INSIGHT WORKS

COUNTER SALES

for Microsoft Dynamics 365 Business Central

★★★★★ **5.0 on Microsoft Marketplace** · **Over 500 Installs**

Counter Sales

STREAMLINE RETAIL OPERATIONS WITH SIMPLIFIED ORDER ENTRY, ADVANCED TOOLS, AND EFFICIENCY-BOOSTING FEATURES.

Order entry, deposits, returns, card payments, and end-of-day close for trade desks and sales counters, built into Business Central.

Counter Sales is an Insight Works point-of-sale extension for Business Central, designed for professional salespeople at trade desks, parts counters, and sales counters. It works within Business Central's standard sales order and return order framework, so a counter sale does not need a separate point-of-sale platform, a third-party connector, or duplicate data entry.

Why it holds up at the counter

Two ways to start an order. The Take Order Wizard finds a customer by name or phone number; Quick Scan mode starts with a barcode and builds sales lines from scans.

Stock checks without an order. Look up an item's availability at any location, scoped to a configurable "My Locations" list, before a sales order exists.

Finds the item, then the next one. Search matches multiple terms in any order, including Business Central item attributes such as color or material, and suggests related items for upsell or substitution.

Deposits and returns handled in the flow. Partial or full deposits, including tax or VAT, support layaway-style multiple deposits; a Return Order Wizard covers refunds, replacements, and conversion to a deposit.

Discounting and missed sales on the record. Overrides to the selling amount can require an authorization code and reason code, and lost sales are captured with reason codes instead of silently deleting the line.

A clean close at the end of the shift. Cash drawer reconciliation by denomination posts the reconciled cash and any variance to the general ledger, and the end-of-day close advances the posting date.

Who's on it

Trade desk salespeople
Handle large, often industry-specific transactions at a specialized counter.

Retail sales associates & cashiers
Run day-to-day counter transactions in a more traditional retail setting.

Store managers
Use a separate role center for end-of-day close, cash drawer reconciliation, and margin reporting.

Business Central Partners & Consultants
Set up counter locations and payment processing for a client.

Free to install and evaluate. Counter Sales installs at no cost from Microsoft Marketplace, so you can try it in a sandbox before committing to production.

Backed by over 800 resellers. Insight Works works through a global network of more than 800 Business Central resellers who can help consult, implement, and support a deployment. **See the Insight Works reseller directory**.

COUNTER SALES for Microsoft Dynamics 365 Business Central

ORDER ENTRY & LOOKUP

- Take Order Wizard with customer search by name or phone number
- Quick Scan mode: barcode-first sales line entry
- Item and stock check at any location without starting a sales order, scoped to a “My Locations” list
- Runs on tablets for floor sales, as well as at the counter and register
- Contacts can be tracked as cash customers, keeping purchase history without a full customer record

ITEM SEARCH & RELATED ITEMS

- Multi-term search in any word order
- Search by Business Central item attribute, such as color or material, as well as description
- Generated “frequently bought together” suggestions from sales history
- A manually maintained related items list for substitutions
- Serial number tracking supported

DEPOSITS & RETURNS

- Partial or full deposits on any sales order, including tax or VAT
- Multiple deposits for layaway-style orders, with a printed deposit receipt
- Return Order Wizard: refund to the original card and authorization number, refund with a replacement order, or convert the refund into a deposit toward a replacement special order

OVERRIDE CONTROL & LOST SALES

- On-the-fly overrides to the selling amount, with reason codes and an optional user-specific authorization code
- Override tracking for reporting on discounting
- Lost sale tracking with reason codes, to record missed sales

PAYMENTS & CASH HANDLING

- Integrated credit card processing with Clover, EBizCharge, Moneris, or Stripe
- Card-present, saved card-on-file, and virtual terminal payments, plus split tender across payment methods
- Optional receipt printer and cash drawer support
- Cash drawer reconciliation by denomination, posting reconciled cash and any variance to the general ledger
- End-of-day close advances the posting date

BUSINESS CENTRAL LICENSING

- Free to install and evaluate from Microsoft Marketplace; most environments start in a sandbox for configuration before go-live
- Subscription, licensed per location: one Counter Sales license per location, not per user
- Compatible with Business Central Device, Essential, Premium, and Team Member licenses; Team Member applies to on-premises deployments

INTEGRATION & INSTALLATION

- Installs from Microsoft Marketplace like any other Business Central extension
- Two Marketplace listings, split by region: North America and Worldwide
- Works with Business Central’s standard sales order and return order framework
- Integrates with Warehouse Insight for warehouse-managed pick and pack when payment is taken at the counter before fulfillment; Warehouse Insight and WMS Express are not required

PREREQUISITES & COMPATIBILITY

- Business Central online and on-premises
- Receipt printer and cash drawer are optional

SUPPORT & RESOURCES

- Knowledge base at kb.dmsiworks.com: user guide, install guide, and receipt printer setup guidance
- Supported directly by Insight Works, on the same contract as any other Insight Works app in use

DATA & PORTABILITY

- Orders and returns are standard Business Central sales orders and return orders
- Reconciled cash and variances post to the general ledger through Business Central

ALSO FROM INSIGHT WORKS

Insight Works builds 30+ apps for Microsoft Dynamics 365 Business Central, concentrated in these areas of manufacturing and distribution. If Business Central has a gap, there’s a good chance we already have a solution.

Warehouse & Inventory Management
Barcode-driven receiving, put-away, picking, cycle counting, and license plate handling.

Shipping & Fulfillment
Carrier rate shopping, pick-to-ship execution, and shipment tracking.

Quality Control & Compliance
Inspections, test management, and quality documentation.

Production Planning & Scheduling
Capacity-aware scheduling, planning worksheets, and demand forecasting.

Shop Floor Execution & Maintenance
Shop floor data capture, machine maintenance, and production analysis.

Point of Sale & Data Tools
Counter sales, document attachment, label printing, and bulk data import/export.

See all Insight Works apps for Business Central

VISIT WEBSITE

WATCH DEMO

Available on Microsoft Marketplace

Scan to visit

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© 2026 Insight Works. E&OE. · Datasheet updated: October 2026