Synergy Acc2026 - Sales Documents: Proforma, Ship Via, DO from Invoice and Credit Term

Small sales tasks are hidden in different menus: a proforma invoice, Ship Via codes, a DO printed from an invoice, one invoice for several DOs, copying a DO and the default credit term. This guide gives each answer in one place. For the full flow from quotation to invoice, read "Synergy Acc2026 - Sales Documents: From Quotation to Delivery Order to Invoice".

Before you start

- Know which document you are working on: quotation, sales order, delivery order (DO) or invoice.
- For credit terms, know that the invoice term comes from the debtor (customer) record, not from the invoice.

Steps

1. Make a proforma invoice

Create it as a Sales Order.

2. Add Ship Via codes

Go to Main > Shared Masterfile > Ship Via and add the codes. The Marking option is only a note for your own reference.

3. Fill in company details, a salesperson or a credit term

For company details, go to Main > Shared Masterfile > Company Information, fill them in and click Save. For a new salesperson, click the blue SA Sales Person button. For a new credit term, click the blue Credit Term button and choose New.

4. Set Credit as the default term on invoices

The invoice term follows the debtor. In the debtor setup, the default term for a New Debtor can be set to Credit. Existing debtors keep their own term, so change them under Credit Control > Credit Terms.

5. Print a DO from an invoice

Open the invoice and click Print. Change the report file to the DO format and click Preview. This only changes the printout. No DO is recorded, and the number stays the invoice number.

6. Make one invoice for several DOs

Open Sales Invoice, choose Action > Load Delivery Order and select every DO that should be on the invoice. Save the invoice. Remain Qty reduces on each DO you selected.

7. Copy a DO to a new DO

Open the existing DO and choose Actions > Save Grid Data. In a new DO choose Actions > Load Excel/Data File, choose XML File and click Load.

8. Remove the signature or company text on a purchase order

Go to System Setting > Terms and Conditions > Purchase Order, delete the company text and click Save. For the screen in detail, read "Synergy Acc2026 - Document Settings: Terms and Conditions Printed on Each Document".

9. Send a document by WhatsApp

WhatsApp sending must be set up first. It sends a Google Drive link, not the file itself. Read "Synergy Acc2026 - E-mail, WhatsApp and SMS for Documents" for the setup.

Tips

- Convert To Sales Invoice from one DO only reduces that one DO. Use Action > Load Delivery Order when the invoice covers several DOs.
- Quotation rows cannot be loaded into an invoice. On a Delivery Order, the Actions menu has Copy From Quotation.
- One invoice can have two credit notes.
- A printed DO from an invoice uses the invoice number. If you need a real DO with its own number, create the Delivery Order document.
- The title printed on a document, such as Proforma, is set in the print layout. Customer-specific item names are not supported, so change the description on the invoice each time.

Common problems

The invoice still shows the wrong term (for example Cash instead of Credit or Transfer).

The term comes from the debtor. Open the debtor and check its credit term, and create the term with the blue Credit Term button if it does not exist yet.

A DO printed from an invoice does not appear in the list of DOs.

This is expected. Printing in DO format does not record a DO.

Convert To Sales Invoice only reduced one DO.

Use Action > Load Delivery Order in Sales Invoice and select all the DOs.

WhatsApp sending gives an error.

WhatsApp sending has to be configured before it works. Contact Synergy to set it up.

You need to invoice rental income, or something not listed here.

This guide does not cover rental income. Contact Synergy and have a screenshot of the screen ready.

Load Delivery Order does not work as expected, or you see a duplicate invoice number.

Contact Synergy. Have the DO numbers and a screenshot of the Load Delivery Order list ready, or a screenshot of both documents for a duplicate number.

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