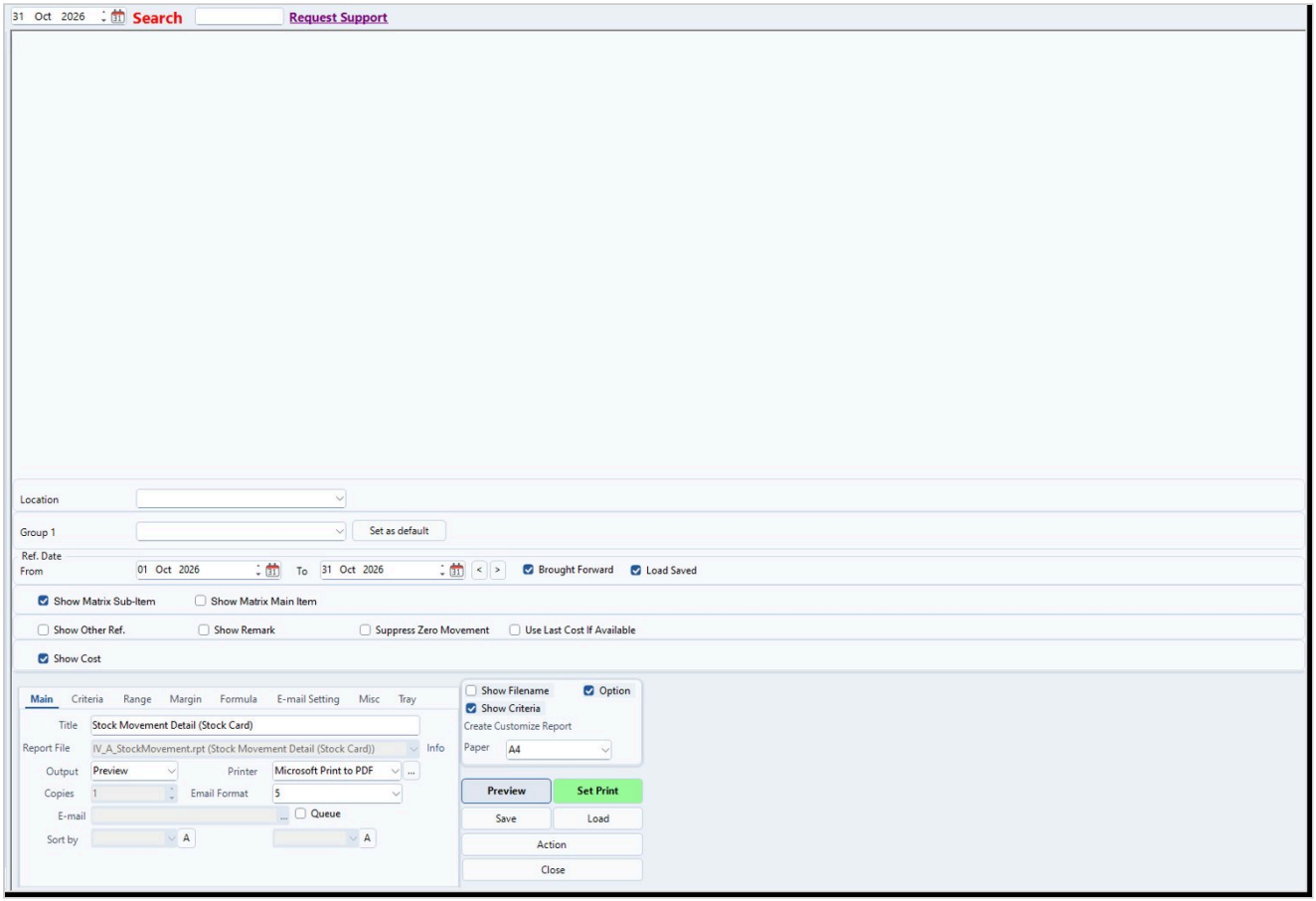
Synergy Acc2026 - Report Options Explained

Before a report runs, its selection window asks for options such as dates, a code range and grouping. Each report shows only the option boxes it was set up for. This guide explains the ones you will see most often.

Steps

1. Open a report and read its option boxes

Open the report from its menu. The selection window shows the option boxes for that report. Your last choices are often remembered, so check each box before you preview.



2. Date range

Enter the From and To dates. The < and > buttons move both dates back or forward by one month. Tick Brought Forward (shown on some reports) to bring in earlier balances. Leave Load Saved ticked to get your last dates back next time. Without saved dates, the range starts as the current month. On some reports an unticked date means no limit on that side.

3. Month and Year

Pick the Month from the list and type or step the Year. It starts at the month and year of the system date. Some reports show balances brought forward or year-to-date, so a month option may not mean one month of data.

4. Lookup choice

Choose one record, such as a location, staff member or type, to limit the report to it. Leave it empty to see everything. Set as default keeps your pick as the starting choice. A message tells you to preview the report so that the default is saved.

5. Lookup range (From and To)

Choose the first and last code. Leave either side empty to leave it open. If the To code is empty or earlier than the From code, it is filled with the From code.

6. Active Status

Choose Active, Inactive or Both. It starts on Active, so inactive records are hidden until you choose Inactive or Both.

7. Group by

Choose up to five grouping levels in Group by, 2nd Group to 5th Group. The small button beside a level switches the sort between A (ascending) and D (descending). The button on the right cycles through Both, Header, Footer and None. Tick Show Details for detail lines, or untick for group totals only. Tick Split Page to start a new page for each group.

8. Filter Top-N Records

Enter how many records you want, for example the top 10. The smallest number is 1. The report's design decides what top means.

9. Transaction filter

Limit a transaction report by Ref. No. From and To, by up to four Date Created ranges (tick the box of the end you want to limit), and by Created By. Leave -ALL- to include every user.

10. Preview or print

Preview or print the report. The options you chose are shown in the report's header line of selected options.

Tips

- Not every report has every option box. An option only works on reports that were set up to use it.
- Printing defaults such as paper size and fonts are in Main > System > System Settings (Main), on the Report Printing Options tab.
- Report screens can save your choices under a name (Description, with an optional Category) and load them later. Loading lists all saved reports, saving lists only those of the same module.
- The last Group by choice and the last Top-N number are remembered and offered next time. Settings you saved yourself take priority.

Common problems

The report shows fewer records than expected.

Check that Active Status is not left on Active when you also want inactive records. Change it to Both.

Dates are not what I used last time.

Check that Load Saved is ticked.

Changing the Top-N number does nothing.

That report may not use the number. Check with whoever set up the report.

The To code changed by itself.

This is expected when it was empty or lower than the From code.

The report shows nothing.

Check that the month, year and dates contain transactions.

An option box is missing.

Not every report includes it.

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