Synergy Acc2026 - Point of Sale: Making a Cash Sale

This guide shows how to ring up a cash sale at the counter: open the sales screen, add the items, choose the member, take the cash and print the receipt. The example sells a T-shirt, two packs of socks and a cap (86.60) to member Sample Member A, who pays with RM 100 and gets 13.40 change. Video on adding a member to the sale: https://youtu.be/DpnSfdQvYKQ

Before you start

- The location must already be set up in Point of Sale Settings, or the sale cannot start.
- Open the POS Transactions screen (Point of Sale > Transaction > POS Transactions) and start the shift. The sales screen opens from there with [F8] SALES ENTRY.

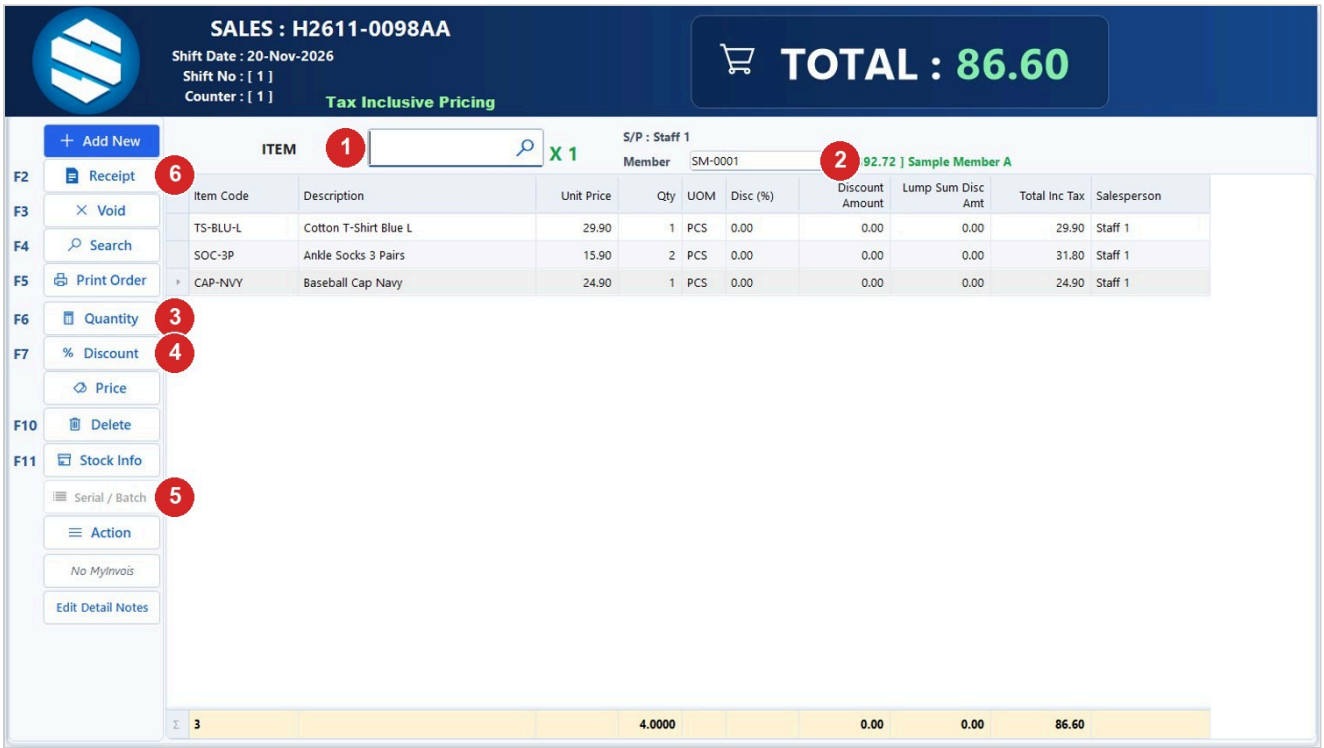
Steps

1. Open the sales screen

On the POS Transactions screen click [F8] SALES ENTRY (Click to add record). The top of the sales screen shows the SALES number, Shift Date, Shift No and Counter, and the TOTAL. After a sale is paid, the screen is ready for the next one; Add New also starts a new sale.

2. Add the items and the member

Each item is added as a line with its Unit Price, Qty and Total Inc Tax. In menu-item (F&B or touch) mode you tap the items on the menu buttons instead.

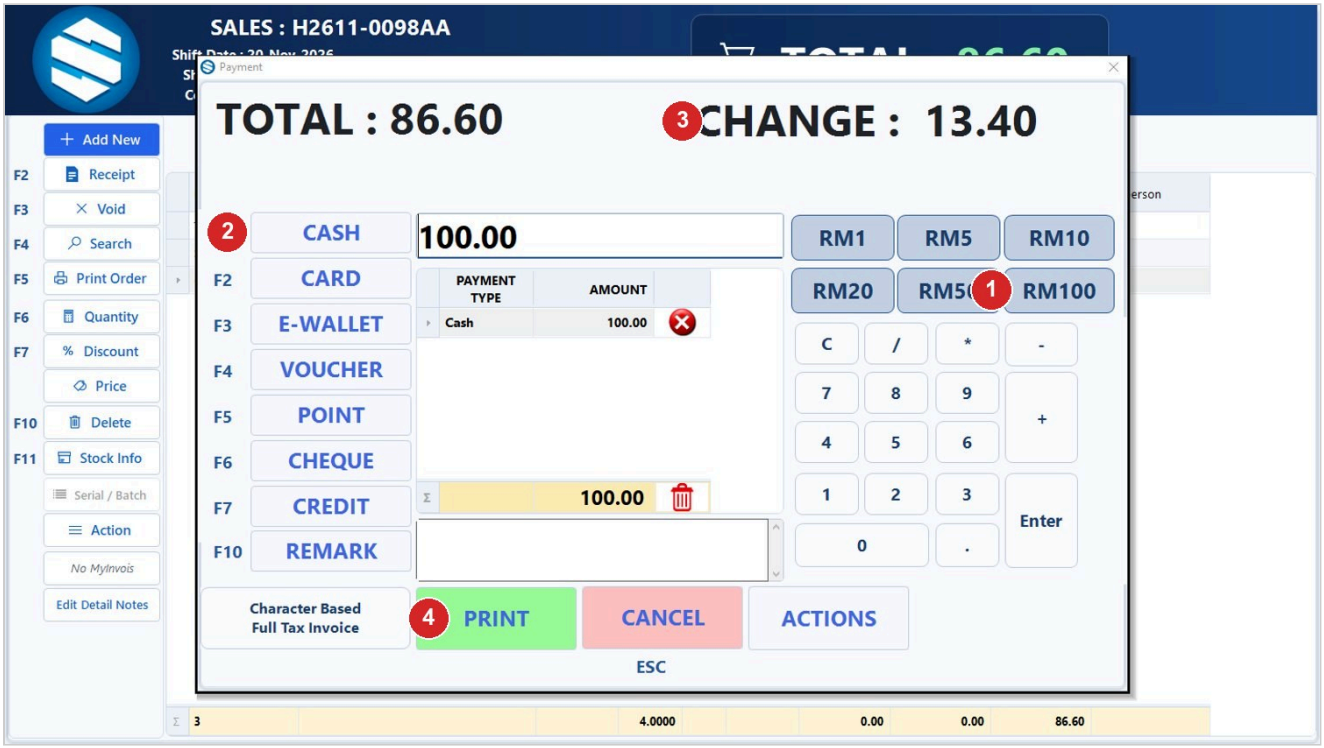


Step	What to do
1	ITEM (F1/F2): scan or type the item code and press Enter. Type 2*SOC-3P to add two at once, or click the magnifier to search.

Step	What to do
2	Member: type the member code (here SM-0001). The member's name and points show beside it.
3	Quantity (F6): change the quantity of the selected line.
4	Discount (F7) or Price: give a discount or change the price of the line.
5	Serial / Batch: for items with serial or batch numbers. Stock Info (F11) shows the item's stock.
6	Receipt (F2): go to payment.

3. Take the cash

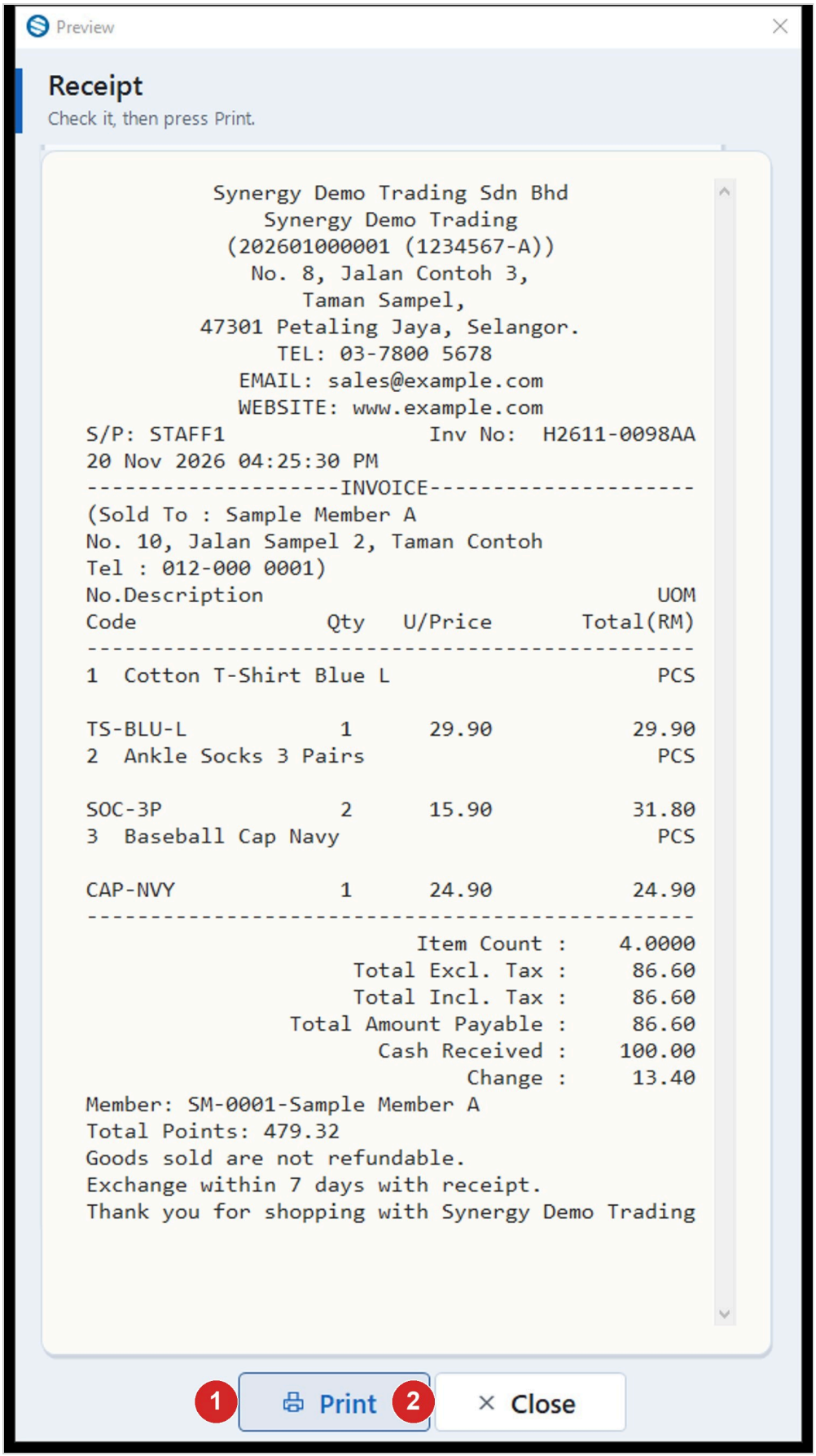
The Payment window shows TOTAL and CHANGE. Payments you add are listed under PAYMENT TYPE.



Step	What to do
1	Tap the note the customer gives (RM1 to RM100), or type the amount with the keypad (here 100.00).
2	Click CASH (F1). The cash line is added.
3	CHANGE shows what to give back (here 13.40). Other payment types have their own buttons (E-WALLET, VOUCHER, POINT and so on).
4	Click PRINT to save the sale and print the receipt.

4. Check and print the receipt

The receipt preview shows the items, totals, cash received and change, and for a member the points. Whether the preview appears is set in Point of Sale Settings > P.O.S Hardware (Action When Print Receipt).



Step	What to do
1	Print: print the receipt.
2	Close: close the preview. The sale is already saved.

5. Other buttons

Search (F4) finds an earlier sale, Void (F3) cancels a sale, Delete (F10) removes a line, Print Order prints the order again, and Action has more tools such as Enable Record Editing and POS Settings.

Tips

- In F&B mode the screen also shows TABLE, Pax Count, Seat No., Take Away / Dine In, Service Charge and paging buttons for menu items.
- No MyInvois / Request MyInvois asks for an e-invoice on the sale.
- Custom buttons such as Edit Detail Notes are set up by your company. Keys such as F2 are shown beside buttons as shortcuts.
- If the NRIC you type (6 or more digits) is not 12 digits long, a message asks whether to proceed anyway; tick the confirm box and click OK to continue.

Common problems

Please set up the location in [Point of Sale Settings] first.

Set the location in the Point of Sale settings, then start the sale again.

This sale transaction has no item.

Add at least one item before you click Receipt.

Payment has not been made.

Add the payment (for example CASH) before you click PRINT.

Invalid Member Id [...] / Invalid Member

Check the member code in the Member box.

Invalid Value for Default Price set in User Flag.

Ask the person who manages your settings to correct the default price setting for the user.

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

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