Synergy Web - Sales Orders, Delivery Orders, Sales Invoices and Credit Notes

The Sales Order, Delivery Order, Sales Invoice and Credit Note / Return Inwards pages all work like the Quotation page, with a few extras for each document. This guide shows the common steps and what is special about each one.

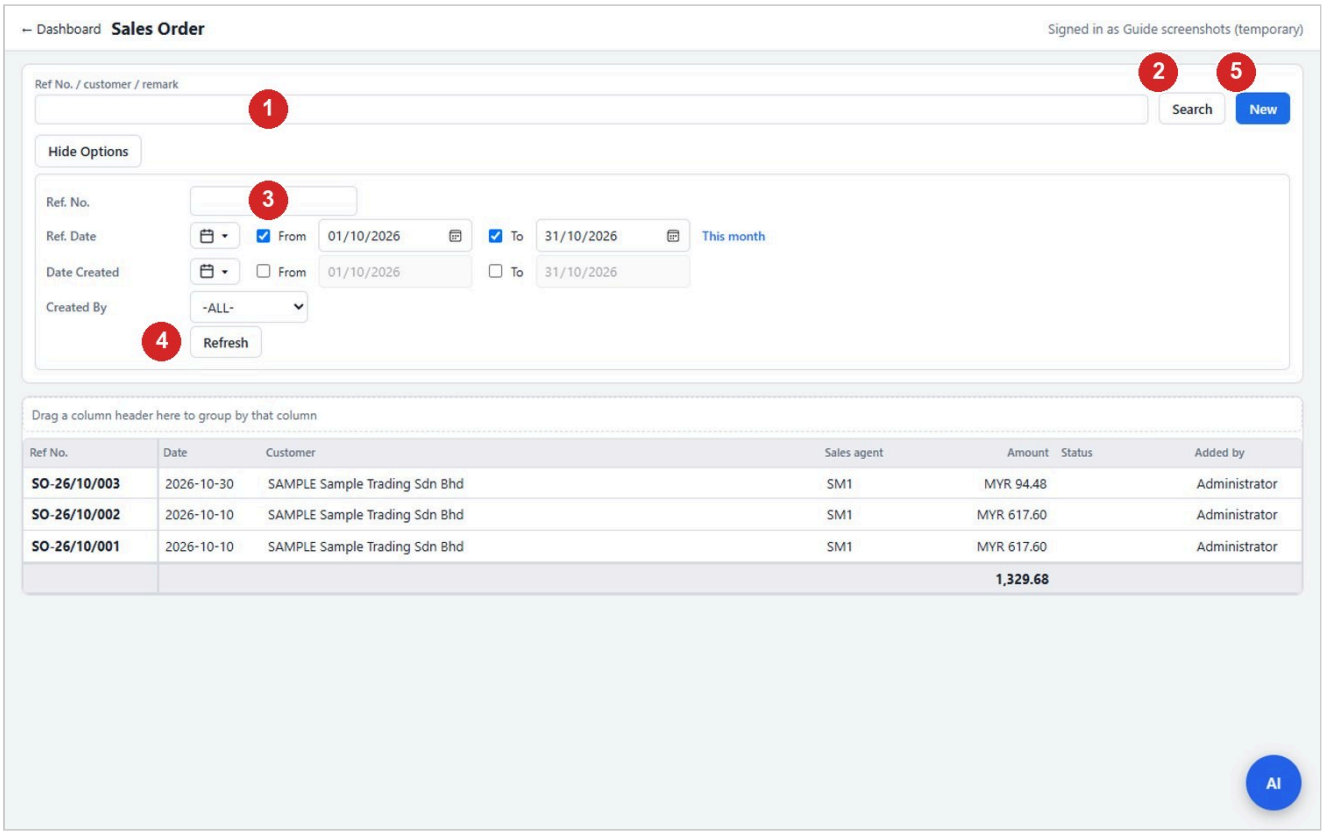
Before you start

- Sign in to Synergy Web Access as a user who may use the page you need (under the Sales tab).
- Add and edit permissions for that document in Synergy. Posting, approving and deleting need their own permissions.

Steps

1. Open the page

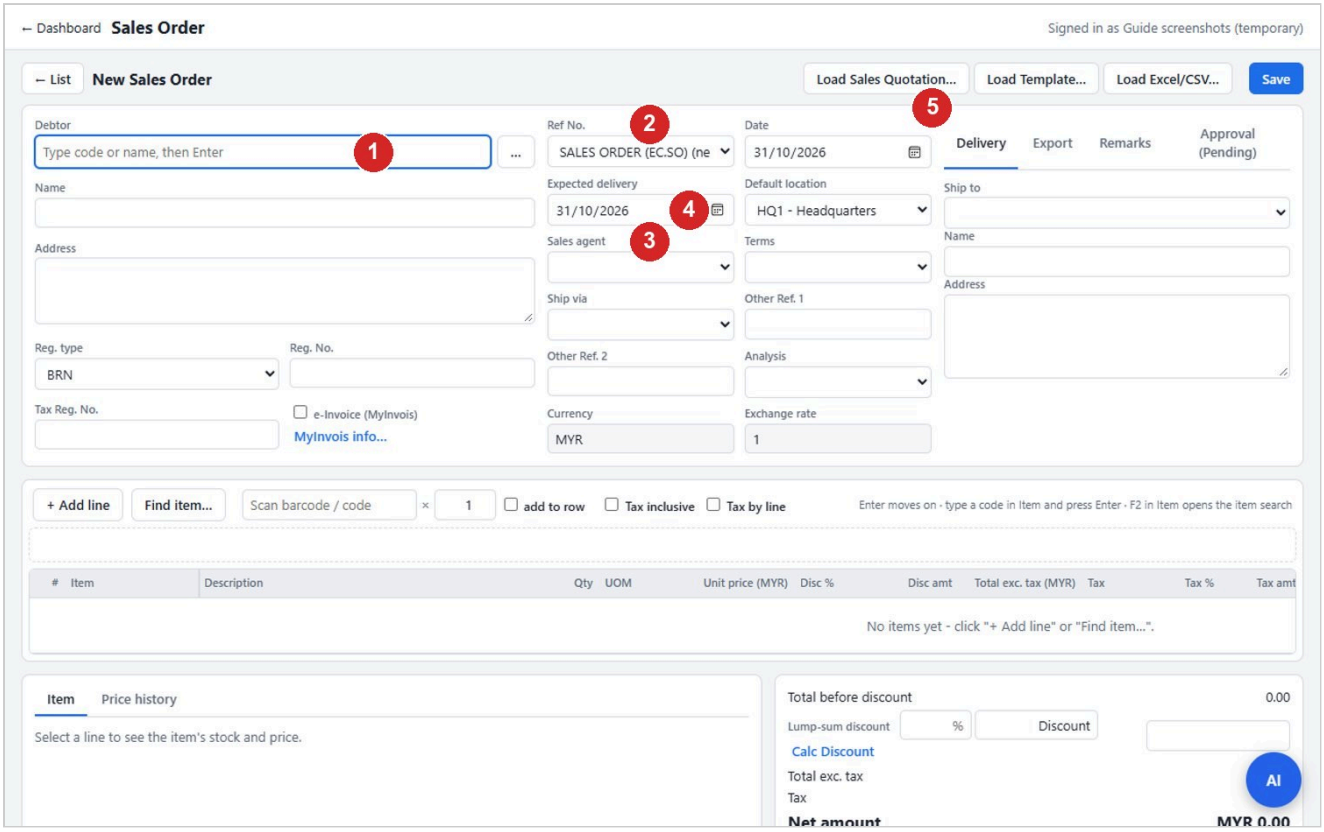
On the dashboard, open the Sales tab and click Sales Order, Delivery Order, Sales Invoice or Credit Note / Return Inwards. The list shows the documents of this month.



Step	What to do
1	Type in Ref No. / customer / remark.
2	Click Search.
3	Or use the options (Ref. No., Ref. Date, Date Created, Created By).
4	Click Refresh.
5	Click New to start a document.

2. Fill in the header

Fill in the header of the document.



Step	What to do
1	Under Debtor type the customer's code or name and press Enter.
2	Check the Ref No. (choose a numbering, or Type it in) and the Date.
3	Check the Default location, Sales agent, Terms and Ship via.
4	A Sales Order also has Expected delivery.
5	The Delivery tab holds the Ship to address, Remarks holds the remarks, and the Approval tab appears when the document needs approval.

3. Load lines from an earlier document

The buttons at the top copy the lines you already have. Sales Order: Load Sales Quotation. Delivery Order: Load Sales Order and Copy From Quotation. Sales Invoice: Load Sales Order and Load Delivery Order. In the window, tick the documents of this customer, click Show lines, tick the lines and click Load. Keep Load main info (customer details, terms, remarks) ticked if you want those copied too. Load Template and Load Excel/CSV are there on every page.

4. Add and check the items

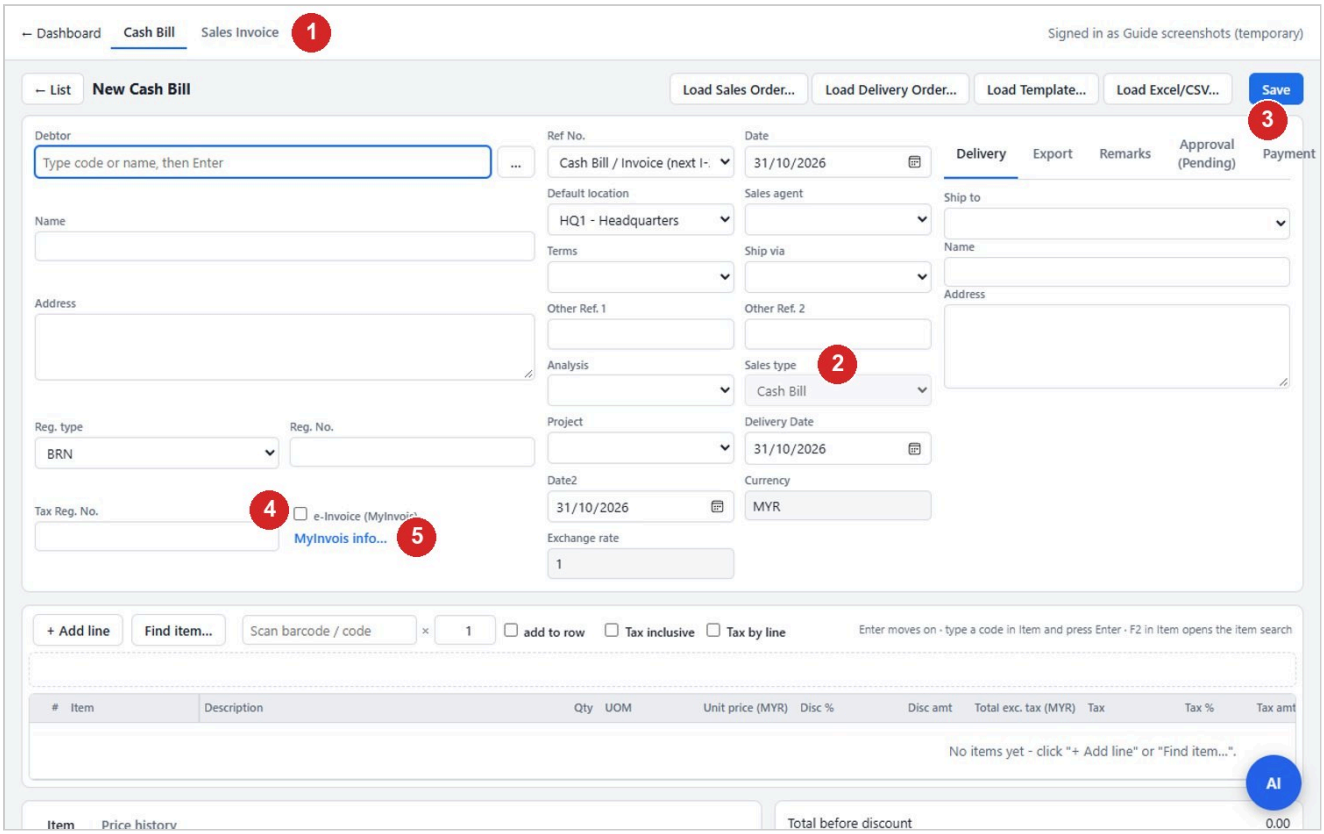
Add items as on the Quotation page: + Add line, Find item, or scan a barcode. Check Qty, UOM, Unit price, Tax and the Net amount. Items that need serial numbers, bins or batches, sizes or colours, or a bill of material open a small window to fill in.

5. Delivery Order notes

A delivery order has Post GST (D/O Supplies) to tick when it applies. After saving a sales order, the buttons at the top such as Convert to Delivery Order or Convert to Sales Invoice open the next document with the outstanding lines already loaded.

6. Sales Invoice: cash bill or invoice

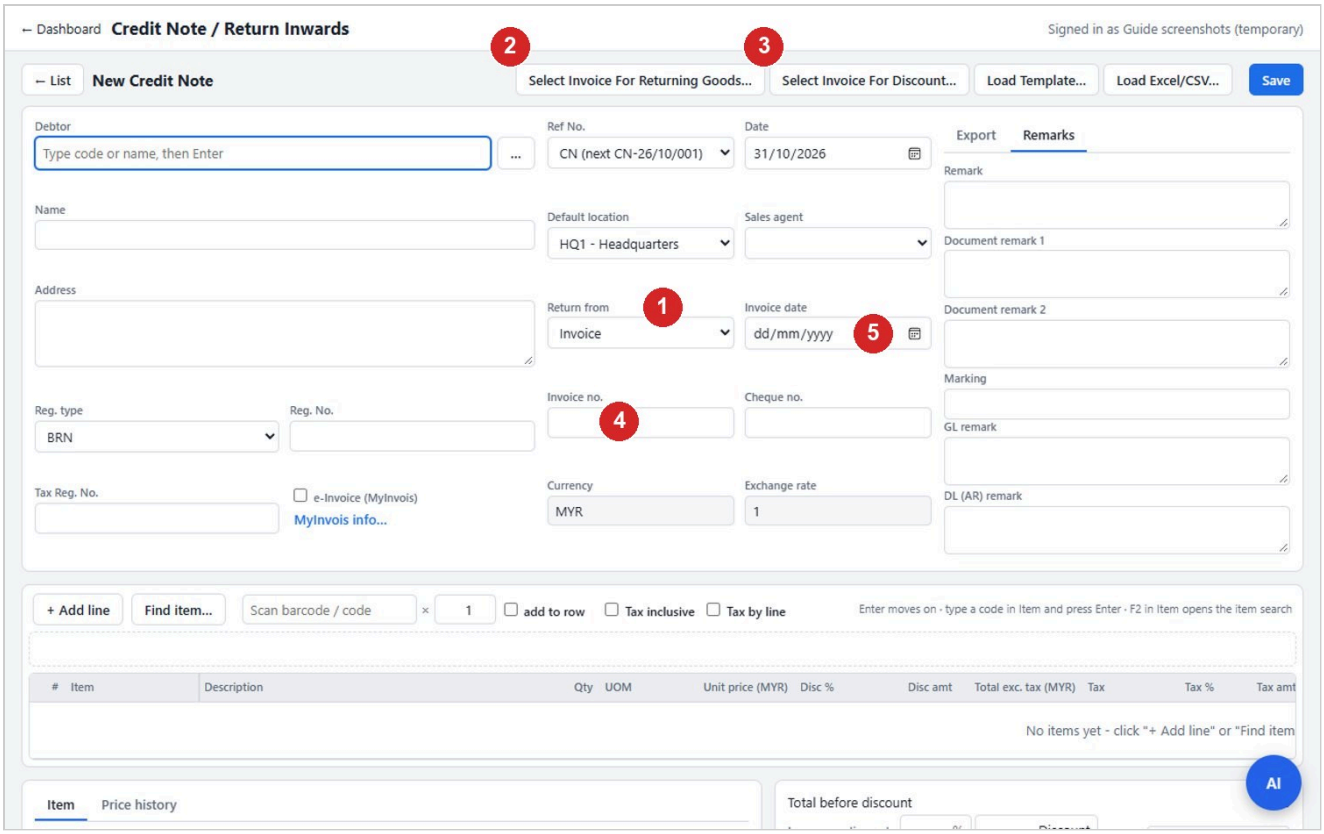
Choose a cash bill or an invoice.



Step	What to do
1	When your company keeps them apart, the Cash Bill and Sales Invoice tabs are at the top of the page.
2	Otherwise choose the Sales type (Cash Bill or Invoice).
3	A cash bill has a Payment tab: Cash / bank account, Cheque no., Analysis, Split 1 and Split 2 account and amount, Amount received and Change.
4	Tick e-Invoice (MyInvois) if the customer needs an e-invoice.
5	Click MyInvois info.

7. Credit Note / Return Inwards

For a return of a cash sale, also fill in the Refund account. Return from cannot be changed once there are lines.



Step	What to do
1	Choose Return from first.
2	Click Select Invoice For Returning Goods or Select Delivery Order For Returning Goods to load the lines being returned.
3	Click Select Invoice For Discount to share a discount over invoice lines.
4	Fill in the Invoice no.
5	Fill in the Invoice date.

8. Save, post and print

Click Save. On a Sales Invoice or Credit Note, click Post and confirm Do you want to Post this transaction? (the button then says Unpost). Save first, or the page says Please save this transaction first. Click Print to get the PDF. A saved invoice can also have Packing List, Packing Checklist and Print Barcode buttons.

Tips

- Changing the Date of a saved document can ask for a supervisor.
- Delete removes a document after you confirm.
- The reasons shown on return lines are kept under Return Reason in the Setup tab.

Common problems

Please save this transaction first.

Click Save, then Post or Print again.

A supervisor permission box appears.

The action needs a supervisor. Type the supervisor's user name and password, or ask the supervisor to do it.

You do not have access to this page.

Your Synergy user has no permission for it. Ask your administrator.

The Load button shows nothing for my customer.

Only documents of that customer that still have something outstanding are listed. Check that the Debtor is chosen first.

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

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