Synergy Order App - Stock Documents, Costing and Stock Reports

Record goods received, returns, adjustments and stock takes as numbered documents in Back Office, choose how cost is worked out, and read the stock reports. This goes further than the Stock screen, which is for quick receive, adjust and count of one item.

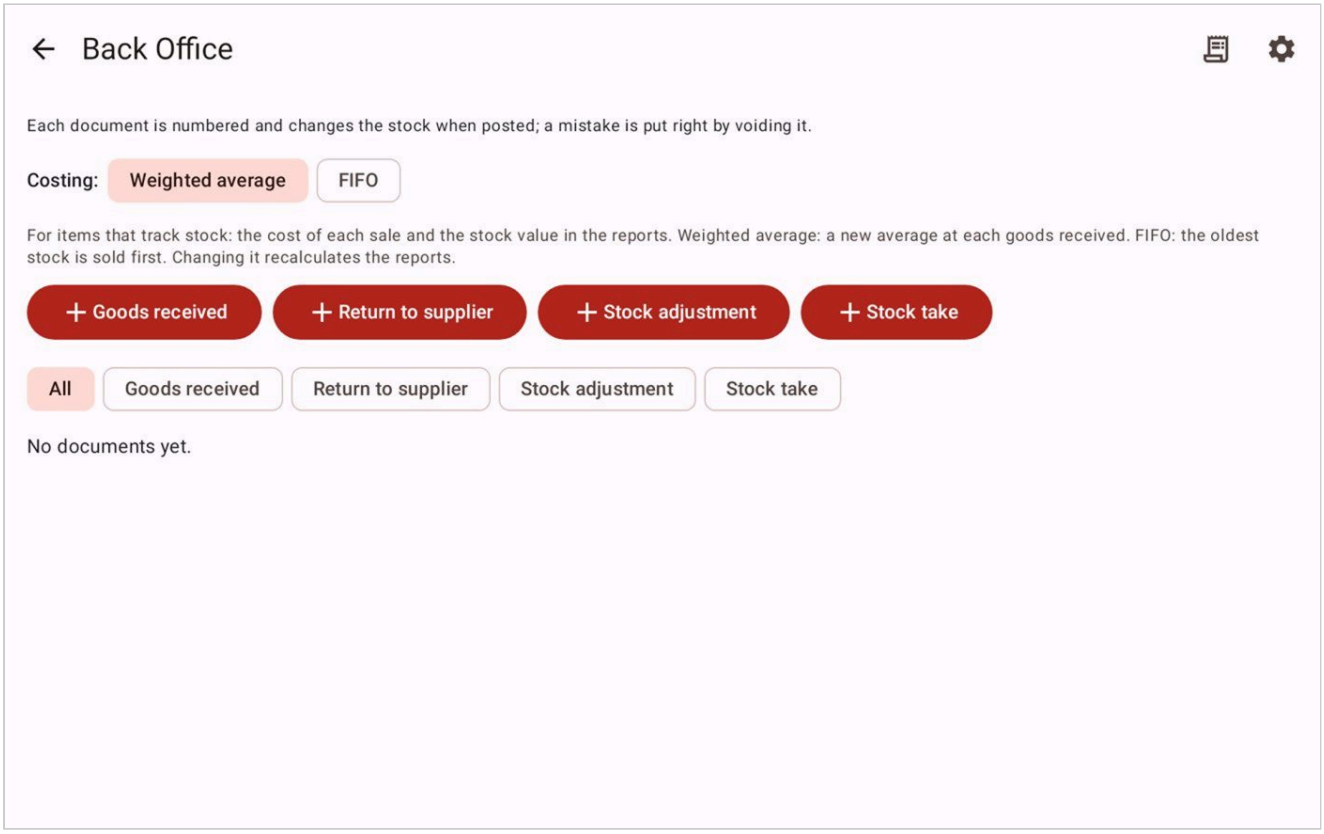
Before you start

- The items must track stock. Switch on Track stock for an item in Back Office > Items or on the Stock screen. An item that does not track stock cannot go on a stock document.
- For goods received and returns, add the supplier first in Back Office > Suppliers.
- In a shop linked to Synergy, the stock comes from the shop server and is received and adjusted on the desktop.

Steps

1. Open Stock documents

Tap the storefront icon to open Back Office. In the Stock group, tap Stock documents. The page shows the Costing choice, the four document buttons, a filter (All and the document types) and the documents already posted.



2. Choose how cost is worked out

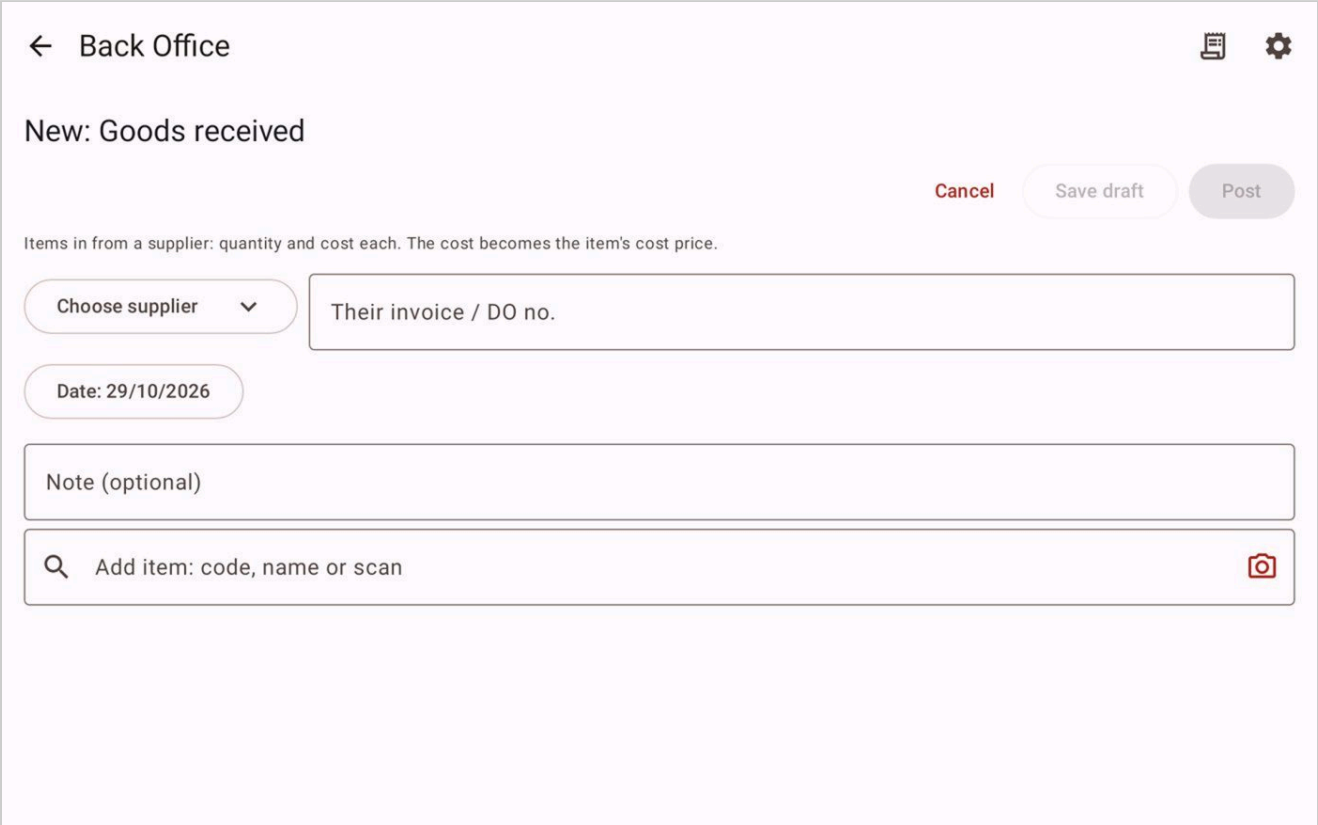
Next to Costing, choose Weighted average (a new average at each goods received) or FIFO (the oldest stock is sold first). This sets the cost of each sale and the stock value in the reports. Changing it recalculates the reports.

3. Start a document

Tap Goods received, Return to supplier, Stock adjustment or Stock take.

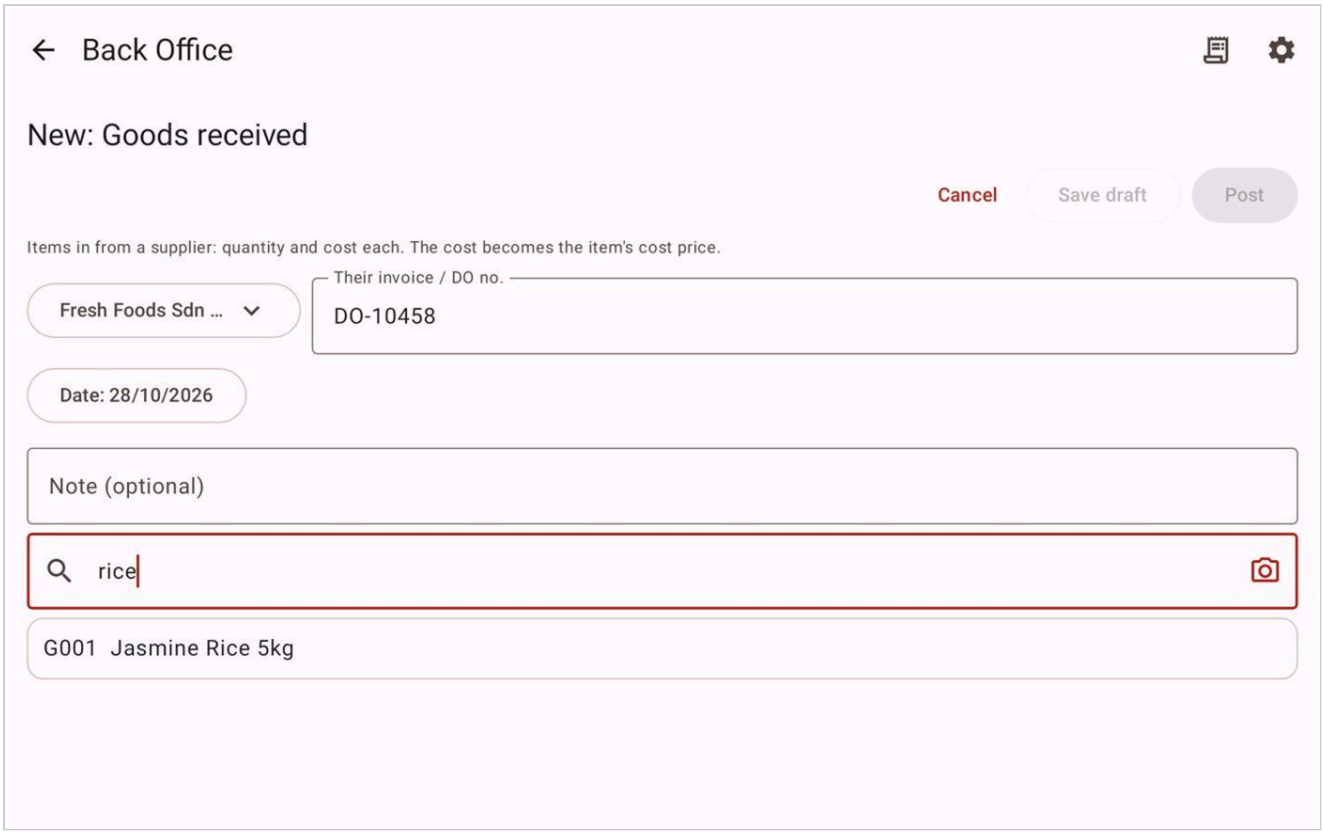
4. Fill in the supplier and date

For goods received and returns, tap Choose supplier and type their invoice or DO number in Their invoice / DO no. Tap the Date button to choose today or an earlier date. A stock take has no date. A Note (optional) can say why.



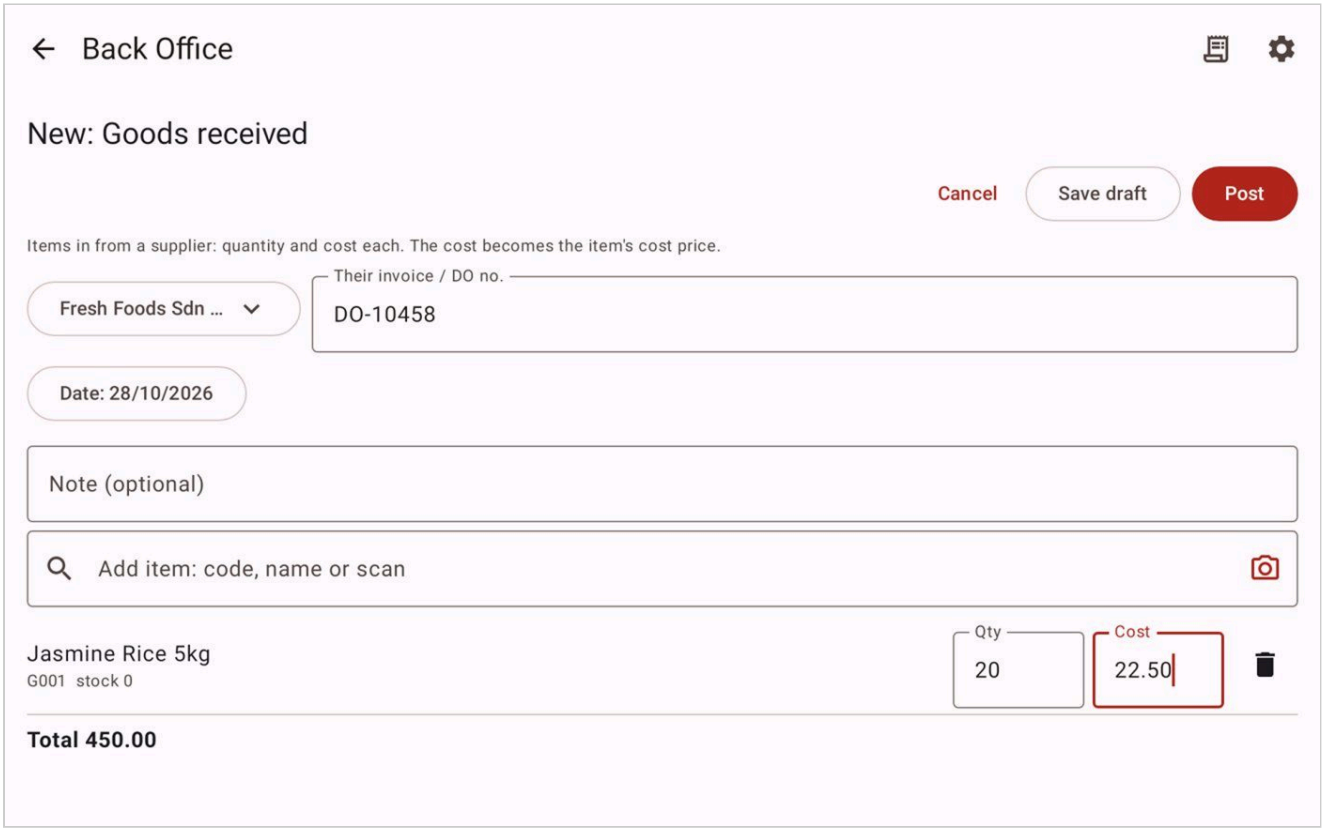
5. Add the items

Type at least 2 letters of the code or name in Add item: code, name or scan, then tap the item in the list. You can also scan the barcode with the camera icon: scanning the same item again adds 1. Each line shows the item's code and its current stock.



6. Type the quantities

Goods received and returns: type Qty and Cost for each line, and the page shows the Total. Stock adjustment: type + or - quantity in the +/- box (a minus takes stock out); the cost is optional. Stock take: type what you counted in the Counted box; the difference to the balance is booked.



7. Save a draft or post it

Tap Save draft to keep it and finish later (it is listed under Drafts (not posted yet)), or tap Post. A posted document is numbered and changes the stock at once.

8. Void a mistake

Open the posted document and tap Void. Its stock changes are reversed. Cost prices stay as they are.

9. Read the stock reports

Tap Reports and choose Stock value, Stock movement or Reorder list at the top. Stock value and Reorder list show the situation now; Stock movement follows the dates you choose. Find in this report searches the rows, and Export Excel saves the report.

Tips

- Goods received: the cost typed becomes the item's cost price.
- Stock adjustment: the cost is used for the quantity added. Leave it blank to use the item's cost price. A minus quantity takes stock out at its current cost.
- Stock movement shows Opening, Received, Returned, Sold, Adjusted and Closing for each item.
- Reorder list shows the tracked items at or below their Low stock level, with Balance, Minimum, Order, Supplier, Cost and Value. Set the Low stock level in the item's window on the Stock screen.
- In Back Office > Staff, a rule decides who can do stock documents on the Stock screen and in Back Office.
- Back Office closes itself after 5 minutes without a touch.

Common problems

It says the item does not track stock.

Turn on Track stock for the item first (Back Office > Items, or the Stock screen), then add it again.

Choose supplier is empty and a message says to add a supplier first.

Add the supplier in Back Office > Suppliers, then start the document again.

The Post button cannot be tapped.

The document has no lines yet. Add at least one item.

The stock reports say no items are tracked.

Switch on Track stock for the items, or post a goods received, and the reports fill in.

The Reorder list says nothing to reorder.

No tracked item is at or below its minimum. Check the Low stock level of the items.

Order App (screens from build 2026-11-13A) - Guide date 2026-11-13.