Synergy Acc2026 - Create a Salesperson (POS)

A salesperson record holds the code, name, password, locations and item range of a person who sells at the point of sale. This guide shows how to create one at head office.

Before you start

- Create salespersons at head office (HQ). A salesperson created at a branch cannot synchronize to HQ.

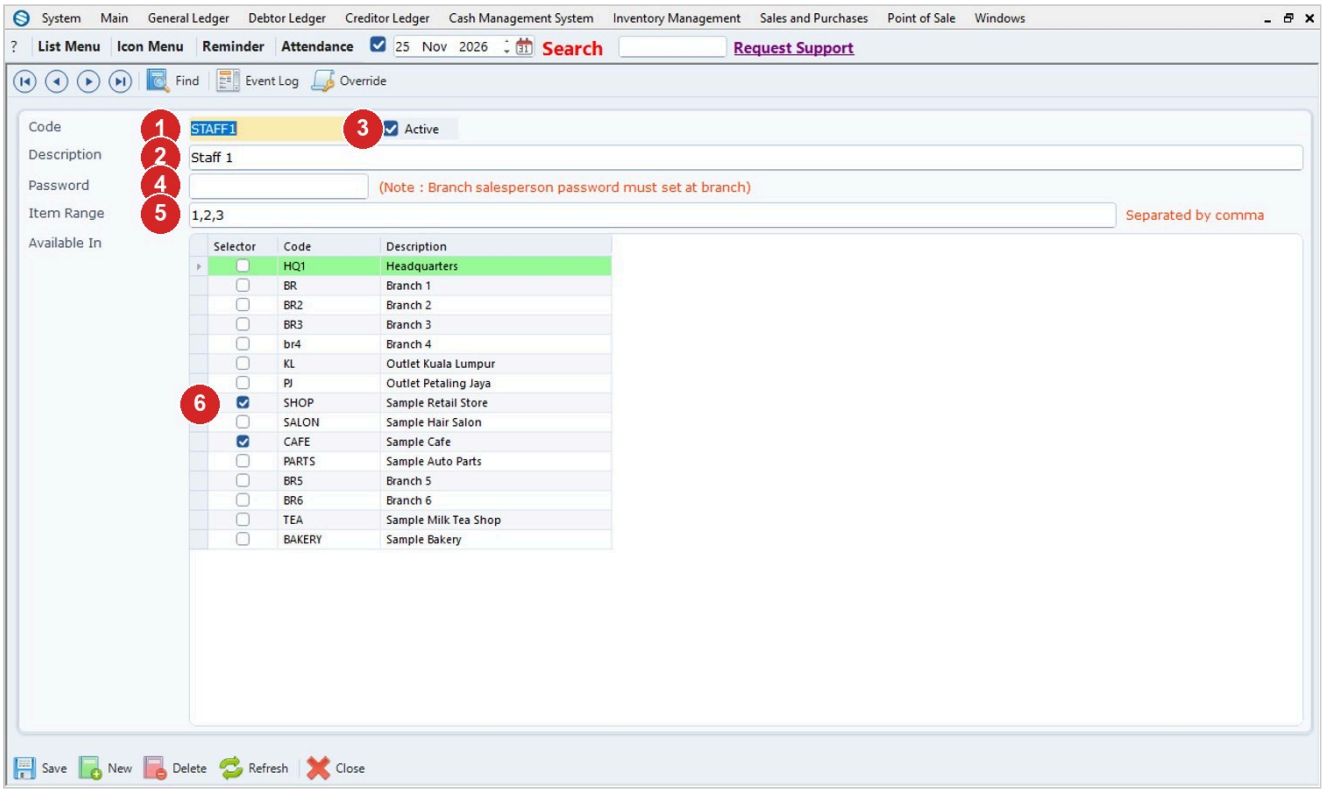
Steps

1. Open the Sales Person screen

From the menu, go to Point of Sale > Point of Sale Setup > Sales Person. Click New for a blank record.

2. Fill in the salesperson

Fill in the boxes. Code and Description must be filled in.



Step	What to do
1	Type the Code (required).
2	Type the Description, the salesperson's name (required).
3	Leave Active ticked while the person is working.
4	Type the Password the salesperson uses to log in at the point of sale.
5	If the person may sell only some items, type the codes in Item Range, separated by commas.

Step	What to do
6	Under Available In, tick the locations where this salesperson may work.

3. Save

Click Save. The salesperson now appears at the point of sale in the locations you ticked.

Tips

- A branch salesperson's password must be set at that branch (the note beside Password says so).
- To stop using a salesperson, untick Active instead of deleting.

Common problems

Cannot add a salesperson at a branch: 'Salesperson can be set up at HQ only'.

Add the salesperson at head office; it reaches the branch through synchronization.

A warning says creating a salesperson at a branch will cause transactions unable to synchronize to HQ.

Cancel and create it at HQ. Tick the box only if you understand the sync problem.

'[Code] is required' or '[Description] is required'.

Fill in the missing box.

The salesperson is not offered at a location.

Check that the location is ticked under Available In.

The salesperson cannot log in at a branch.

Set the password at that branch.

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

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