2017

DISCOUNTS  
Total discount %  
0.00

REPLENISHMENT  
Service category  
Location

CROSS DOCKING DATES  
Delivery date  
2/2/2017  
Cross docking date

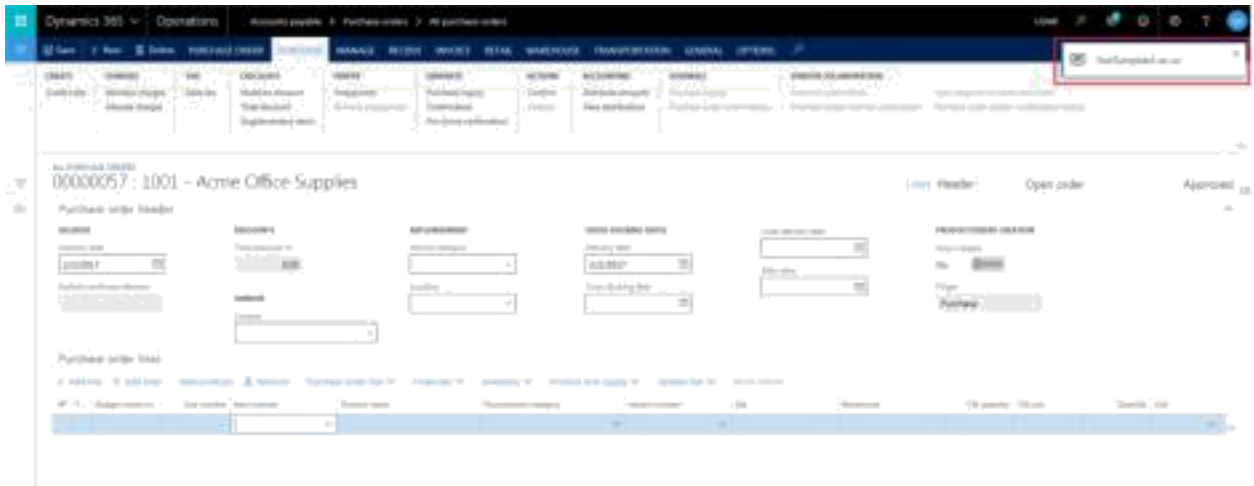
Local delivery date  
Sales date

PRODUCT/ORDER CREATION  
Auto created  
No  
Origin  
Purchase

Purchase order lines

Line number	Item number	Product name	Procurement category	Variant number	Configuration	Size	Color	Style	Site
1									

If the user configures a warning message for the customer or vendor, warning message is displayed at the notification section while creating a sales order or purchase order as shown below.



On the following table, we can see on which places the warning notes can be deposited and where they will be shown. The “X” shows, where the user can see the warning notes.

Warning note is deposited on:	Warning note is shown on:							
	Sales order (header)	Sales order (footer)	Sales offer (header)	Sales offer (footer)	Purchase order (header)	Purchase order (footer)	Production order	Project module
Customer base	X		X					
Vendor base					X			
Product base		X		X		X	X	X

## 5.3 Use with the project module

In the case of sales or purchase orders, the inheritance of text templates to forms is clear and simple. The project module is much more difficult, because bookings from different areas should be printed on the same invoice.

Path: Organization administration ➡ Document Management ➡ Document Types



Dynamics 365 Operations Organization administration > Document management > Document types

USME

Click the edit button to make changes.

Filter

File

Image

Note

URL

### Document types

Type: Note Name:

General

Class: Simple note Group: Note Category: None Location: Database SharePoint Address:

DOCUMENT REMOVAL OPTIONS

Remove: Document only

Ask for confirmation: No

Text Management

RESTRICTION DEFAULT

Restriction for new notes: External

PRINTING DEFAULTS

Print with quotation: Yes

Print with confirmation: Yes

Print with picking list: Yes

Print with packing slip: Yes

Print with invoice: Yes

Print with request for quote: Yes

Print with purchase order: Yes

Print with production: Yes

Print with project invoice: Yes

Print with work report: Yes

POSITION DEFAULT

Position for new notes: Top

COPY

From vendor to purchase order: Yes

From item to sales: Yes

From item to request for quote: Yes

From item to purchase: Yes

From item to production: Yes

From customer to sales order: Yes

From sales to work: Yes

Remove link: Yes

From item to project: Yes

User has the possibility to make the settings for the printing and transfer rules in the document types. If user set both flags, the notes will be printed and transferred as follows:

Transfers / prints the text on:	Project	Item requirements	Project sales order	Project purchase order	Project production orders	Prints on project offer	Prints on on account invoices	Prints on project invoices
Text deposited on:								
Project contract	X						H	H
Project							H	H
Product base		X	F	F	X	F		F
Customer base			H					
Vendor base				H				
Hour bookings								F
Expens bookings								F
Item bookings								F
Fee bookings								F
On account bookings							H	F

X = transfers resp. prints the note  
H = transfers resp. prints the note on the header  
F = transfers resp. prints the note on the footer

In the project module user has the possibility to edit all deposited notes at the invoice proposal (before the invoice is booked).

## 5.4 Printing linked files

Another functionality is the possibility to print linked files together with other documents (e.g. sales order confirmation, packing slip, invoice etc.). This functionality sends the files, which are included in the print order to the standard programs. This corresponds to the default Windows functionality.

### Confirm sales order

Arrange Select **Printer setup** ▾

---

Parameters

PARAMETER	PRINT OPTIONS	SETUP
Quantity All	Print Current ▾	Check credit limit Balance+All ▾
Posting Yes <input checked="" type="checkbox"/>	Print confirmation No <input type="checkbox"/>	Deadline <input type="text"/>
Late selection No <input type="checkbox"/>	Use print management destination No <input type="checkbox"/>	<b>SUMMARY ORDER</b> Summary update for None ▾
	Print COD No <input type="checkbox"/>	
	Print shipping labels No <input type="checkbox"/>	
	Print linked files Yes <input checked="" type="checkbox"/>	

---

Overview

+ Add Remove Totals Sales tax

✓	Update	Customer packi...	Sales order	Name	Currency
	Confirmation		000752	Birch Company	USD

## 6. Installation

### 6.1 Requirements

Model file and License file should be installed in the standard Dynamics AX for accessing this functionality.

## 6.2 Configuration

