

Purchase Orders User Guide

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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.

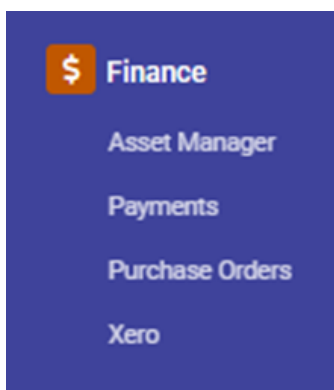
Content

- 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.



Overview

Purchase Orders

Xero Sync:
Last Synchronisation:
Sync failed at 18/01/2025
03:01
[Show Log](#)

Enterprise Sync:
Last Synchronisation:
Sync completed at
17/01/2025 12:52

[Sync with Xero](#)

[Sync with Enterprise](#)

My Purchase Orders Awaiting Approval

Order No.	Requested By	Supplier	Total Amount	Status
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Purchase Orders ^

- New Purchase Order
- Pending Approval
- Validation 1
- Pending 1
- Faculty Approval 2
- Approved Orders 4
- Awaiting Delivery 1
- Completed Orders 3
- Rejected Orders 1

Reports ▾
History ▾

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

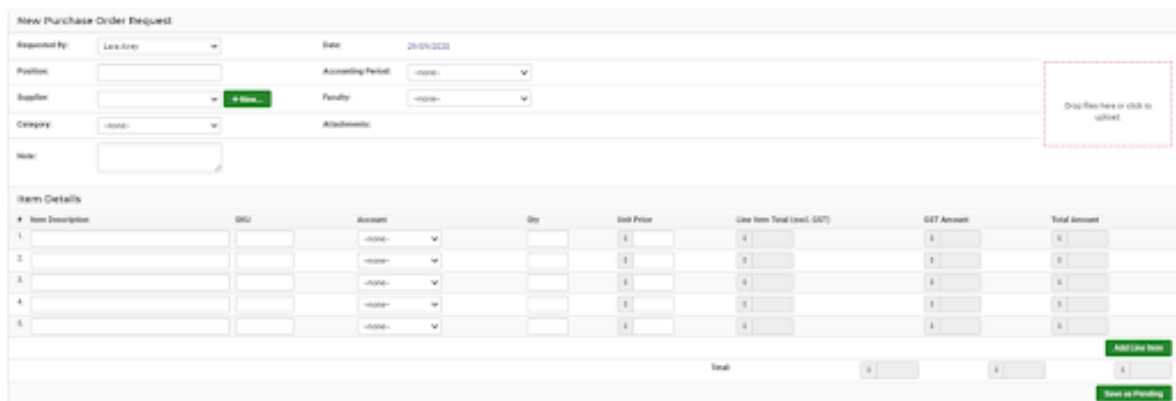
Use the information in this topic to complete a new purchase order request when you are required to make purchases on behalf of a faculty or department.



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.

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.

The screenshot displays the 'Purchase Order #00046' interface. At the top, there is a progress bar with four stages: Pending (checked), Approved, Ordered, and Complete. Below the progress bar, the order details are shown: Requested By: Mrs Gladis Adamson (Pending), Date: 06/10/2020, Position: SAM, Faculty: PDWPE, Supplier: Rebel Sports, Attachments, and Category: Sporting Equipment. A table titled 'Item Details' lists the items: 1. Soccer Ball (Item No. 06/12345, Account: 6010 - Official Account, Qty: 1, Unit Price: \$ 15.00, Extended Price (incl. GST): \$ 15.00, GST Amount: \$ 0.00, Total Amount (incl. GST): \$ 15.00). The total for the order is \$ 15.00.



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.

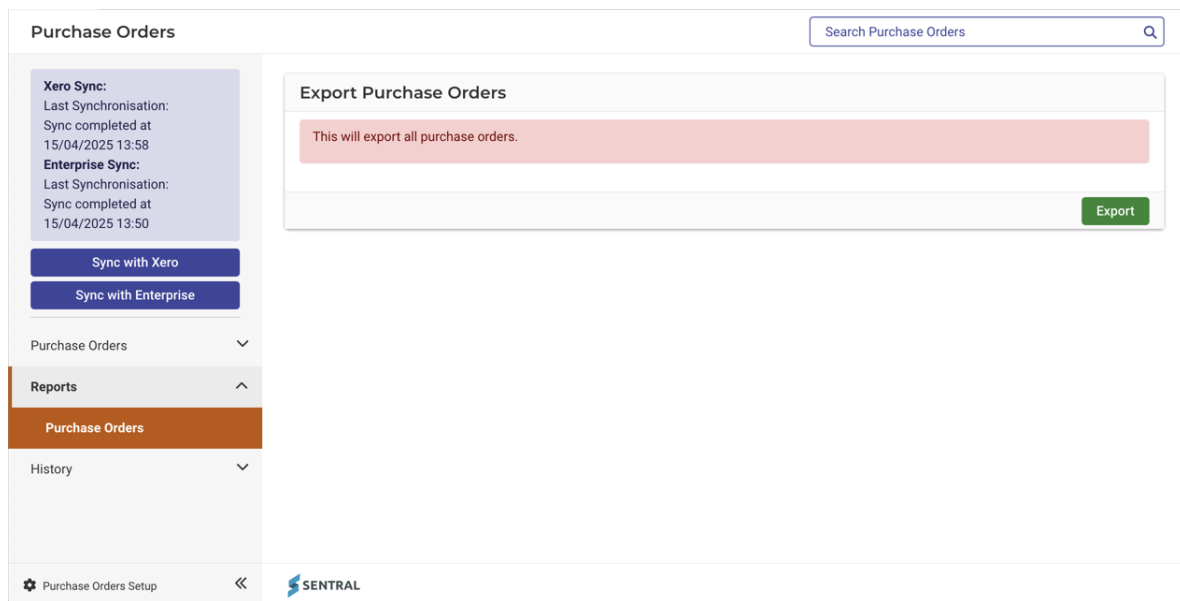
Reports

Overview

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

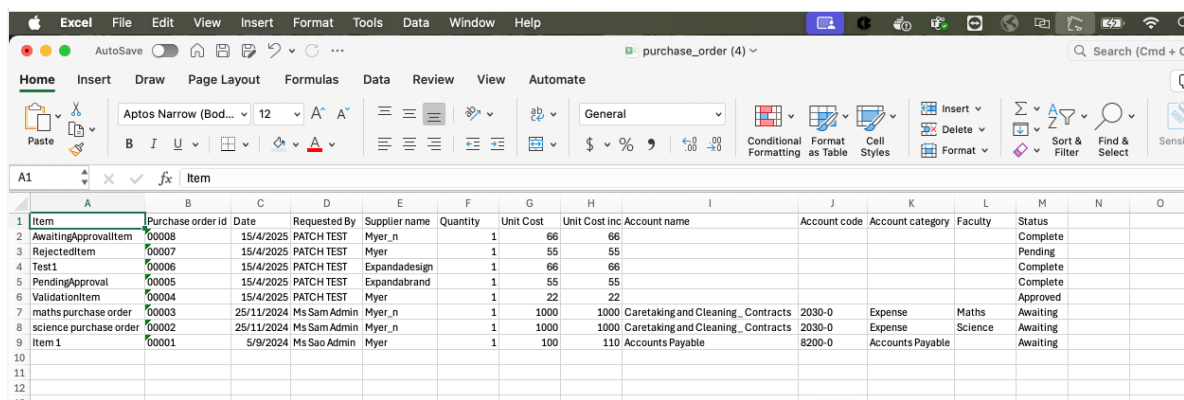
Steps

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.



Item	Purchase order id	Date	Requested By	Supplier name	Quantity	Unit Cost	Unit Cost inc	Account name	Account code	Account category	Faculty	Status
AwaitingApprovalItem	00008	15/4/2025	PATCH TEST	Myer_n	1	66	66					Complete
RejectedItem	00007	15/4/2025	PATCH TEST	Myer	1	55	55					Pending
Test1	00006	15/4/2025	PATCH TEST	Expandadesign	1	66	66					Complete
PendingApproval	00005	15/4/2025	PATCH TEST	Expandabrand	1	55	55					Complete
ValidationItem	00004	15/4/2025	PATCH TEST	Myer	1	22	22					Approved
maths purchase order	00003	25/11/2024	Ms Sam Admin	Myer_n	1	1000	1000	Caretaking and Cleaning_ Contracts	2030-0	Expense	Maths	Awaiting
science purchase order	00002	25/11/2024	Ms Sam Admin	Myer_n	1	1000	1000	Caretaking and Cleaning_ Contracts	2030-0	Expense	Science	Awaiting
Item 1	00001	5/9/2024	Ms Sao Admin	Myer	1	100	110	Accounts Payable	8200-0	Accounts Payable		Awaiting