CREATING A PURCHASE ORDER

1. To create a new PO, go to Financial Management under the grid icon.

Compass A	 	Q Search for	people, activities and more
		Organisation	
	<	Activity Management	> (
•	9am	CompassTix	Welcome back Albust Magic P-12 College
	10am	Daily Organisation	Theoreman
	11am	Group Activities	There is 1 Professional Development Activity requiring your feedback
	12pm	Professional Development Resource Bookings	Please click here to view and respond.
	1pm	Room Changes Seminars	You have I unmarked rolls
	2pm	School Administration	Please click here to view and mark these rolls.
	3pm	Einancial Management	Progress reports are available for you to complete
	100 040	Issue Tracker	99 Yr 1 Generalist O1GEN_01B. Please dick here to write these reports.
	4pm	Payment Plans	

2. Click the 'New Purchase Order' button.

2. Financial Management Dashboard - 2018

Purchase Or	rdering - 2018				
+ New Purch	hase Order				
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3. Select a creditor from the drop down list of your school's creditors. The creditor's details will be automatically populated from the information that has been imported from CASES.

If you have a quote number or other reference number from the Creditor, you can add it in the 'Creditor Ref' field.

Order Details		Creditor Deta	aits		
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4. Choose the Distribution type for the Purchase Order once approved.

If you have information for the creditor you can type this into the 'Notes' field and it will be printed on the PO for the creditor to see. This can include delivery information for the creditor, eg if the order should be shipped to a different contact and/or address from the school's main campus.

Anything you add to the 'Private Notes' field is only viewable within

Compass Purchase Orders. These can be used to include additional notes for the Sub-Program or Business Manager.

4.

Order Details				Creditor Details				
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	emove Line 🔄 Move	Sub-Program	Account		Unit Cost	Unit GST	Total Cost	
+ Add Line 💥 R Description	QQ							

5. Tick the 'OHS Purchase Order Checklist Required' if applicable for your order. You can also select a Campus is required.

Once the Order Details section has been completed, you will need to add Lines to the PO.

A single line in a PO contains one type of item to be purchased (either a single item or a quantity of that same item). EG a PO for a stationary supplier could include one line for blue ball-point pens, one line for black ball-point pens, one line for A4 paper, one line for A3 paper etc.

For each line you can define the sub-program relevant to this purchase (i.e. I am buying coloured paper for 'Visual Art') and the account to which the item will be charged (eg, the coloured paper is a 'Classroom Material').

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When completing an order for Professional Development the exact name of the PD is to be entered in the description. The notes section will also need to be completed confirming all the PD Details and when it was approved.

3.

6. Once the details for a line have been entered click 'Update' to save.

If at any time you wish to change any details of the line, you can do so by double-clicking on the line.

If you are unhappy with any of the changes you have made you can use the "Revert' function to change the PO back to the last time it was saved. Each line is completely independent. Therefore a PO can include purchases for multiple sub-programs and accounts. This allows a single purchase order to be processed to charge multiple sub-programs, allowing funding/ cost to be shared or consolidated across departments within the school.

6.

Order Details					Creditor Deta	ils					
Status:	Draft										
Date:	Wednesday, 28	8 Nov	ember 2018	3	Address:	123 Parkville Road Melbourne					
Creditor:	Abc Pty Ltd			✓ ♣		VIC 300	00				
Creditor Ref:	Quote #452				Phone:	9887765	54				
Distribution:	Email			~	Fax:	98877625					
Notes:	School is close	d for	deliveries 20 Dec 2018 to	o 23 Jan 2019	Email:	accounts	s@abc.com.au				
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7. When you save a PO, it is saved with a 'Draft' status. POs marked as 'Draft' can remain indefinitely and will not be processed. Once you have completed your PO and are ready to submit the PO for approval, select the 'Submit for Approval' button in the top bar of the PO. This will change the PO's status to "Pending Sub-Program (SP) Approval". You will no longer be able to edit the PO.

Once a PO has been submitted it needs to be approved by all relevant subprogram managers and the school'sBusiness Manager before it can be sent off. The creator of a PO will be notified via an alert when their PO has been fully approved.



8. When you see this notification you can click it. Click into the Purchase Order and then you can proceed to forward it to the Creditor via the available options.

8.

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