Synergy Acc2026 - POS Report Options, Export and Stock Balance Query

This guide shows you how to set the date, shift and counter for point-of-sale reports, filter a transaction list by status, choose the receipt invoice type, save or e-mail a report as a picture, and check the stock balance of an item.

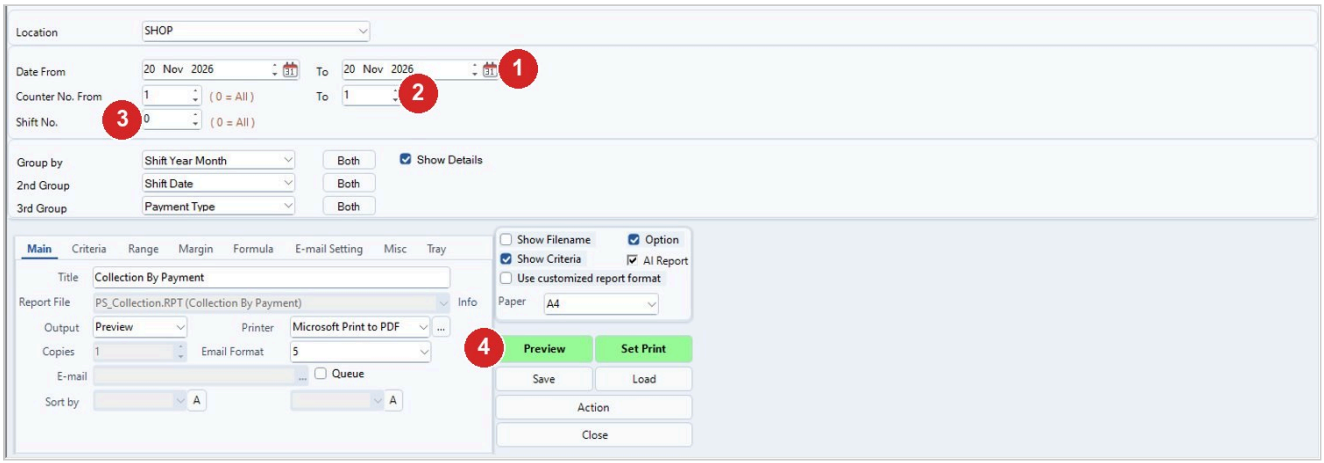
Before you start

- To e-mail a report, your company's e-mail sending must already work.
- The picture export is opened from the Preview screen of a POS sale or report.

Steps

1. Set the period, shift and counter

Open a point-of-sale report that shows the date and shift options, for example Point of Sale > Reports > Collection By Payment.



Step	What to do
1	Date From and To.
2	Counter No. From and To, or leave them at 0 for all counters.
3	Shift No., or leave it at 0 for all shifts.
4	Click Preview to run the report.

2. Use the extra options if they are shown

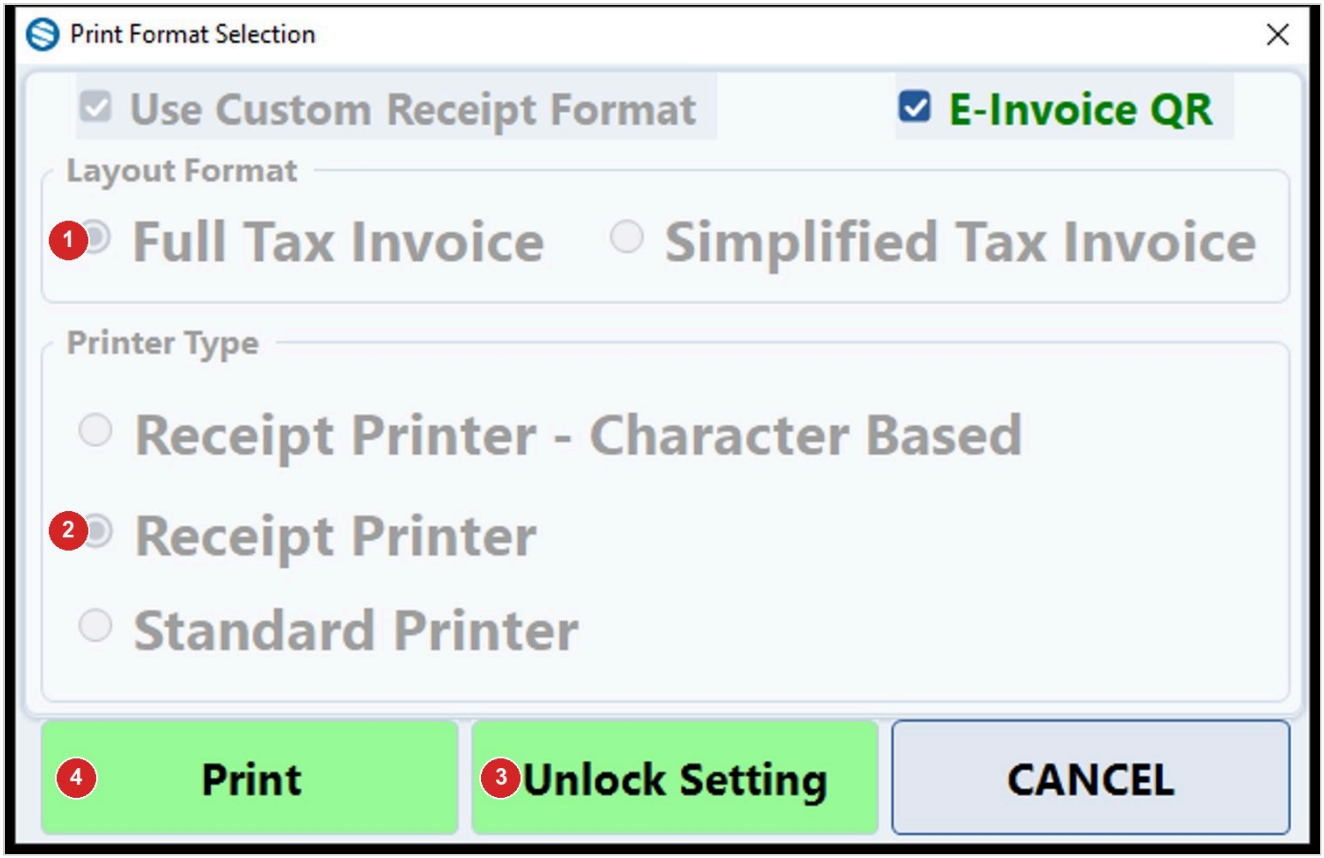
Brought Forward (shown only on reports that support it): when ticked, the From date is not applied so earlier amounts are included. View All Sections (shown only when your company limits what users see in the Sales Summary): ticking it needs supervisor approval if you do not have the right to view everything.

3. Filter a transaction list by status

On a transaction list that has the status filter, choose ALL, RECEIVED or PENDING in the criteria box. The list reloads straight away; you do not need to press a search button.

4. Choose the receipt invoice type

On the Payment window click the print format link (for example Character Based Full Tax Invoice) to open Print Format Selection. The choices are greyed out until you unlock them. For a standard printer receipt report you can also tick or untick Show Item Code (Standard Printer Only) and Show Discount Column (Standard Printer Only).



Step	What to do
1	Layout Format: Full Tax Invoice or Simplified Tax Invoice.
2	Printer Type: Receipt Printer - Character Based, Receipt Printer or Standard Printer.
3	Click Unlock Setting to change the choices.
4	Click Print.

5. Save a report as a picture

From the Preview screen open Save As File. Choose the Folder with the Browse button. Check the File Name, which starts as the reference number. Set the Font Size and click Save. The folder containing the saved picture then opens and the window closes.

6. E-mail a report

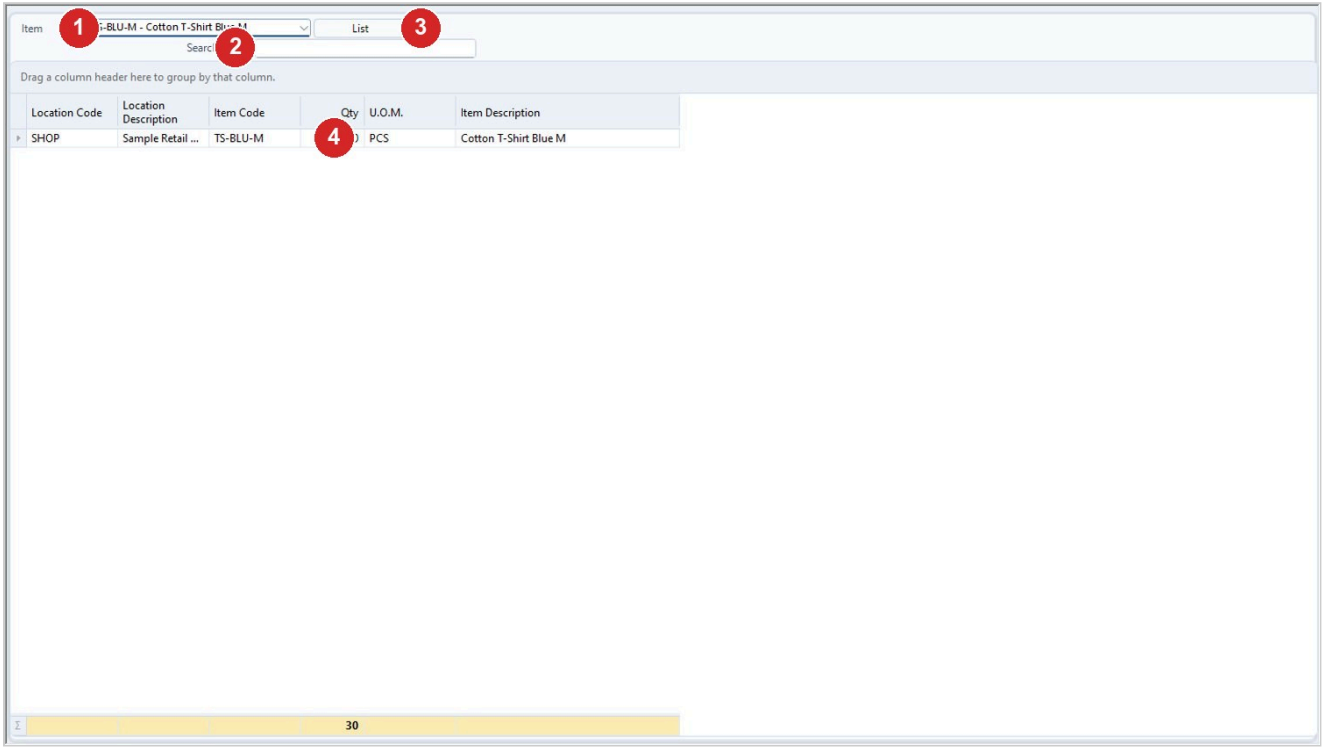
Open the Send E-Mail tab. Enter E-Mail To (for a Payment Order it is filled from the member's e-mail when there is one). Check the Subject and E-mail body, then click Send. The report is attached as a picture file.

7. Save your default wording

On the Setting tab set the Default Mode (Send E-Mail or Save As File), Default Subject and Default E-mail body. You can use the placeholders <Ref No>, <Ref Date>, <Customer Name> and <Company Name>, which are replaced when the screen opens. Click Save Setting to keep the folder, font size, subject, body and default mode for next time.

8. Check the stock balance of an item

Go to Point of Sale > Query > Stock Balance Query (ALL Locations). This branch's quantity is worked out now; other locations show the balances last downloaded from HQ.



Step	What to do
1	Item: choose the item (here TS-BLU-M Cotton T-Shirt Blue M).
2	Search: type text to filter the result by code, barcode or description.
3	Click List.
4	Read the Qty for each location (here 30 at SHOP).

Tips

- Counter No. From and To start with this counter's own number, so a report shows only this counter until you change them to 0.
- Your company can limit how many days back a normal user may report. If Date From is earlier than allowed, it is moved forward automatically without a message.
- The last values you used are remembered for next time.
- The status filter may open on PENDING or RECEIVED because of your shop's default. Choose ALL to see everything.
- The two receipt tick boxes are saved as company-wide settings, so what you choose affects every user. The Simplified / Full choice is remembered with the report's own saved options.

- Items such as the logo, terms and conditions, signature line and corner texts on the receipt come from point-of-sale settings, not from the receipt options panel.
- If there is no customer name on the sale, the greeting "Sir/Madam" is used in the e-mail.
- The Subject and E-mail body are empty until you save defaults on the Setting tab.
- If the item has dimensions such as size or colour, the stock balance grid shows extra columns using the item's own dimension names.

Common problems

The report shows less than expected.

Check that Shift No. and the counter numbers are 0 and that the date range is wide enough.

Date From changed by itself.

Your company limits how far back you may report.

I cannot tick View All Sections.

A supervisor must approve it.

Brought Forward is not shown.

That report does not support it.

The transaction list is missing transactions I expect.

Check that ALL is selected. The list may have opened on PENDING or RECEIVED.

The item code or discount column is missing on the receipt.

These tick boxes only apply when printing to a standard printer.

"[E-mail] is required." or "[Subject] is required." appears.

Fill in E-Mail To and the Subject before sending.

No e-mail address is filled in.

The customer may not be a member, or the member has no e-mail recorded. Type the address yourself.

An error appears when saving the picture.

Check the Folder you chose and that you can write to it.

Nothing is shown in the Stock Balance Query.

Click List after choosing the item or typing a filter.

Size or colour columns are missing.

The item has no dimensions defined, so those columns stay hidden.

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

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