Synergy Acc2026 - Batches and Expiry Dates

Synergy Acc2026 handles expiry dates through batch tracking. This guide shows how to create a batch with its dates, and how to use the batch when receiving and transferring stock.

Before you start

- Make sure the item already exists in your item master, so you can choose it on the batch.
- Have the Item Code ready. When keying batch details, type the Item Code, not the item name.

Steps

1. Open the Batch screen

From the menu, go to Inventory Management > Masterfile > Sub-Masterfile > Batch, then start a new record.

2. Type the batch number

The cursor starts in Batch / Lot No. Type the batch or lot number. This is the only field you must fill in.



Step	What to do
1	Batch / Lot No. (here LOT-2611-A); Active.
2	Manufacture Date and Expiry Date.
3	Item (here OIL-5L).
4	The note: without an Item, every item can use the batch, but POS will not pop it up.

3. Add the dates

If you wish, fill in Manufacture Date and Expiry Date. Either can be left empty, and an empty date simply shows blank.

4. Choose an Item if needed

Choose an Item if the batch belongs to one item only. If you leave Item empty, every item can use this batch, but in POS transactions it will not pop up automatically and the cashier must enter the batch number manually.

5. Keep Active ticked and save

Leave Active ticked if the batch is in use, then save.

6. Key the batch on Goods Received

On Goods Received, key the batch number and expiry date.

7. Choose the batch on Stock Transfer

On Stock Transfer, choose the same batch in the batch column.

Tips

- Expiry dates are not a separate feature. They are part of batch tracking, so look for Batch rather than Expiry Date.
- When keying batch details, always type the Item Code, not the item name.
- A batch with no Item selected can be used by all items, but in POS it will not pop up on screen.

Common problems

Some items cannot be entered into a batch.

Check that you typed the Item Code and not the item name.

Cannot save the batch.

The Batch / Lot No. is empty. Type a number and save again.

The item is not in the Item list.

Add the item to the item master first, then choose it on the batch.

The batch is offered for the wrong item.

Item was left empty, so the batch is open to all items. Choose an item to limit it.

The expiry reminder does not appear.

Close and reopen the software. Then check Inventory Management > Query > Stock Query > Stock Movement By Batch Query.

Still not working.

Contact Synergy support. Have ready the item code and a screenshot.

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

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