


VISUAL WORK INSTRUCTION

TITLE / DESCRIPTION OF PROCESS		Change vendor data in Dynamics 365 Finance and Operations		
CREATED BY	OBJECTIVE	PREREQUISITES	EXPECTED RESULTS	
Reno	Change of vendor data	Access to Dynamics 365 Finance and Operations and Microsoft Power Apps	Changed vendor data	
PROCESS NUMBER				
1				
INITIAL ISSUE DATE				
12-04-2021				
CURRENT VERSION				
1.0.1				
STEP NUMBER / ID	INSTRUCTIONS	ILLUSTRATION OF STEP	EXPECTED RESULTS	
1)	<p>In this scenario, we will be changing vendor data.</p> <p>Navigate to the 'apps.powerapps' button</p> <p>Left-click on app "Change Vendor Master Data" to open the app, begin using it by clicking on 'NEW VENDOR CHANGE' create new item.</p>		See illustration	

2)

Under 'Item Changes' form fill in the specified fields.

'*' indicates that the field is mandatory, therefore data input is required.
'i' click on icon for addition information and instructions.

'Field to update' change field should have data changed for only that specific field.

'Old data value' and 'New data value' fields represent the as-is and to-be data value in active branch.

'Comments' field should be used for only additional details.

'Add an attachment' insert initial request/ email/ invoice from vendor. **For changes such as:** IBAN/ Bank account, VAT number.

VENDOR CHANGES

Company Code



* Vendor Number or Vendor Name



* Field to Update



* Old data value

* New data value

Comments

Add an attachment

BACK: OVERVIEW

SUBMIT CHANGE

See illustration

3)

Review all fields are fulfilled in the 'VENDOR CHANGES' form according to the standard business rules.

'Keep old IBAN/Bank account active?' should be used for only keeping old/existing bank details on vendor account active.

Left-click on 'SUBMIT CHANGE' to send request.

CHANGE VENDOR DATA

Company Code

01CE

* Vendor Number or Vendor Name

VECE000805

* Field to Update

IBAN / Bank Account #

* Old data value

BE96363158812305

Keep old IBAN/Bank account active?

☒ Yes

* New data value

BE96363158812405

Comments

Attached invoice with new IBAN

[MDM Power BI Report](#)

ADD ATTACHMENT

BACK: OVERVIEW

SUBMIT CHANGE

See illustration

