



# Accounting App Tutorial

A walkthrough of how to navigate the features within the accounting app of Syniq Business OS.



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### How to Add a Client

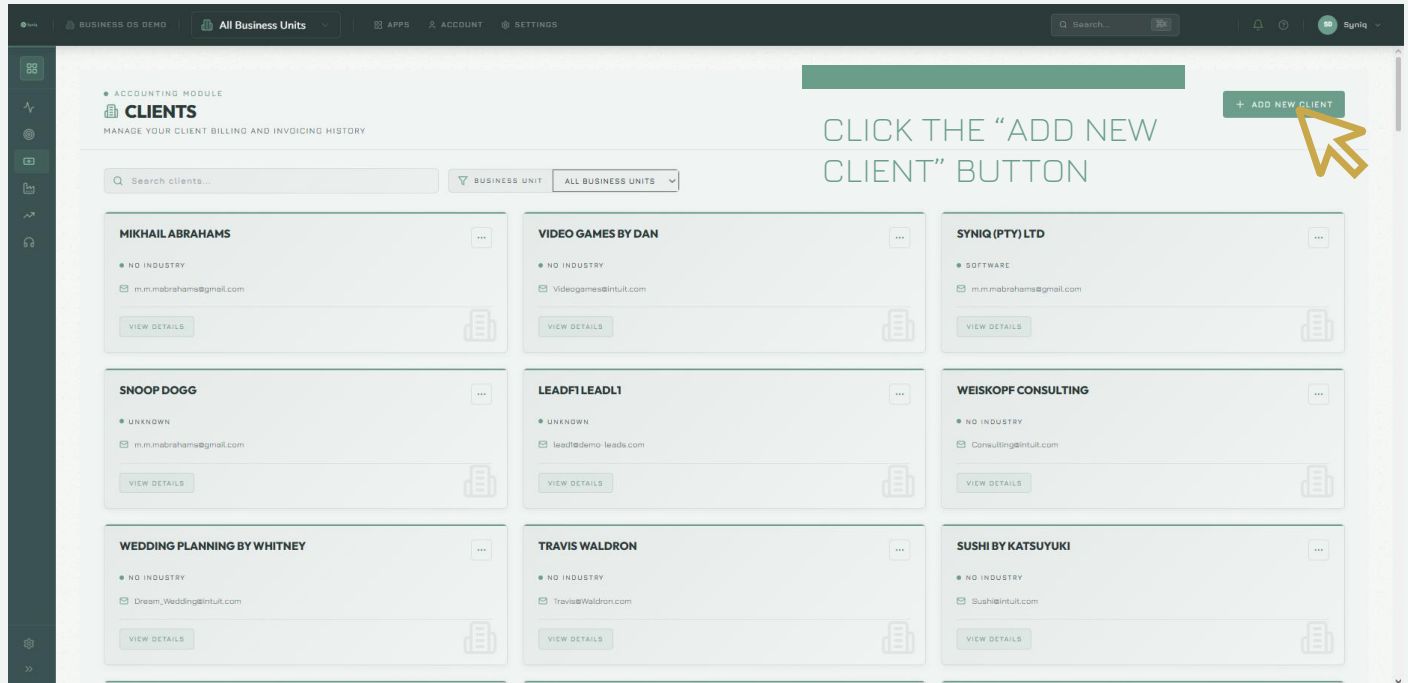


Figure 1: Add a Client Step 1

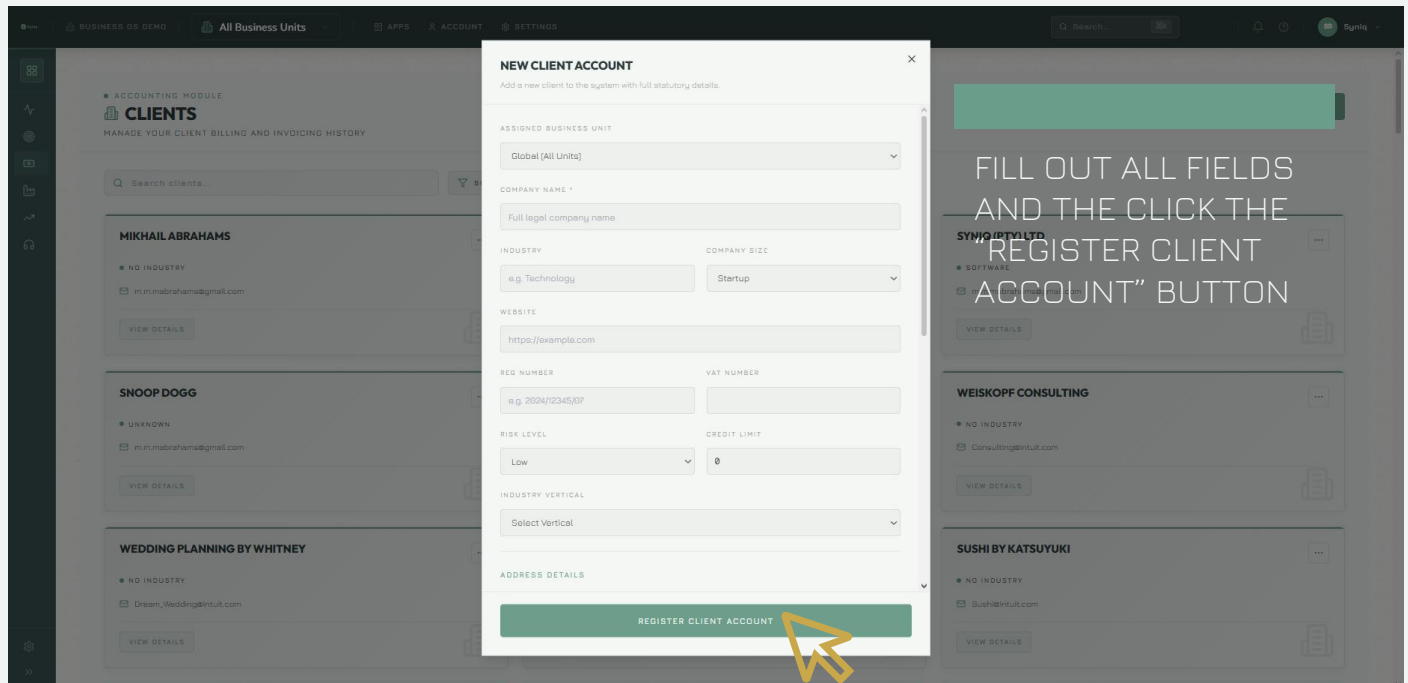


Figure 2: Add a Client Step 2

## How to Edit a Client

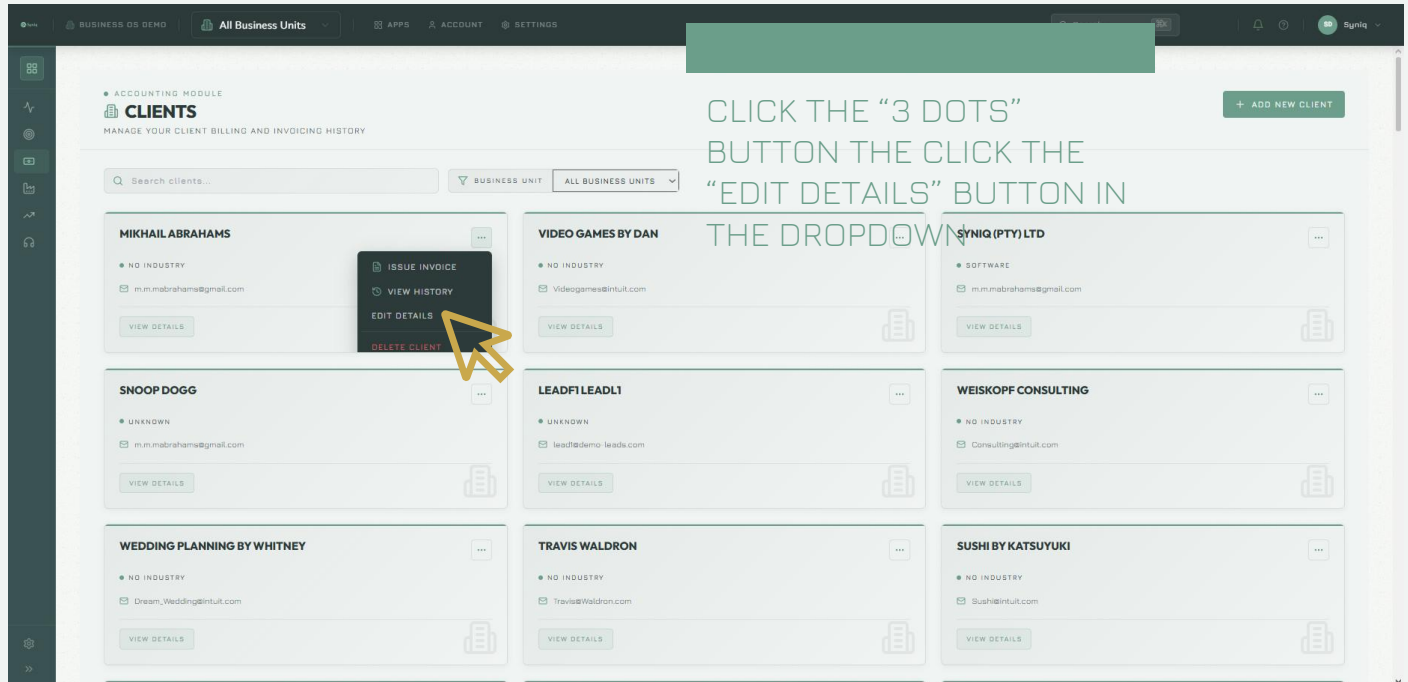


Figure 3: Edit a Client Step 1

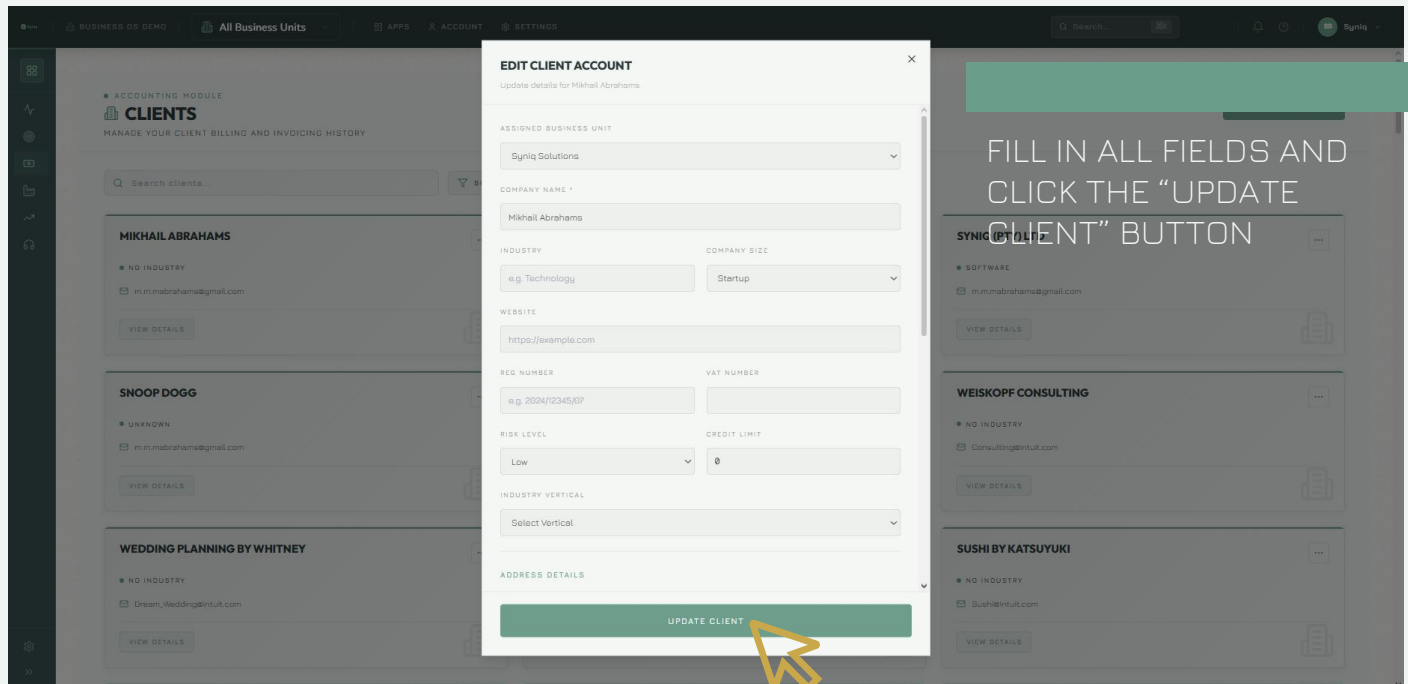


Figure 4: Edit a Client Step 2

## How to Issue a Statement

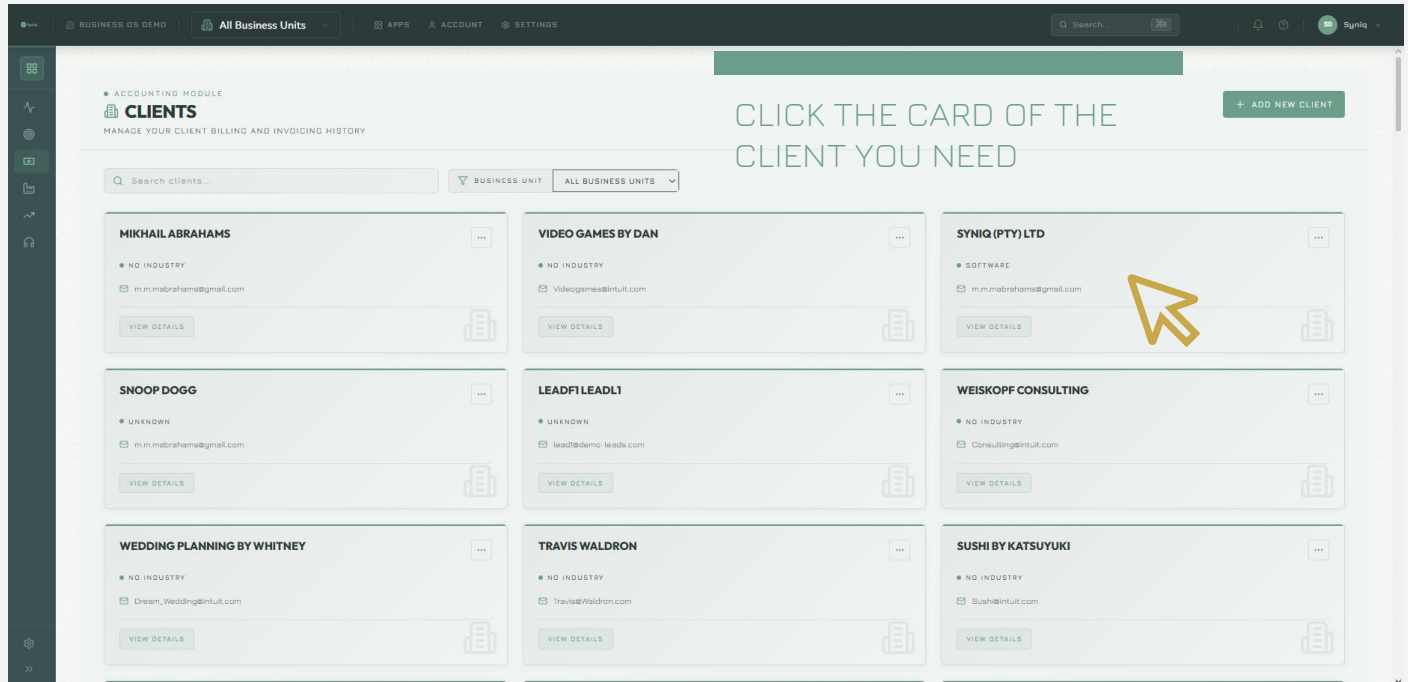


Figure 5: Issue a Statement Step 1

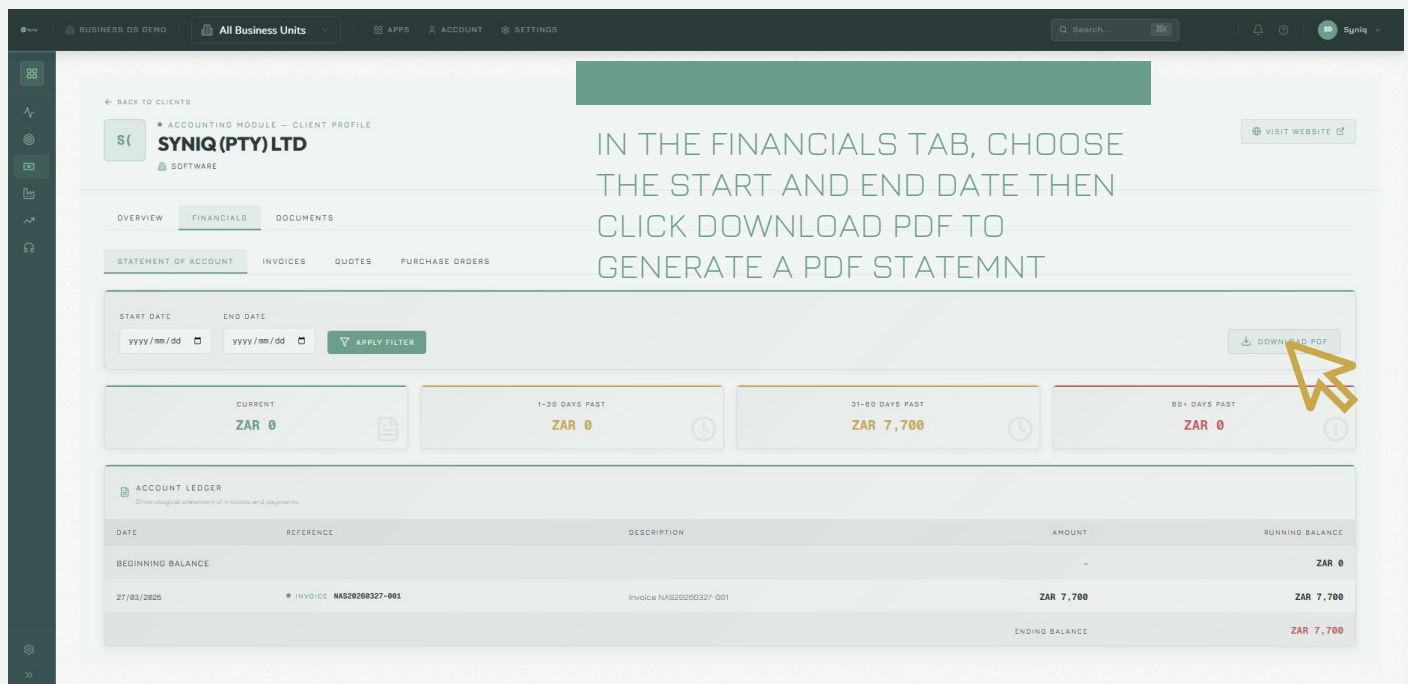


Figure 6: Issue a Statement Step 2

### How to Add a Vendor

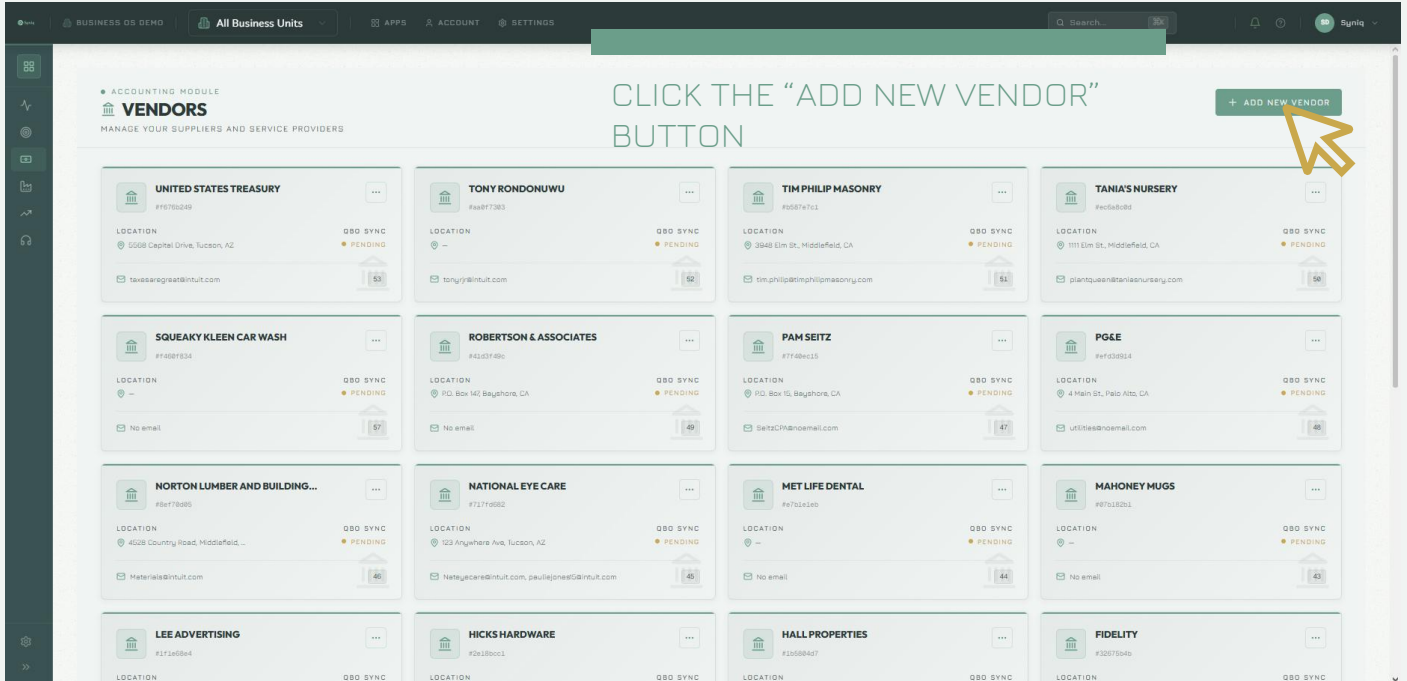


Figure 7: Add a Vendor Step 1

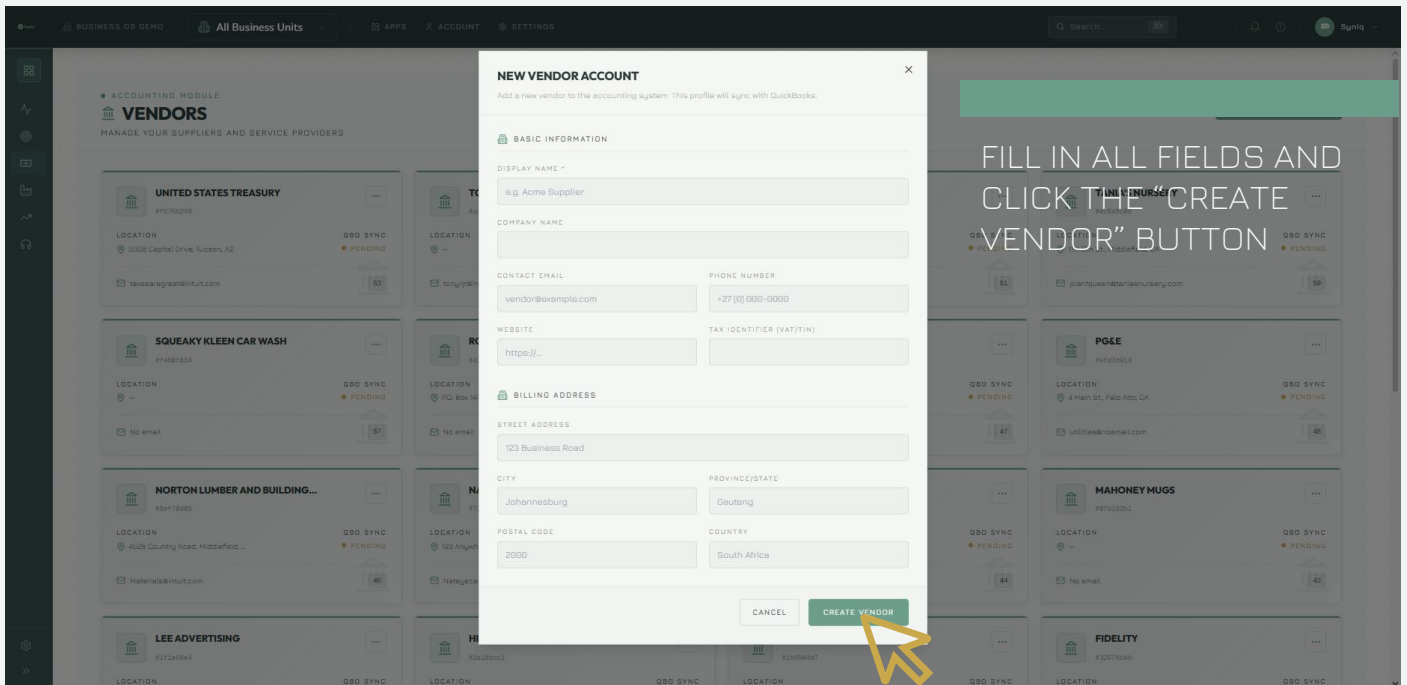


Figure 8: Add a Vendor Step 2

## How to Edit a Vendor

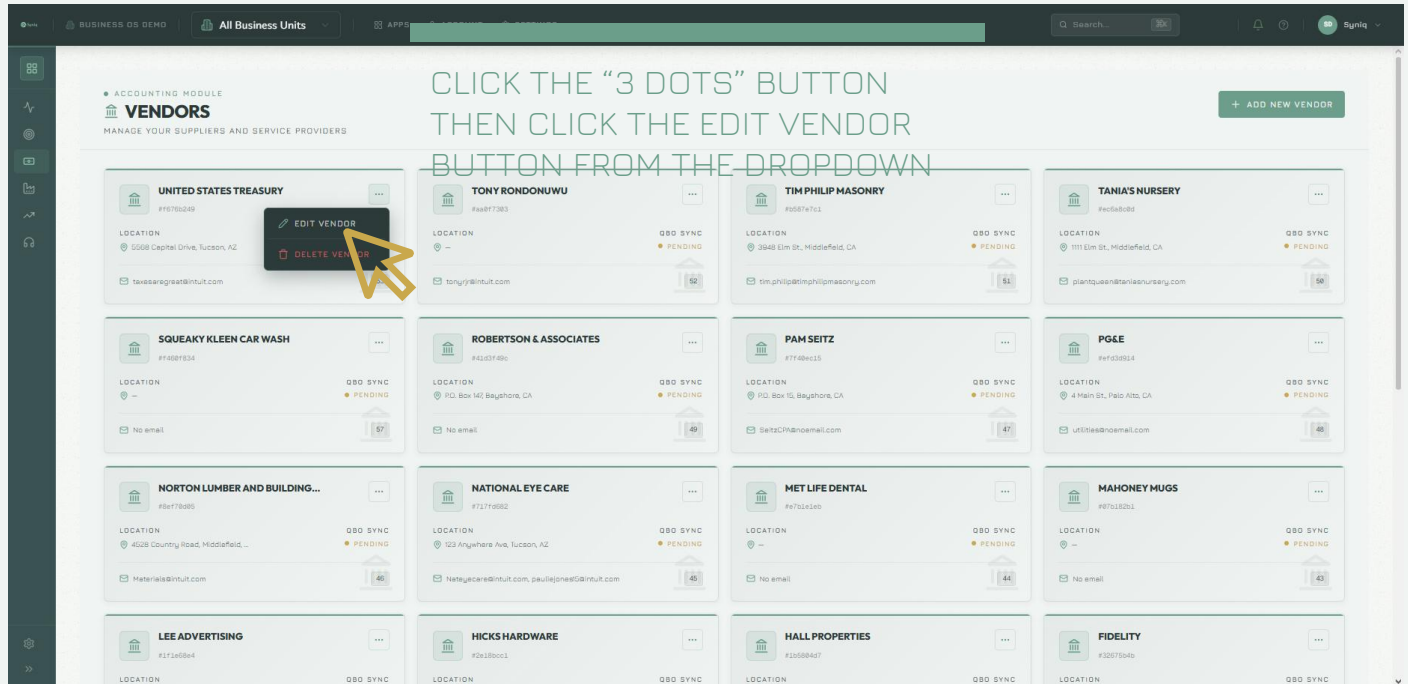


Figure 9: Edit a Vendor Step 1

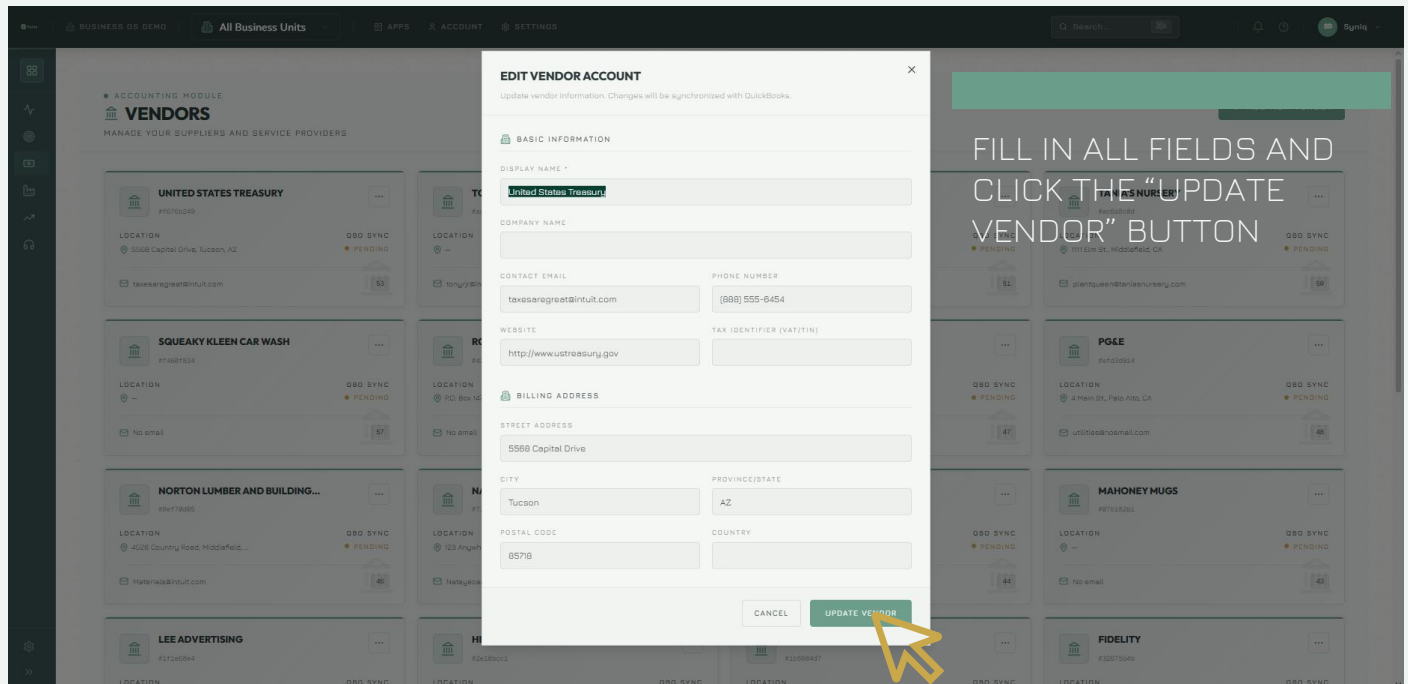


Figure 10: Edit a Vendor Step 2

### How to Create a Quote

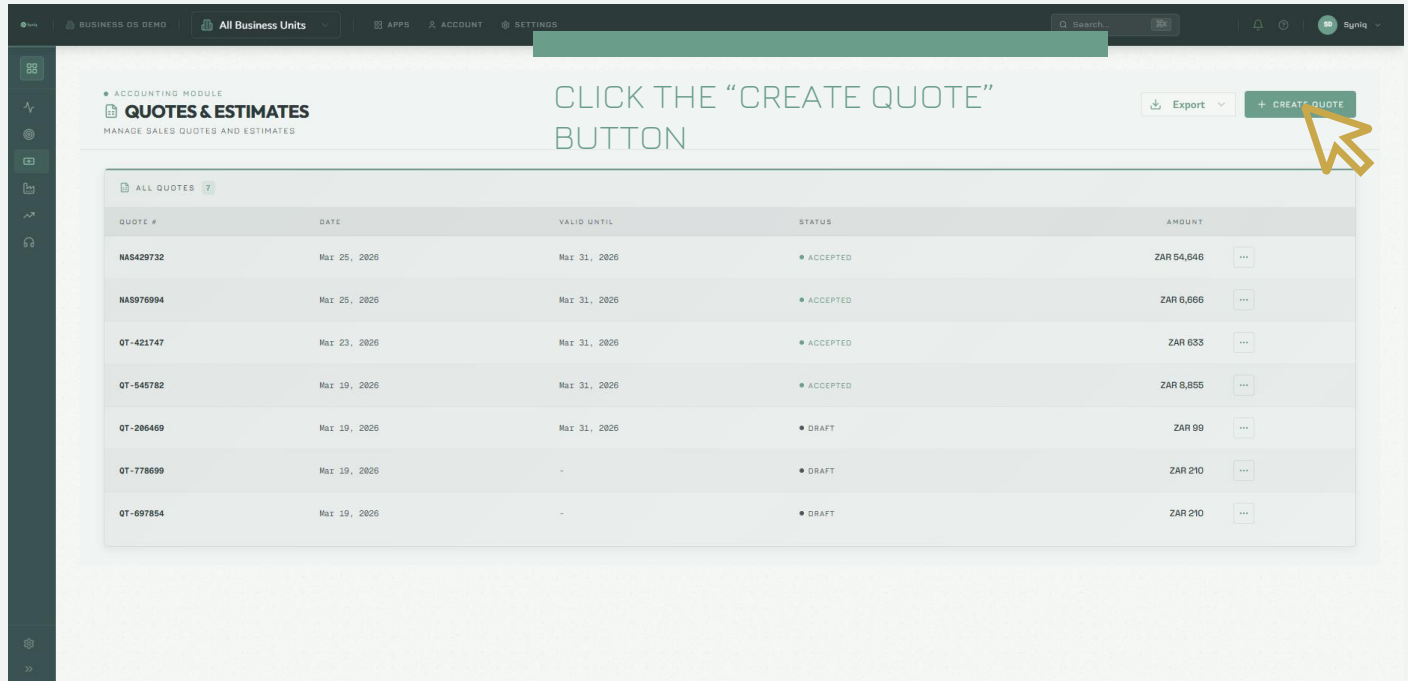


Figure 11: Add a Quote Step 1

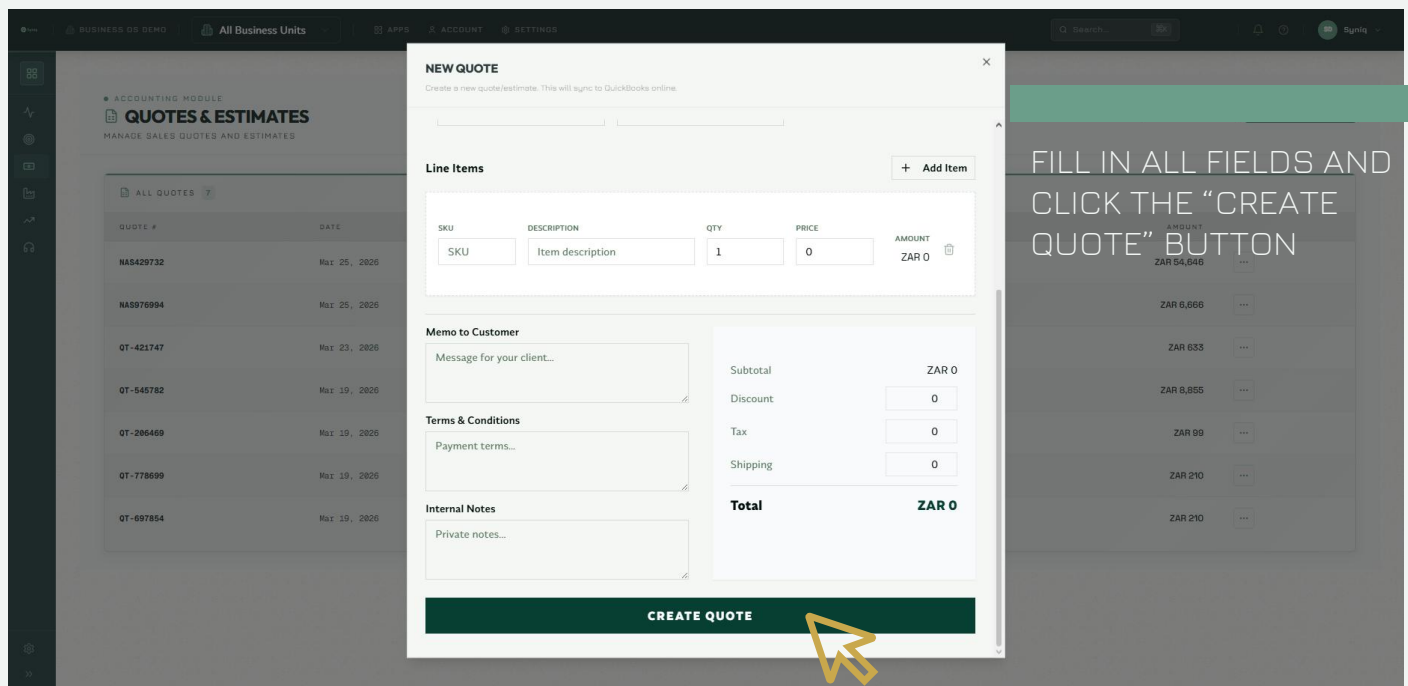


Figure 12: Add a Quote Step 2

## How to Edit a Quote

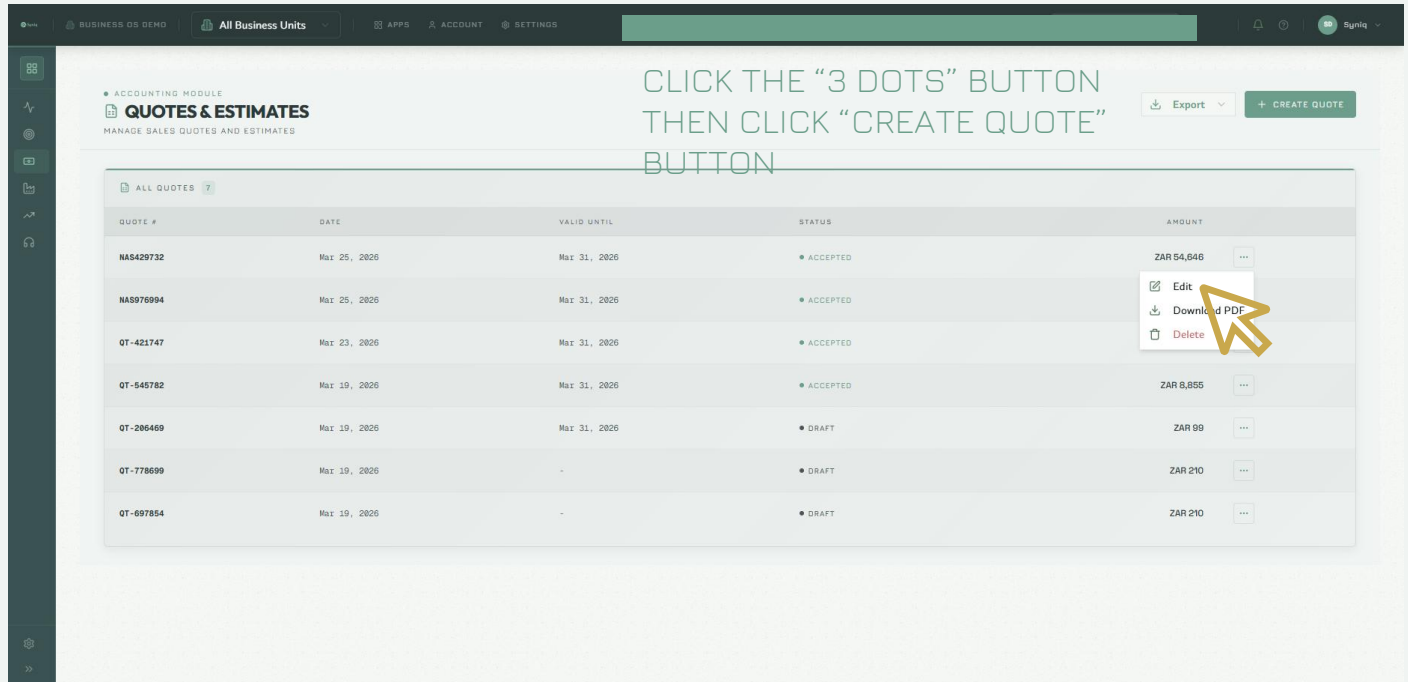


Figure 13: Edit a Quote Step 1

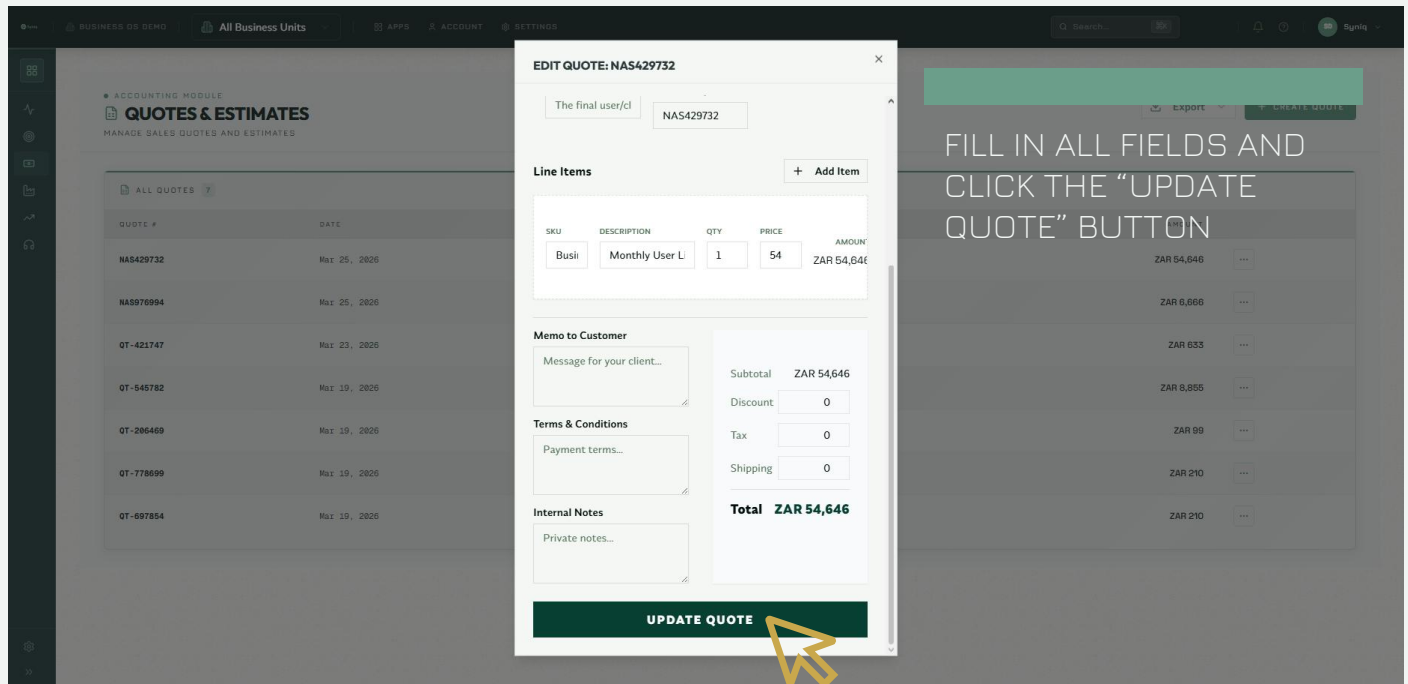
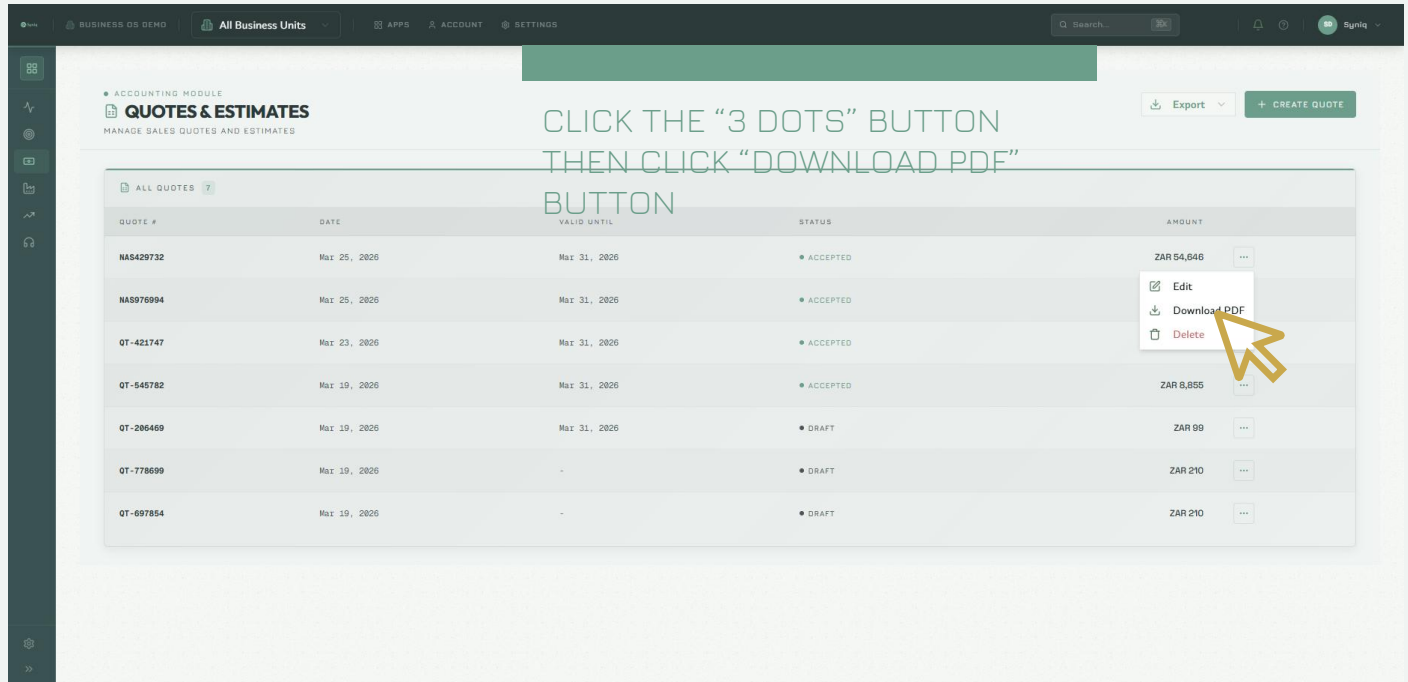


Figure 14: Edit a Quote Step 2

## How to Download a Quote

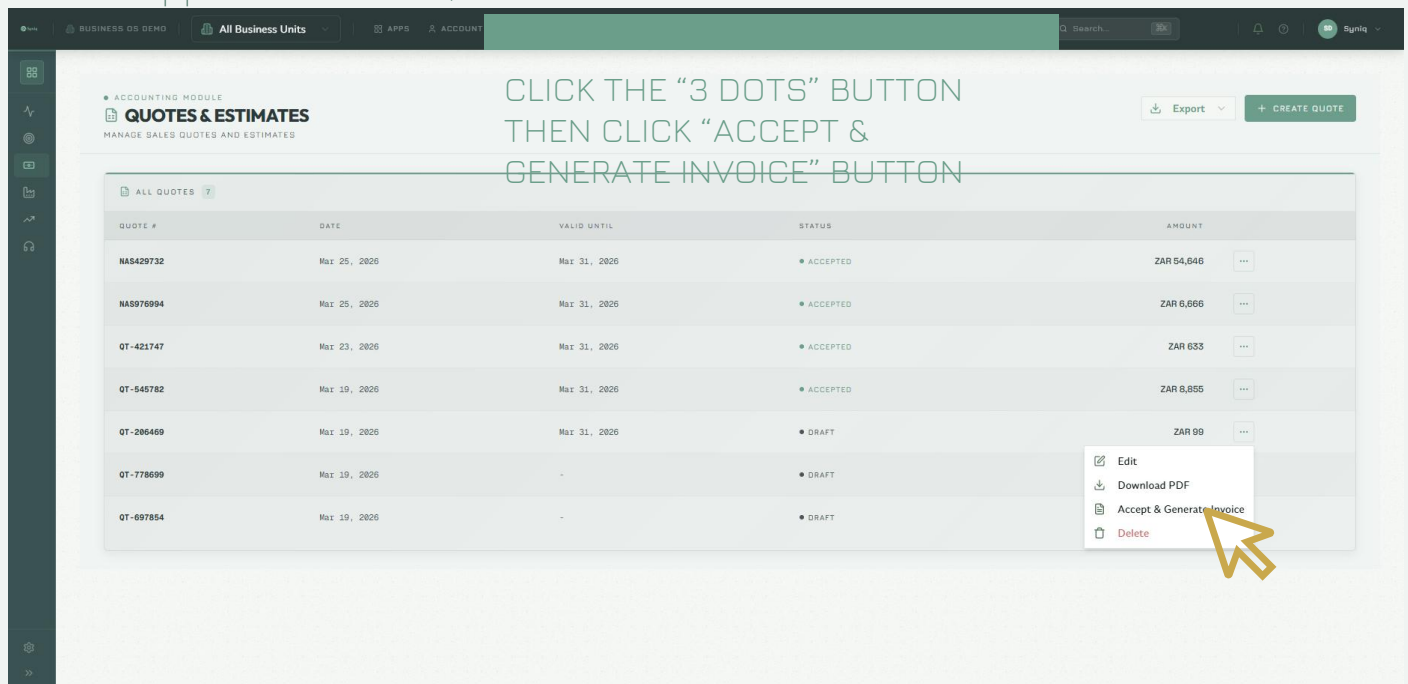


CLICK THE "3 DOTS" BUTTON THEN CLICK "DOWNLOAD PDF" BUTTON

QUOTE #	DATE	VALID UNTIL	STATUS	AMOUNT
NAS429732	Mar 25, 2026	Mar 31, 2026	ACCEPTED	ZAR 54,646
NAS976994	Mar 25, 2026	Mar 31, 2026	ACCEPTED	
QT-421747	Mar 23, 2026	Mar 31, 2026	ACCEPTED	
QT-545782	Mar 19, 2026	Mar 31, 2026	ACCEPTED	ZAR 8,855
QT-206469	Mar 19, 2026	Mar 31, 2026	DRAFT	ZAR 99
QT-778699	Mar 19, 2026	-	DRAFT	ZAR 210
QT-697854	Mar 19, 2026	-	DRAFT	ZAR 210

Figure 15: Download a Quote

## How to Approve a Draft Quote



CLICK THE "3 DOTS" BUTTON THEN CLICK "ACCEPT & GENERATE INVOICE" BUTTON

QUOTE #	DATE	VALID UNTIL	STATUS	AMOUNT
NAS429732	Mar 25, 2026	Mar 31, 2026	ACCEPTED	ZAR 54,646
NAS976994	Mar 25, 2026	Mar 31, 2026	ACCEPTED	ZAR 6,666
QT-421747	Mar 23, 2026	Mar 31, 2026	ACCEPTED	ZAR 633
QT-545782	Mar 19, 2026	Mar 31, 2026	ACCEPTED	ZAR 8,855
QT-206469	Mar 19, 2026	Mar 31, 2026	DRAFT	ZAR 99
QT-778699	Mar 19, 2026	-	DRAFT	
QT-697854	Mar 19, 2026	-	DRAFT	

Figure 16: Approve a Draft Quote

### How to Add an Invoice

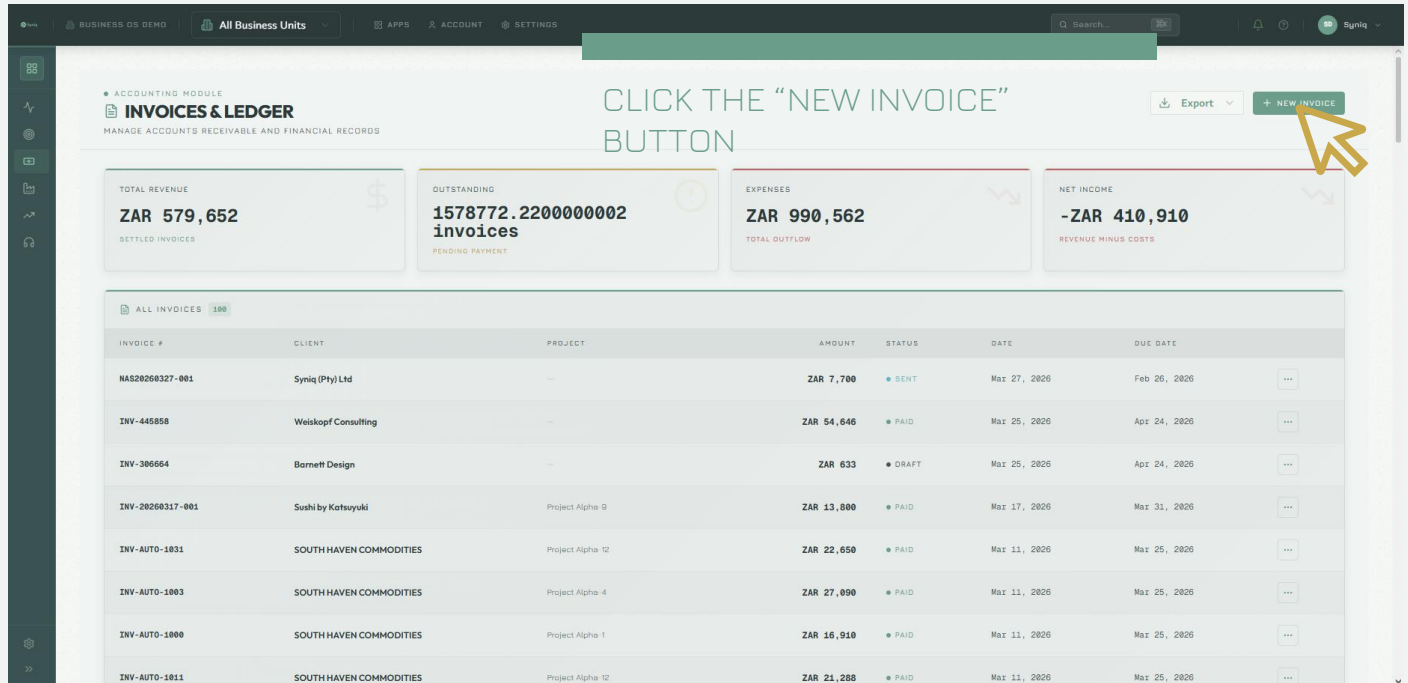


Figure 17: Add an Invoice Step 1

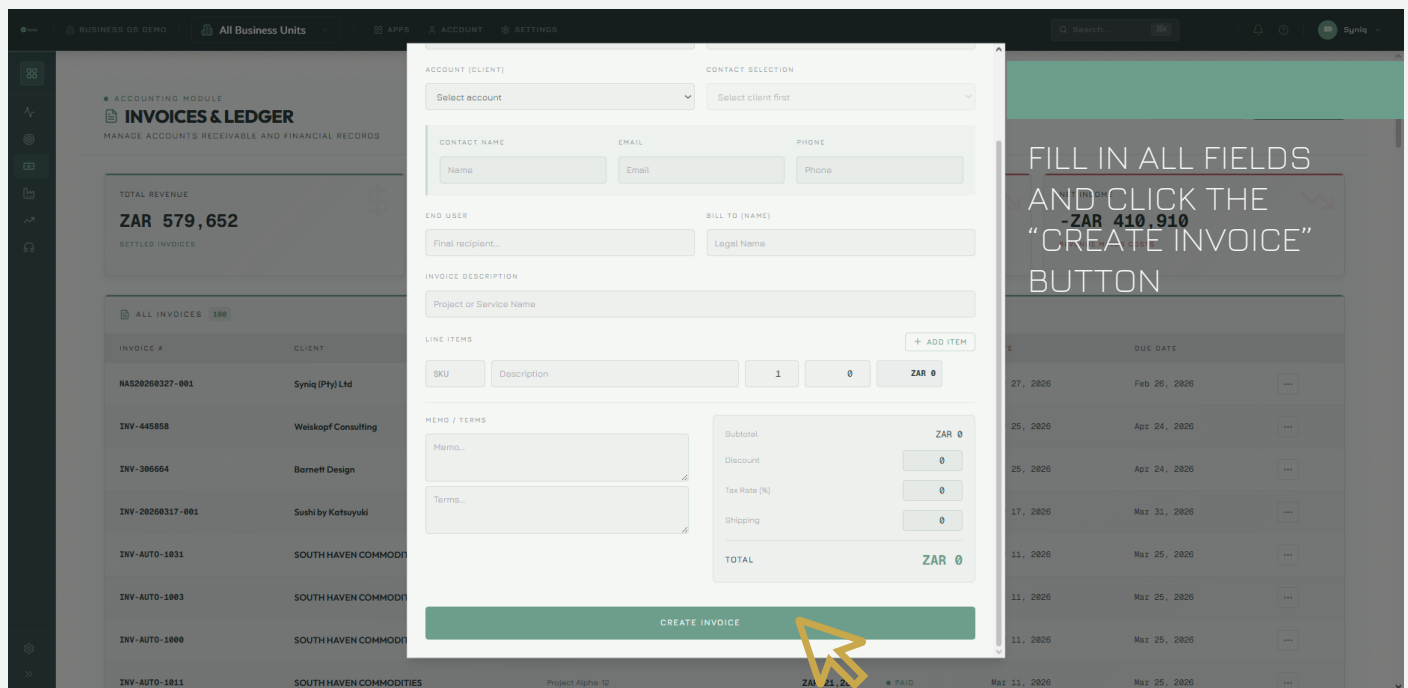


Figure 18: Add an Invoice Step 2

## How to Edit an Invoice

Figure 19: Edit an Invoice Step 1

Figure 20: Edit an Invoice Step 2

## How to Download an Invoice

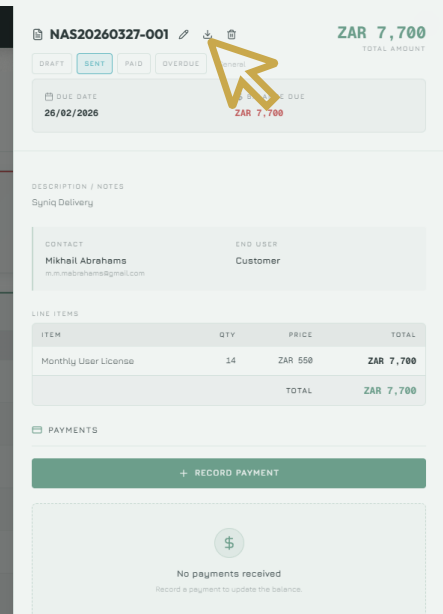
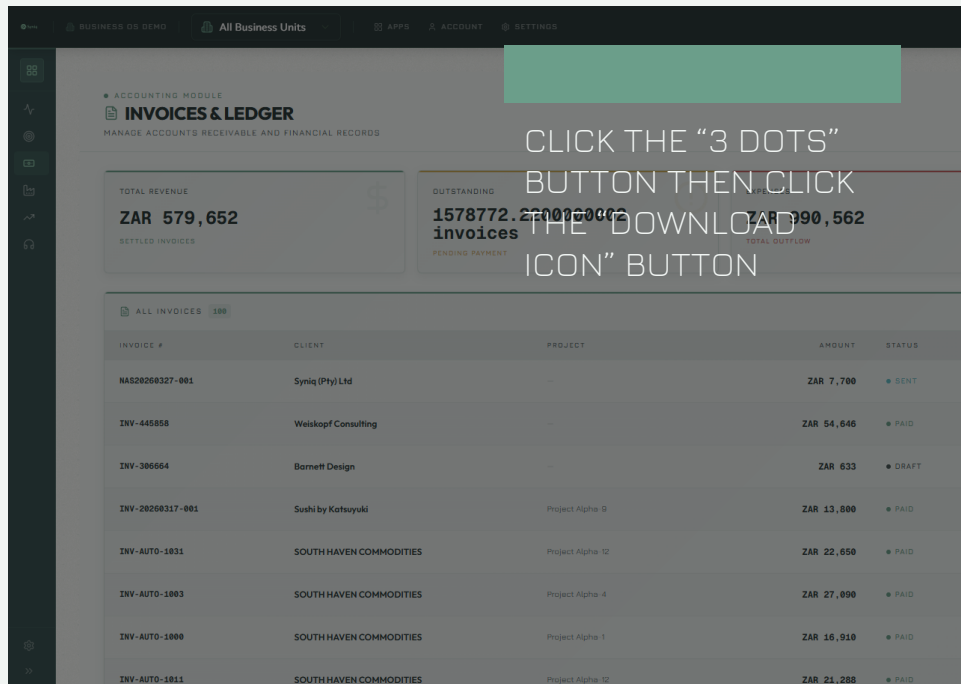


Figure 21: Download an Invoice

## How to Record a Payment

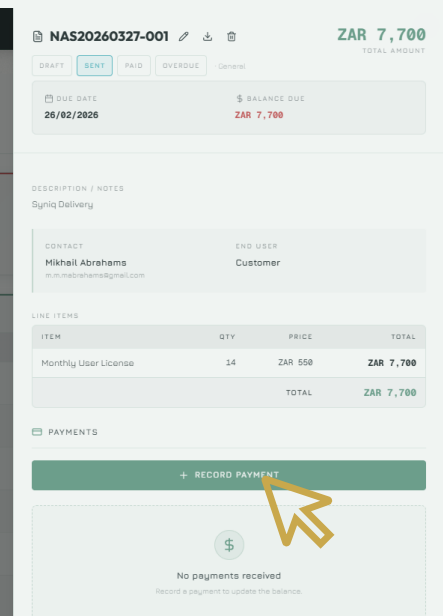
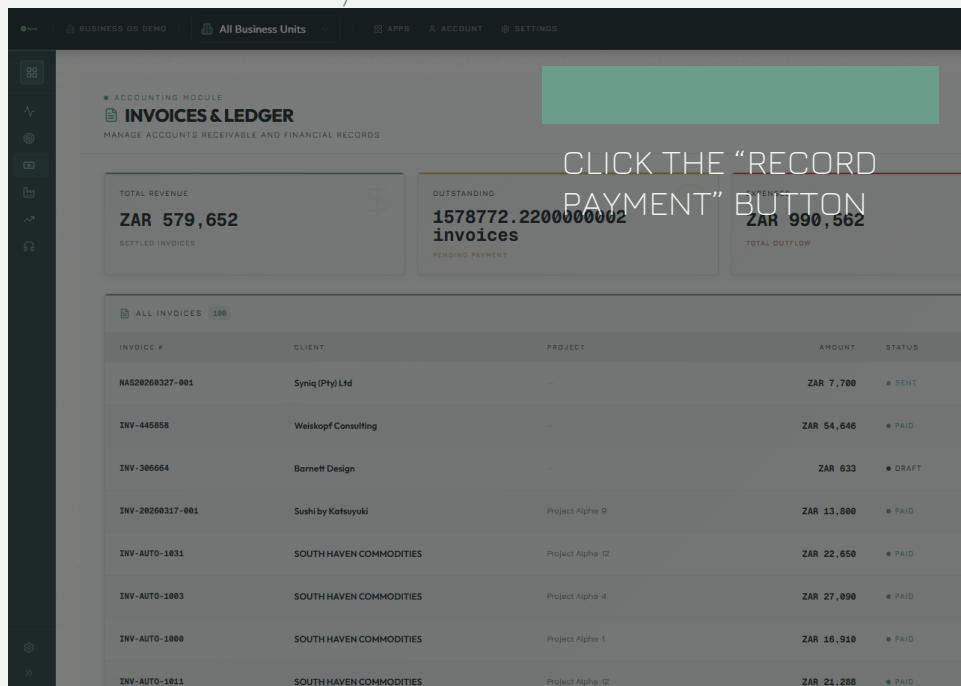
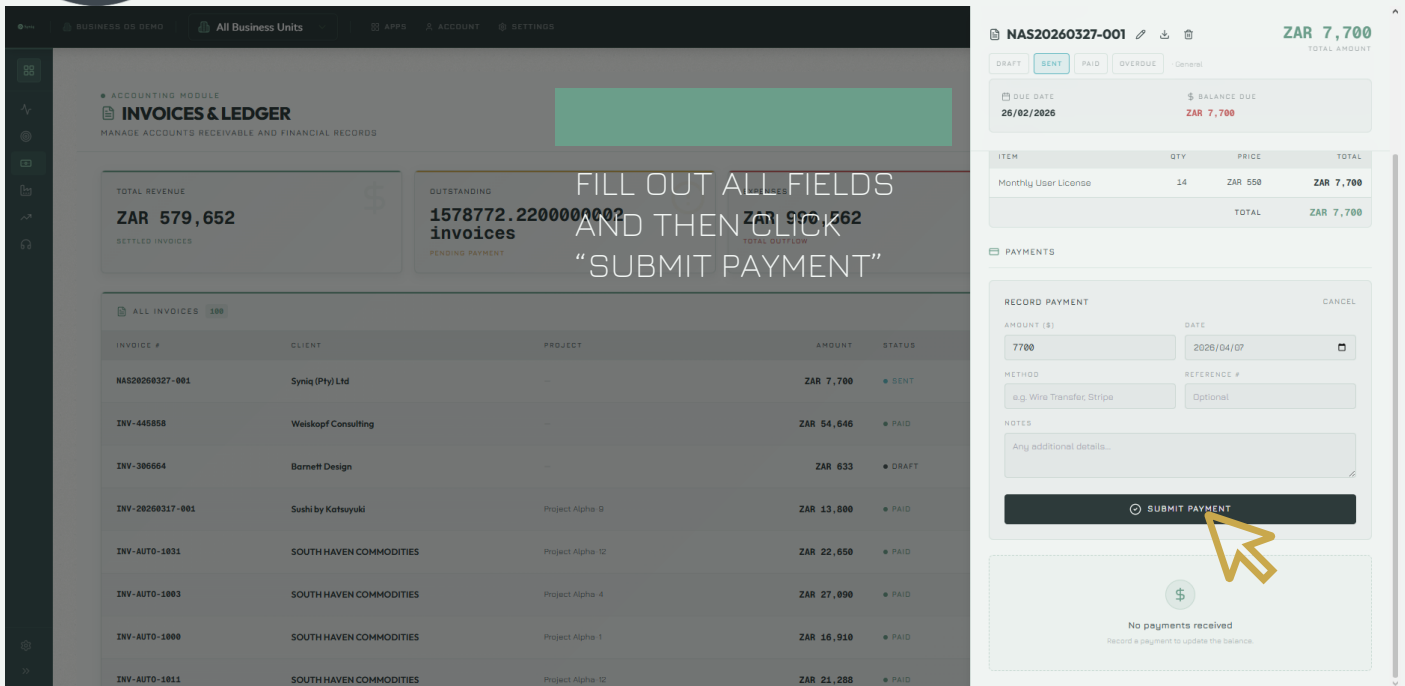


Figure 22: Record a Payment Step 1



**INVOICES & LEDGER**  
MANAGE ACCOUNTS RECEIVABLE AND FINANCIAL RECORDS

TOTAL REVENUE  
**ZAR 579,652**

OUTSTANDING  
**1578772.2200000000 invoices**

**FILL OUT ALL FIELDS AND THEN CLICK "SUBMIT PAYMENT"**

INVOICE #	CLIENT	PROJECT	AMOUNT	STATUS
NAS20260327-001	Syniq (Pty) Ltd		ZAR 7,700	SENT
INV-445858	Weiskopf Consulting		ZAR 54,646	PAID
INV-306664	Barnett Design		ZAR 633	DRAFT
INV-28260317-001	Sushi by Katsuyuki	Project Alpha 9	ZAR 13,800	PAID
INV-AUTO-1831	SOUTH HAVEN COMMODITIES	Project Alpha 12	ZAR 22,650	PAID
INV-AUTO-1803	SOUTH HAVEN COMMODITIES	Project Alpha 4	ZAR 27,090	PAID
INV-AUTO-1800	SOUTH HAVEN COMMODITIES	Project Alpha 1	ZAR 16,910	PAID
INV-AUTO-1811	SOUTH HAVEN COMMODITIES	Project Alpha 12	ZAR 21,288	PAID

**RECORD PAYMENT**

AMOUNT (\$)  DATE

METHOD  REFERENCE #

NOTES

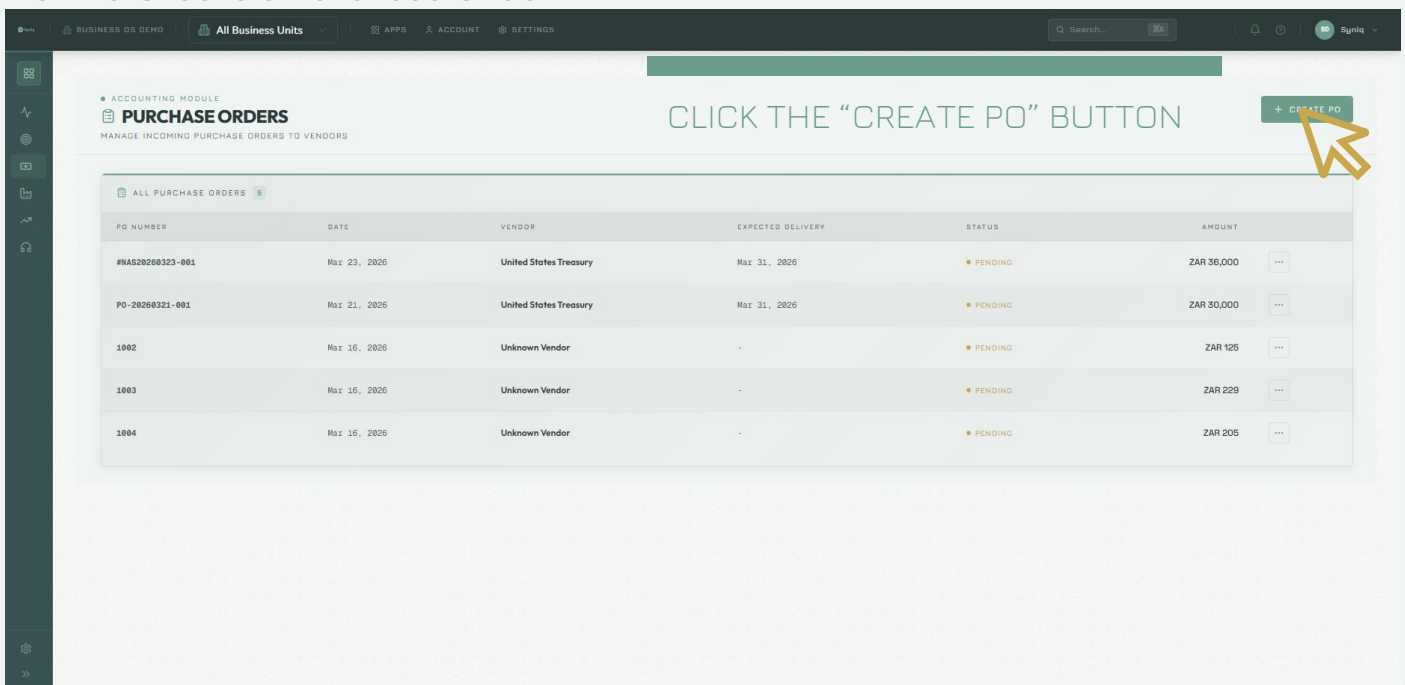
**SUBMIT PAYMENT**

No payments received  
Record a payment to update the balance.

Figure 23: Record a Payment Step 2

## Purchase Orders Page

### How to Create a Purchase Order



**PURCHASE ORDERS**  
MANAGE INCOMING PURCHASE ORDERS TO VENDORS

**CLICK THE "CREATE PO" BUTTON**

PD NUMBER	DATE	VENDOR	EXPECTED DELIVERY	STATUS	AMOUNT
#NAS20260323-001	Mar 23, 2026	United States Treasury	Mar 31, 2026	PENDING	ZAR 30,000
PO-20260321-001	Mar 21, 2026	United States Treasury	Mar 31, 2026	PENDING	ZAR 30,000
1002	Mar 16, 2026	Unknown Vendor	-	PENDING	ZAR 126
1003	Mar 16, 2026	Unknown Vendor	-	PENDING	ZAR 229
1004	Mar 16, 2026	Unknown Vendor	-	PENDING	ZAR 206

**+ CREATE PO**

Figure 24: Create a PO Step 1

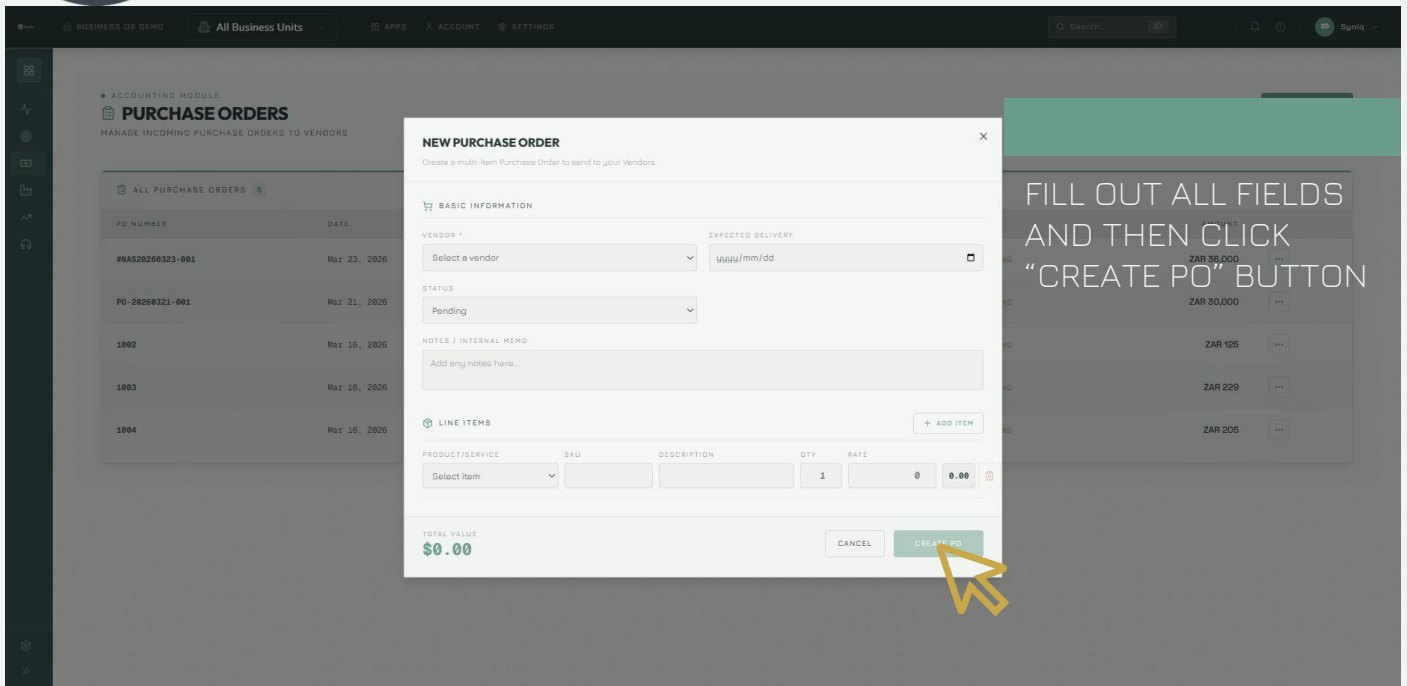


Figure 25: Create PO Step 2

## How to Download a Purchase Order

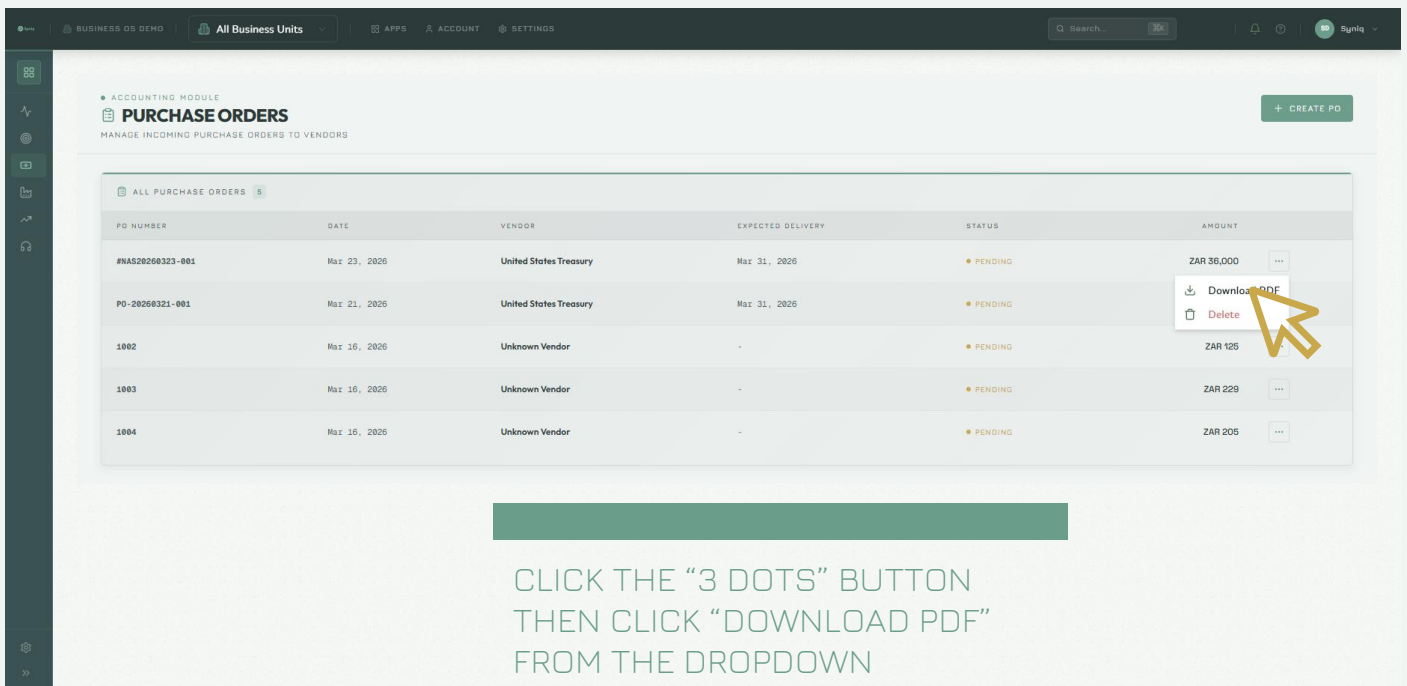


Figure 26: Download a PO

### How to Log an Expense

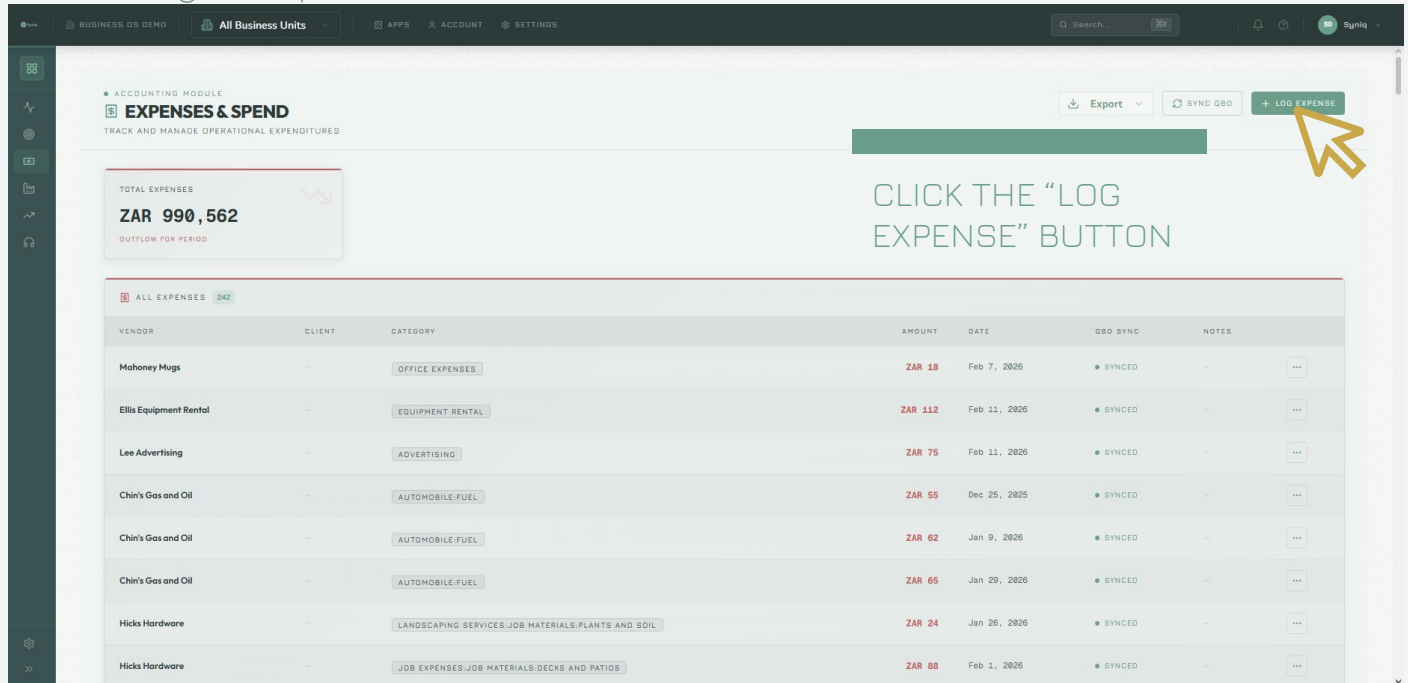


Figure 27: Log an Expense Step 1

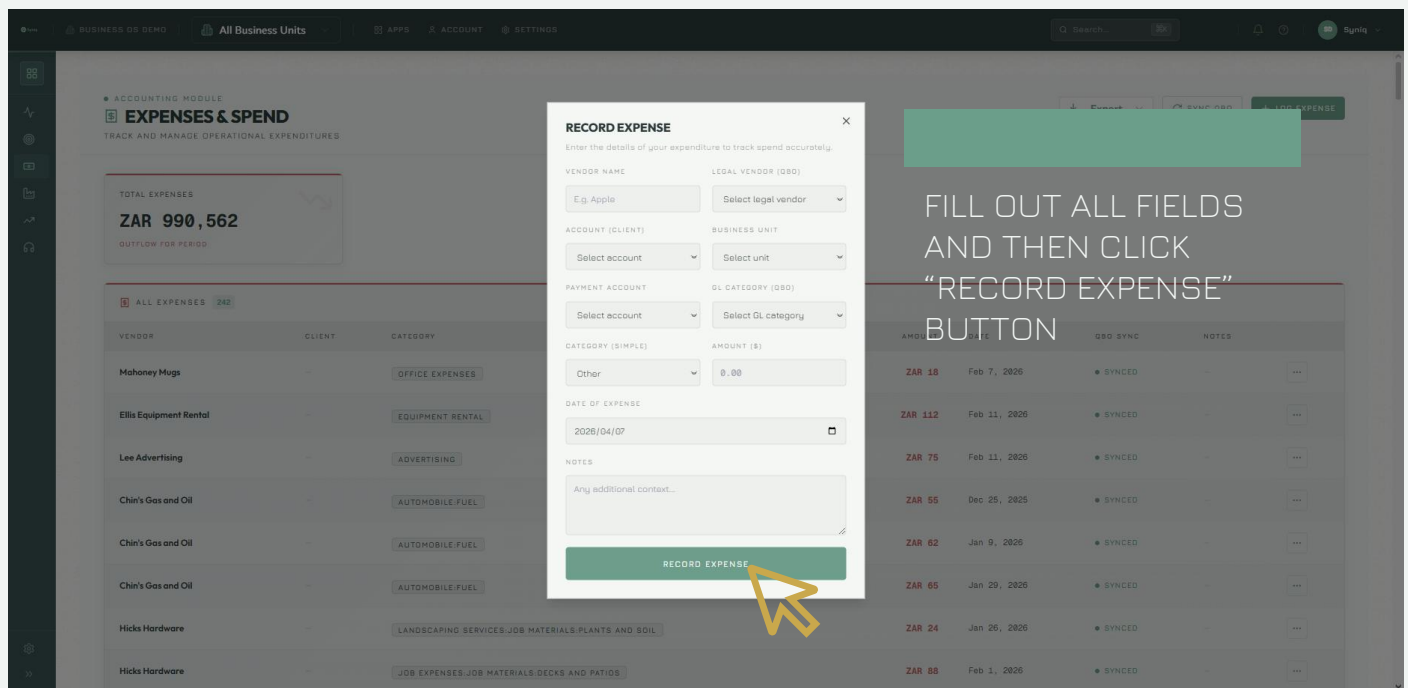


Figure 28: Record a Payment

## How to Add an Item/Service

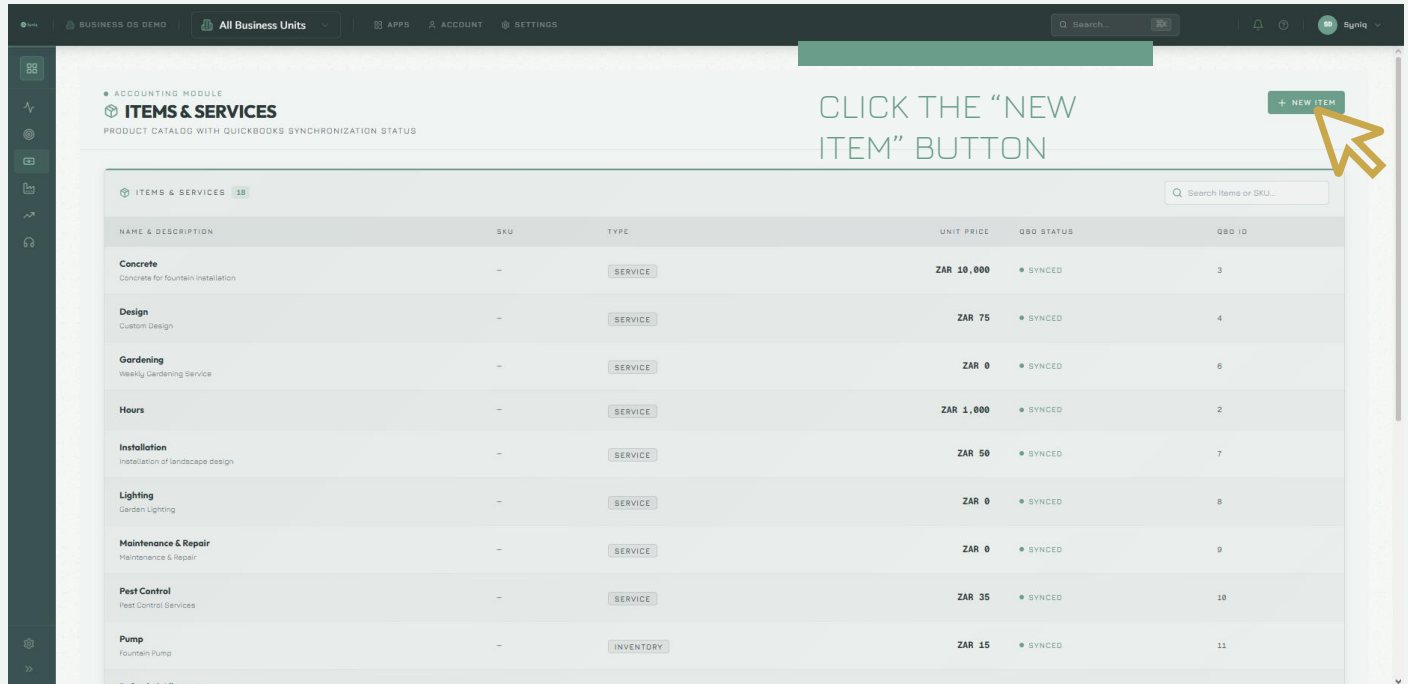


Figure 29: Add an Item/Service Step 1

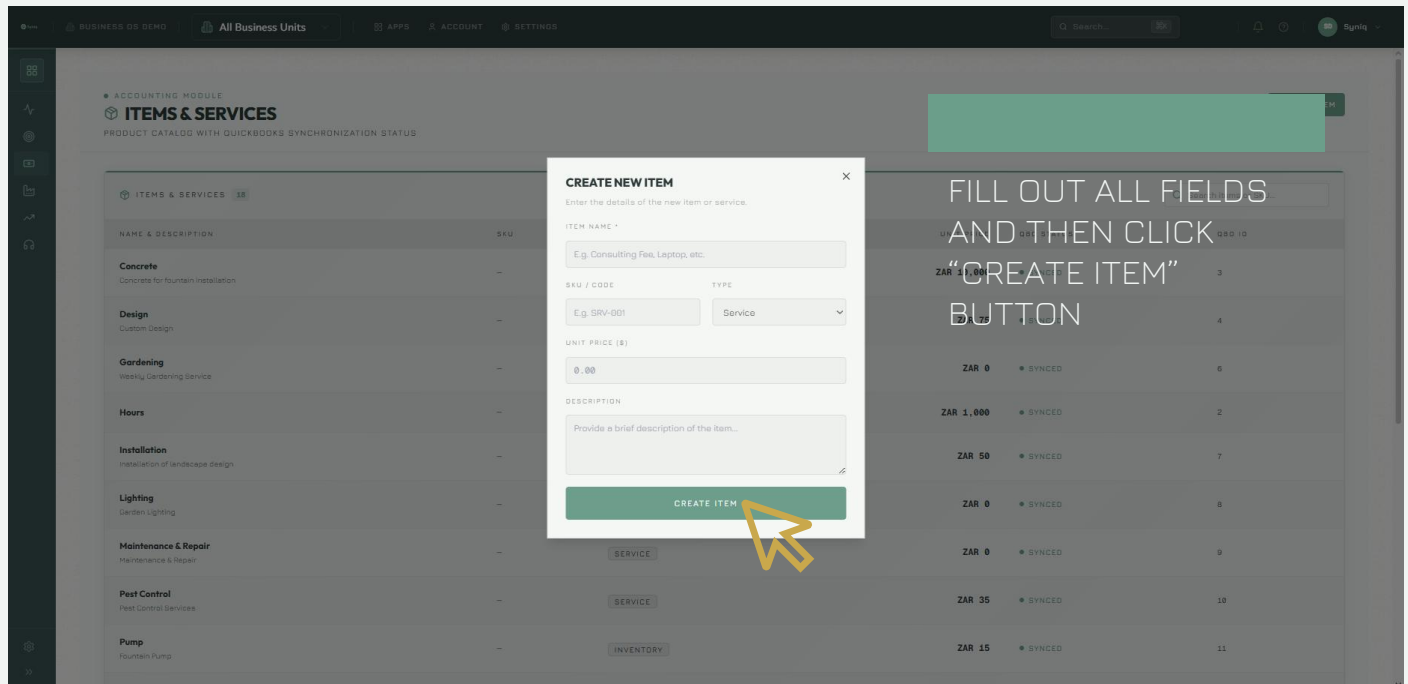


Figure 30: Create an Item

### How to Integrate QuickBooks Online

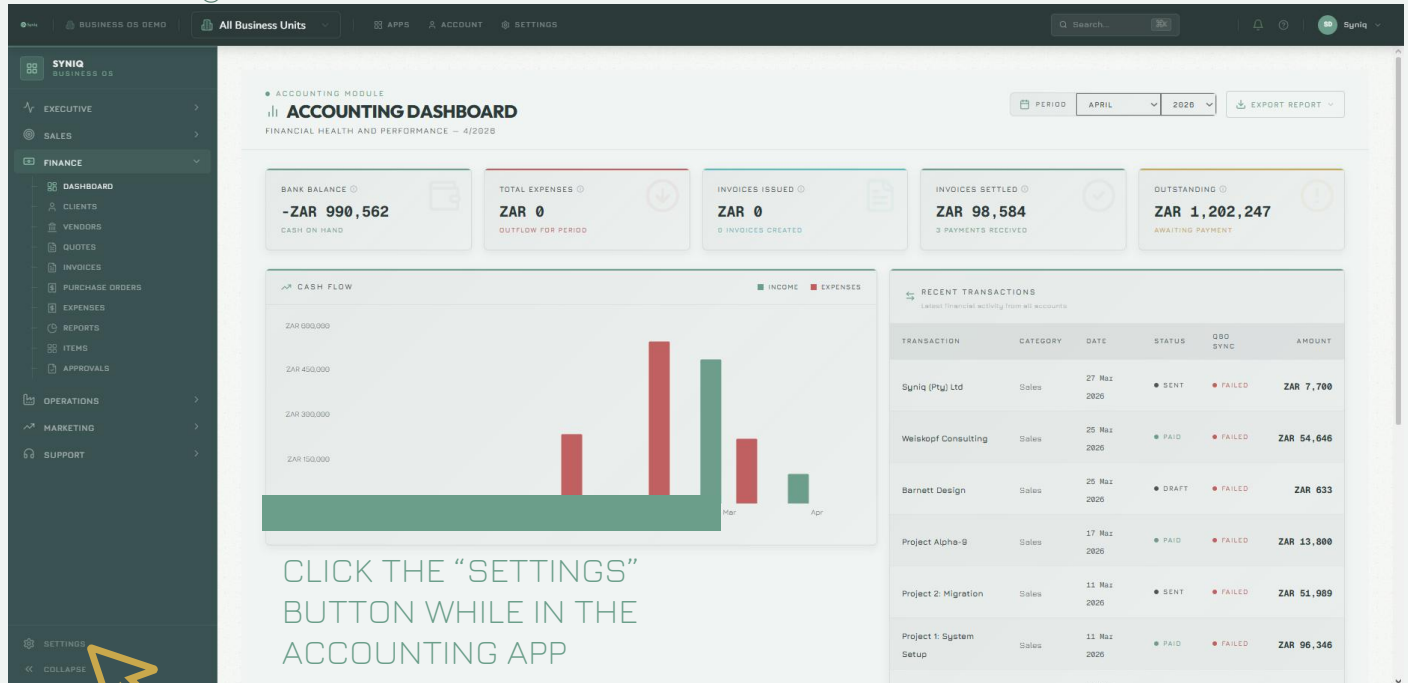


Figure 31: Integrate QuickBooks Step 1

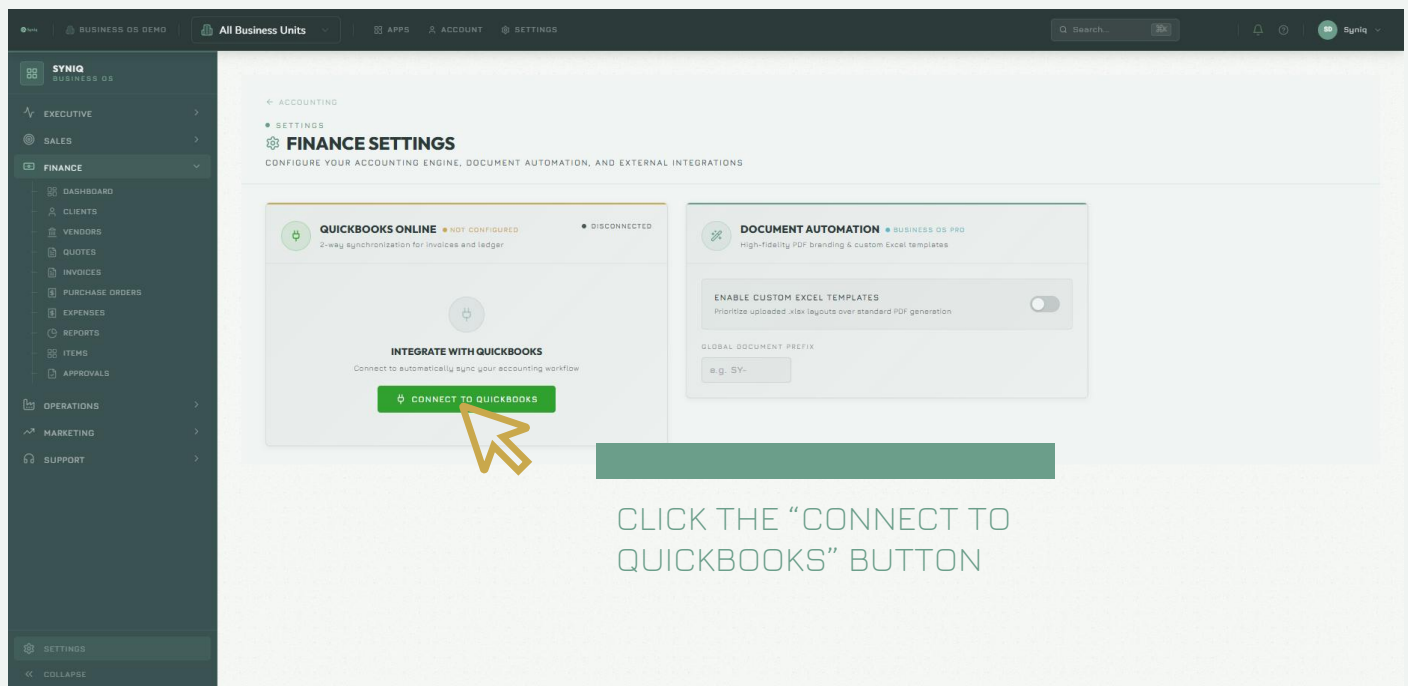


Figure 32: Integrate QuickBooks Step 2

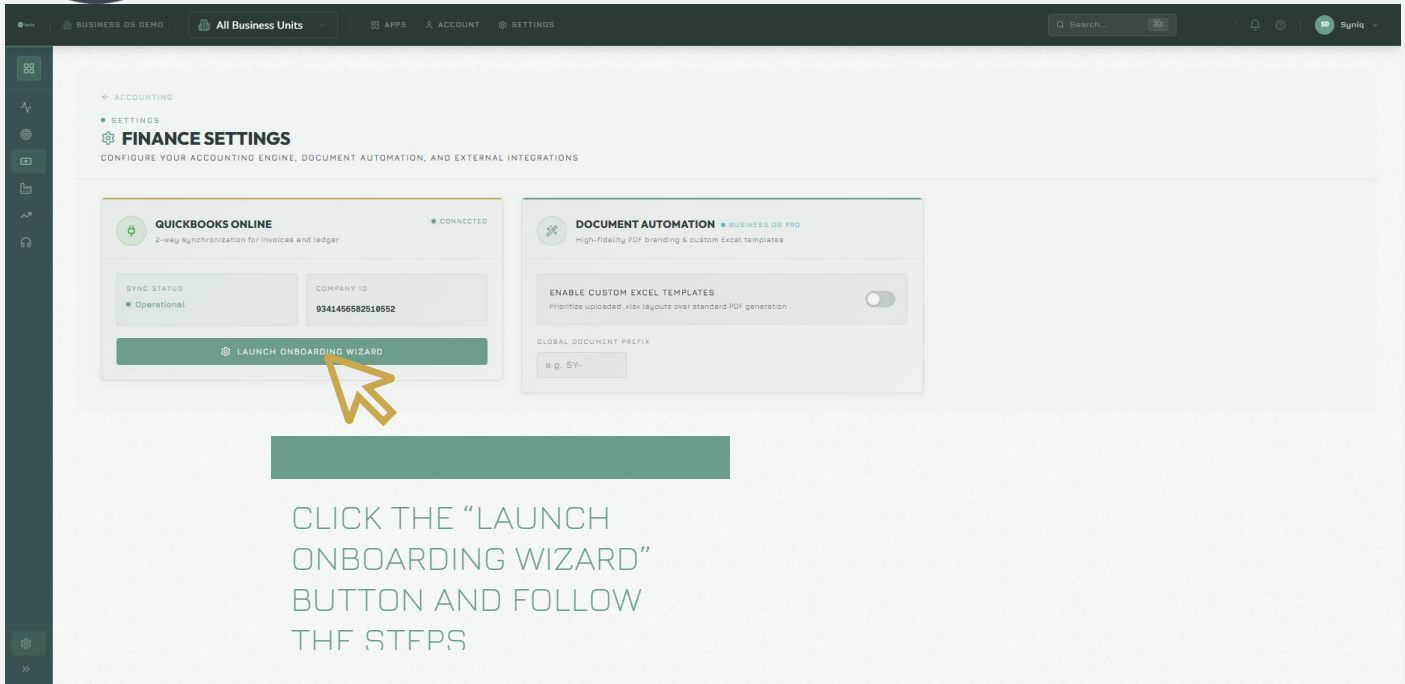


Figure 33: Integrate QuickBooks Step 3