Synergy Acc2026 - Choose Automatic or Manual Reference Numbers on a Document

On document screens, a small button next to the reference number box shows whether the number is automatic or typed by you. This guide shows how to read it and how to pick a numbering rule or type your own number.

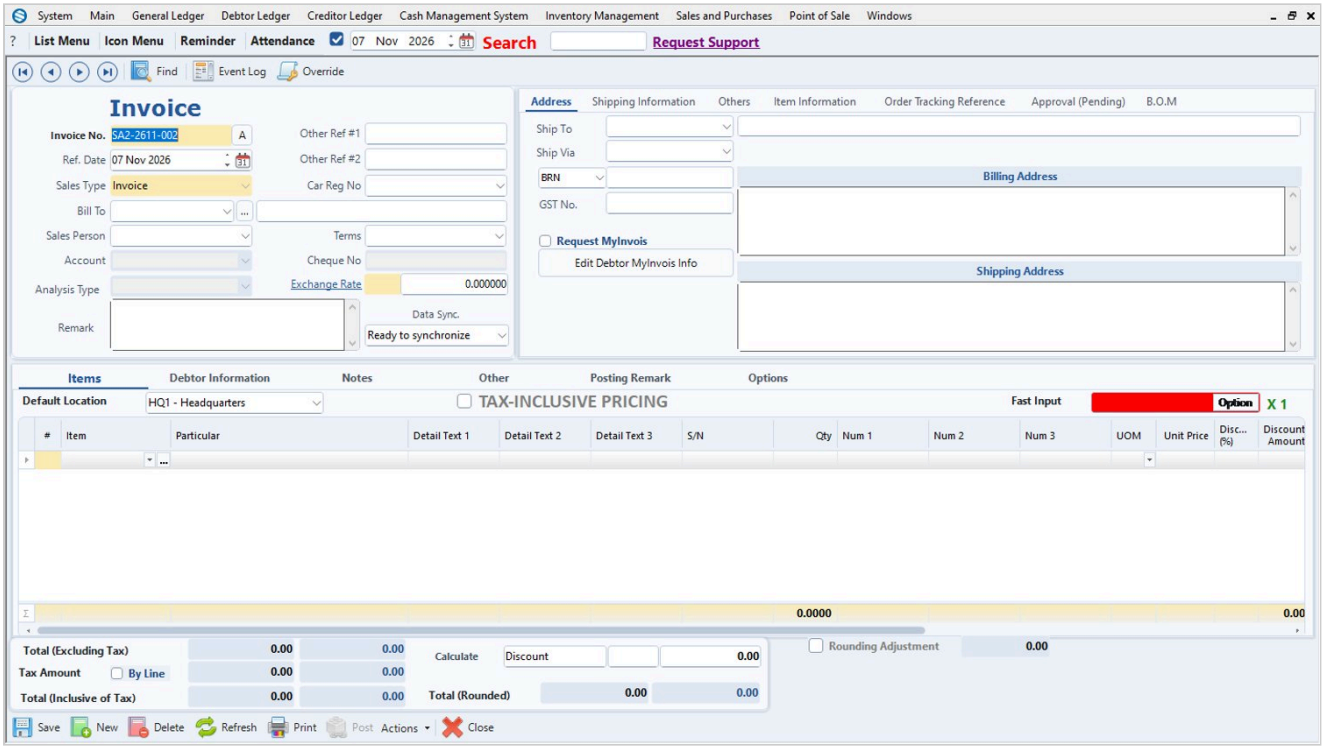
Before you start

- A numbering rule must already be set up for the type of document (see the guide Set Up Automatic Reference Numbers).

Steps

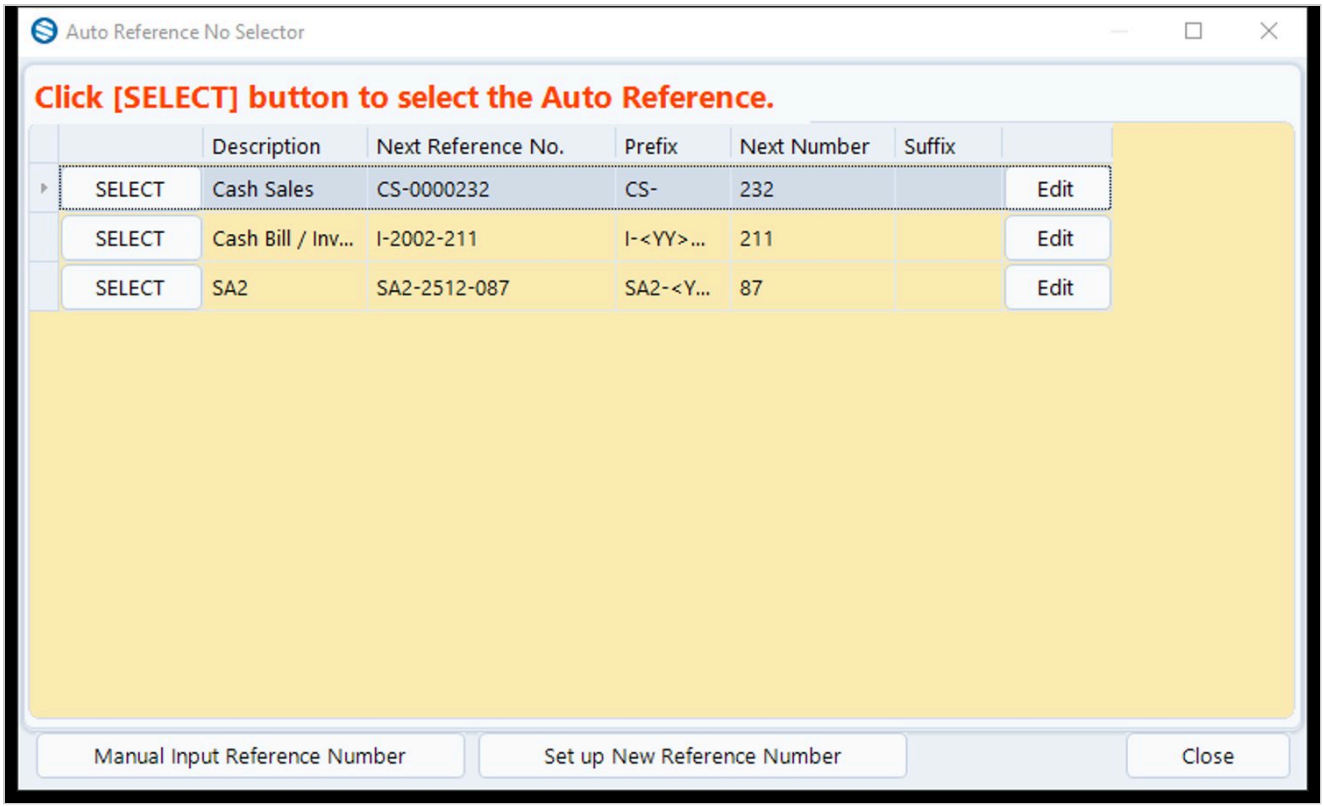
1. Look at the button

Find the small button next to the reference number box. A means the number is automatic. The box is read-only and shows the next number. M means the number is manual and you type it yourself.



2. Open the selector

Click the button. The Auto Reference No Selector opens and lists the active rules for this type of document, with their prefix, suffix and next number.



3. Pick a rule

Click the select button in the row of the rule you want, or double-click the row, or highlight it and press Enter.

4. Or type your own number

Click Manual Input Reference Number to type the reference number by hand.

5. Need a new rule?

Click Set up New Reference Number to open the numbering set-up and create one. The list is refreshed afterwards. This only works when the document screen has set-up linked to it.

6. Leave without choosing

Click Close. Nothing changes.

Tips

- Only rules marked Active, and only rules for this type of document, are listed.
- If the rule uses the year or month in its prefix, the program works out the latest number for the current period when you select it.

Common problems

The list is empty.

No active rule exists for this document type. Use Set up New Reference Number, or use Manual Input Reference Number.

There are no set-up buttons.

The document screen did not provide set-up. Open the Reference Number screen from the menu instead.

Not allowed to change Auto Reference No.

The document has locked its numbering, for example because it already has a saved number.

I cannot type in the reference number box.

It is on A. Click the button and choose Manual Input Reference Number.

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