Synergy Acc2026 - Data Export, Loading Excel Files and Excel Mapping

This guide covers three related tools: Data Export, which keeps named queries and shows their results; loading data into a document from an Excel or CSV file; and Excel Mapping, which tells the program which Excel column matches each field.

Before you start

- Close the Excel file in other programs before loading it.

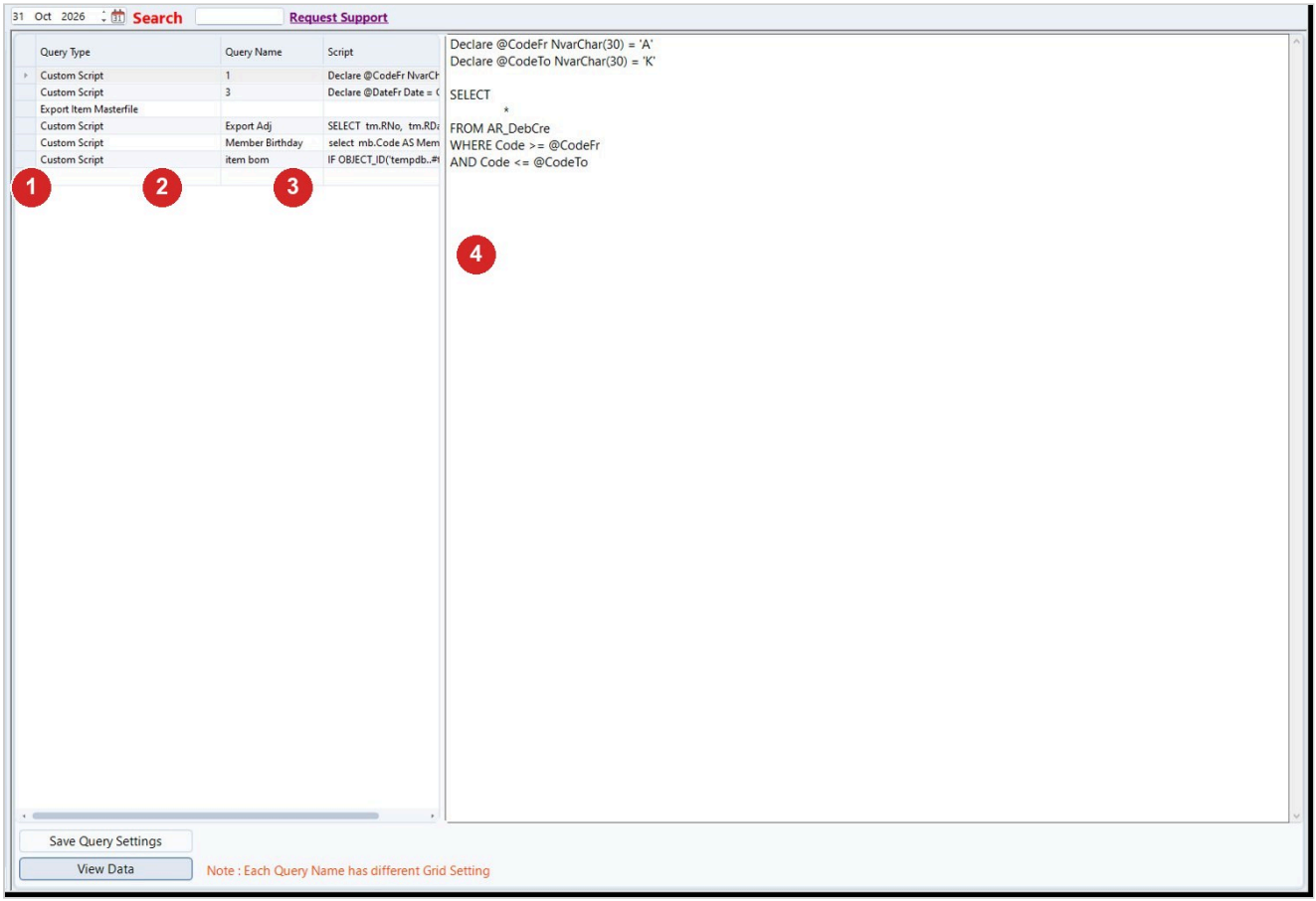
Steps

1. Open Data Export Utility

From the menu, go to Main > Shared Masterfile > Data Export Utility. Your saved queries are listed in the grid.

2. Add a query

Only do this if you know the query is correct.



Step	What to do
1	Add a row.
2	In the first column choose Export Item Masterfile, Export Debtor Masterfile or Custom Script.

Step	What to do
3	Give it a name.
4	For a custom script, type the query in the Sql Script box.

3. Save and view

Click Save Query Settings, then select a row and click View Data. The results open in a viewer.

4. Open Load for a document

On a screen that can import data, such as Stock Adjustment, Delivery Order or Invoice Received, open the load window. It has an Excel / CSV File tab and an XML File tab.

5. Load from Excel or CSV

On the Excel / CSV File tab, click Browse and choose an Excel (xlsx, xls) or CSV file. It loads straight away. Or type the path in File Name and click Load.

6. Choose the match options

If shown, choose an Option first. Tick Match Alternative Codes and Description to match rows by alternative codes and descriptions too, then choose Proceed with one of the matching item, Skip loading the item or Prompt for selection for rows with several matches.

7. Load a saved file

On the XML File tab, check File Location, pick a file and click Load. Double-click a file to preview it. To remove old files, tick them and click Delete.

8. Open Excel Mapping

Excel Mapping is part of the screens that import from Excel, such as Sales and Purchases > Transactions > Batch Import Sales Invoice From Excel. In the grid, type the heading used in your Excel file beside each program field. You can give more than one heading, separated by commas.

9. Name and save the mapping

Type a name in Mapping File, or click the button in the box to choose an existing mapping, which loads its matches. Click Save.

10. Check

The message Settings saved. confirms it. This mapping is loaded by default the next time.

Tips

- Each Query Name has its own grid setting.
- You can only run the export queries your user has been given permission for.
- Mappings are kept in a shared folder on the server, so other users can use them.
- Saving with an empty Mapping File name and confirming clears the saved default mapping.

Common problems

No Query selected.

The list is empty or the selected row has no query. Choose a row first.

You don't have permission to run this query.

Ask an administrator to give your user the permission.

Nothing happens on View Data.

The query may return no records, or a custom script has an error.

File not found. or No records in the file.

Check the file name, and that the first sheet has rows.

The file will not open.

Make sure it is not open in another program and is an xlsx, xls or csv file.

Rows are missing after loading.

They may have been skipped because several items matched. Choose Prompt for selection.

Invalid filename entered. or No mapping details provided.

Use only characters allowed in a file name, and fill in at least one Excel heading.

Import columns are not recognised.

Check that the Excel heading is spelled the same as typed in the grid.

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