Synergy Acc2026 - Branch: Upload Daily Sales and Download from Head Office

This guide shows a branch how to send the day's point-of-sale sales to head office (HQ) and how to bring master data back from HQ. This screen is for branches only. Head office cannot use it.

Before you start

- The computer must be a branch computer. If head office opens this screen, the program says it is for branches only.
- The branch must have its FTP Code and POS Branch Code set up. Without them the synchronisation cannot run.
- Close the day's shift first. If the selected date still has an open shift, the program can warn you that the shift has not been closed yet.

Steps

1. Open the Data Synchronization screen

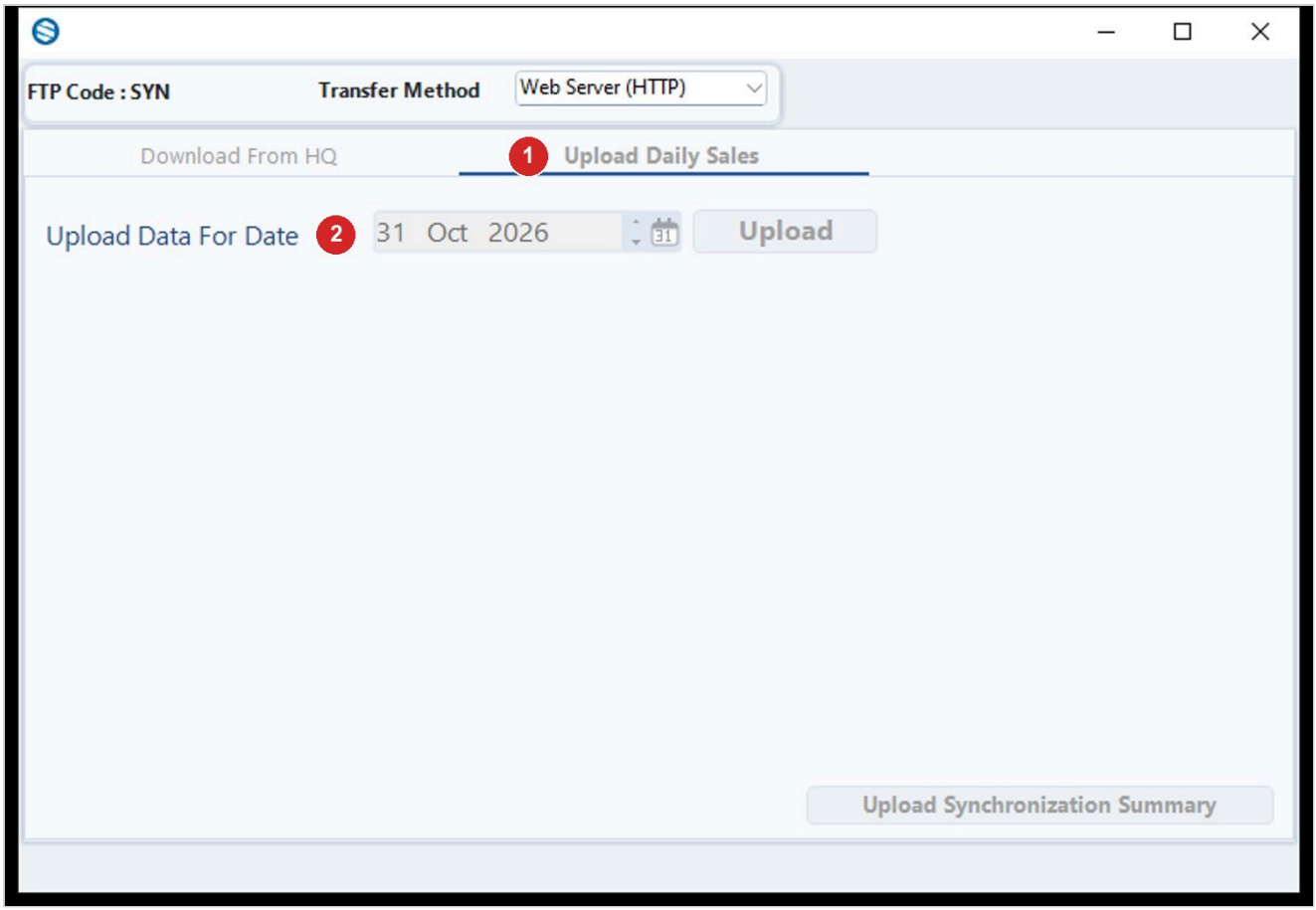
Go to Point of Sale > Transaction > Data Synchronization (POS). The screen has two tabs: Upload Daily Sales and Download From HQ.

2. Check the connection details

FTP Code shows the code that identifies this branch to HQ. Transfer Method shows how the files travel to HQ: Web Server (HTTP), FTP or File Folder. Your choice is remembered for next time. If you choose File Folder, use the Select Sync Folder link to pick the folder for the transfer.

3. Choose the sales date

Choose the sales date to send. It starts on today's date.



Step	What to do
1	Open the Upload Daily Sales tab.
2	In Upload Data For Date, choose the date to send.

4. Upload the sales

Click Upload. The screen first checks the connection. If it fails you see NO CONNECTION! and nothing is sent.

5. Confirm and wait

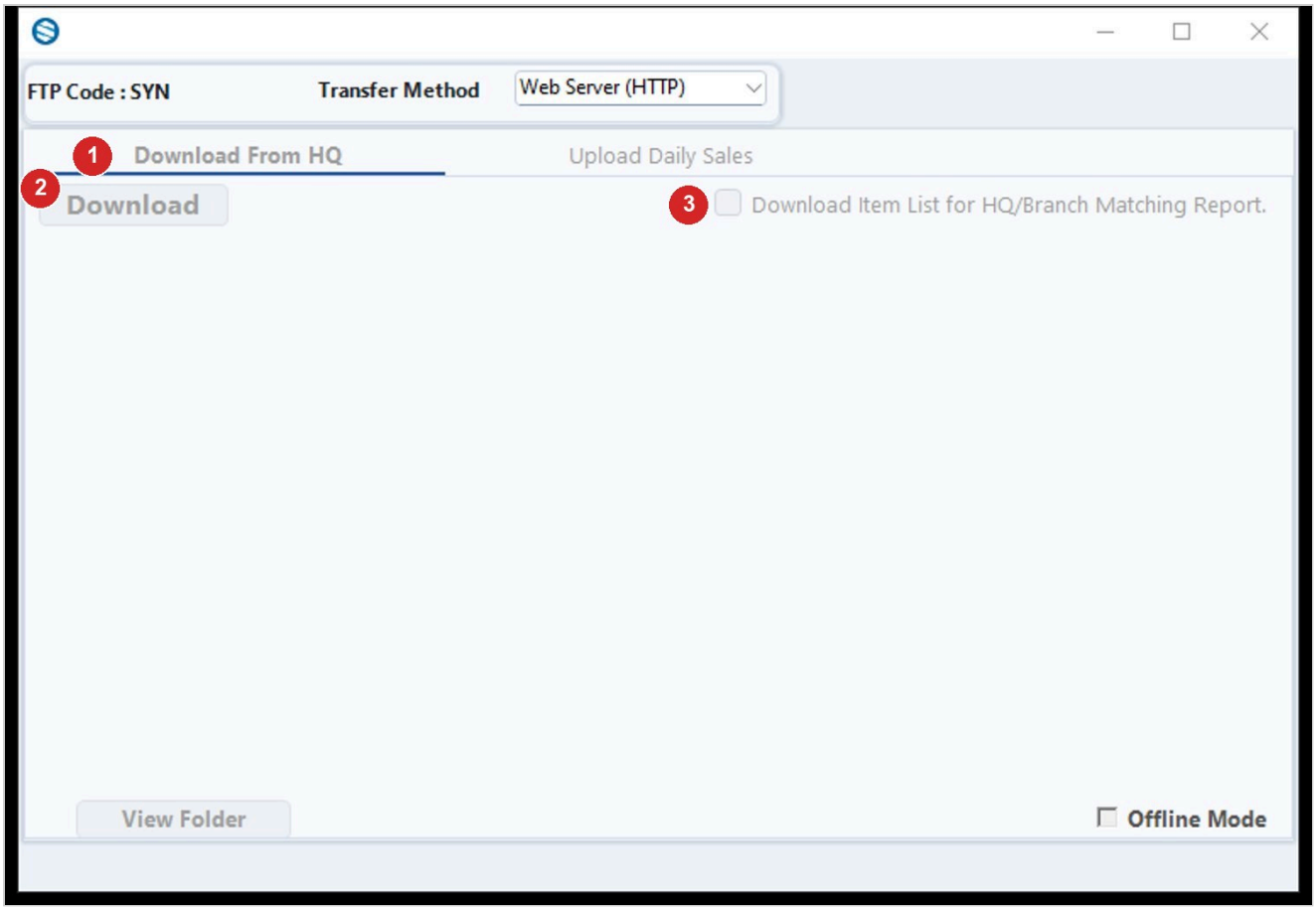
Answer the question Do you want to upload data for the selected date? You may not be asked if the shop is set to upload automatically when a shift is closed. Wait until you see UPLOAD COMPLETED!

6. Send the summary if needed

Click Upload Synchronization Summary (or tick its box) to send a summary of what was synchronised. You see Summary uploaded. when it is done.

7. Download from head office

The percentage label shows the progress. When it finishes you see DOWNLOAD COMPLETED!



Step	What to do
1	Open the Download From HQ tab.
2	Click Download.
3	Tick Download Item List for HQ/Branch Matching Report. first if you also need the item list for the matching report.

8. Open the download folder

Click View Folder to open the folder where the downloaded files were saved.

Tips

- Upload the sales every day so head office always has the latest figures.
- File Folder is only offered as a Transfer Method when that feature is switched on for your company.
- If a part of the download fails, the program says so, for example it could not download the Item Matching List or the Membership data.

Common problems

NO CONNECTION!

Check the internet connection and the transfer details, then click Upload again.

Shift has not been closed yet.

The selected date still has an open shift. Close the shift first, then upload.

POS Branch Code is not defined, or FTP Code not found.

The branch has no POS branch code or FTP code set up, so synchronisation cannot run. Contact Synergy and have your company name and branch name ready.

Failed to upload file. or Error Upload

The transfer failed. Check the connection and try again.

Unable to create folder ... Please create the folder manually and try again.

Create the folder yourself in the place named in the message, then try again.

Unable to update the [Post] status for uploaded transactions.

The files went up but the transactions were not marked as uploaded. Contact Synergy and tell them the date you uploaded.

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

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