Counter Sales Battle Card

For Microsoft Partners who sell Insight Works apps

Counter Sales gives parts counters, trade desks, and retail stores a simplified order entry screen inside Microsoft Dynamics 365 Business Central. Deposits, card payments, returns, and the end-of-day close run on standard Business Central sales documents.

WHO TO CALL ON

Businesses on Business Central that sell over a parts counter, trade desk, or retail store.

Users are counter salespeople and the staff who close the cash drawer at the end of the day.

AT A GLANCE

Business Central	Online and on-premises
Licensing	Per location, subscription
User license	Device or full user, Essentials or Premium
Payment processors	Clover, EBizCharge, Moneris, Stripe, mx51 (Australia)
Availability	All countries where Business Central is available

What changes when you add Counter Sales to Business Central

	Business Central without Counter Sales	Business Central with Counter Sales
Item lookup	A customer waits while the salesperson hunts for a part whose description does not match the item card.	Orders start from the Take Order Wizard or Quick Scan. Search matches item number, description, item references, and attributes, and shows availability by location.
Deposits and payments	Customers pay part cash and part card, or leave a deposit. Tracked outside Business Central, those balances get reconciled by hand.	Each order accepts multiple payment types and partial or full deposits. Card processing runs through Clover, EBizCharge, Moneris, or Stripe, or mx51 in Australia.
Lost sales and discounts	An out-of-stock line gets deleted and the missed sale disappears. Counter discounts are hard to see afterward.	Lost sales are recorded with reason codes instead of deleted. Override codes, subject to user permissions, control and track changes to the selling amount.
End-of-day close	Matching the drawer to the day's sales is a spreadsheet exercise. Errors show up later as unexplained variances.	The reconciliation worksheet counts the drawer by denomination and posts cash and any variance to the general ledger. The daily close posts counter orders and deposits.

Selling points

Fast item lookup.
Search by item number, description, extended text, item references, or attributes, with availability at each location.

Integrated card processing.
Card payments run through Clover, EBizCharge, Moneris, or Stripe, or mx51 in Australia.

Cash drawer to the general ledger.
The reconciliation worksheet counts the drawer by denomination and posts cash and any variance.

Deposits and split payments.
Accept multiple payment types per order and partial or full deposits, with a printed deposit receipt.

Lost sales and overrides tracked.
Reason codes record lost sales, and override codes track changes to the selling amount.

Cloud or on-premises, two versions.
Install the North America version with North American tax calculations, or the Worldwide version elsewhere.

Qualify the opportunity

1. Are you on Business Central today, or another ERP system?
2. How many sales counters or store locations do you run?
3. How do you handle cash, card, and split payments, and with which processor?
4. Do counter staff search by description, item references, or item attributes?
5. Do you use barcode scanners at checkout? What problems do you have?
6. How do you track deposits, layaway payments, or prepayments on orders?
7. Do you need to track who changes selling amounts and why?
8. Do you track lost sales and the reasons, such as out-of-stock items?
9. Do you have trouble matching payments to the cash drawer at day end?
10. Will you run Business Central online or on-premises, inside or outside North America?

Common questions

Does it run on Business Central online?
Yes. Counter Sales runs on Business Central online and on-premises.

What Business Central license is needed?
Users need a device license or a full user license on Essentials or Premium. Team Member licenses apply to on-premises deployments.

Which card processors does it support?
Clover, EBizCharge, Moneris, and Stripe, plus EFTPOS terminals in Australia through mx51. Cash drawers and receipt printers are optional.

Does it need other Insight Works apps?
No. Counter Sales can work with Warehouse Insight when orders are picked and packed in the warehouse.

How is it licensed?
Counter Sales is a subscription that needs one license for each location, not for each user.

Which version should the customer install?
The North America version includes North American tax calculations. Install the Worldwide version outside North America.

Is it a separate point-of-sale system?
No. Counter Sales runs on standard Business Central sales documents, so there is no separate system to keep in step.

> **Orders picked and packed in the warehouse?** Position Warehouse Insight, Insight Works' mobile warehouse management app, alongside Counter Sales. Counter Sales can work with it when orders are picked and packed in the warehouse.

Resources

Sales kit: insight-works.com/partner-hub/counter-sales

App page and demo: insight-works.com/apps/counter-sales

Datasheet: Counter Sales datasheet (PDF)

Partner hub: insight-works.com/partner-hub

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For a pre-sales meeting, a demo, or implementation guidance, send a message at insight-works.com/partner-hub/contact.

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