Synergy Acc2026 - Set Up Locations and Bins

A location is an outlet, branch or warehouse where you keep stock. A bin is a storage spot inside a location. This guide shows how to add locations and bins, and how to copy items to your locations or clear out unused items.

Before you start

- Create the location first, because a bin must belong to a location.
- Only active locations can be chosen for a bin.

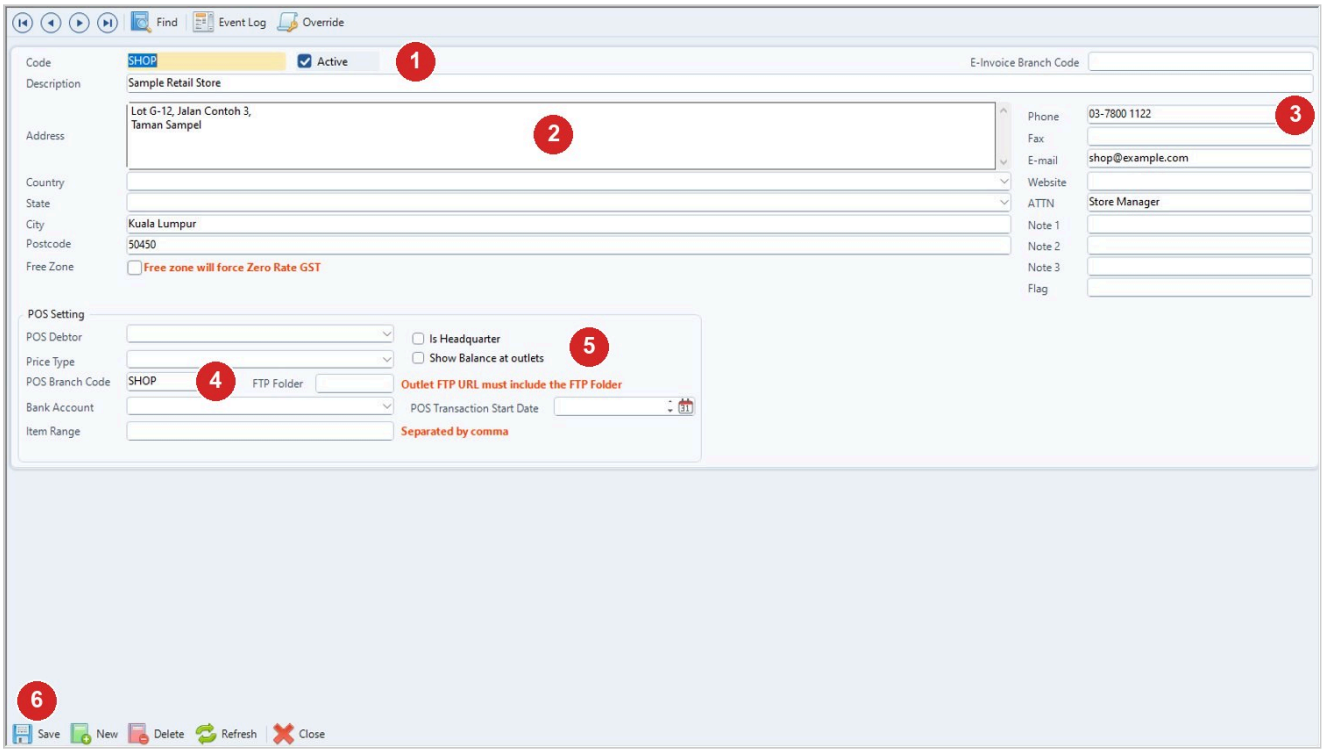
Steps

1. Open the Location screen

From the menu, go to Inventory Management > Masterfile > Sub-Masterfile > Location. Open a new or existing location.

2. Fill in the location

Here the SHOP location, Sample Retail Store. State and Country are links that open their own lists; choosing a country limits the states shown.

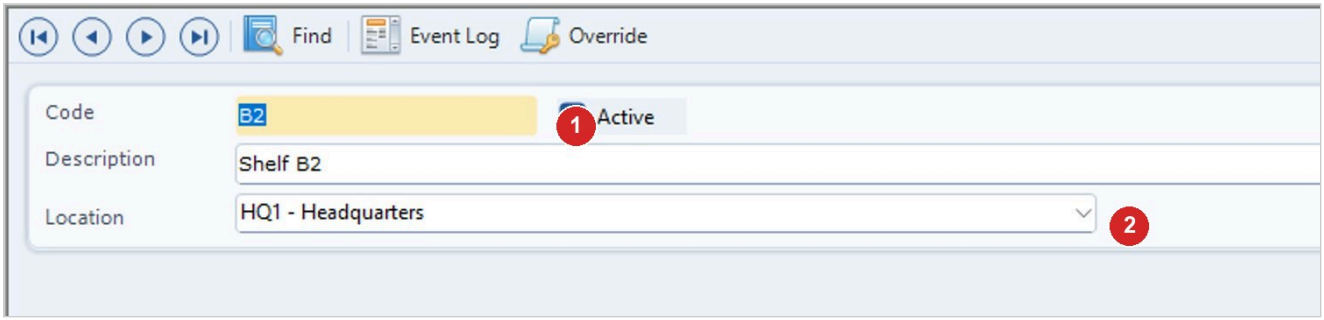


Step	What to do
1	Code and Description are required. Leave Active ticked.
2	Address, Country, State, City and Postcode.
3	Phone, Fax, E-mail, Website, ATTN and notes.
4	POS Setting group (if the location sells through POS): POS Branch Code (letters and numbers only), Price Type, FTP Folder, Bank Account, Item Range ...

Step	What to do
5	Is Headquarter and Show Balance at outlets.
6	Click Save.

3. Add a bin

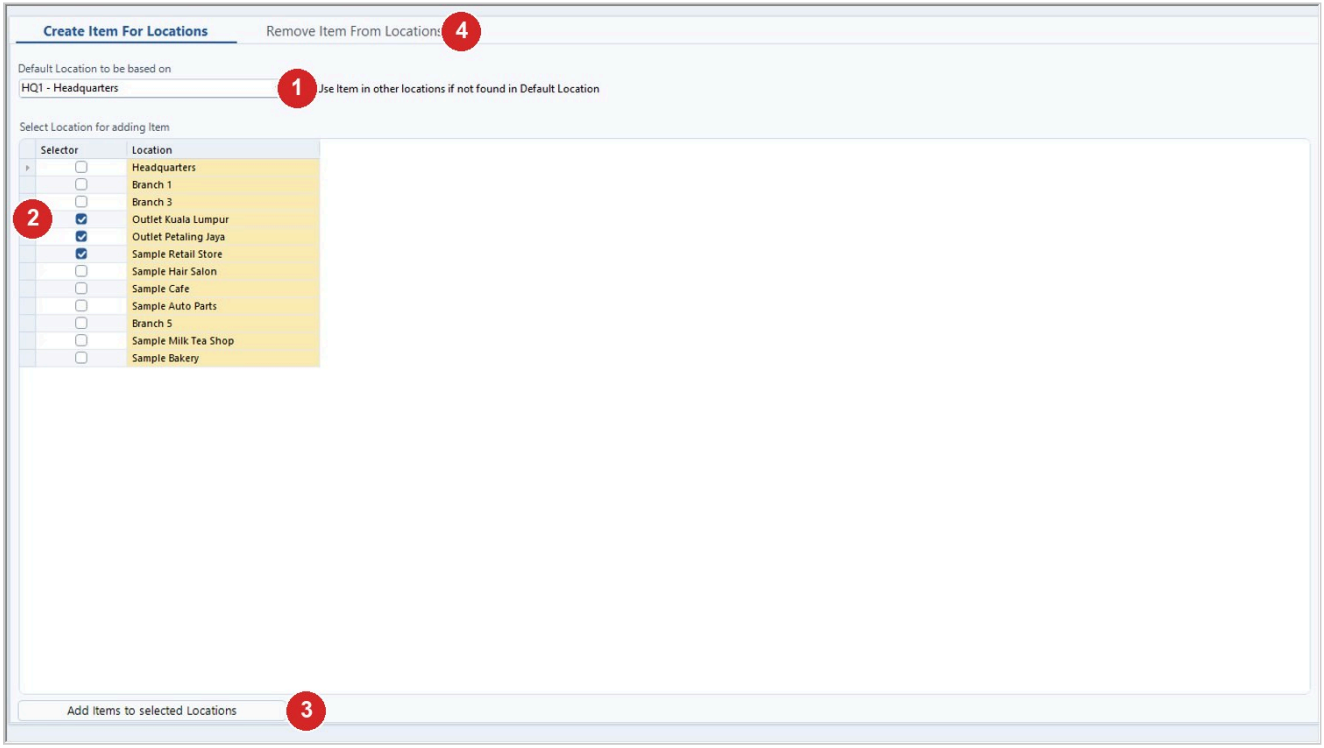
Go to Inventory Management > Masterfile > Sub-Masterfile > Bin and start a new record. The screen needs the code, the description and the location before it will save. Only active locations can be chosen.



Step	What to do
1	Code and Description (here B2, Shelf B2). Leave Active ticked if the bin is in use.
2	Location the bin belongs to (here HQ1). Then save.

4. Copy items to your locations

Go to Inventory Management > Utilities > Add / Remove Items From Locations Utility. On the Create Item For Locations tab:



Step	What to do
1	Default Location to be based on (here HQ1), and tick Use Item in other locations if not found in Default Location if needed.
2	Select Location for adding Item: every location comes ticked; untick the ones you do not want (here KL, PJ and SHOP stay ticked).
3	Click Add Items to selected Locations.
4	To clean up, the Remove Item From Locations tab removes all UNUSED items from one location after a warning. Only items that were never used are removed.

Tips

- Items you add or remove here are for whole locations at once, so check the ticked locations before you click.
- Do not remove items from a location after you have already synchronized the item to a branch. This can cause problems with transaction synchronization later.
- In the POS Branch Code, an underscore is changed to a hyphen automatically when you save.
- The POS Debtor box appears only when the POS module is licensed.

Common problems

The location is missing from the Bin list

The location may be inactive or not created yet. Use the Location link on the Bin screen to create it or make it active.

The Bin screen will not save

Fill in Code, Description and Location. All three are checked.

Invalid POS Branch Code message

Use letters and numbers only. You can confirm to save anyway, or decline and correct the code.

A state is not listed

Check the country, and check that the state is active.

Removing items is blocked

At head office with branch synchronization, a supervisor override is asked for first because head office is not allowed to delete items.

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

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