Synergy Acc2026 - What To Do When an Excel Import Fails

Use this when a file will not load, rows are rejected, imported data looks wrong, or you need to undo an import. The checks apply to every import screen. Work down them in order. Each step names the full guide to read next.

Before you start

- The exact message on the screen (take a screenshot) and the import screen you used.
- Your Excel or CSV file, with a heading row and at least one data row.
- A database backup. Some imports update or replace existing records and cannot be reversed.

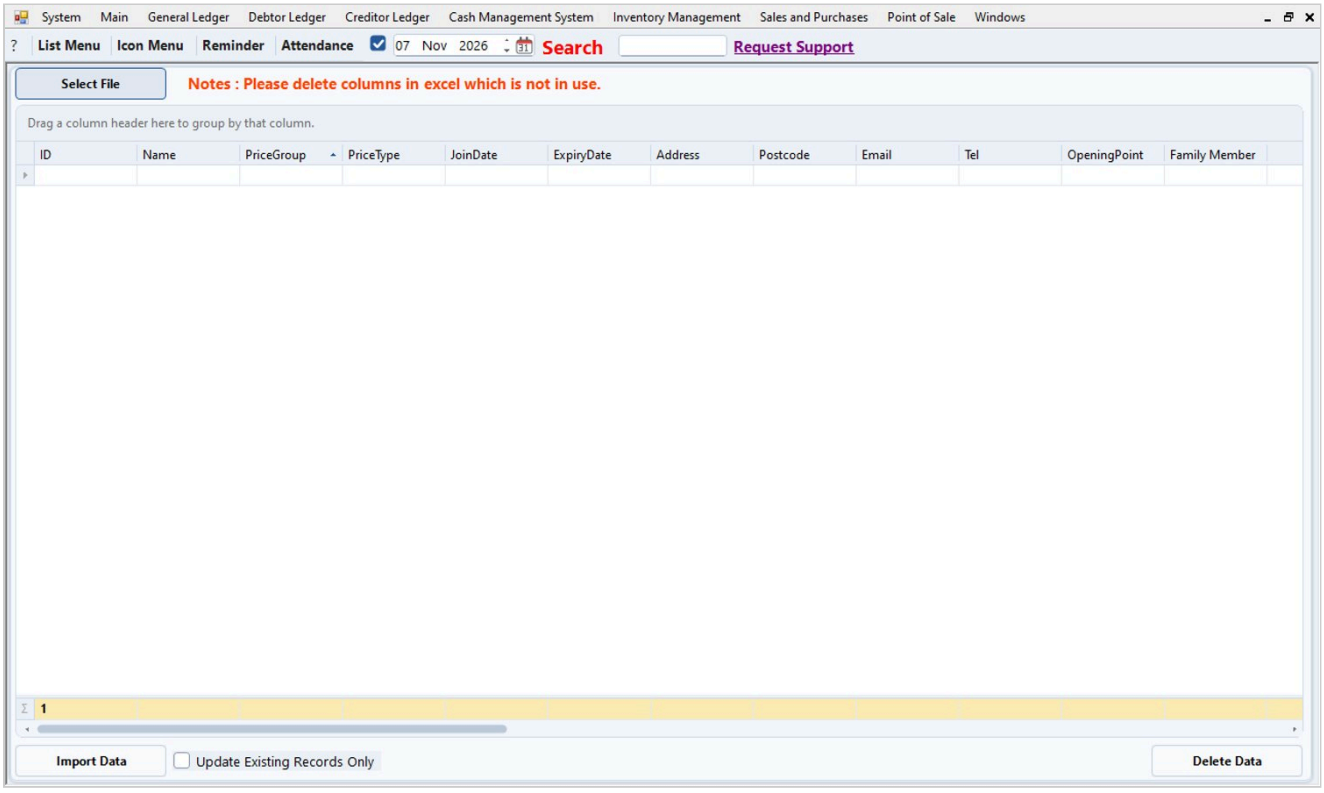
Steps

1. Are you on the right import screen, on a licensed copy?

Each kind of data has its own import screen, for example Item Masterfile Import Utility, Member Import Utility, Debtor Masterfile Import and Transaction Batch Import Utility. Importing does not work on a Demo or Trial copy, where the screen says the function is disabled. Full guide: Synergy Acc2026 - Importing Your Data: Overview

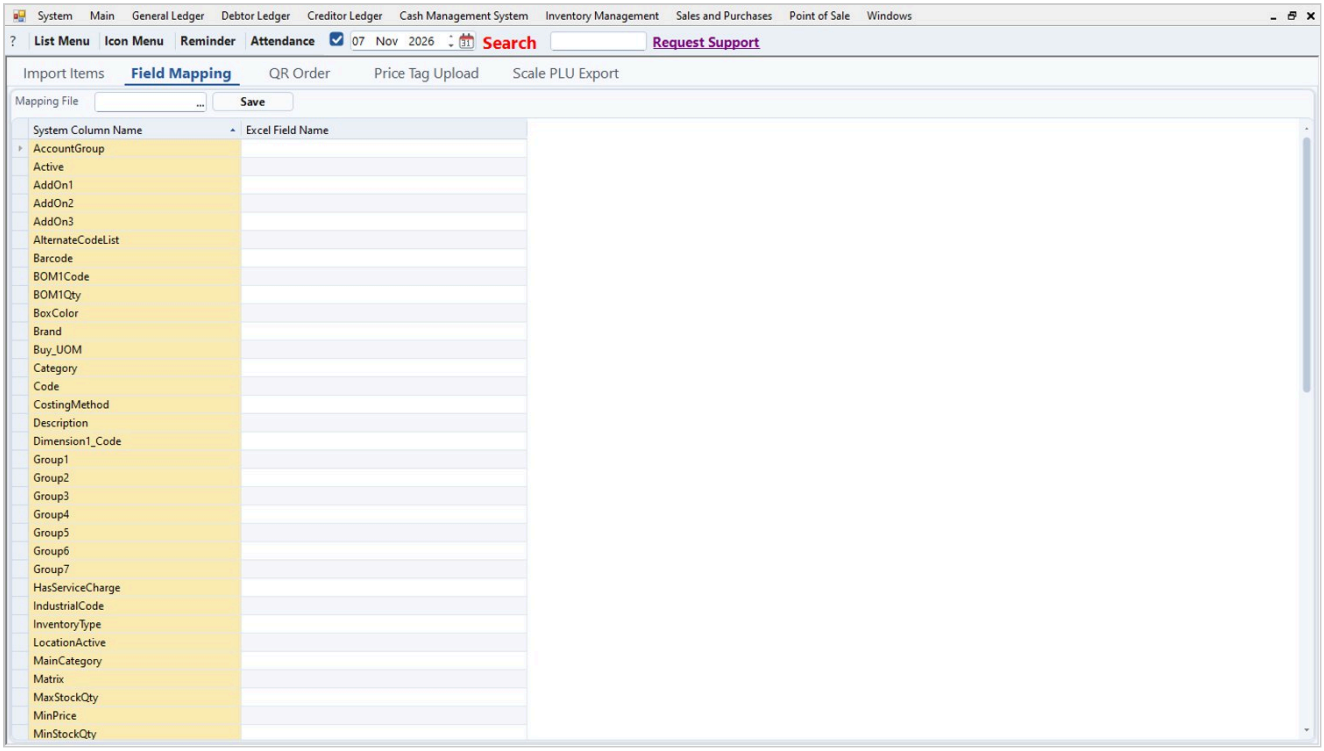
2. Nothing appears after you choose the file

Click Select File again and check that the file has a heading row and at least one data row, and that it is not open in another program. Messages such as File not found. and No records in the file. mean the file name is wrong or the first sheet has no rows. Some screens also need a particular column: for members the file must have a Member ID column. Full guide: Synergy Acc2026 - Data Export, Loading Excel Files and Excel Mapping



3. The columns come in empty or in the wrong place (header mismatch)

The headings in your file do not match the names the screen expects. Use the exact headings shown in the Required data box or note on the screen, typed with no extra spaces. If your file uses other names, set them on the Field Mapping tab (items) or in Excel Mapping before you import. Full guide: Synergy Acc2026 - Importing Items and Menu Lists from Excel

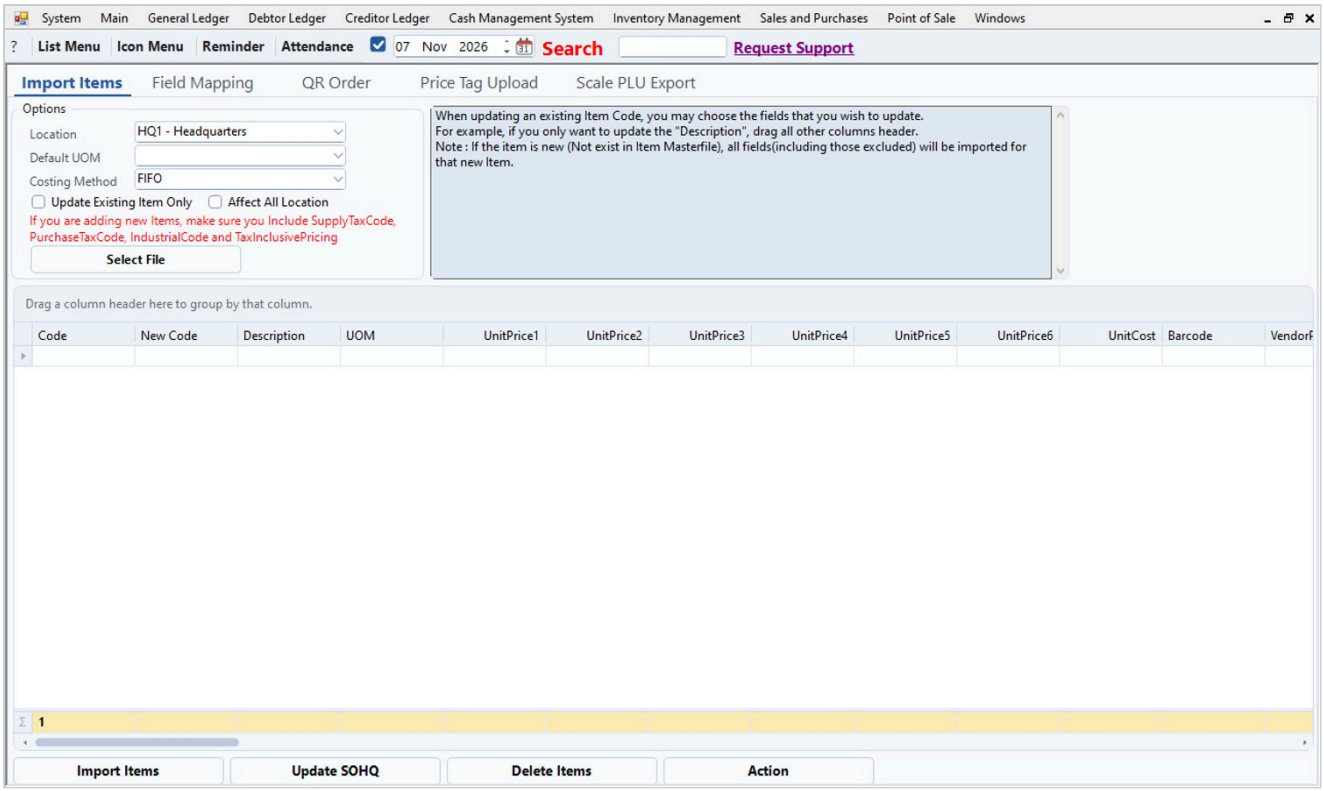


4. Some rows are red or show an error

Read the message in the error column, correct that row in your file and select the file again. Choosing a new file clears the grid first. Press Import Data only when no red rows are left. The message Data import completed. can appear even when some rows failed, so check the grid first. Full guide: Synergy - Messages You May See: Imports

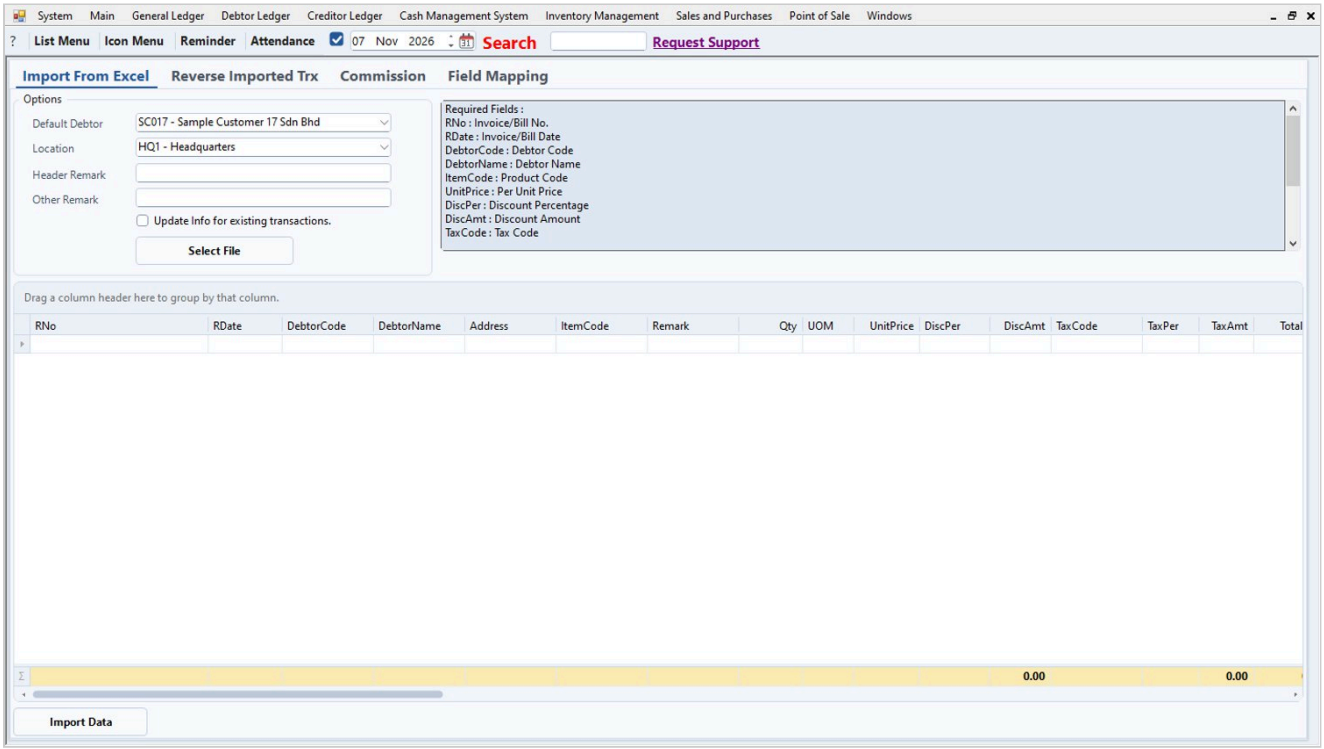
5. The item import fails or the count does not match

Delete blank rows at the end of the Excel file and check the U.O.M. column for empty cells. Every item code must exist in the item list, so create new items first or fix the code. In the Active column use exactly Y (or TRUE) for active and N for inactive. Format the Code column as Text so leading zeros are kept, and make sure item codes are not duplicated. Full guide: Synergy Acc2026 - Importing Items and Menu Lists from Excel



6. An invoice import is skipped or fails

If a Ref No already exists and Update Info for existing transactions is not ticked, the import fails. Fill in the Location and the Default Debtor (Default Creditor for purchases) under Options. Rows with errors are skipped and the rest are still imported, so read the list in the message These Ref No have errors and will NOT be imported before you answer. In the purchase template, Total Amt is the amount before tax, Tax Amt is the tax and Net Amt is the total including tax. Try one or two lines first. Full guide: Synergy Acc2026 - Importing Sales or Purchase Invoices from Excel



7. The e-invoice classification does not import

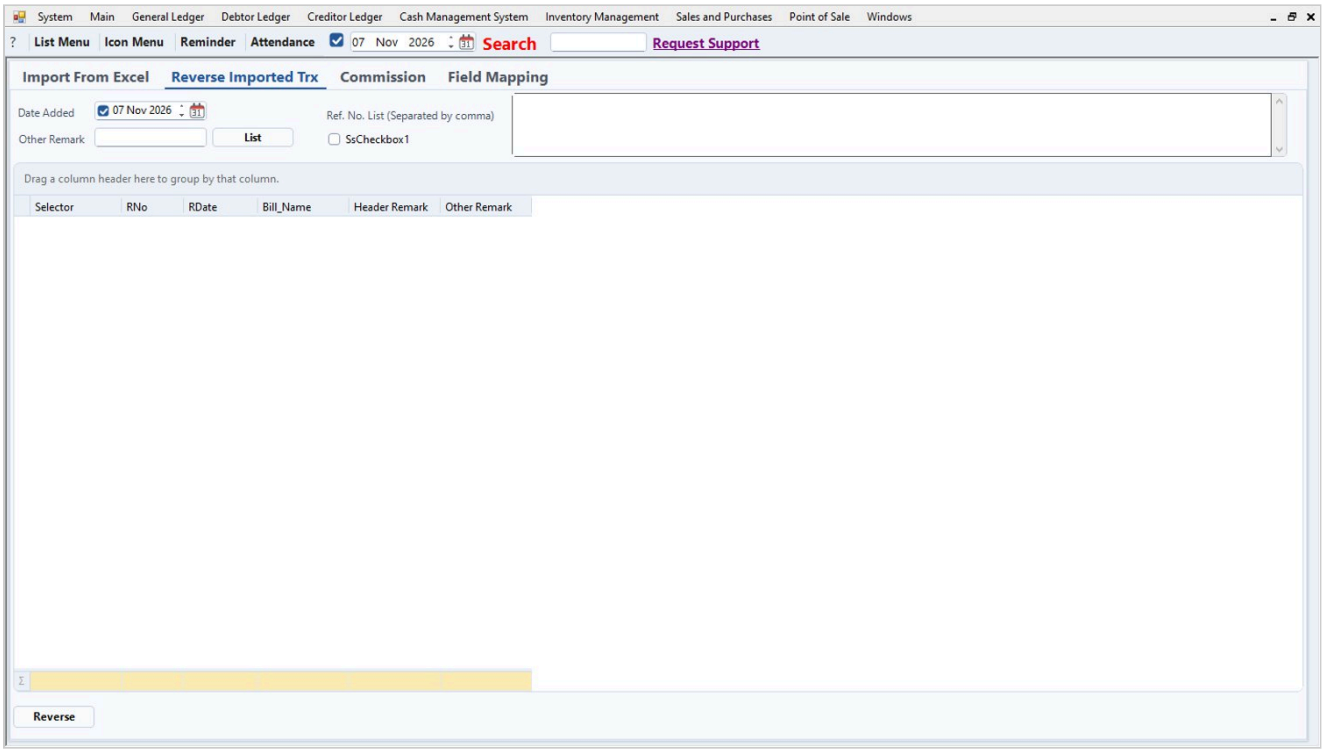
The header is MyInvois Item Class. Type the classification code number only, for example 022. A blank or invalid cell clears the classification already saved on that item, so remove the column if you do not want to change it. Self-Billed Item Class is a separate column. Full guide: Synergy Acc2026 - Header for the E-invoice Classification in the Item Import Excel

8. Existing records changed after the import

Importing replaces existing data with the values in the file. A Description column replaces the description of every item with the same Code, even with blank if the cell is empty. For members, a Member ID that already exists is updated with the file values, and every column in the file is written, including Opening Point and Active. Tick Update Existing Item Only (items) or Update Existing Records Only (members) if you do not want new records created. Restore your backup if the result is wrong. Full guide: Synergy Acc2026 - Importing Members from Excel

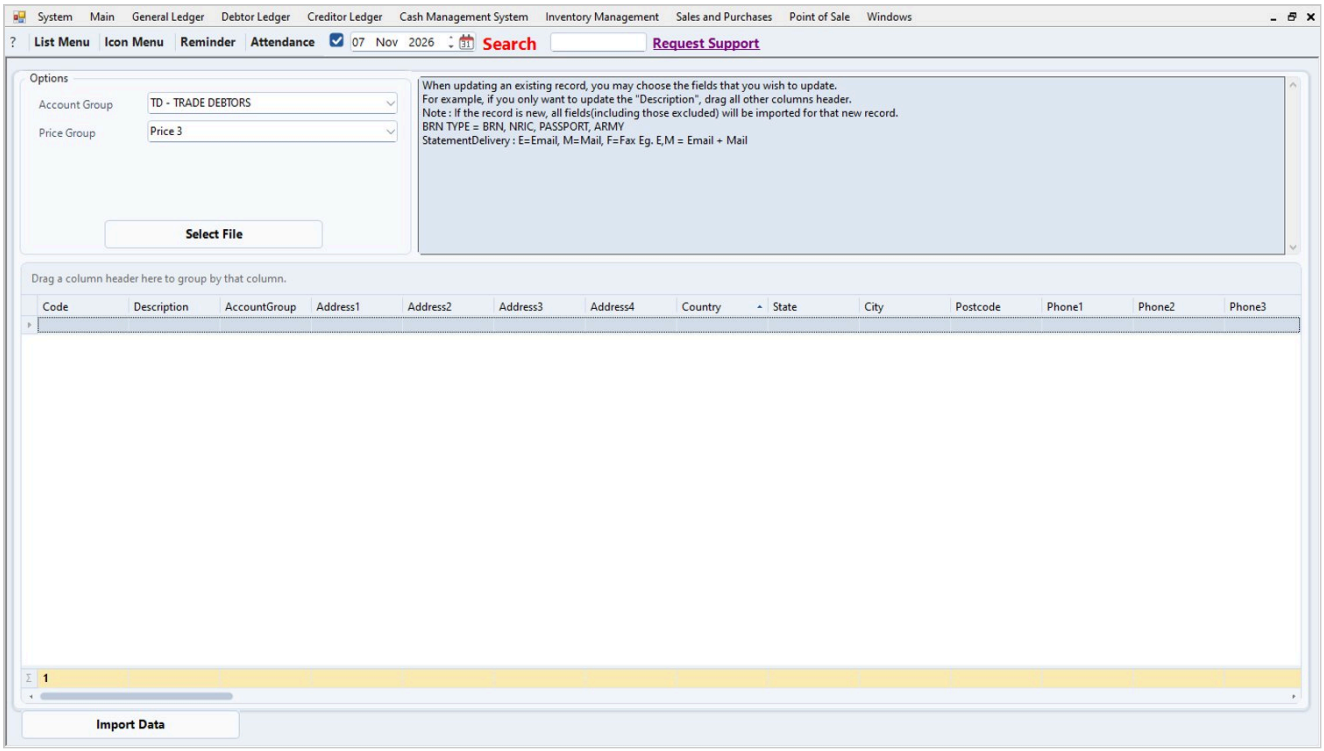
9. You need to undo an import

For sales or purchase transactions, use the Reverse Imported Trx tab: filter by Date Added, Other Remark or Ref. No., click List, then Reverse and confirm. For General Ledger journals, open Reverse Imported Trx, choose the Date Added or Batch No., press List and then Reverse. For cash book transactions, use the Reversal tab. Members and items cannot be reversed this way, so use your backup. Full guide: Synergy Acc2026 - Importing General Ledger Journal Transactions



10. A debtor, creditor, cash book or opening balance import is refused

For debtors and creditors, choose a default Account Group under Options or fill in the Account Group column. For customer credit opening balances, choose the Location and make sure no row has an empty RefNo. For cash book imports, foreign currency is not supported, SST transactions are not supported, and you use one row per transaction. Full guide: Synergy Acc2026 - Importing Debtors and Creditors from Excel



Tips

- Use the column headings exactly as the screen asks. Most screens list them in a Required data box or a note.
- Do not click Delete Data on the member import screen unless you really want to delete every member listed in the grid. It cannot be undone.
- The exported item list does not have the same columns as the import file, so adjust the headings before you import it again.

Common problems

Account Group is required because one or more rows have no Account Group

Choose a default Account Group under Options, or fill in the Account Group column in your file.

[Location] or [Debtor Code] is required

Fill in the Location and the Default Debtor under Options before you import.

Member ID column is required

The file has no Member ID column. Add one and select the file again.

Inactive items still show after an import

Check the show-inactive filter option. An item that already has transactions can only be made inactive, not deleted.

The import still fails.

Contact Synergy support. Have ready the Excel file, a screenshot of the import screen and the exact message.

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

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