Synergy Web - Purchase Requisitions and Generate P/O From P/R

A Purchase Requisition lists what must be bought, by item and quantity, with no supplier or price. Generate P/O From P/R then turns the approved lines into purchase orders. This guide shows both pages.

Before you start

- Sign in to Synergy Web Access as a user who may use Purchase Requisition and Generate P/O From P/R (under the Purchases tab).
- Add permission for Purchase Requisition. Generating purchase orders needs its own permission, or the Generate P/O button is hidden.

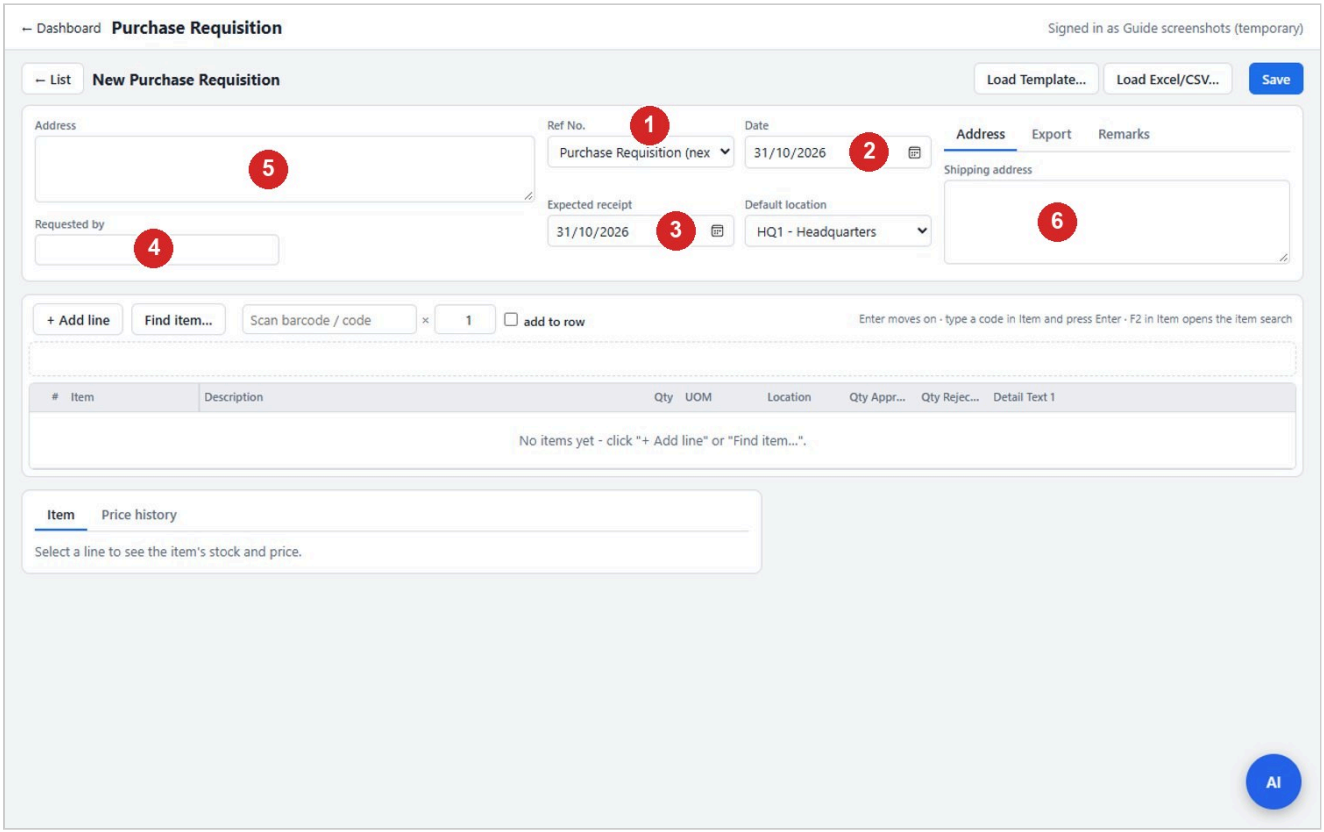
Steps

1. Start a requisition

On the dashboard, open the Purchases tab and click Purchase Requisition. The list works as on the other purchase pages: search, then click New.

2. Fill in the header

Fill in the header boxes. There is no creditor, price, tax or currency on a requisition.



Step	What to do
1	Choose the Ref No. numbering.
2	Check the Date.

Step	What to do
3	Set the Expected receipt date and the Default location.
4	Type who asked in Requested by.
5	Type the Address if it is needed.
6	Type the Shipping address if it is needed.

3. Add the items

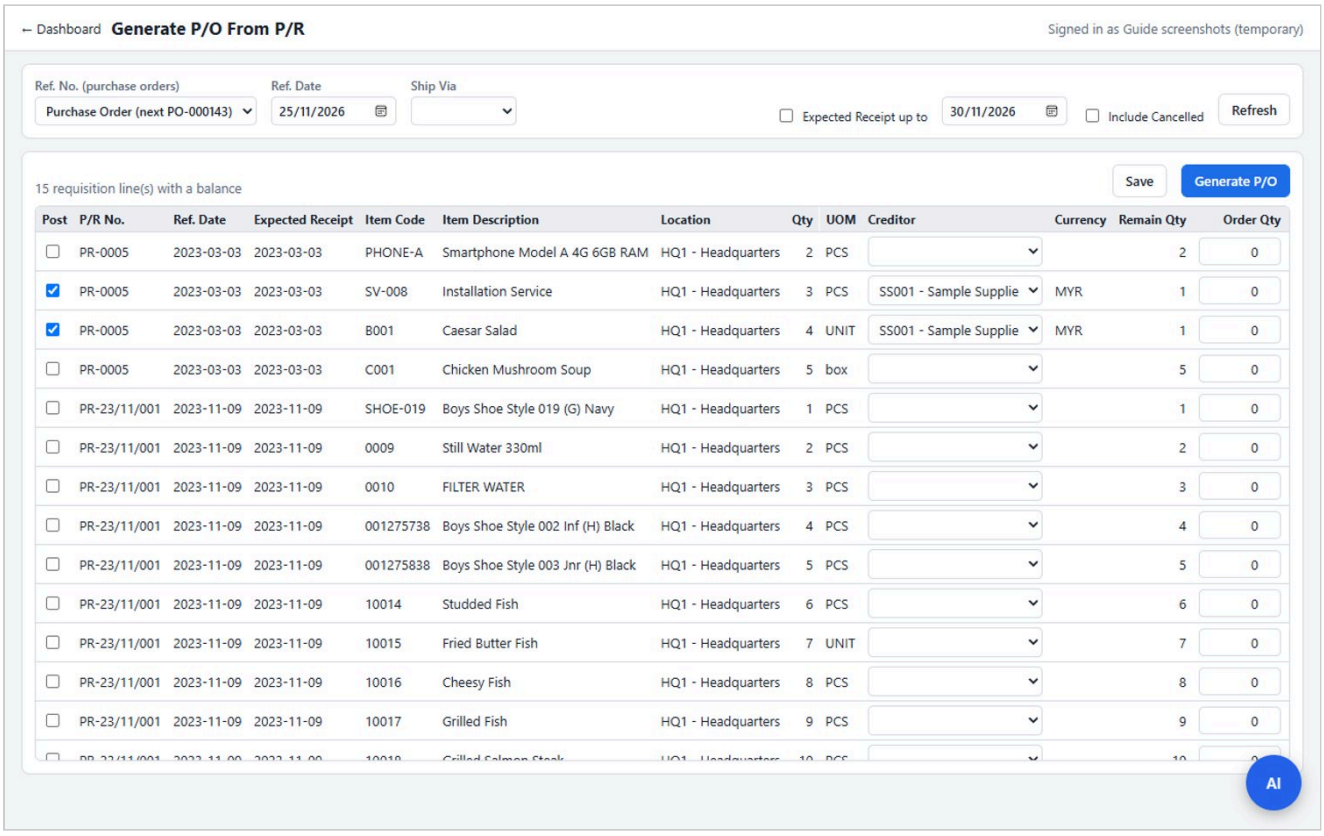
Use + Add line, Find item or scan a barcode, then type the Qty and UOM of each line. Load Template and Load Excel/CSV copy lines from another document or a file. Qty Approved and Qty Rejected are filled in later by Generate P/O From P/R.

4. Save

Click Save. The requisition now waits to be approved and turned into purchase orders.

5. Open Generate P/O From P/R

On the Purchases tab click Generate P/O From P/R. The page lists the requisition lines that still have a balance. The count above the list tells you how many.



6. Narrow the list

Tick Expected Receipt up to and choose a date to see only lines due by then. Tick Include Cancelled to list cancelled lines too, then click Refresh.

7. Approve each line

Choose the Creditor for the line. The supplier's price and purchase tax are filled in, and you can change the Unit Price and the Tax Code. Type the Order Qty to order, and the Cancel Qty for what

you will not order. Order Qty plus Cancel Qty cannot be more than the Remain Qty. Total (Excl. Tax), Tax Amount and Total (Incl. Tax) follow your figures.

8. Tick and save

Tick Post on every line you want ordered. Click Save to keep your changes. The page says Purchase Requisition Information has been saved.

9. Generate the purchase orders

Choose the Ref. No. numbering for the purchase orders, the Ref. Date and the Ship Via, then click Generate P/O and confirm Do you want to Post the selected P/R? The page makes one purchase order for each supplier and location, and lists the new numbers.

Tips

- Save your changes before you click Generate P/O, or the page says Please save the changes first.
- Lines with sizes or colours cannot be changed on this page. Use the Synergy desktop for them.
- The new purchase orders open on the Purchase Order page, where they are received and billed as in the Purchase Orders guide.

Common problems

Please select Auto Reference No.

Choose a numbering in Ref. No. (purchase orders) before you click Generate P/O.

[Ship Via] is required.

Choose a Ship Via at the top of the page.

[Order Qty + Cancel Qty] cannot exceed [Remain Qty]

Lower the Order Qty or the Cancel Qty so that together they are not more than the Remain Qty.

No requisition lines with a balance.

Every line is already ordered or cancelled. Tick Include Cancelled, or remove the Expected Receipt up to date, and click Refresh.

You do not have access to this screen.

Your Synergy user has no permission for it. Ask your administrator.

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

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