Purchase Orders User Guide

SENTRAL

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Getting started

Overview

Purchase Orders provides a comprehensive online purchase order system and approval workflow option for schools to manage school purchases and link to an FMS (Xero).

Target audience

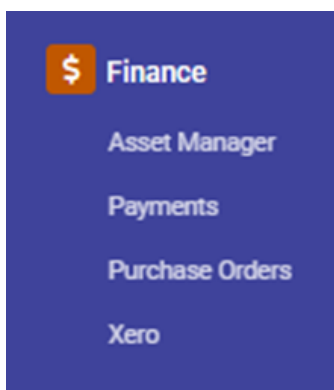- Staff who handle purchases and accounts payments.

Content

- Accessing Purchase Orders
- Purchase of new orders
- Purchase order approvals

Access Purchase Orders

All Staff can access Purchase Orders. However, your school should predetermine staff roles and responsibilities in this space.

Select the menu icon ⠿ and choose **Purchase Orders** in the Finance group.

Purchase Orders Dashboard

Overview

The Dashboard provides an overview of My Purchase orders Awaiting Approval for individual users. It also provides access to Administrators or Global/Faculty approvers to the approval workflow stages.

Enterprise schools

If your school is an Enterprise school, extra functionality includes:

- manually syncing with your school's FMS and Enterprise (for schools with multiple campuses).
- Enrolments and FMS set up to sync every day.
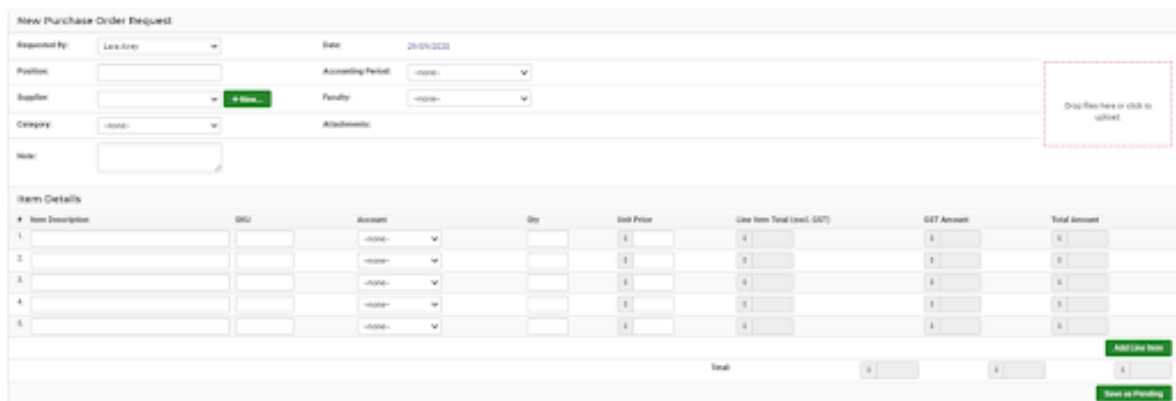
Complete a new purchase order

Overview

Use the information in this topic to complete a new purchase order request when you are required to make purchases on behalf of a faculty or department.

> **Note:** This is all determined by your school's current school policy around the purchase of goods.

Steps

1. Select the menu icon ⠿ and choose **Purchase Orders** in the **Finance** group.
2. Select **Purchase Orders** in the left menu and choose **New Purchase Order**.

The New Purchase Order Request screen displays. You need to complete both sections - the order and the items being purchased.

3. Complete order details.

   a. Selected an option for Requested by.

   b. Enter information for Position.

   c. Select an option for Supplier.

   If a supplier is not listed, select **+New Supplier**. The Suppliers screen displays in Purchase Orders Setup. Add the new supplier, and then select the **Back to Purchase Orders** link above the list of suppliers to continue with the purchase order.

   > **Note:** For schools using Dynamics, suppliers that are set with a Blocked status in Dynamics will sync across to Sentral as 'Archived' to ensure users cannot select the supplier when creating purchase orders.

   d. Select an option for Category.

   e. Specify the accounting period.

   f. Specify the faculty - or leave the default 'None' selected.

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4. Complete item details, and then select **Save as Pending**.

All new orders (when submitted) can be classed as Pending if this has been set up by your school.

Newly created purchase orders will sit in a Pending stage for the creator's review or be sent to the first stage of the approval process for approval review.

> ⓘ **Note:** The Glossary of Terms explains some of the fields in more detail.

The Purchase Order displays and is tracked by a code (e.g. #00093). You can Edit, Add a note or Delete this order.

The Audit Log will display when the requests were lodged and each of the approval stages as it progresses.

Move to Awaiting Approval moves this purchase to the next approval stage created by your school. This will vary from school to school.

> ⓘ **Note:** Your school can set up a minimum amount whereby no approval is required.
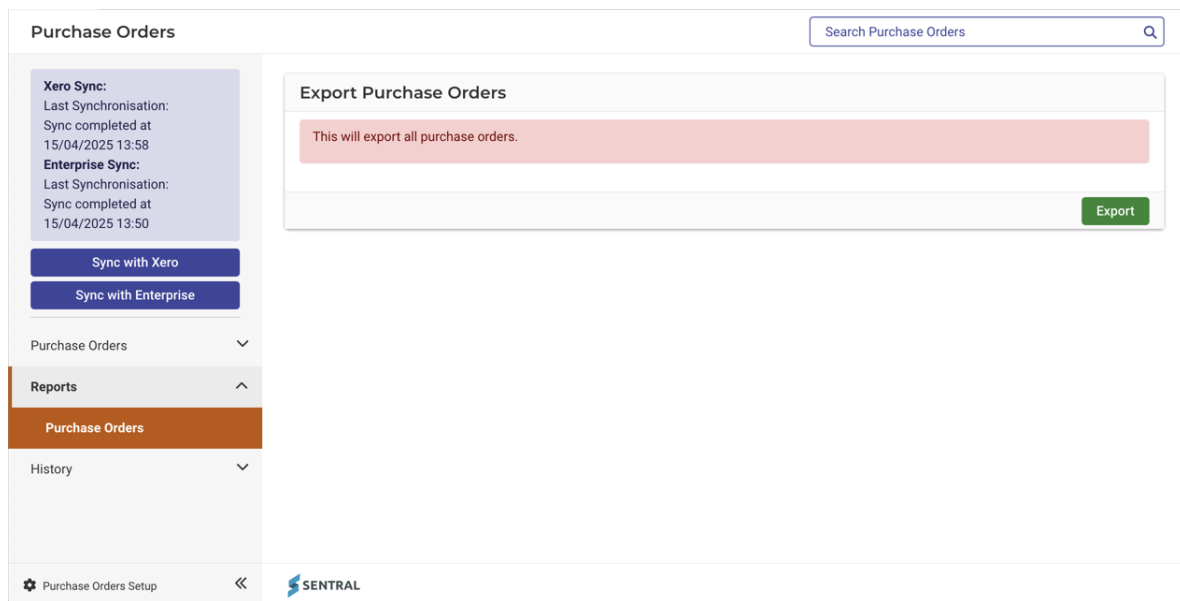
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Reports

Overview

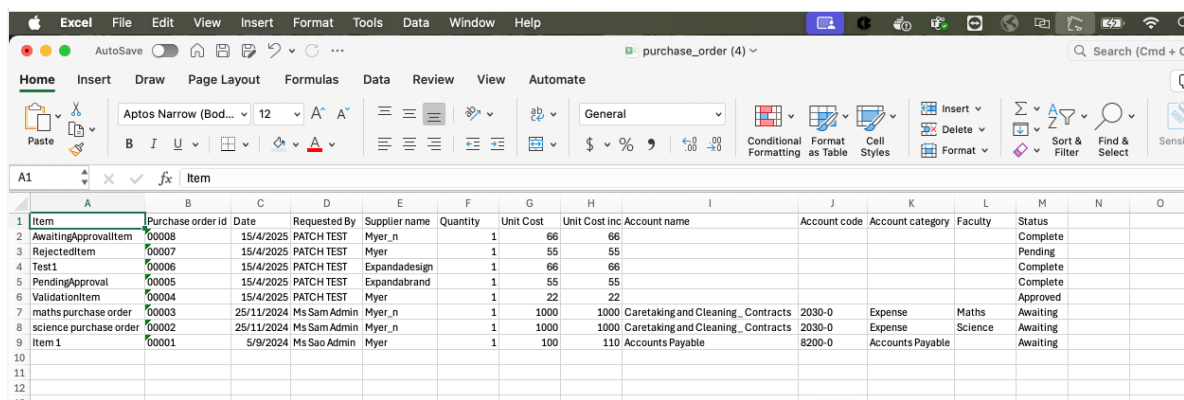Use the information in this topic to run reports to export data for reconciliation.

Steps

1. Select the menu icon ⣿ and choose **Purchase Orders** in the Finance group.
2. Select **Reports** in the left menu and choose **Purchase Orders**.

3. Specify search criteria.
4. Select **Export** to download a CSV file.

   The exported file includes: Item Description, Purchase Order ID, Date, Requested by, Supplier Name, Quantity, Unit Cost, Unit Cost including GST, Account Name, Account Code, Account Category, Faculty, and Status.