Counter Sales

User Guide

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Version

Date	Author	Version	Change
August 4, 2020	J. Dei	1.0	Initial Version

1 Overview

This documentation provides summary information on configuring the **Insight Works Counter Sales** add-on in Microsoft Dynamics 365 Business Central. **Counter Sales** is an affordable and easy-to-use industrial point of sale solution that allows organizations to quickly and easily add retail capabilities to their system. **Counter Sales** is packed with all the features you'd expect from a powerful point of sale system, but in a simple and cost effective package. Additional information for configuration not covered in this guide is available in the online help for **Insight Works Counter Sales**.

2 Configuring Business Central

2.1 User Permissions

The **Insight Works Counter Sales** permission sets will provide access to features for individual users. On the **User Card** page, you can set the appropriate permission set to the user.

Permission Set	Name	Type	Extension Name
COUNTERSALESMANAGER	Counter Sales Manager	Extension	Counter Sales
COUNTERSALESUSER	Counter Sales User	Extension	Counter Sales

- For manager level users assign the *COUNTERSALESMANAGER* permission set.
- For retail or order-taking users assign the *COUNTERSALESUSER* permission set.

2.2 Profiles (Roles)

The **Insight Works Counter Sales** profiles can be assigned to individual users reflecting their business role. On the **User Personalizations** page, administrators can assign roles to individual users. On your user's **My Settings** page, you can assign the role for your specific user. The following **Insight Works Counter Sales** profiles are available:

- For manager level users assign the *Counter Sales Manager* profile.
- For retail or order-taking users assign the *Counter Sales Order Processor* profile.

2.3 Counter Sales Setup

To configure **Insight Works Counter Sales** manually or for advanced functionality, navigate to the **Counter Sales Setup** page. One the page, you can specify:

2.3.1 Payment Posting

- ***Payment General Journal Batch Name*** specifies the name of the general journal batch to use for posting payments. It is strongly recommended users do not manually enter journal lines in the specified batch otherwise it may result in errors during posting.
- ***Source Code*** specifics the code linked to posted payment entries.

2.3.2 Documents

- ***Counter Sales Order Nos.*** specifies the number series that will be used to assign numbers to counter sales orders.

- ***Counter Sales Return Order Nos.*** specifies the number series that will be used to assign numbers to counter sales return orders.
- ***Default Posting Date*** specifies how to set the posting date on counter sales documents.

2.3.3 Cash Sales

- ***Cash Payment Terms Code*** specifies the code for the payment terms that will indicate if the counter sales document is a cash sale. When the counter sales document has the same payment terms code as the cash payment terms code the user will be required to process the customer payment prior to posting the transaction.
- ***Default Cash Customer*** specifies the customer account that will be used on cash sales orders created from the take order wizard.
- ***Default Cash Customer External Document No.*** specifies the code that will be used for the external document number on cash sales orders created from the take order wizard.
- ***Enable Cash Payment Rounding*** specifies if rounding rules will be applied when processing cash only payments on the same counter sales document. For example, set this to yes if you require cash only payments to round to the nearest 0.05 value.
- ***Cash Payment Rounding Type*** specifies the type of rules to be used when rounding cash only payment amounts. For example, set this to nearest if you require cash only payments to round to the nearest 0.05 value.
- ***Cash Payment Rounding Precision*** specifies the size of the interval to be used when rounding cash only payment amounts. For example, set this to 0.05 if you require cash only payments to round to the nearest 0.05 value.
- ***Cash Payment Rounding G/L Account*** specifies the general ledger account to post cash rounding adjustments.
- ***Cash Back Payment Method*** specifies the code for the payment method that will be used when providing cash back payment amounts, such as cash change, when processing customer payments.

2.3.4 Price Override

- ***Price Override Behavior*** specifies how the price override is handled when users adjust the default pricing on sales lines. When the setting is set to:
    - 'No Code Required' there are no restrictions or change in standard behavior when users adjust the unit price, line discount, or line amount.
    - 'User Code Required' the price override page will open when users adjust the unit price, line discount, or line amount. If the current user is set up with a ***Price Override Code*** in the **Counter Sales Users** page it will open the price override page unlocked and the user can record the reason for the price override and confirm the adjustment. If the current user does not have a ***Price Override Code*** then a valid code for another user will

need to be entered to unlock the price override page in order to record the reason and confirm the adjustment.

2.3.5 Special Order Items

Special order items are items requested by customers but are not currently carried by the company however can be purchased from vendors when requested. Functionality exists in **Insight Works Counter Sales** for users to easily create special order items and add them to the customer's sales order. The following fields specify the default configuration when creating special order items:

- ***Special Order Item Nos.*** specifies the number series that will be used to assign numbers to special order items.
- ***Special Order Item Template*** specifies the configuration template that will be used when creating special order items.

2.3.6 Enhanced Item Search

- ***Maximum Item Search Results*** specifies the maximum number of search results that will be returned on the enhanced item search. Setting the value to zero will result in all matches returned. If you are experiencing performance issues when performing searches in the enhanced item search, consider adjusting this setting to a value between 1 and a reasonable value based on the size of your item list and business needs.

2.3.7 Enhanced Contact Search

- ***Maximum Contact Search Results*** specifies the maximum number of search results that will be returned on the enhanced contact search. Setting the value to zero will result in all matches returned. If you are experiencing performance issues when performing searches in the enhanced contact search, consider adjusting this setting to a value between 1 and a reasonable value based on the size of your contact list and business needs.

2.3.8 Quick Scan

The **Quick Scan** page in **Insight Works Counter Sales** provides users functionality to quickly add items to the sales order by scanning barcodes. The following fields specify the rules for reading barcodes when they are scanned:

- ***Barcode Rules*** specifies the barcode rules to be used when scanning barcodes on the **Quick Scan** page. Currently only the base counter sales rules are available. These rules require the barcode to consist of only the ***Item No.*** or ***Item Cross-Reference No.*** to find and add the item to the sales order.
- ***Barcode Rules Custom Codeunit*** specifies the custom codeunit to be used when scanning barcodes on the **Quick Scan** page. Currently this field is not available.

2.4 Counter Sales Users

To configure users interacting with **Insight Works Counter Sales**, navigate to the **Counter Sales Users** page. On the page you can specify:

- ***User ID*** specifies the ID of the user.
- ***Take Order Default View*** specifies the default order entry page to use for counter sales orders created from the take order wizard.
- ***Price Override Code*** specifies the code to use for entering price overrides on counter sales document lines. This field should only be set for users authorized to perform price overrides. When the ***Price Override Behavior*** is set in the **Counter Sales Setup** there should be at least one user with a price override code.
- ***Show Sales Margin*** specifies whether sales margin details will be shown for the user.
- ***Default Location Code*** specifies how to default the location code on counter sales documents. When the setting is set to:
    - 'Sales Resp. Ctr. Filter' the location code will be set to what is specified for the user in the **User Setup** page.
    - 'System Default' the location code will be set based on the base application behavior.
    - 'User Specific' the location code will be set to what is specified for the ***User Specific Location Code***.
- ***User Specific Location Code*** specifies the default location code to use when 'User Specific' is set for the ***Default Location Code***.
- **Post Behavior** specifies how counter sales documents are posted for the user. When the setting is set to:
    - 'User License Type' the ability to post will be based on the user setup, such as license type and user permissions.
    - 'Limited User' the ability to post will be limited to registered, meaning the transaction will not be fully recorded until the counter sales document is posted by a user with the proper user setup or by running the daily close report.
- ***Daily Close Update Allow Posting Date Behavior*** specifies how the allow posting dates in the **User Setup** is updated when running the daily close report.

2.5 Payment Methods

To configure the payment types to accept in **Insight Works Counter Sales**, navigate to the **Payment Methods** page. On the page you can specify:

- ***Counter Sales Payment Type*** specifies the type of payment, this must not be blank to use the payment method in counter sales.

- ***Authorization No. Required*** specifies if an authorization number is required when the payment method is used in counter sales.
- ***Bal. Account Type*** specifies the type of account that a balancing entry is posted to.
- ***Bal. Account No.*** specifies the number of the account that a balancing entry is posted to, this must not be blank to use the payment method in counter sales.

2.6 Customer Accounts

To configure specific customer accounts for cash sales processed at specific locations in **Insight Works Counter Sales**, navigate to the **Counter Sales Customer Accounts** page. On the page you can specify:

- ***Customer No.*** specifies the number of the customer account.
- ***Default Cash Account for Location*** specifies if the customer account is the default cash customer account for the associated location.

2.7 Reason Codes

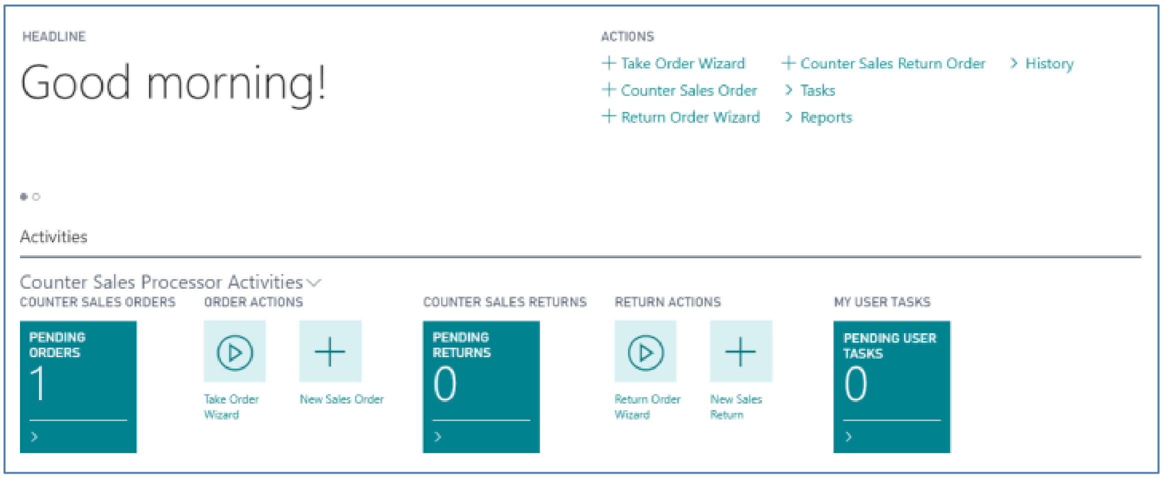
To configure the standard reasons for processing price overrides and capturing lost sales in **Insight Works Counter Sales**, navigate to the **Counter Sales Reason Codes** page. On the page you can specify:

- ***Type*** specifies the type for the reason code, can be either Lost Sale or Price Override.
- ***Code*** specifies the code for the reason, this is what the user will choose when capturing reasons in counter sales.
- ***Description*** specifies the description for the reason, this provides additional detail to users.

3 Using Counter Sales

3.1 Take Order Wizard

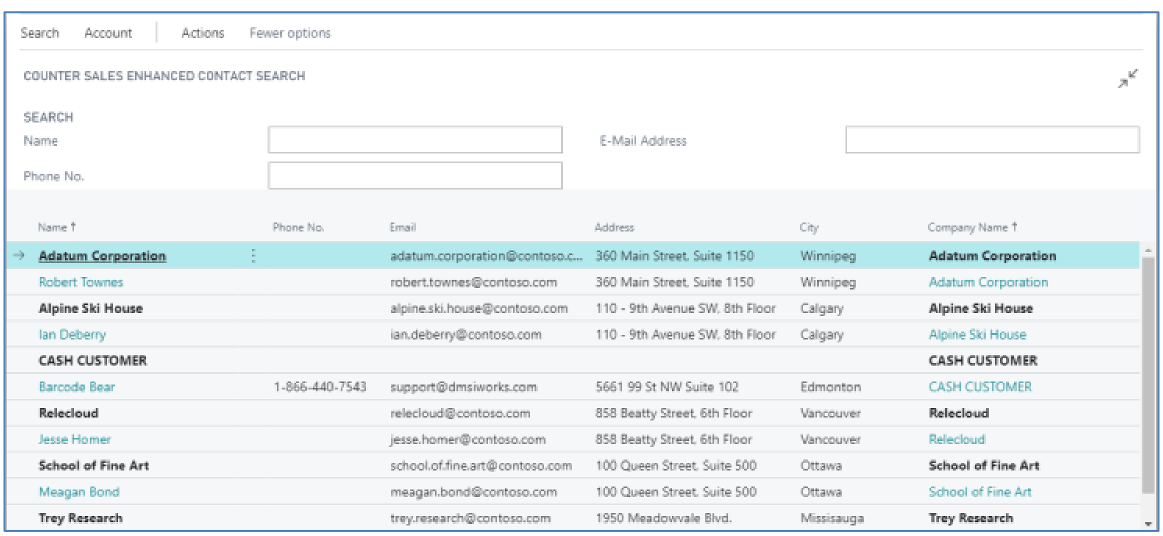
The **Take Order Wizard** in **Insight Works Counter Sales** provides order processors with a streamlined workflow for order entry. The **Take Order Wizard** can be accessed from the role center page for the *Counter Sales Order Processor* or *Counter Sales Manager* roles:



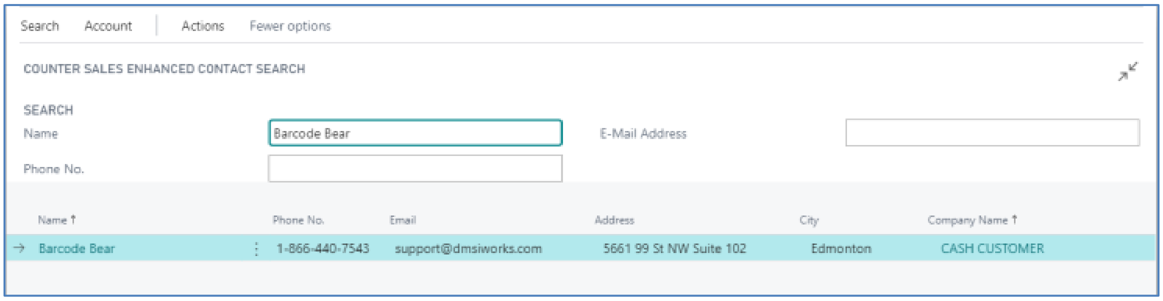
The **Take Order Wizard** guides the user through the following steps:

3.1.1 Enhanced Contact Search

Using the **Counter Sales Enhanced Contact Search** the order processor can easily look up an existing contact or create a new contact.



To look up an existing contact you can search by their ***Name***, ***Phone No.***, and ***E-Mail Address*** by simply entering the criteria in the applicable field and the contact list will automatically update with matching results.



To create a new Contact you can click the New Contact action in the ribbon. You will then be prompted to select whether they are a new cash customer, new account customer, or related to the existing customer selected in the Contact list.

If you select new account customer you will then be prompted to select the appropriate template from the **Contact Conversion Templates** to set up the new customer.

Once the template is set or another option selected, you will be prompted to enter the contact's details in the **Counter Sales Create Contact** page.

Once the Contact is selected or created the **Take Order Wizard** will open the **Counter Sales Order** page with an initialized order set for the selected contact.

3.1.2 Counter Sales Order

The **Counter Sales Order** page displays the order details and allows the user to record the terms of the agreement with the contact, process customer payments, and post the order as shipped or as shipped and invoiced. The next section describes the features available from the **Counter Sales Order** page.

3.2 Counter Sales Orders

The **Counter Sales Orders** page provides a listing of existing counter sales orders and allows the user to update existing orders or create new orders.

To update an existing counter sales order from the list simply click on the ***No.*** field to open the **Counter Sales Order** page. To create a new order click the New action button or use the **Take Order Wizard** discussed in the previous section.

3.2.1 Order Entry

The **Counter Sales Order** page is tailored towards users operating in a point of sale environment. The page is like the base Business Central **Sales Order** page to provide consistency in the application however it offers a simplified layout and additional features to improve the order entry experience.

The **Counter Sales Order** page consists of several FastTabs, FactBoxes, and action buttons:

- The Sales Order FastTab captures standard information on the customer, contact, and salesperson.
- The Lines FastTab contains details on the items to be sold to the customer and includes totals for the order, sales taxes, payments, deposits, and amount owing.
- To display additional billing information, click the Billing Details action button found under the View menu in the ribbon. The action will display, or hide if already displayed, the Billing Details FastTab. The Billing Details FastTab captures standard billing information on the bill-to customer, sales taxes, and currency.
- To display additional shipping information, click the Shipping Details action button found under the View menu in the ribbon. The action will display, or hide if already displayed, the Shipping Details FastTab. The Shipping Details FastTab captures standard shipping information such as the ship-to address, shipment method, and shipping agent.
- The Item Availability by My Locations FactBox displays the inventory on-hand for the user defined **My Locations** for the item on the currently selected line.
- The Related Items FactBox displays related items for the item on the currently selected line. From this FactBox the user can easily inform the customer of related items and then quickly add any of the related items to the order.
- The Quick Scan action found under the Process menu in the ribbon opens the **Quick Scan** page where users can scan valid item number barcodes to quickly add them to the order. More information on the **Quick Scan** page can be found later in this guide.
- The Payments action found under the Process menu opens the **Payment Processing** page where users can record customer payments. More information on payment processing can be found later in this guide.
- The Take Deposit and Show Deposits actions found under the Process menu opens the **Deposits Processing** and **Deposits** pages respectively. More information on deposits can be found later in this guide.

3.2.2 Payment Processing

The **Payment Processing** page allows the order processor to record payment accepted from the customer immediately prior to transferring, or shipping, the product to the customer. Multiple payment types per order can be entered, such as cash for a portion of the amount owing and credit card for the remaining amount. Click the Payments action on the **Counter Sales Order** page to access the **Payment Processing** page.

To capture payments in the **Payment Processing** page simply enter the ***Payment Method Code*** and the ***Amount***. If required, record the ***Authorization No.*** to complete the entry. Once an entry is completed the totals found at the bottom of the page will update to indicate the remaining amount owing for the shipment and order.

For counter sales orders to cash customers the amount owing must be zero before the order processor can post the order. Cash customers are defined by the ***Payment Terms Code*** on the **Counter Sales Order** page matching the ***Cash Payment Terms Code*** on the **Counter Sales Setup** page.

If the ***Enable Cash Payment Rounding*** is set to yes in the **Counter Sales Setup** page and all payment entries in the **Payment Processing** page are cash payments the amount owing (cash only) total will be used to determine the remaining amount owing. Cash payment rounding handles the scenario where cash only transactions are subject to rounding to settle the amount owing. For example, if the cash payment rounding is configured to round to the nearest $0.05 and the amount owing before rounding is $95.02, the amount owing (cash only) will be $95.00 and if the customer provides only cash payment the $95.00 will be the final amount owing.

If the ***Cash Back Payment Method Code*** is defined in the **Counter Sales Setup** page, click the Calculate Cash Change action in the ribbon on the **Payment Processing** page to record a cash back entry. Cash back entries capture the scenario where the customer provides payment exceeding the amount owing and change is returned. For example, if the amount owing is $95.00 and the customer provides payment totalling $100.00 the action will result in a cash back entry representing the $5.00 returned to the customer.

3.2.3 Deposits

The **Deposits Processing** page allows the order processor to record payment accepted from the customer as a form of deposit or prepayment. Click the Take Deposit action on the **Counter Sales Order** page to access the **Deposits Processing** page. Deposits can then be applied to future shipments in the **Payment Processing** page.

To capture deposits in the **Deposits Processing** page simply enter the ***Payment Method Code*** and the ***Amount***. If required, record the ***Authorization No.*** to complete the entry. Click the Post (or Register) action in the ribbon to post (or register) the deposit to the customer's account. Alternatively clicking the OK button when closing the page will check for unposted deposits and prompt the user if they want to post the deposits. Click the Post And Print (or Post And Register) action in the ribbon to post (or register) the deposit and then print a receipt to provide to the customer.

To apply deposits in the **Payment Processing** page, select the posted deposit and click the Apply Deposit action. The ***Applies-to ID*** will update with the current user ID to indicate the application. When the counter sales order is invoiced the applied deposits will be processed with the order.

Chick the Show Deposits action on the **Counter Sales Order** page to open the **Deposits** page where the order processor can:

- View previous deposits related to the order
- Print the deposit receipt report for previous deposits
- Undo previously posted (or registered) deposits

3.2.4 Posting

To post the order click the Post or Post and Print actions found under the Posting menu in the ribbon. When you post an order for a cash customer the **Payment Processing** page will open and require payment is entered for the entire shipment prior to posting. If insufficient payment is entered the order will be prevented from posting.

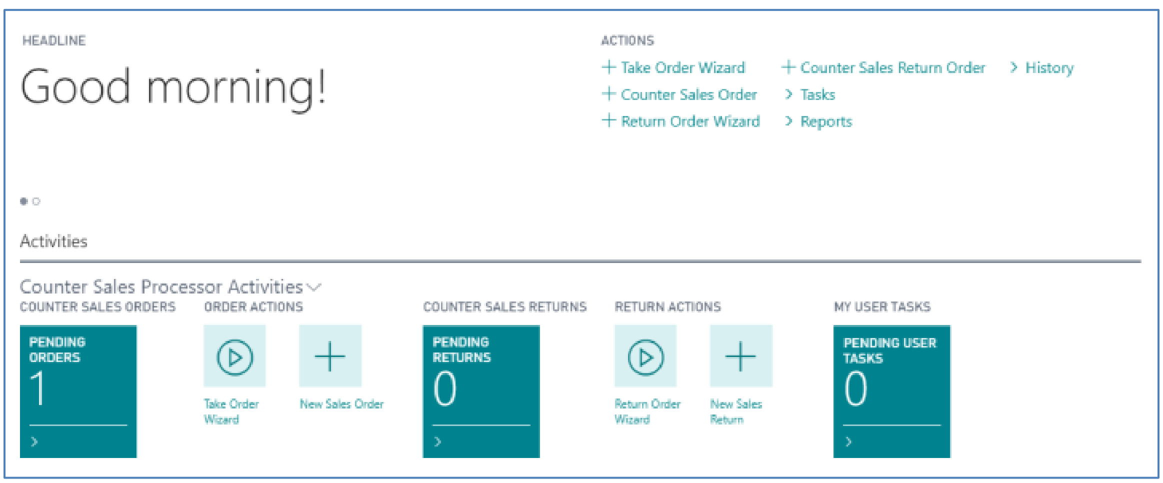
3.3 Quick Scan

The **Quick Scan** page in **Insight Works Counter Sales** provides the order processor with the ability to scan the item number barcode to quickly add the item to the order. Once a valid barcode is scanned the last scan details will update with the item details and the item will be added to the lines. If the scanned item already exists on a sales line the quantity on the line will increment by one unit. Additionally, if the last scan details are set the order processor can click the Increase, Decrease, or Edit actions found under the Quantity menu in the ribbon to quickly update its quantity.

Once the order processor is finished adding items to the order they can close the page and return to the **Counter Sales Order** page to complete the posting.

3.4 Return Order Wizard

The **Return Order Wizard** in **Insight Works Counter Sales** provides order processors with a streamlined workflow for handling return orders. The **Return Order Wizard** can be accessed from the role center page for the *Counter Sales Order Processor* or *Counter Sales Manager* roles:



The **Return Order Wizard** guides the user through the following steps:

3.4.1 Posted Counter Sales Invoices

Using the **Posted Counter Sales Invoices** page the order processor can find the previously posted order relating to the return. Once the posted order is selected clicking the OK button will open the **Posted Counter Sales Invoice Lines** page where the order processor can specify the quantity to return from the posted order. The following actions are available in the page ribbon to set the quantity to return:

- **Increase Qty. to Return by 1** to increase the ***Qty. to Return*** for the selected line by one unit.
- **Decrease Qty. to Return by 1** to decrease the ***Qty. to Return*** for the selected line by one unit.
- **Edit Qty. to Return** to open a dialog page where the user can manually enter the ***Qty. to Return*** for the selected line.

Once the quantity to return is set clicking the OK button will prompt the user to select one of the following options:

- **Refund Only** to create a counter sales return order with the lines set based on the previously set quantity to return and with the customer's initial payment for those lines set to be refunded.
- **Refund & Replacement Order** to create a counter sales return order with the lines set based on the previously set quantity to return and with the customer's initial payment for those lines set to be refunded and create a new counter sales order based on the lines returned.
- **Deposit & Replacement Order** to create a counter sales return order with the lines set based on the previously set quantity to return and create a new counter sales order based on the lines returned with the customer's initial payment for those lines set as a registered deposit.

Selecting one of the options above and clicking the OK button will open the **Counter Sales Return Order** page with an initialized order set for the return.

3.4.2 Counter Sales Return Order

The **Counter Sales Return Order** page displays the return order details and allows the user to record the terms of the agreement with the contact, process customer refunds, and post the return order as received or as received and invoiced. The next section describes the features available from the **Counter Sales Return Order** page.

3.5 Counter Sales Return Orders

The **Counter Sales Return Orders** page provides a listing of existing return orders and allows the user to update existing return orders or create new return orders.

To update an existing counter sales order from the list simply click on the ***No.*** field to open the **Counter Sales Return Order** page. To create a new return order click the New action button or use the **Return Order Wizard** discussed in the previous section.

3.5.1 Return Order Entry

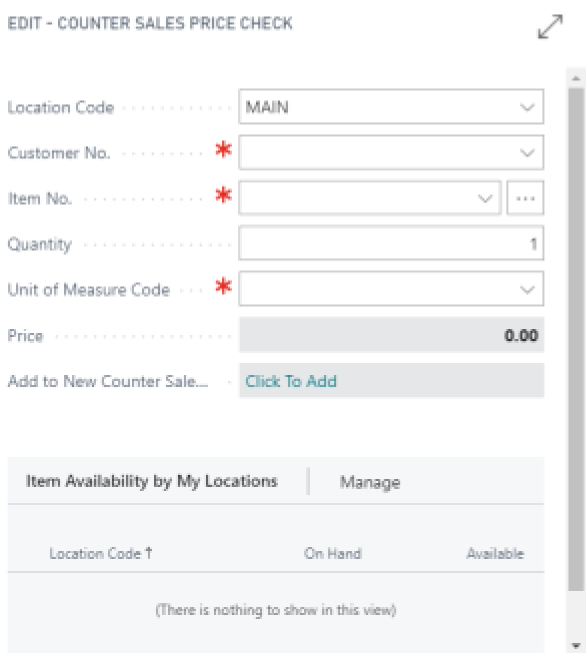
The **Counter Sales Return Order** page is like the base Business Central **Sales Return Order** page however it offers a simplified layout to enhance the user experience.

3.6 Price Check

The **Price Check** in **Insight Works Counter Sales** allows users to easily look up the sales price for a specific item based on the customer and quantity. Additionally, the user can quickly view item availability by location and create a new sales order for the customer with the item, quantity, and sales price included.

You can access the **Price Check** page from the role center page for the *Counter Sales Order Processor* or *Counter Sales Manager* roles.

To use the **Price Check** page, simply set the ***Customer No.***, ***Item No.***, ***Quantity***, and ***Unit of Measure Code*** fields and the ***Price*** will automatically calculate. Changing any of the fields will recalculate the ***Price***. The ***Price*** calculation uses the same Business Central **Sales Price** logic found in the standard sales documents.



When all the fields are set you can click the ***Click To Add*** link on the ***Add to New Counter Sales Order*** field to quickly create a new sales order with the set details.

3.7 Enhanced Item Search

The **Enhanced Item Search** in **Insight Works Counter Sales** provides the user a tailored page to quickly search existing items.

The **Enhanced Item Search** can be accessed from the role center page for either the *Counter Sales Order Processor* and *Counter Sales Manager* roles under the Tasks actions or by using the Tell me what you want to do icon to search for it.

To use the **Enhanced Item Search** simply enter the search criteria in the ***Description***, ***Item No.***, ***Cross-Reference No.***, and other available field boxes. Click the Show more fields toggle to display all available search fields boxes. Once you have entered the search criteria click the Filter action button to update the item list with results matching the criteria. To clear the search results, click the Reset action button.

[screenshot]

Specifying the ***Location Filter*** will update the inventory on-hand and on document fields in the item list.

3.8 Enhanced Contact Search

The **Enhanced Contact Search** in **Insight Works Counter Sales** provides the user a tailored page to quickly search existing contacts.

The **Enhanced Contact Search** can be accessed from the role center page for either the *Counter Sales Order Processor* and *Counter Sales Manager* roles under the Tasks actions or by using the Tell me what you want to do icon to search for it.

To use the **Enhanced Contact Search** simply enter the search criteria in the ***Name***, ***Phone No.***, or ***E-Mail Address*** boxes and the contact list will update with results matching the criteria.

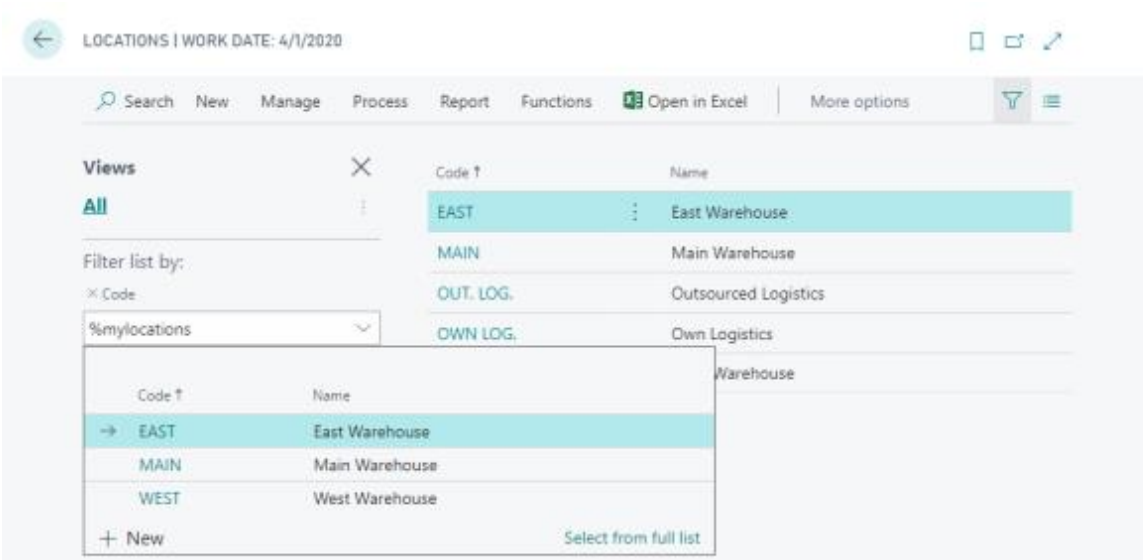
[screenshot]

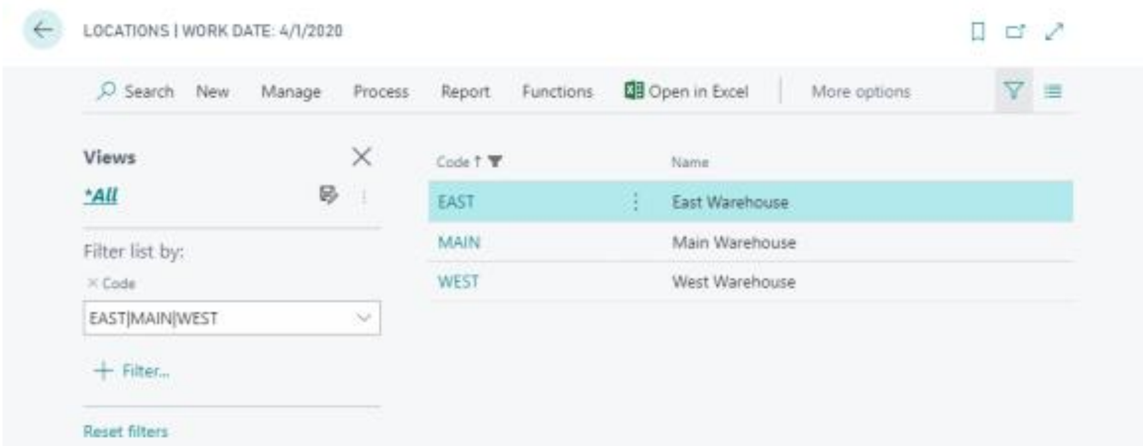
3.9 My Locations

The **My Locations** in **Insight Works Counter Sales** provides configurable lists by user for frequently, or exclusively, used locations. To set up your **My Locations** you can access your list from the role center page for the *Counter Sales Order Processor* or *Counter Sales Manager* roles:

The **My Locations** provide quick visibility of the on hand inventory at different locations in the **Item Availability by My Locations** FactBox found in various **Insight Works Counter Sales** pages.

The **My Locations** can also be used to populate the filter for the ***Location Code*** field on pages and reports using the string: *%mylocations*





3.10 Related Items

The **Related Items** in **Insight Works Counter Sales** alerts users for related and paired items during the order entry process. The order processor can inform the customer of the related items and quickly add them to the current order if needed.

To configure **Related Items** navigate to the **Counter Sales Related Items** page. On the page, choose the new or edit action from the ribbon to add or modify item relationships. The ***Item*** fields specify the original item, that is the item the customer is planning to buy, whereas ***Related Item*** fields specify the related or paired item, that is the item the order processor can suggest to the customer as an additional purchase.

To access **Related Items** from the **Counter Sales Order** page, click on the **Related Items** action from the Lines menu.

[Screenshot]

From the page you can quickly add to the existing order by selecting the related item to add and choose the **Add to Order** action from the ribbon. You will be prompted with a dialog to enter the quantity to add and by choosing OK the related item will be added to the order.

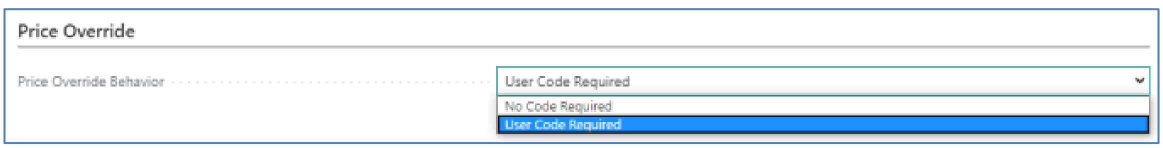
To access **Related Items** from the **Counter Sales Quick Scan** page, after scanning the barcode the ***Related Items*** FactBox will update. The FactBox alerts the order processor of any related or paired item for the scanned item and they can quickly add a related item to the order by choosing the **Add to Order** action.

3.11 Price Overrides

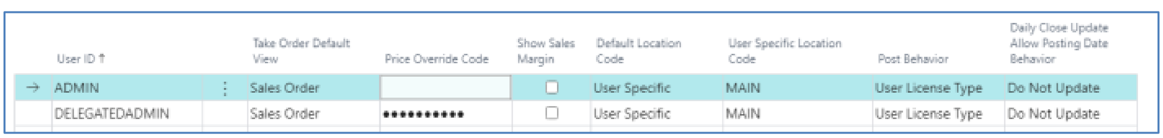
The **Price Overrides** in **Insight Works Counter Sales** allows prices to easily be adjusted during the order entry process.

To configure **Price Overrides** navigate to the **Counter Sales Setup** page. On the page, you can specify the ***Price Override Behavior*** to either:

- No Code Required
- User Code Required



When set to 'No Code Required' the price can be adjusted without any checks. When set to 'User Code Required' the price can only be adjusted by entered a valid user code and logging the price override details. To specify user codes navigate to the **Counter Sales Users** page and enter the ***Price Override Code*** for the applicable users.



User ID ↑	Take Order Default View	Price Override Code	Show Sales Margin	Default Location Code	User Specific Location Code	Post Behavior	Daily Close Update Allow Posting Date Behavior
ADMIN	Sales Order		☐	User Specific	MAIN	User License Type	Do Not Update
DELEGATEDADMIN	Sales Order	••••••••••	☐	User Specific	MAIN	User License Type	Do Not Update

To access the price override logging when ***Price Override Behavior*** is set to 'User Code Required' simply adjust the ***Unit Price Excl. Tax***, ***Line Discount %***, or ***Line Amount Excl. Tax*** fields on the **Counter Sales Order** page. If the entered value is different than the current value the **Counter Sales Price Override Entry** page will open. If the current user is set up with a ***Price Override Code*** they will not need to enter their user code otherwise a valid user code needs to be entered to proceed. Once the adjustment is authorized the user can log details by selected a standard reason or entering general comments.

3.12 Lost Sales

The **Lost Sales** in **Insight Works Counter Sales** allows users to capture information on sales that cannot be completed such as an item being out of stock or the specific item requested by the customer is no longer available.

You can enter **Lost Sales** from the **Counter Sales Order** page and the **Enhanced Item Search** page:

- From the **Counter Sales Order** page, after entering the sales line with the item choose the **Create Lost Sale** action from the **Lines** menu.
- From the **Enhanced Item Search** page, choose the **Actions** menu, then choose the **Functions** menu, and then choose the **Create Lost Sale** action.

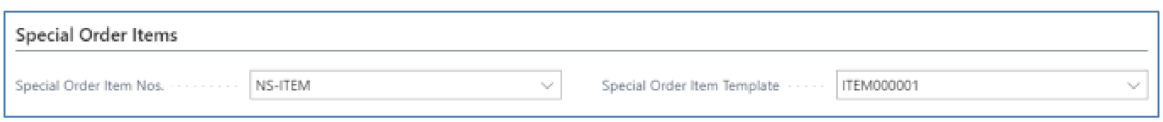
From the **Counter Sales Lost Sale** page, you can capture information on the lost sale, such as the customer and item, and why it cannot be completed, such as the standard reason or general comments. After entering the information click the OK button to close the page and record the lost sale. If the page was accessed from the **Counter Sales Order** page you will be prompted to delete the selected sales line.

You can view historical **Lost Sales** by navigating to the **Counter Sales Lost Sales** page.

3.13 Special Order Items

The **Special Order Items** in **Insight Works Counter Sales** provides users with a simplified approach to generate new items for product requested by the customer that are not currently set up in Business Central but can be procured from one of your vendors.

To configure **Special Order Items** navigate to the **Counter Sales Setup** page. On the page, you can specify the ***Special Order Item Nos.*** and ***Special Order Item Template*** to use when generate new **Special Order Items**.



You can generate new **Special Order Items** from the **Enhanced Item Search** page by choosing the **Actions** menu, then choosing the **Functions** menu, and then choosing the **Create Special Order Item** action. You will be prompted with the **Counter Sales Create Special Order Item** page where you can specify its details such as its description, unit of measure, and vendor to procure from. Clicking OK will generate the new **Special Order Item** and set the search criteria and corresponding result for the newly created item. If you accessed the **Enhanced Item Search** from the **Counter Sales Order** page you can easily add the **Special Order Item** to the order by clicking OK.

3.14 Daily Close

The **Daily Close** report in **Insight Works Counter Sales** allows managers to efficiently perform typical end of day tasks such as reconciling payments to the cash drawer and reviewing daily sales figures. System activities such as posting registered payments and orders and updating user allowable posting dates can also be performed using the **Daily Close** report.

The **Daily Close** report can be accessed from the role center page for the *Counter Sales Manager* role under the Tasks actions or by using the Tell me what you want to do icon to search for it.

The **Daily Close** report requires the user to specify the ***Close Date*** and ***Location Code*** for the sales activities.

Optional settings include:

- ***Show Daily Payment Details*** to display the payment entries for the close date and location.
- ***Show Daily Counter Sales Orders & Return Orders*** to display the counter sales documents for the close date and location.
- ***Post Unapplied Registered Deposits*** to post any unapplied registered deposit for the close date and location.
- ***Post Counter Sales Orders & Return Orders*** to post any registered counter sales documents and associated payments for the close date and location.
- ***Update Allow Posting Dates for Users*** to update the allow posting dates in the user setup for the close date and location.