Synergy Acc2026 - Load Orders, Requisitions and Discounts into Documents

Several pop-up windows let you bring earlier documents into the one you are working on, so you do not key them in again. This guide covers Load Sales Order, Load Purchase Requisition, Generate P/O From P/R and Load Discount.

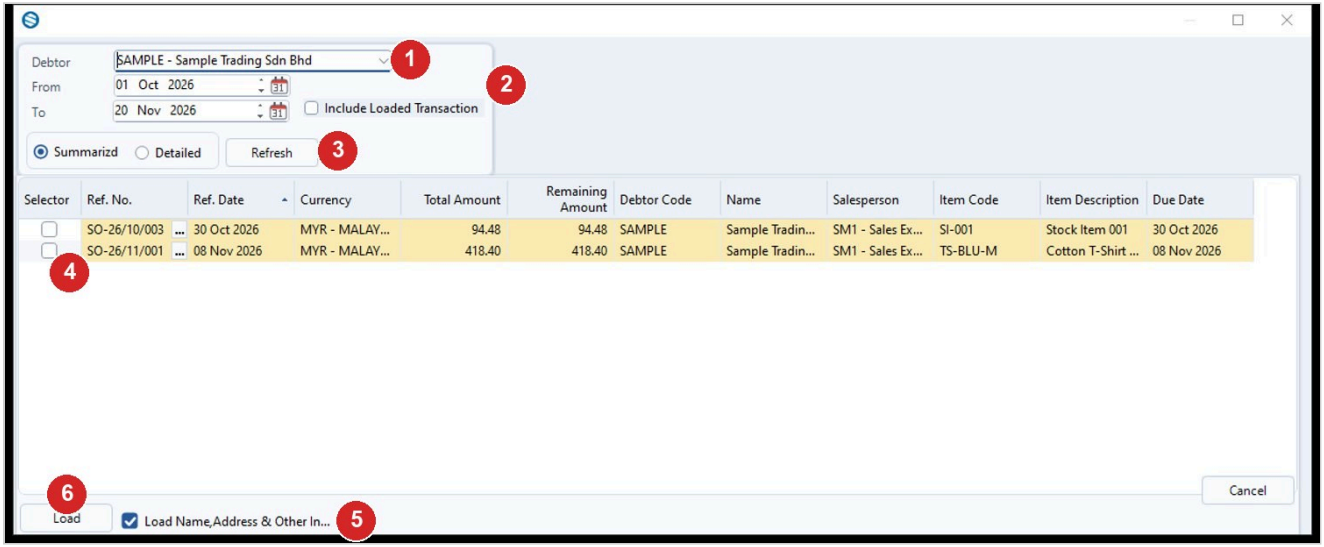
Before you start

- These pop-ups have no menu entry of their own. They open from buttons on the document screens, such as Delivery Order, Sales Order, Sales Invoice, Credit Note / Return Inwards and Invoice Received.

Steps

1. Load a sales order

On a document screen such as Delivery Order, choose Actions > Load Sales Order. Here sales orders of Sample Trading Sdn Bhd since 1 Oct 2026. Click Cancel to close without loading.



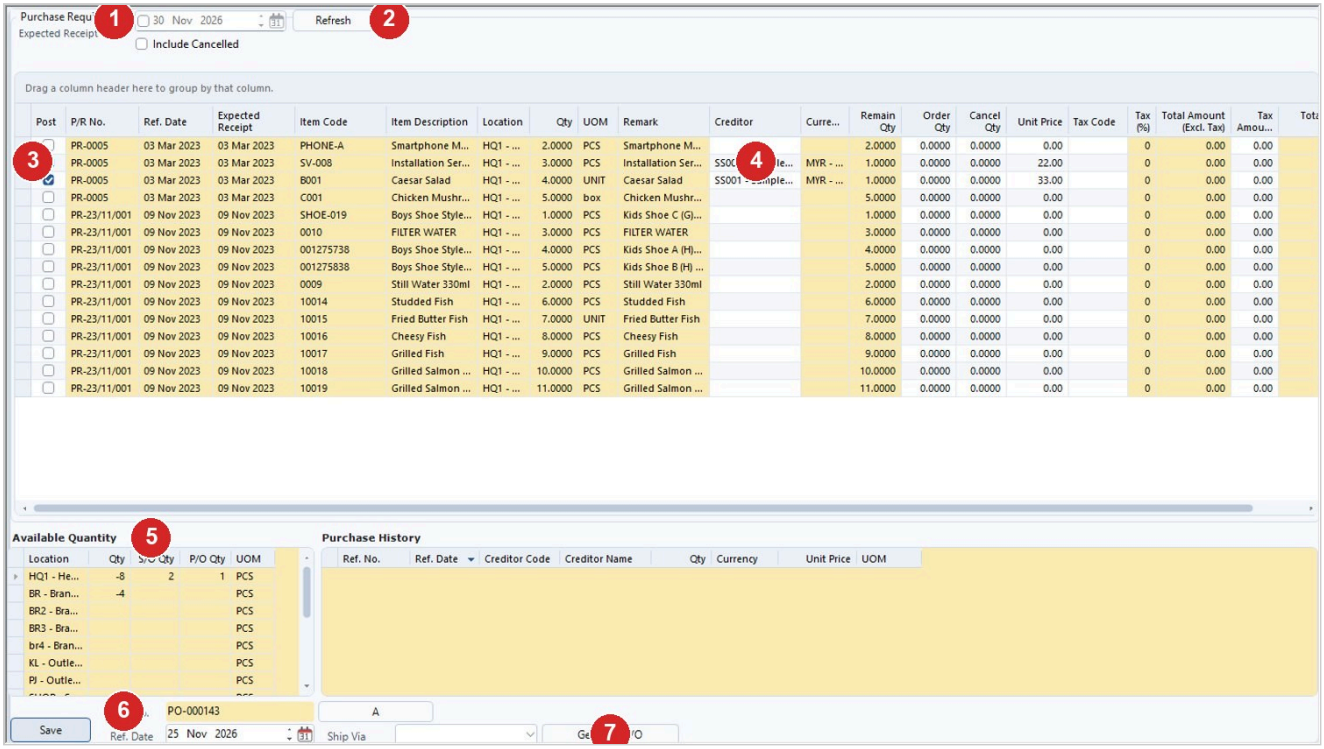
Step	What to do
1	Debtor (shown as Creditor for purchasing).
2	From and To, then Refresh. Include Loaded Transaction also lists orders already loaded.
3	Summarizd ticks whole orders; Detailed ticks single lines.
4	Tick the orders (here SO-26/11/001).
5	For whole orders, Load Name,Address & Other Info brings the customer details too.
6	Click Load.

2. Load purchase requisition lines

Open Load Purchase Requisition from the Sales Order screen. The outstanding requisition lines are listed, and lines already loaded into the current document are left out. Tick the lines you want and click Load. Click Refresh to read the list again.

3. Turn requisitions into purchase orders

Go to Sales and Purchases > Transactions > Purchase Process > Generate P/O From P/R.



Step	What to do
1	Tick Expected Receipt and set a date to list only lines due by then; tick Include Cancelled if needed.
2	Click Refresh.
3	Post: tick each line to order.
4	Creditor and Order Qty for each line. Choosing a creditor also loads the creditor's latest purchase price and tax.
5	Available Quantity and Purchase History help you decide.
6	Ref. No. (must be automatic, A), Ref. Date and Ship Via. Click Save.
7	Click Generate P/O and answer Yes to Do you want to Post the selected P/R?

4. Apply one discount across several invoices

Open Load Discount from Credit Note / Return Inwards, Return Outwards, Invoice Received or Sales Invoice. Choose the Debtor (or Creditor), set From and To under Select Invoice For Discount and click Refresh. Tick the invoices or lines the discount is for. Tick Auto Check Items in same Invoice to tick whole invoices together.

5. Enter the discount and load it

Check Invoice Total, then type either the Amount or the Percent %. Each one updates the other. Click Load to send the discount back, or Cancel to close without loading.

Tips

- Orders of different customers cannot be mixed. Only the first customer's orders are loaded, one customer at a time.
- Turn on Include Loaded Transaction to see orders that were already loaded into the current document.
- If another user changes requisitions, click Refresh to read the list again.
- A quantity above the remaining quantity of a requisition line needs your confirmation when you type an order quantity. A cancel quantity that pushes the total over the remaining quantity is always refused.

Common problems

No item to load

The list is empty. Check the debtor and the dates, and click Refresh.

An order is missing from the list

It may already be loaded in this document, so turn on Include Loaded Transaction, or it falls outside the date range.

Creditor is required for all item to post, or Order Qty is required for all item to post

A ticked line has no creditor or a zero quantity. Fix it and click Save.

Please save the changes first, or Please select Auto Reference No.

Click Save before posting, and set the reference number to automatic mode.

System failed to post Purchase Order for Creditor

That creditor's order could not be created. Other creditors' orders may still be done.

Discount Item (Non-Stock) is not defined in System Settings

The default discount item is not set. Choose it in the stock and purchase system settings first.

Discount Amount is required, or Tick at least one invoice

Enter an amount or percent, and tick at least one invoice.

Draft: written from Synergy's support notes (checked by AI against the program), not yet reviewed by Synergy staff.

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