Synergy Acc2026 - Importing Items and Menu Lists from Excel

This guide shows how to prepare your Excel file and load items (or a restaurant menu) with the Item Masterfile Import Utility.

Before you start

- An Excel file with a Code column and a Description column
- A database backup, because the import can replace existing descriptions and classifications
- Unique item codes, with the Code column formatted as Text in Excel so leading zeros are kept

Steps

1. Prepare the Code and Description columns

Keep the Code and Description columns. If you have no Description column, add one beside Code with the header Description. Fill the Description for every row: an empty cell blanks the description of an existing item with the same Code.

2. Set the Active column

In the Active column put Y (or leave it blank) for an active item and N to deactivate it. Use exactly Y or N.

3. Set the InventoryType column

Use IV for an inventory item, UOM for a UOM conversion item and SV for a non-stock or service item.

4. Fill the other columns

The POS Separate Row column takes Y or N. If you add new items, also fill in SupplyTaxCode and PurchaseTaxCode.

5. Add the e-invoice class if you need it

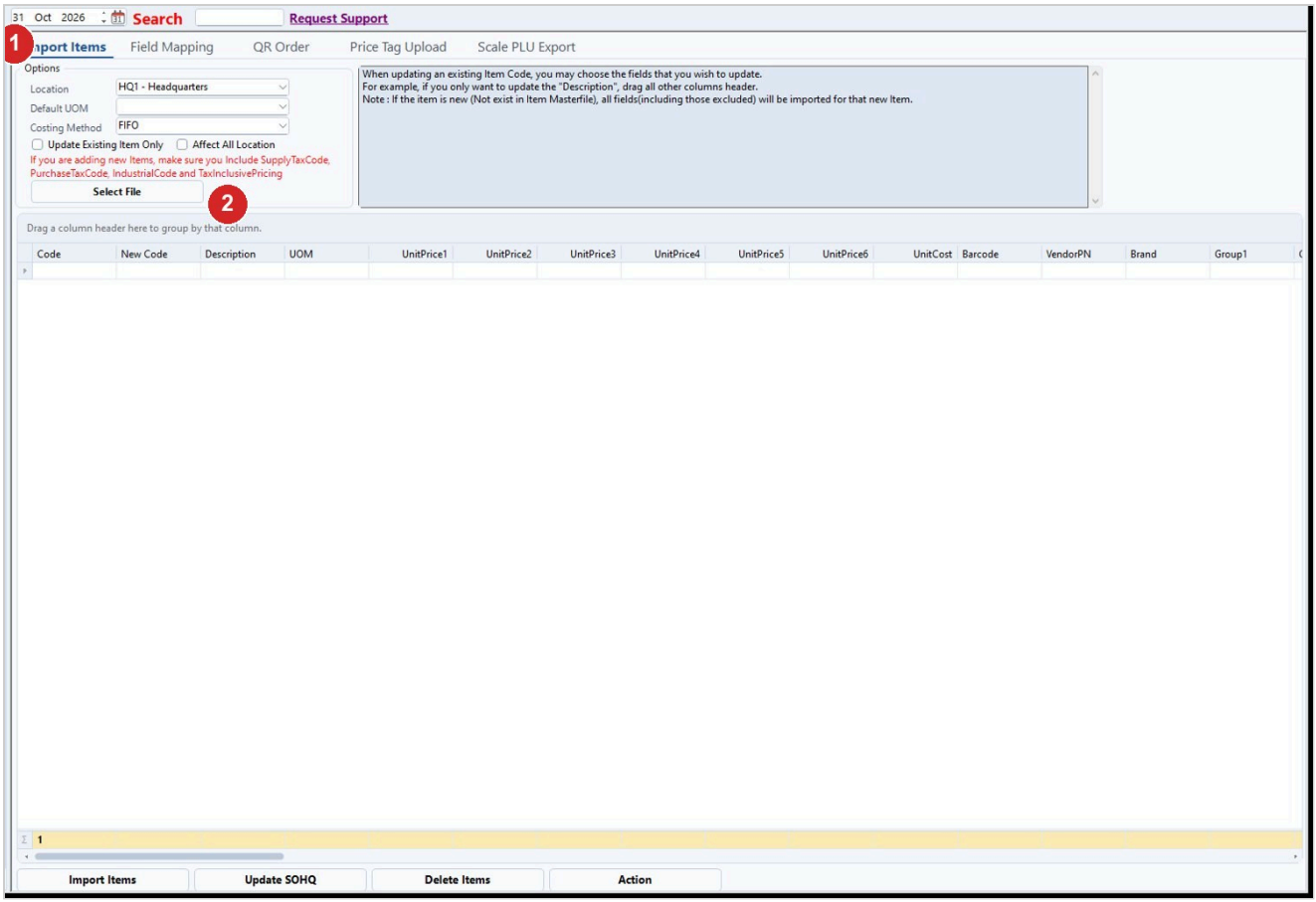
Use the header MyInvois Item Class and type the classification code number only (for example 022). A blank or invalid cell clears the saved classification of that item. Remove the column if you do not want to change it.

6. Take a backup

Back up the database before you import.

7. Open the Item Masterfile Import Utility

Go to Inventory Management > Utilities > Item Masterfile Import Utility.



Step	What to do
1	Open the Import Items tab.
2	Click Select File and choose your Excel file.

8. Choose the options

Choose the Location, Costing Method and Default UOM. Tick Update Existing Item Only if you only want to change existing items and not create new ones. If your file uses different column names, set them on the Field Mapping tab first.

9. Import

Check the rows shown, click Import Items, then answer Yes to Do you want to import the data?

Tips

- To sell an item without a fixed price, import it with the price empty or 0. The POS then asks for the price when the item is chosen.
- An item that already has transactions cannot be deleted, only made inactive.
- The Self-Billed Item Class is a separate column. Do not put the same code in both unless both apply.
- The exported item list does not have the same columns as the import file, so adjust the headings before importing it again.
- Create and change items at head office. Creating or changing them at a branch causes sync problems.

Common problems

Imported items do not show

Check that the Active column holds exactly Y or N, and that you clicked Import Items.

Inactive items still appear

Check the show-inactive filter option.

Codes do not match or the import fails

Duplicate item codes or leading zeros dropped in Excel are common causes. Format the Code column as Text.

Header names are not accepted

Use the exact header names, as the import screen shows them, or map them on the Field Mapping tab.

Import still fails

Contact Synergy support with the Excel file and the import message.

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

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