Synergy Acc2026 - Enter Customer Details and MyInvois Request on a POS Sale

The Customer Information window collects the customer's name, address, contact numbers and tax details for the current POS sale, so they can appear on the receipt or invoice. It also lets you request an e-invoice (MyInvois) for the sale.

Before you start

- You need an internet connection to verify a tax number or fetch details from a QR code.
- For a MyInvois request, an e-mail address for the customer is required.

Steps

1. Open Customer Information

On the POS sale screen or the payment screen, open Customer Information for the current sale.

2. Enter the name

Type the Name. To look for a past customer, fill in at least one of name, telephone, address, tax id, e-mail, GST number or registration number first, then click the search button in the Name box.

3. Enter the contact details

Fill in Billing Address, City, Postcode, State, Country, Billing Phone and E-mail. State and Country are links: click them to open the list and add a new one. Choosing a country limits the states.

4. Enter the tax details

Enter the Tax Id No. and the identity or registration number, and choose the identity type from the list.

5. Verify the registration number

Click the button in the registration number box and choose Select From MyInvois List or Verify Online. Verify Online checks the tax number with the tax authority.

6. Or fetch from a QR code

Scan or type the QR Code from the customer's MyTax profile and click Fetch Info. Answer Yes to 'Do you want to fetch MyTax Profile Info?'. Pressing F1 in the QR Code box reads the QR code from a picture file.

7. Request an e-invoice

Tick Request MyInvois if the sale is to be submitted to MyInvois. For a member sale you can also fill in MyInvois Address and MyInvois Phone if they differ.

8. Save

Click OK (on a member sale the button reads Save), or press the function key shown beside it. CANCEL closes without saving.

Tips

- When Request MyInvois is ticked, the phone, e-mail, tax id, name, registration number, address, postcode and city boxes are marked Required.
- For a member sale, the member's record is updated with these details when you click OK.
- The e-mail box has a Send Online Form button.

Common problems

'Email is required.'

Request MyInvois is ticked, so the e-mail must be filled in before you can click OK.

'Please Name/Address/Tel to search.'

Fill in at least one of the search details before clicking the search button.

'Invalid BRN Type/TIN/Reg. No'

The tax authority did not accept the identity type, tax number and registration number together. Check all three.

'Failed Retrieving State' after Fetch Info.

The state or country from the MyTax profile could not be found or added. Choose the State and Country yourself.

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