Synergy Acc2026 - Debtors and Creditors: Set Up a Record, Account Groups and Billing Information

This guide shows how to create a debtor (customer) or creditor (supplier) record, set up the account group it needs, and update the billing and e-invoice (MyInvois) details for a customer.

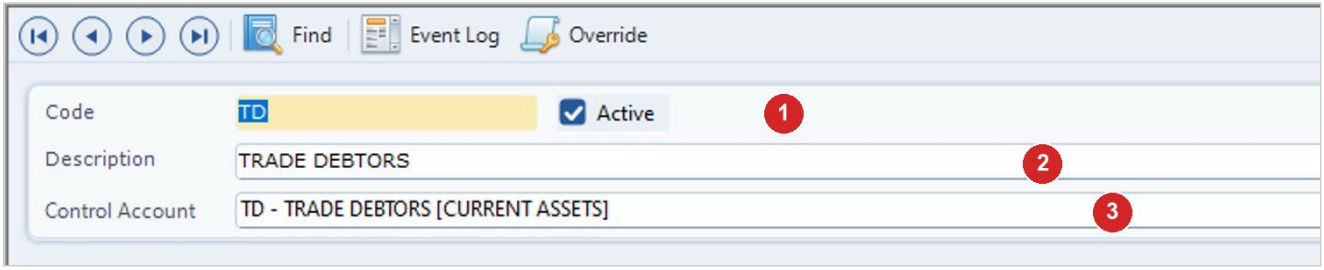
Before you start

- Debtor: Debtor Ledger > Masterfile > Debtors. Creditor: Creditor Ledger > Masterfile > Creditor.
- Account groups: Debtor Ledger > Masterfile > Sub-Masterfile > Debtor Account Group, or Creditor Ledger > Masterfile > Sub-Masterfile > Creditor Account Group.
- Have the code, name, credit term, currency and address ready. For e-invoices, have the customer's TIN and registration number ready.

Steps

1. Create the account group first (if you do not have one)

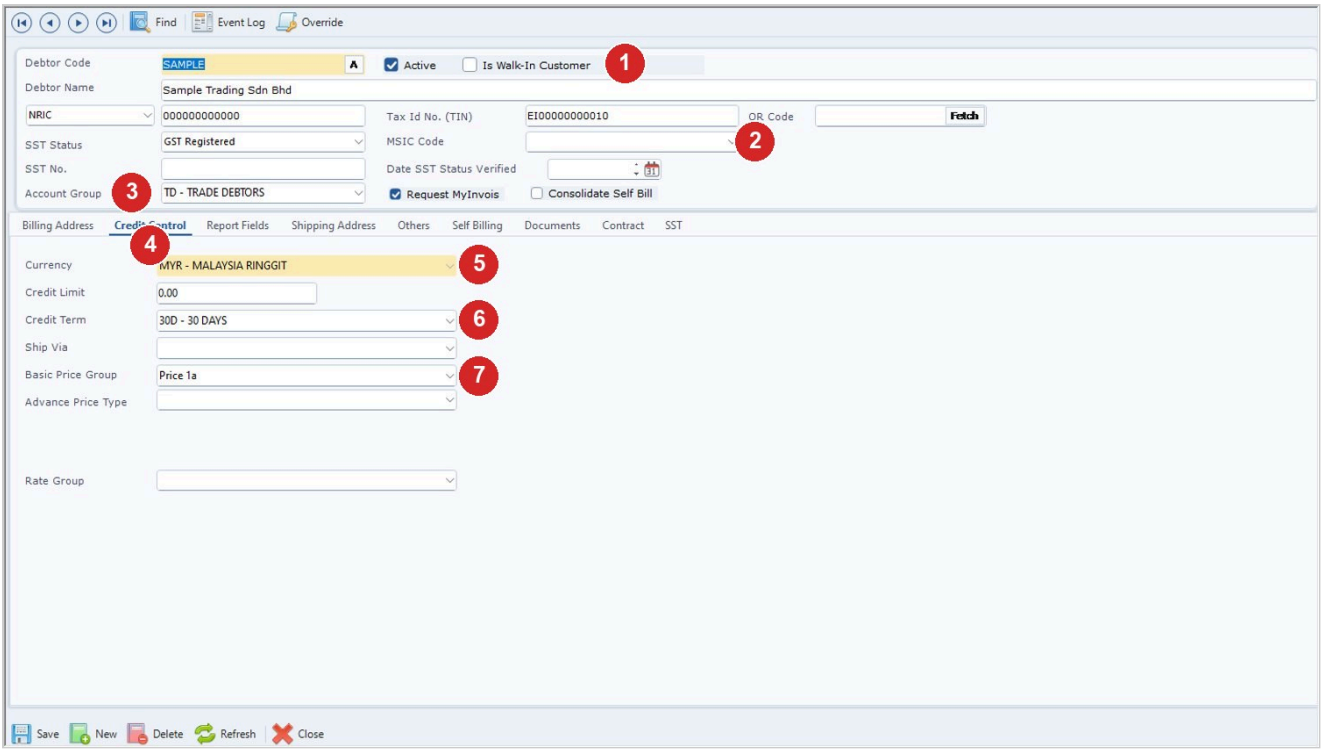
Go to Debtor Ledger > Masterfile > Sub-Masterfile > Debtor Account Group (Creditor Ledger has its own). Save.



Step	What to do
1	Code (here TD). Leave Active ticked.
2	Description.
3	Control Account (here TD - TRADE DEBTORS).

2. Open the debtor or creditor screen and enter the code and name

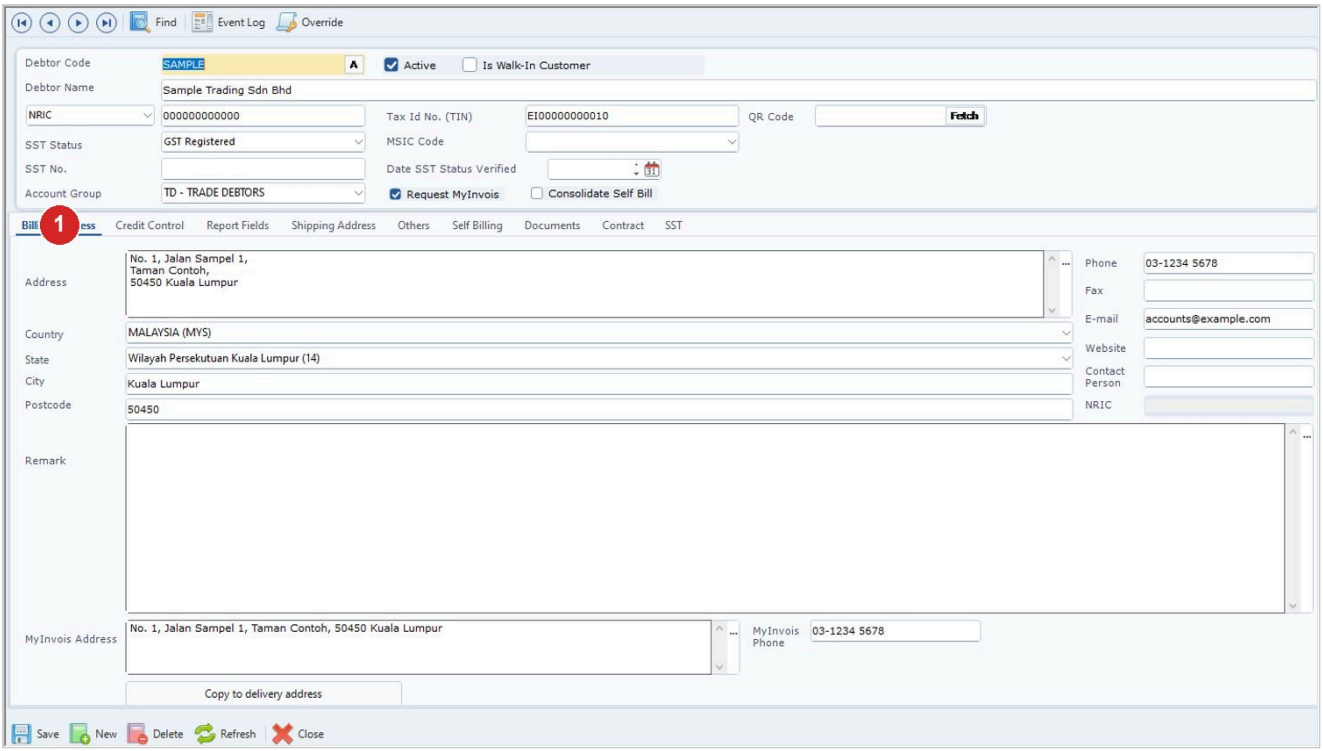
Enter the Debtor Code (or Creditor Code) and the name. Both are required. The button next to the code field can generate a code. Choose the Account Group, which is also required.



Step	What to do
1	Debtor Code (A = generate a code) and Debtor Name; Active, Is Walk-In Customer.
2	Registration type and number, Tax Id No. (TIN), MSIC Code and SST details for e-invoices.
3	Account Group (here TD - TRADE DEBTORS); Request MyInvois if the customer always needs e-invoices.
4	Credit Control tab.
5	Currency (required).
6	Credit Limit and Credit Term (required).
7	Basic Price Group and Advance Price Type for this customer's prices.

3. Fill in the Billing Address tab

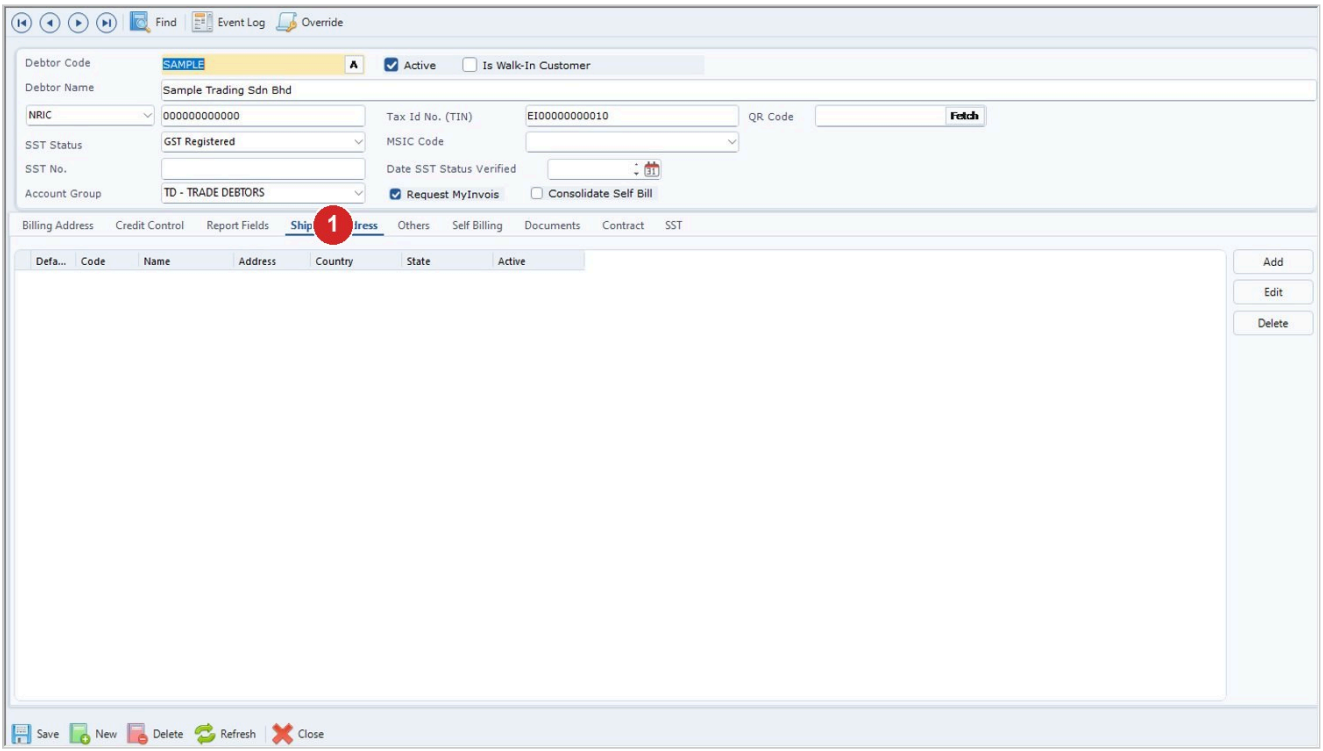
Use the Billing Address tab.



Step	What to do
1	Billing Address tab: address, country, state, city, postcode, phone, e-mail and contact.

4. Manage the Shipping Address tab

The first address you add becomes the default. After any change, save the record.



Step	What to do
1	Shipping Address tab: the first address you add becomes the default.

5. Complete the other tabs and save

Fill in Report Fields, Others, Self Billing, Documents, Contract or SST only if you need them. Then save the record.

6. Update a customer's billing and e-invoice details on a document

On a sales document, open the screen from the Tax Info link (Sales Invoice (DL)) or the Edit Debtor MyInvois Info button. Check the Code and Name, then correct Billing Address, Postcode, City, State, Country, E-mail and Billing Phone.

7. Request an e-invoice and enter the tax details

Tick Request E-Invoice if the customer needs one, then fill in the Tax Id No. (TIN), the registration type and number, and the MyInvois Address and MyInvois Phone. Use Verify Online to check the registration type, TIN and registration number together.

8. Save the information

Click Save (it reads OK in some cases, such as a walk-in customer). For a walk-in customer the details are kept with that transaction only, so you must still click Save in the transaction screen.

Tips

- The Country and State labels are links. Click one to add a missing country or state without leaving the screen.
- Adding, editing or deleting a shipping address marks the record as changed, so save afterwards.
- Only one shipping address can be the default.
- On Update Information, Fetch Info next to QR Code fetches the customer's MyTax profile. Choosing Yes also ticks Request E-Invoice and fills in the TIN, registration details, State, Country, city and postcode.
- The Control Account browse button on the account group only lists active general ledger accounts.

Common problems

I cannot save the debtor or creditor.

Check the required fields: Code, Name, Account Group, Credit Term and Currency. If you use Self Billing, complete the Self Billing tab too.

The message New Code [...] generated. Please try and save again. appears.

The code you used was taken, so a new one was generated. Save again.

The wrong states are listed.

Change the Country first. The State list follows it.

The message More than 1 Shipping Address set as default appears.

Make sure only one shipping address is the default.

Save does nothing on Update Information.

Check that Billing Phone is valid and that a registration type is chosen.

Verify Online fails.

The registration type, TIN and registration number must match what is registered with MyInvois.

The account group cannot be saved.

Both Code and Description must be filled in.

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

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