Synergy Acc2026 - Preparing a Menu or Item List for Import

If you want your menu or item list loaded into the system, prepare the Excel file correctly first. Synergy support does the import in a remote session.

Before you start

- Have your Excel menu or item file ready.

Steps

1. Use unique item codes

Every item code in the Excel must be unique.

2. Format the item code column as Text

Format the item code column as Text so leading zeros are kept. Otherwise the import fails to match.

3. Book a remote session

Contact Synergy support to book a remote session and have the Excel file ready.

4. Make old items inactive

Items with past transactions cannot be removed, only made inactive. Untick Active on the item.

5. Check the filter for inactive items

If inactive items still show, check the show-inactive filter option.

Tips

- Duplicate item codes and dropped leading zeros are the common causes of a failed import.
- The UOM button on the POS screen is added by Synergy support in a remote session, on both the main PC and the client PC. For drink stickers, set the barcode printer paper size and use the drink sticker format.

Common problems

CTN and PCS UOM still show after the import

Check the show-inactive filter option, and remember that items already used in transactions can only be inactivated.

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

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