Synergy Acc2026 - Selling and Using a Visit Package

This guide is for a package of visits or treatments, for example a 5-visit package, where the customer pays once and uses the visits later. Packages are sold with the Treatment Package function at the point of sale, and each visit is ticked off with Treatment Usage. This guide covers using the visits and checking the balance. The exact steps for selling the package itself are not covered here, so contact Synergy for them.

Before you start

- The customer must be a member, because packages are kept under the member.
- Know which salesperson to record. Treatment Usage needs one.
- Receipt numbering for treatment usage must be set up. If it is not, the list and the OK button on Treatment Usage stay greyed out.

Steps

1. Sell the package with the Treatment Package function

Visit packages are sold at the point of sale with the Treatment Package function. The step-by-step for selling the package is not covered in this guide. Contact Synergy and ask for the POS Treatment Package guide. Have ready the name of the package, the number of visits and the price.

2. Open Treatment Usage for each visit

When the customer comes for a visit, go to the POS sale screen and use its Treatment Usage function.

3. Find the member

Enter the Member ID / Name. If several members match, a search window opens so you can choose one. When the member is found, the Member Name shows and the member's packages are listed with the balance left.

4. Choose the salesperson

Choose the Salesperson. This is required. If the package list looks out of date, click Refresh.

5. Set how many visits are used now

For each package in the list, use the plus and minus buttons to set the quantity used now, for example 1 for one visit. The quantity cannot go above the balance.

6. Check the receipt number and click OK

Check the Receipt No., which is normally given automatically, and click OK. A usage slip prints after a successful save. Cancel (or ESC) closes the screen without saving.

7. Check what a member has used

Go to Point of Sale > Query > Treatment Usage. Set Date From/To (both start as today, so widen them to see earlier visits), pick a Location or leave it open, and choose a Member or leave it empty for all members. Click List. The grid shows the quantity subscribed, the quantity used and the balance.

Tips

- The quantity used can never be more than the balance left on the package.
- In the usage query, Shift No. 0 means all shifts, and the Counter No. range must include the counter that was used.
- For deposit bookings and closing a booking, read the guide "Synergy Acc2026 - Bookings, Deposits and Visit Packages".

Common problems

The message says No record listed.

There is nothing to save. Click Refresh to reload the member's package list.

The message says No itms selected.

All used quantities are zero. Use the plus button to set the visits used now.

The message says Member is required, Salesperson is required, or Member not found.

Fill in the member and the salesperson. For Member not found, check the spelling or code and try again.

The message says Auto Ref. not set up, and OK is greyed out.

Receipt numbering for treatment usage is not set up yet. Contact Synergy to have it set up.

The usage query shows no results.

The dates start as today only. Widen Date From/To, and check the Shift No. and the Counter No. range.

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