



Dynamics
Shop

User Guide for Microsoft Dynamics 365 Business Central

Product: SD Trade Counter

Release: D365 BC V21+

Revision: April 2023

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2 Getting Started

SD Trade Counter is a trimmed down Point of Sale that allows for rapid order entry and fast cash out.

Using pared back Order, Quote and Credit Memo pages, you can quickly and easily input your transactions and cash out quickly.

SD Trade Counter is optimised for touch screen devices.

Using barcode scanning users can easily input items.

Tills and Till Users are linked to locations and SD Trade Counter allows for the option to initiate and reconcile tills at days end and to run X and Z reports.

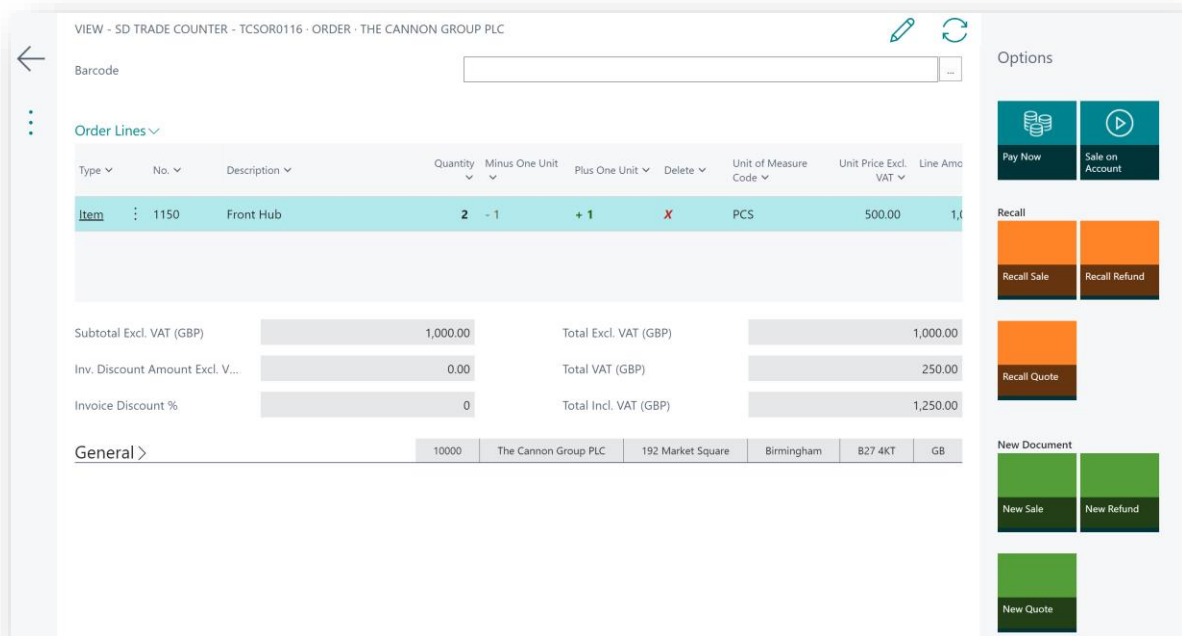
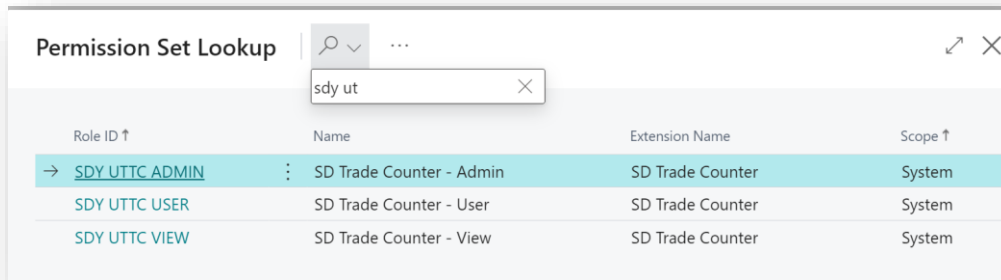


Figure 2-1

3 Security Setup

We have provided the following permission sets for SD Trade Counter: SDY UTTC ADMIN, SDY UTTC USER and SDY UTTC VIEW (*Figure 3-1*).



Role ID ↑	Name	Extension Name	Scope ↑
→ SDY UTTC ADMIN	SD Trade Counter - Admin	SD Trade Counter	System
SDY UTTC USER	SD Trade Counter - User	SD Trade Counter	System
SDY UTTC VIEW	SD Trade Counter - View	SD Trade Counter	System

Figure 3-1

We have also created extensions on the following standard Microsoft Dynamics 365 Business Central Permissions:

- Exten. Mgt. - Admin includes SDY UTTC ADMIN permissions.
- D365 BUS FULL ACCESS includes SDY UTTC USER permissions.
- D365 BASIC includes SDY UTTC VIEW permissions.

4 Installing SD Trade Counter

To install **SD Trade Counter** from the Business Administration Shell:

1. Run the **Business Central Administration Shell** as **Administrator**.
2. To publish the extension from the package file (.app), use the **Publish-NAVApp cmdlet**.

Example:

```
Publish-NAVApp -ServerInstance BC19 -Path "C:\Users\name\Downloads\Simply Dynamics Ltd_SD Trade Counter_2.0.0.0.app"
```

3. To synchronise the schema changes, use the **Sync-NAVApp cmdlet**.

Example:

```
Sync-NavApp -ServerInstance BC19 -Name "SD Trade Counter"
```

4. To install the published NAV App, use the **Install-NAVApp cmdlet**.

Example:

```
Install-NAVApp -ServerInstance BC19 -Name " Trade Counter"
```

5. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** (Figure 4-1).

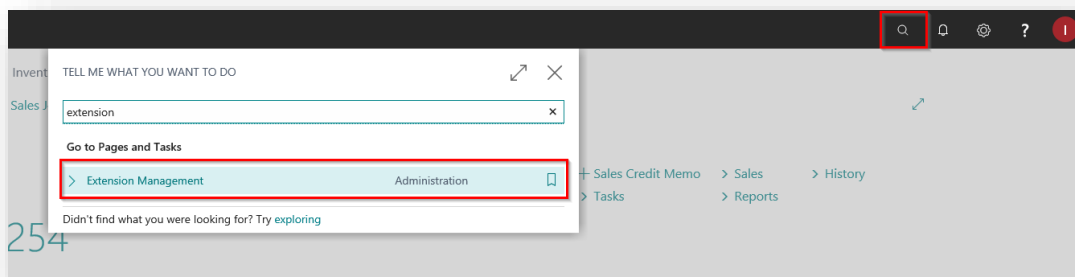


Figure 4-1

6. In the **Extension Management** list, you should see the **SD Trade Counter** App installed.

4.1 Allowing HttpClient Requests in SD Trade Counter

Switching on the **Allow HttpClient Requests** option allows SD Trade Counter to call an API that sends and returns licence key information to activate the product. The **Allow HttpClient Requests** option is automatically enabled on install of SD Trade Counter.

1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** (Figure 4-2).

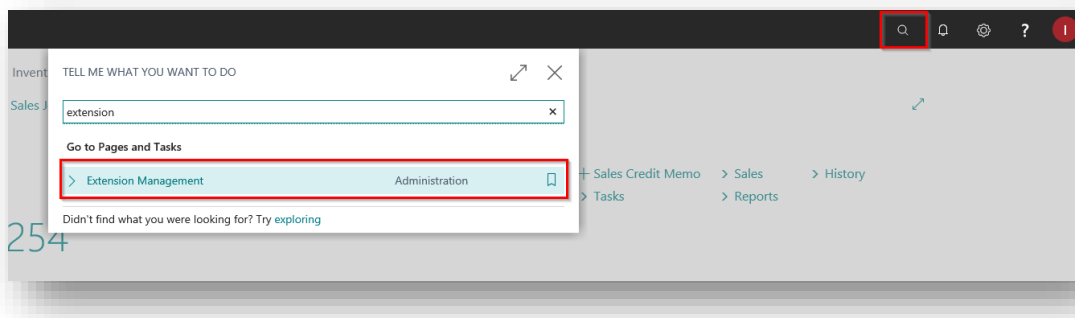
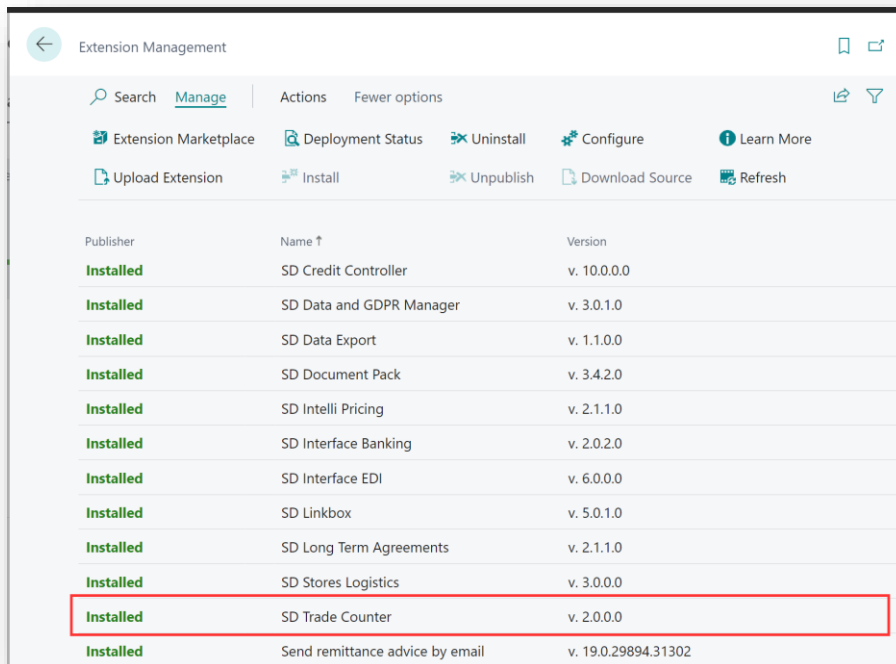


Figure 4-2

2. In the **Extension Management** list, you should see the **SD Trade Counter** App installed (Figure 4-3).



Publisher	Name ↑	Version
Installed	SD Credit Controller	v. 10.0.0.0
Installed	SD Data and GDPR Manager	v. 3.0.1.0
Installed	SD Data Export	v. 1.1.0.0
Installed	SD Document Pack	v. 3.4.2.0
Installed	SD Intelli Pricing	v. 2.1.1.0
Installed	SD Interface Banking	v. 2.0.2.0
Installed	SD Interface EDI	v. 6.0.0.0
Installed	SD Linkbox	v. 5.0.1.0
Installed	SD Long Term Agreements	v. 2.1.1.0
Installed	SD Stores Logistics	v. 3.0.0.0
Installed	SD Trade Counter	v. 2.0.0.0
Installed	Send remittance advice by email	v. 19.0.29894.31302

Figure 4-3

3. Select the **SD Trade Counter** App record and from the menu, select the **Manage** group, and choose **Configure** (Figure 4-4).

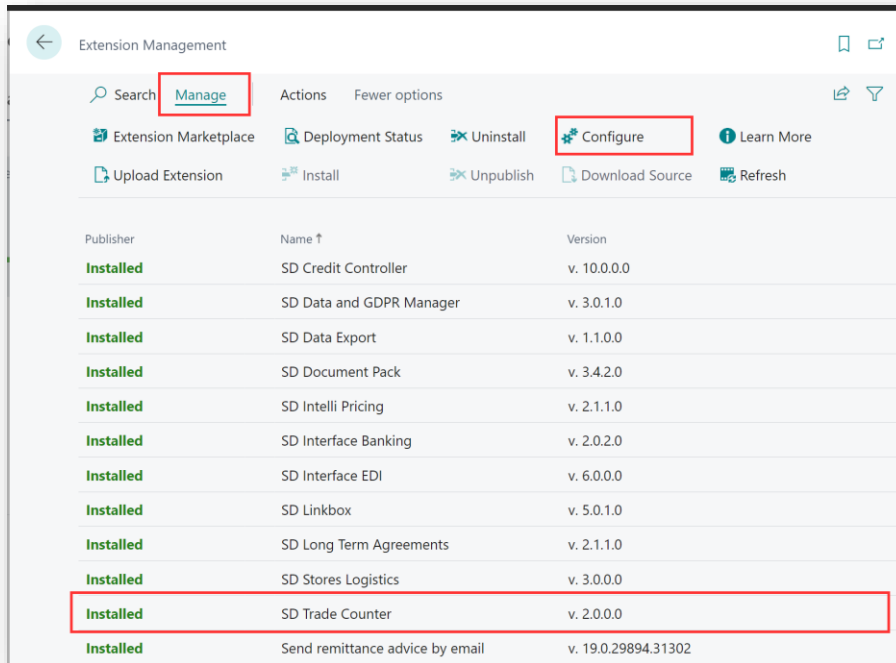


Figure 4-4

4. Choose to allow the **Allow HttpClient Requests** option (Figure 4-5).

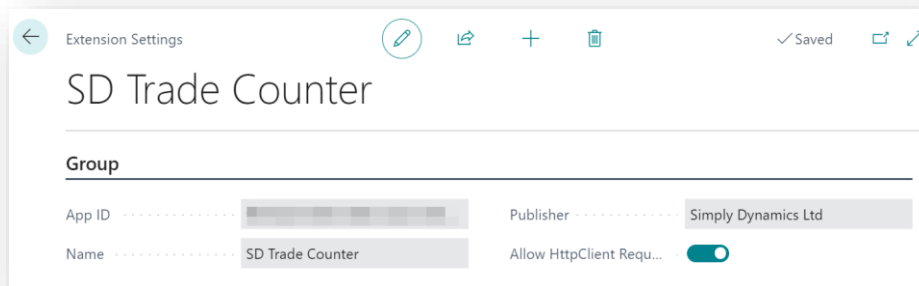


Figure 4-5

4.2 Choosing the SD Trade Counter Role

1. From your Dynamics 365 Business Central Web Client, in the app bar, select the **Settings** icon and then select **My Settings** (Figure 4-6).

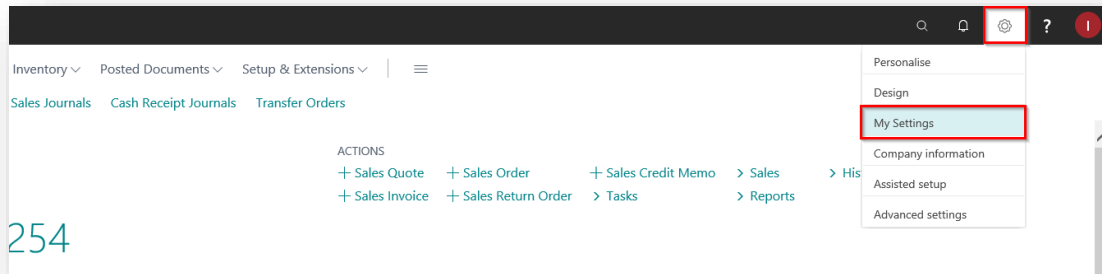


Figure 4-6

2. In the **My Settings** page, on the **Role** field, select the **AssistEdit** icon (Figure 4-7).

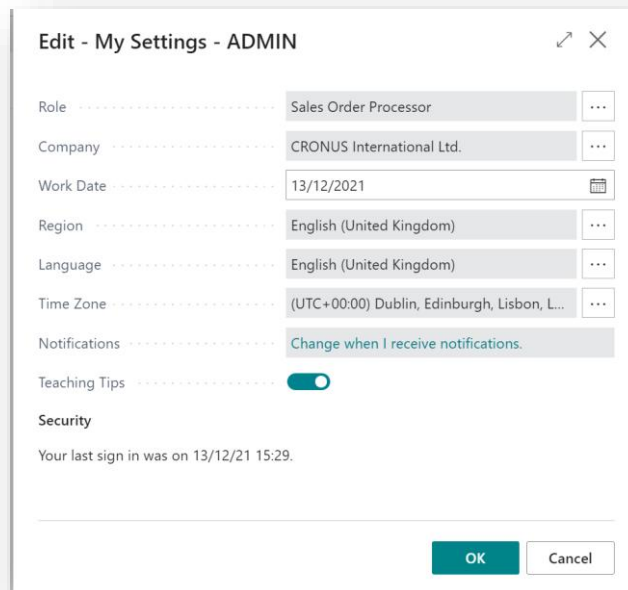


Figure 4-7

3. You should see **SD Trade Counter – Manager** in the list of Roles (Figure 4-8).

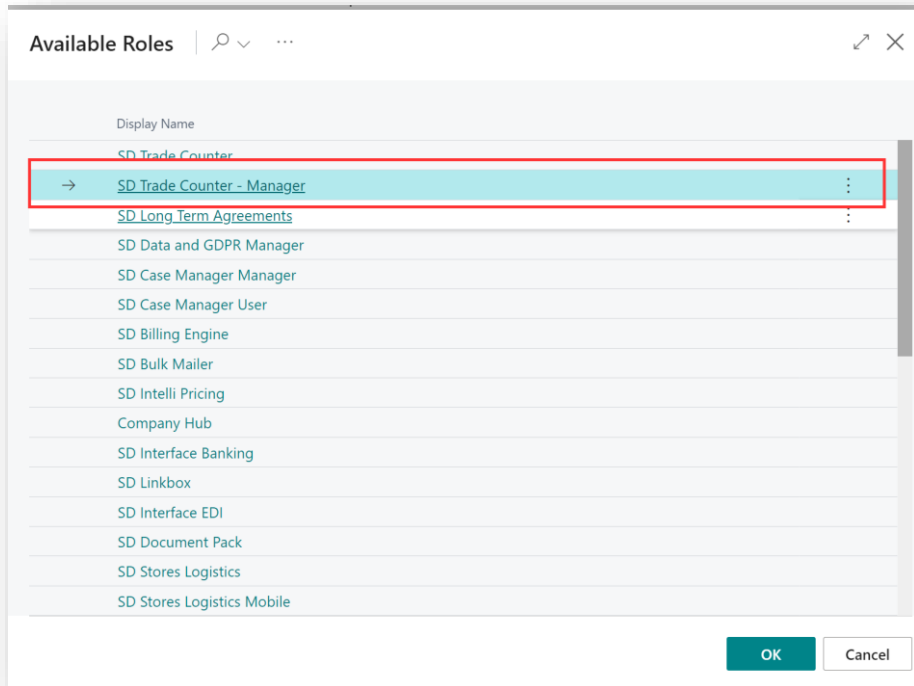


Figure 4-8

4. Choose **SD Trade Counter – Manager** and click **OK**.
5. The **SD Trade Counter – Manager** Role should now be displayed in the **Role** field (Figure 4-9).

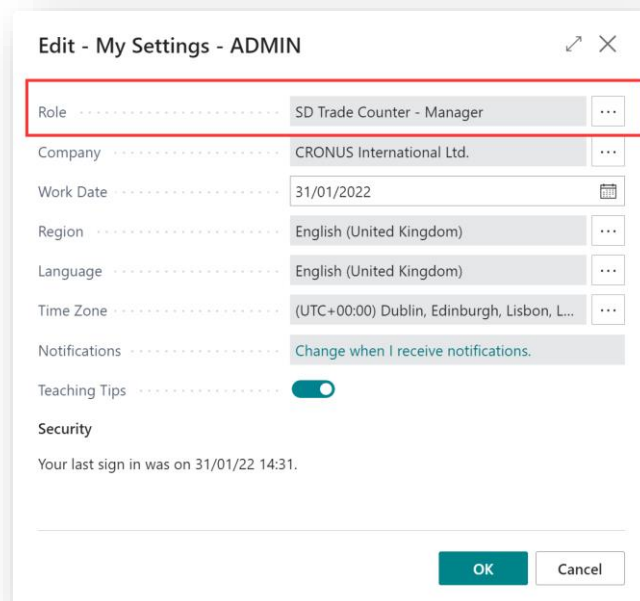


Figure 4-9

4.3 Accessing the SD Trade Counter Pages

Use the **Tell Me** to search for SD Trade Counter pages. Begin typing **SD** or **Trade** to see a list of the SD Trade Counter pages (*Figure 4-10*).

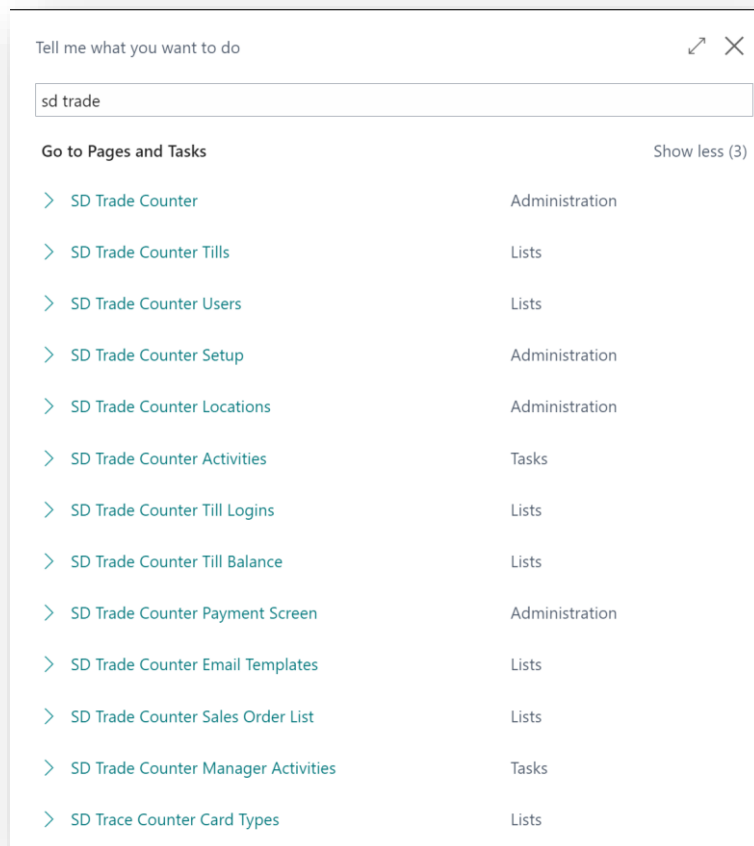


Figure 4-10

4.4 Activating the SD Trade Counter Licence

To use SD Trade Counter, you must activate the licence.

1. From the **Tell Me**, search for and select the **SD Trade Counter Setup** card.
2. When the **SD Trade Counter Setup** card opens, you will be prompted that You will be prompted that “Your license is invalid”. Choose **OK** (Figure 4-11).

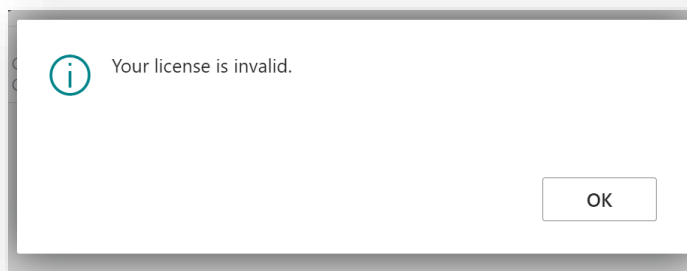


Figure 4-11

3. You are then prompted that “Your SD Trade Counter license needs to be validated”. Choose **Yes** (Figure 4-12).

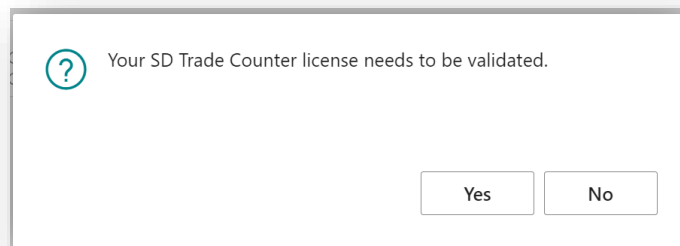


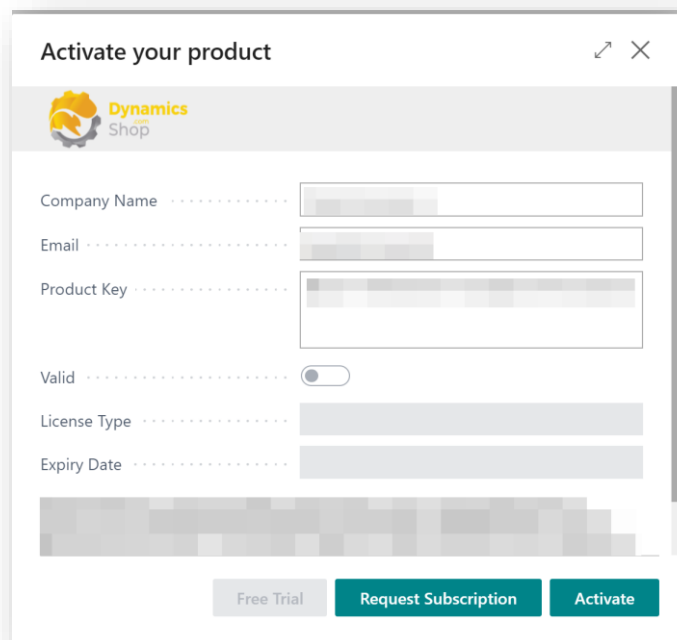
Figure 4-12

4. You will then see the **Activate your product** page.

4.4.1 Activating the SD Trade Counter Licence with a Product Key

If you have received a Product Key from Simply Dynamics Ltd., in the **Activate your product** page (*Figure 4-13*):

1. Enter your company name in **Company Name**
2. Enter your company email in **Email**
3. Paste the supplied product key into the **Product Key** field. **Tab off the Product Key field to validate the contents of the field and to enable the Activate key.** Choose **Activate** (*Figure 4-13*).



The screenshot shows a web form titled "Activate your product" with the Dynamics Shop logo. The form contains the following fields and controls:

- Company Name: Text input field
- Email: Text input field
- Product Key: Text input field
- Valid: Toggle switch (currently off)
- License Type: Text input field
- Expiry Date: Text input field

At the bottom of the form, there are three buttons: "Free Trial" (disabled), "Request Subscription" (active), and "Activate" (active).

Figure 4-13

4. The **Activate your product** page will update to display a message that the activation was successful. The expiry date will depend on the date that you activated your free trial.

4.4.2 Activating the SD Trade Counter Licence with a Free Trial

If you have not received a Product Key from Simply Dynamics Ltd. and want to avail of a free trial, in the **Activate your Product** page (Figure 4-14):

1. Enter your company name in **Company Name**
2. Enter your company email in **Email**
3. Choose **Free Trial** (Figure 4-14).

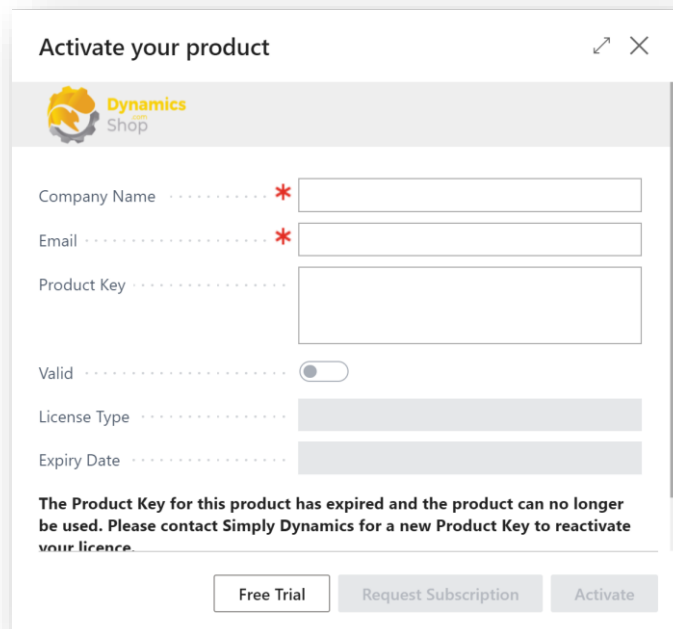


Figure 4-14

4. You are then prompted to choose **Yes** to activate your free trial. Choose **Yes** (Figure 4-15).

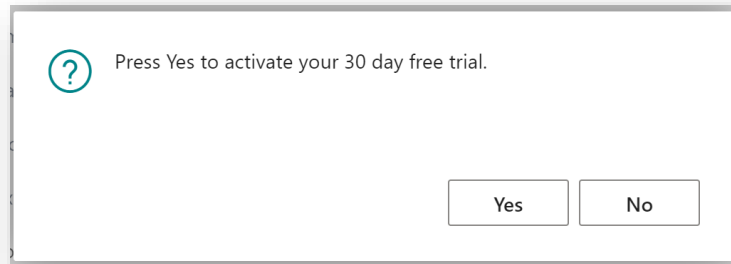


Figure 4-15

5. The **Activate your product** page will update to display a message that the activation was successful. The expiry date will depend on the date that you activated your free trial (Figure 4-16).

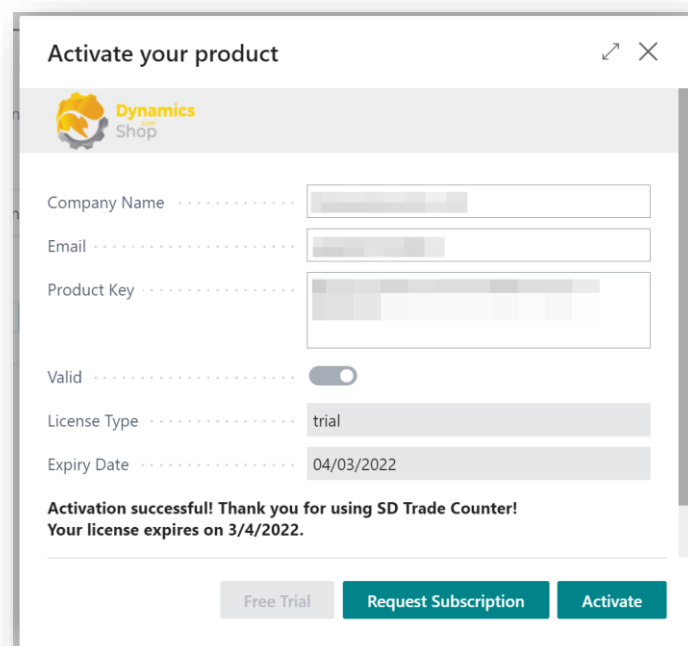


Figure 4-16

6. Choose **Finish** to exit the page.
7. When your Free Trial has expired, choose **Request Subscription** to request a Product Key from Simply Dynamics.

5 Uninstalling SD Trade Counter

You can uninstall **SD Trade Counter** using the Web Client:

1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** (*Figure 5-1*).

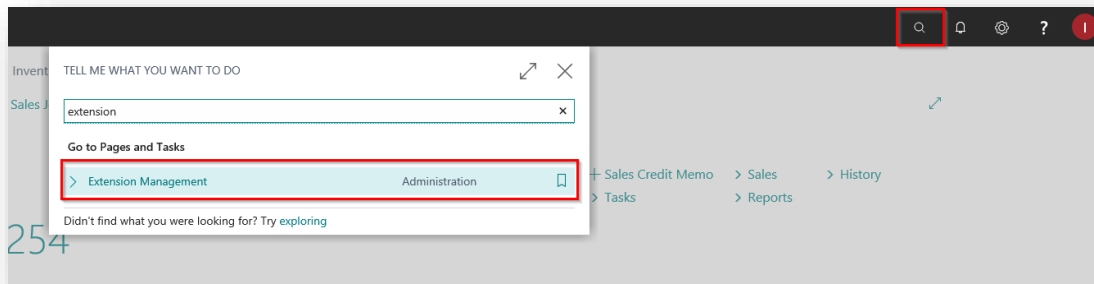


Figure 5-1

2. In **Extension Management**, you should see the **SD Trade Counter** App installed.
3. Select the **SD Trade Counter** App and choose the **Uninstall** Action (*Figure 5-2*).

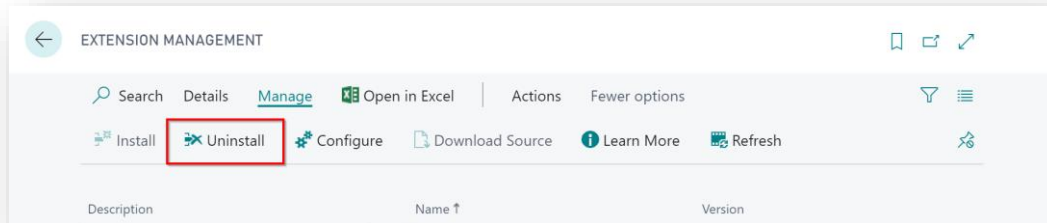


Figure 5-2

6 Setup and Configuration

6.1 SD Trade Counter Assisted Setup Wizard

You can easily walk-through the setup for SD Trade Counter using the **Assisted Setup** action on the **SD Trade Counter Setup** card.

1. In the **SD Trade Counter Setup**, from the menu choose the **Process** group, and then **Assisted Setup** (Figure 6-1).

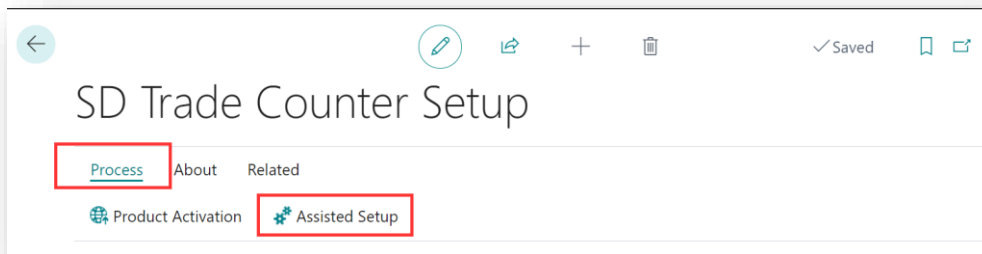


Figure 6-1

2. The **Assisted Setup Wizard** is displayed and guides you through set up. Choose **Next** (Figure 6-2).

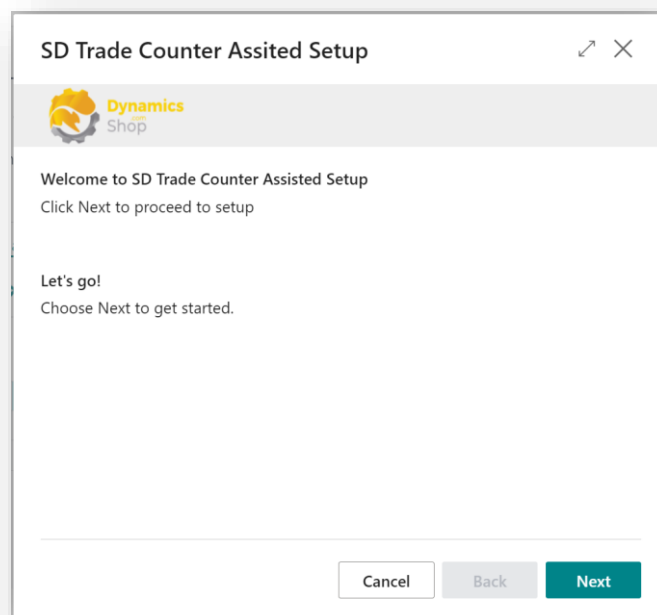
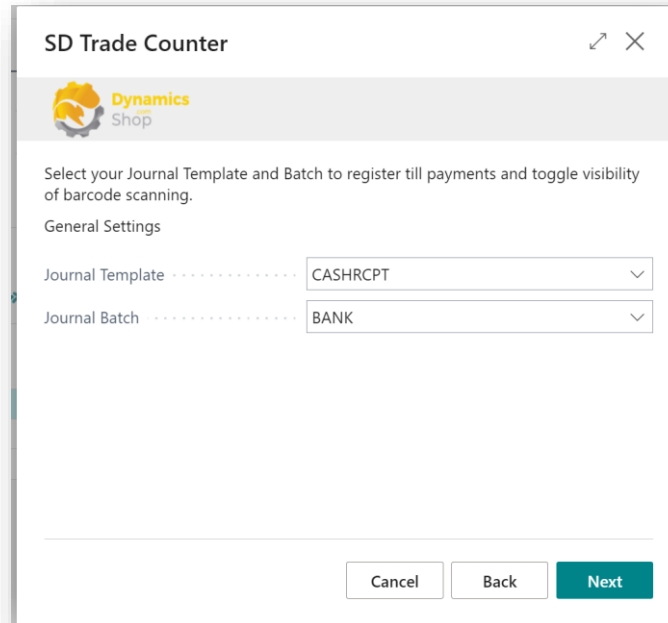


Figure 6-2

3. Choose a Journal Template and Journal Batch to register till payments. Choose **Next** (Figure 6-3).



SD Trade Counter

Select your Journal Template and Batch to register till payments and toggle visibility of barcode scanning.

General Settings

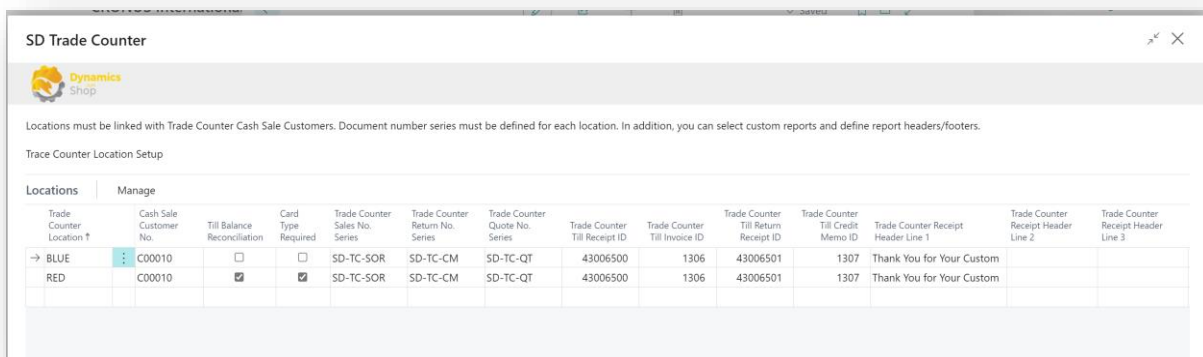
Journal Template CASHRCPT

Journal Batch BANK

Cancel Back Next

Figure 6-3

4. Choose your Trade Counter Location and your Cash Sale Customer. Create Document No. Series for the SD Trade Counter Orders, Refunds and Quotes. Choose the Report IDs for the Sales Till Receipt, Refund Till Receipt, Invoice and Credit Memo. In this page you can also turn Barcode Scanning in the SD Trade Counter Order, Refund and Quote pages on and set the Email Options used to Email Sale and Refund Receipts from the SD Trade Counter Payment Screen. Choose Next (Figure 6-4).



SD Trade Counter

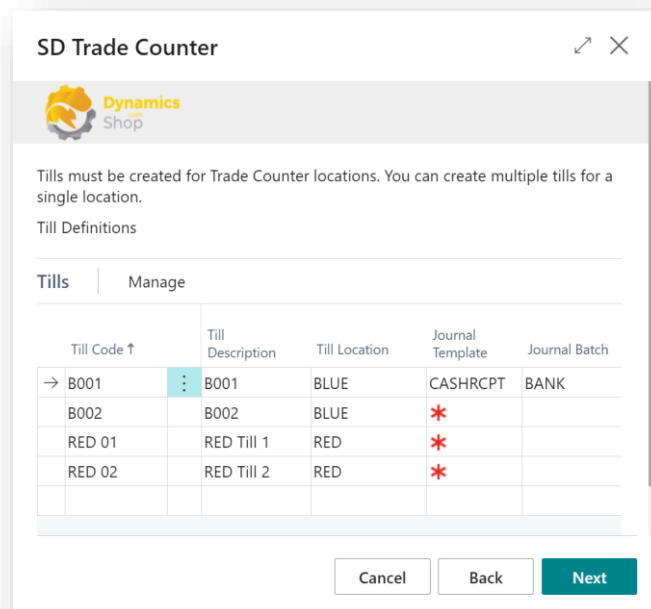
Locations must be linked with Trade Counter Cash Sale Customers. Document number series must be defined for each location. In addition, you can select custom reports and define report headers/footers.

Trace Counter Location Setup

Trade Counter Location ↑	Cash Sale Customer No.	Till Balance Reconciliation	Card Type Required	Trade Counter Sales No. Series	Trade Counter Return No. Series	Trade Counter Quote No. Series	Trade Counter Till Receipt ID	Trade Counter Till Invoice ID	Trade Counter Till Return Receipt ID	Trade Counter Till Credit Memo ID	Trade Counter Receipt Header Line 1	Trade Counter Receipt Header Line 2	Trade Counter Receipt Header Line 3
→ BLUE	C00010	<input type="checkbox"/>	<input type="checkbox"/>	SD-TC-SOR	SD-TC-CM	SD-TC-QT	43006500	1306	43006501	1307	Thank You for Your Custom		
RED	C00010	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SD-TC-SOR	SD-TC-CM	SD-TC-QT	43006500	1306	43006501	1307	Thank You for Your Custom		

Figure 6-4

5. Create Tills for each Trade Counter Location. You can create multiple tills per location. You can also define a Journal Template and Journal Batch that will be used at till level or leave blank to use the Journal Template and Batch defined on the first page. Choose **Next** (Figure 6-5).



SD Trade Counter

Tills must be created for Trade Counter locations. You can create multiple tills for a single location.

Till Definitions

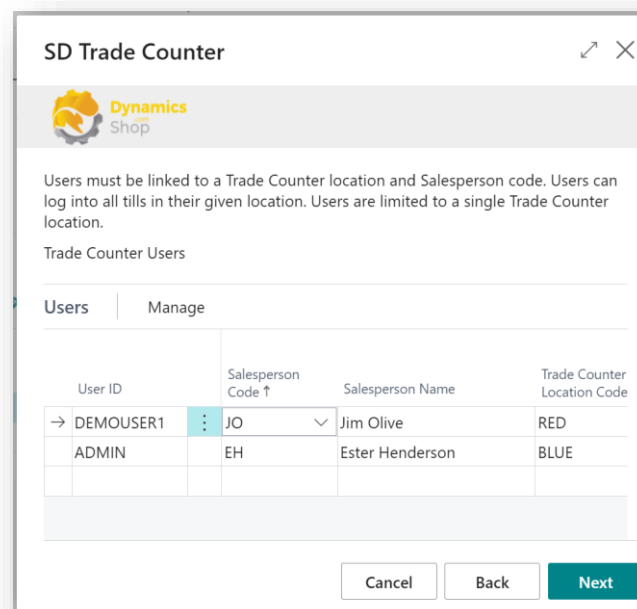
Tills | Manage

Till Code ↑	Till Description	Till Location	Journal Template	Journal Batch
→ B001	B001	BLUE	CASHRCPT	BANK
B002	B002	BLUE	*	
RED 01	RED Till 1	RED	*	
RED 02	RED Till 2	RED	*	

Cancel Back Next

Figure 6-5

6. Assign your Users a Trade Counter Location and a Salesperson Code. Choose Next (Figure 6-6).



SD Trade Counter

Users must be linked to a Trade Counter location and Salesperson code. Users can log into all tills in their given location. Users are limited to a single Trade Counter location.

Trade Counter Users

Users | Manage

User ID	Salesperson Code ↑	Salesperson Name	Trade Counter Location Code
→ DEMOUSER1	JO	Jim Olive	RED
ADMIN	EH	Ester Henderson	BLUE

Cancel Back Next

Figure 6-6

7. Choose **Finish** (Figure 6-7).

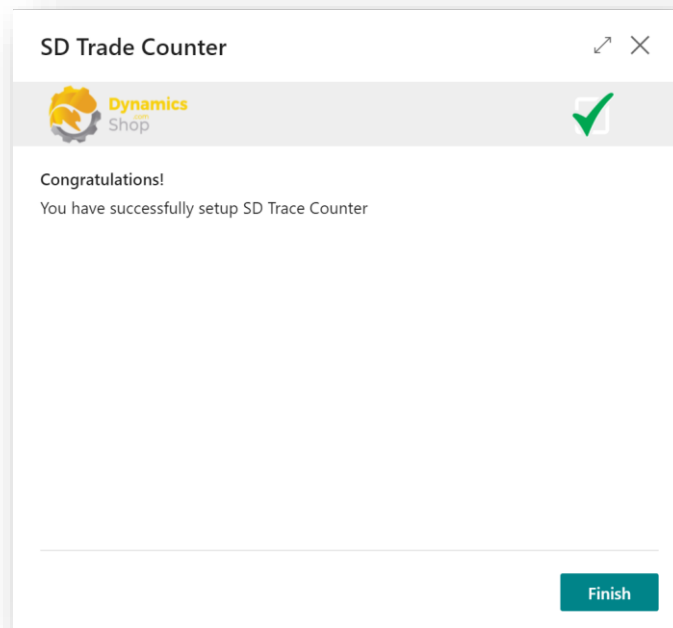


Figure 6-7

7 Using SD Trade Counter

7.1 SD Trade Counter Setup

The **SD Trade Counter Setup** is accessed from the **SD Trade Counter Role Centre**, by selecting the **Setup** action cue (*Figure 7-1*), or, by searching for **SD Trade Counter Setup** in the **Tell Me**.

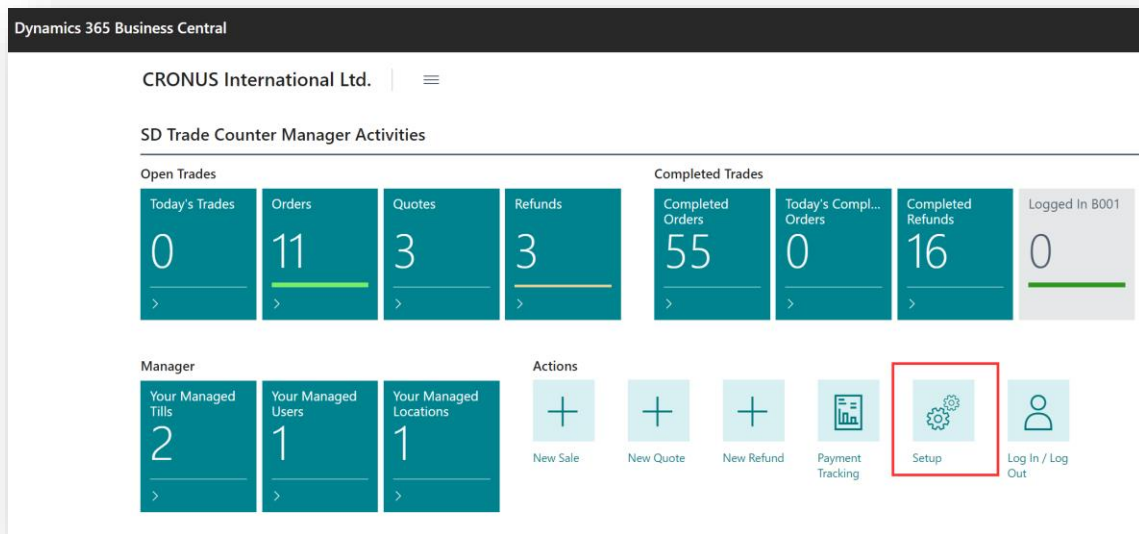


Figure 7-1

The **SD Trade Counter Setup** contains the following fields in the **General** FastTab (*Figure 7-2*).

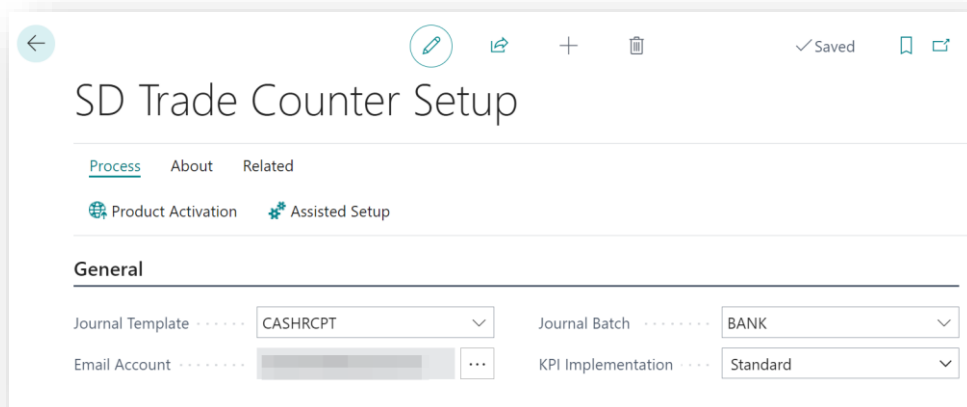
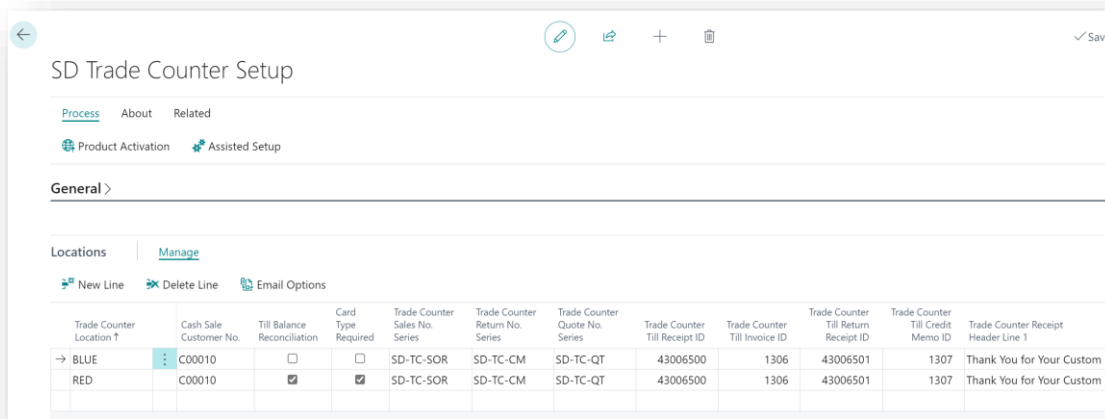


Figure 7-2

- **Journal Template** – Select the Journal Template that SD Trade Counter will use to create the payments posted when taking payment for the transactions.

- **Journal Batch** – Select the Journal Batch that SD Trade Counter will use to create the payments posted when taking payment for the transactions.
- **Email Account** – Select the Email Account to use when emailing Sales and Refund receipts from SD Trade Counter.
- **KPI Implementation** – Defaults to **Standard**. This field allows for future releases of SD Trade Counter to use different CodeUnits to calculate the values in the Your Managed Tills KPI page.
- **Prompt Delete On Sales Order Exit** – Defaults to on. Switch this option off if you do not want SD Trade Counter to prompt the user to delete an order when exiting a Trade Counter Order that contains sales lines.

Expand the **Locations** FastTab (Figure 7-3).



Trade Counter Location	Cash Sale Customer No.	Till Balance Reconciliation	Card Type Required	Trade Counter Sales No. Series	Trade Counter Return No. Series	Trade Counter Quote No. Series	Trade Counter Till Receipt ID	Trade Counter Till Invoice ID	Trade Counter Till Return Receipt ID	Trade Counter Till Credit Memo ID	Trade Counter Receipt Header Line 1
→ BLUE	C00010	<input type="checkbox"/>	<input type="checkbox"/>	SD-TC-SOR	SD-TC-CM	SD-TC-QT	43006500	1306	43006501	1307	Thank You for Your Custom
RED	C00010	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SD-TC-SOR	SD-TC-CM	SD-TC-QT	43006500	1306	43006501	1307	Thank You for Your Custom

Figure 7-3

- **Trade Counter Location** – Select the location of the Trade Counter. Enter a Location from a list of existing Locations.
- **Cash Sale Customer No.** – Enter the customer that will act as the Cash Sale customer for SD Trade Counter for this Location. Select from a list of existing customers.
- **Till Balance Reconciliation** – Select this checkbox if you want to switch on the functionality to setup floats, close off and reconcile your tills.
- **Card Type Required** – Choose this checkbox if you want to force till users to choose the card type used when cashing out the transactions.

- **Trade Counter Sales No. Series** – Enter the No. Series to use for Sales Documents generated in SD Trade Counter for this Location.
- **Trade Counter Return No. Series** – Enter the No. Series to use for Return Documents (Credit Memos) generated in SD Trade Counter for this Location.
- **Trade Counter Quote No. Series** – Enter the No. Series to use for Quotes generated in SD Trade Counter for this Location.
- **Trade Counter Till Receipt ID** – Choose the Report ID to use to print Till Receipts. **43006500** is the Report ID for the SD Trade Counter Till Receipt Report.
- **Trade Counter Till Invoice ID** – Choose the Report ID to use to print Till Invoices.
- **Trade Counter Till Return Receipt ID** – Enter the Report ID to use to print Till Return Receipts. **43006501** is the Report ID for the SD Trade Counter Till Return Receipt Report.
- **Trade Counter Till Credit Memo ID** – Enter the Report ID to use to print Till Credit Memos.
- **Receipt Header Line 1** – Enter text to print on the Till Receipt Header.
- **Receipt Header Line 2** - Enter text to print on the Till Receipt Header.
- **Receipt Header Line 3** - Enter text to print on the Till Receipt Header.
- **Receipt Footer Line 1**- Enter text to print on the Till Receipt Footer.
- **Receipt Footer Line 2** - Enter text to print on the Till Receipt Footer.
- **Receipt Footer Line 3** - Enter text to print on the Till Receipt Footer.
- **Use Barcode Scanning** – Select this option if you want to use the barcode scanning functionality in SD Trade Counter for this Location. When using barcode scanning a barcode field is displayed on the SD Trade Counter Order, Quote and Refund pages.
- **Background Scanning** – Select this option if you want to use the background barcode scanning functionality in SD Trade Counter for this Location. When using background barcode scanning the barcode field is not displayed on the SD Trade Counter Order, Quote and Refund pages. The page is placed in a receptive mode to accept the scanned input without having to have the focus on the barcode field when scanning input.

- **Email Options** – Click into this field to open the Email options for the Location.
- **Show Advanced Order Actions** – Selecting this checkbox displays the Release and Reopen action on the SD Trade Counter Order, Refund and Credit Memo pages.

The following action cues are in the **KPIs** FastTab (*Figure 7-4*). Drilling through on these action cues brings you to the associated setup page.

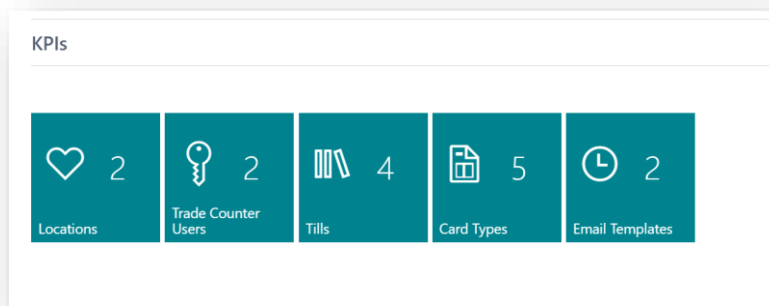


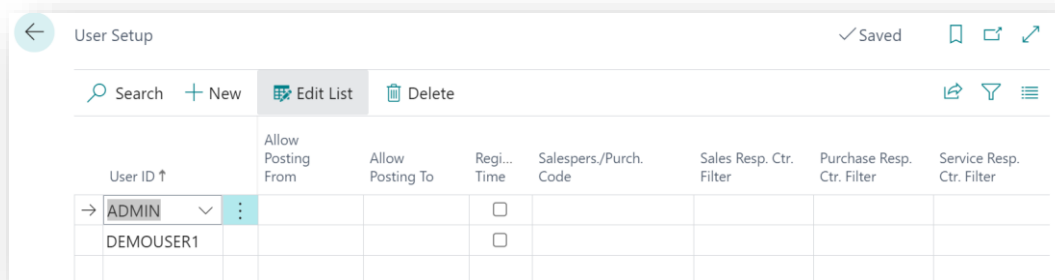
Figure 7-4

- **Locations** – Choose this action cue to open the **SD Trade Counter Locations Setup**.
- **Trade Counter Users** - Choose this action cue to open the **SD Trade Counter User Setup**.
- **Tills** - Choose this action to open the **SD Trade Counter Till Setup**.
- **Card Types** - Choose this action to open the **SD Trade Counter Card Types** list.
- **Email Templates** - Choose this action to open the **SD Trade Counter Email Templates** list.

7.2 SD Trade Counter – User Setup

The **SD Trade Counter User Setup** is accessed from the **SD Trade Counter Card** or by searching the **Tell Me**.

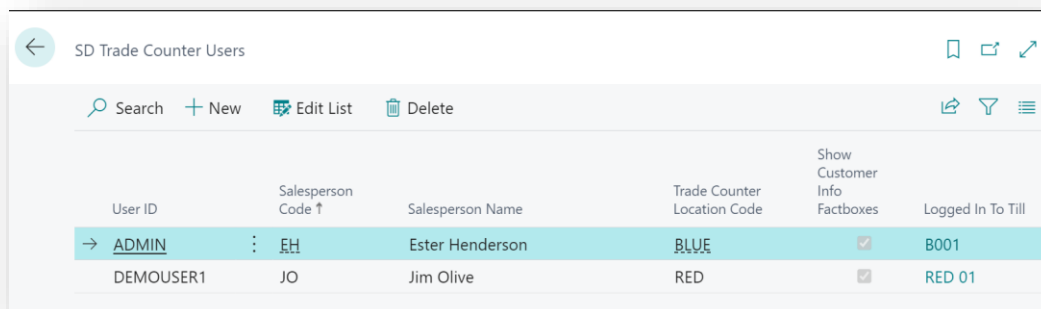
Note: Each Microsoft Dynamics 365 Business Central User that will use SD Trade Counter must have a record defined in the standard Dynamics 365 Business Central **User Setup** (Figure 7-5).



User ID ↑	Allow Posting From	Allow Posting To	Regi... Time	Salespers./Purch. Code	Sales Resp. Ctr. Filter	Purchase Resp. Ctr. Filter	Service Resp. Ctr. Filter
→ ADMIN			<input type="checkbox"/>				
DEMOUSER1			<input type="checkbox"/>				

Figure 7-5

The **SD Trade Counter User Setup** contains the following fields (Figure 7-6).



User ID	Salesperson Code ↑	Salesperson Name	Trade Counter Location Code	Show Customer Info Factboxes	Logged In To Till
→ ADMIN	EH	Ester Henderson	BLUE	<input checked="" type="checkbox"/>	B001
DEMOUSER1	JO	Jim Olive	RED	<input checked="" type="checkbox"/>	RED 01

Figure 7-6

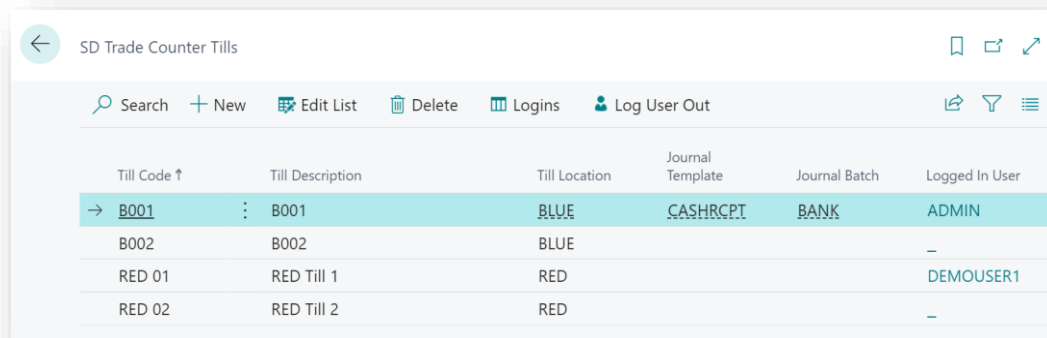
- **User ID** – Select the Dynamics 365 Business Central User.
- **Salesperson Code** – Select a **Salespers./Purch. Code** to link to the user in **User ID**. The Salesperson Code defined here will be stamped on the Sales Header of the Documents created in SD Trade Counter. This field can be left blank.

- **Salesperson Name** – Displays the name of the Salesperson entered in **Salesperson Code**.
- **Trade Counter Location Code** –This field specifies the location of the Trade Counter. Enter a location from a list of existing Locations. If this field is left blank, the user can view transactions in the SD Trade Counter Role Centre for all Locations.
- **Prompt Select Salesperson** – Select this option to prompt for a Salesperson on every SD Trade Counter transaction. This is to allow for situations when multiple users are allowed to log in to the same till and users can choose their Salesperson Code when entering the transaction.
- **Show Customer Info FactBoxes** – Select this checkbox if you want to see the Customer Information FactBoxes displayed on the SD Trade Counter Order, Quote and Refund pages.
- **Logged In to Till** – This field displays the till that the user is currently logged in to. You can drill through on this field to see the time the user logged in to the till.

7.3 SD Trade Counter – Till Setup

The **SD Trade Counter Till Setup** is accessed from the **SD Trade Counter Card** or by searching the **Tell Me**.

The **SD Trade Counter Till Definitions** contains the following fields (*Figure 7-7*).



Till Code ↑	Till Description	Till Location	Journal Template	Journal Batch	Logged In User
→ B001	B001	BLUE	CASHRCPT	BANK	ADMIN
B002	B002	BLUE			-
RED 01	RED Till 1	RED			DEMOUSER1
RED 02	RED Till 2	RED			-

Figure 7-7

- **Till Code** - This field specifies the till code. Enter a unique code to define the till.
- **Till Description** – Enter a user defined description to define the till.
- **Till Location** – Enter the till’s location. Select from a list of existing locations. A location must be defined for each till in SD Trade Counter.
- **Allow Concurrent Logins** – Select this option if you want to allow multiple users to log in to the same till.
- **Journal Template** – Select the Journal Template that SD Trade Counter will use to create the payments posted from this till when taking payment for the transactions. If this field is blank, SD Trade Counter will look to the Journal Template defined on the SD Trade Counter Setup card.
- **Journal Batch** – Select the Journal Batch that SD Trade Counter will use to create the payments posted from this till when taking payment for the transactions. If this field is blank, SD Trade Counter will look to the Journal Template defined on the SD Trade Counter Setup card.

- **Logged In Users** - This field displays a flowfield count of the users that are currently logged in to the till. You can drill through on this field to see the time the users logged in to the till.

There are several actions that you can choose from the menu in the SD Trade Counter Tills page (*Figure 7-8*):

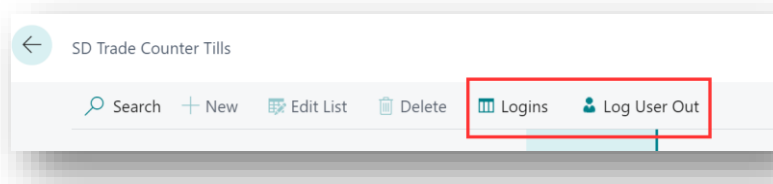


Figure 7-8

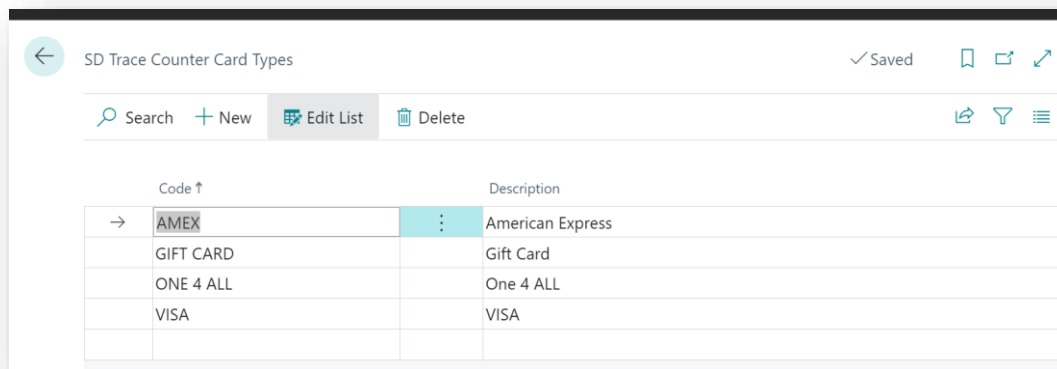
- **Logins** – Choose this action to see the history of the logins for the till. You can see the date and time that users have logged in and out of the till.
- **Log Users Out** – Choose this action to log the currently logged in users out of the till.

7.4 SD Trade Counter – Card Types

The **SD Trade Counter Card Types** is accessed from the **SD Trade Counter Card** or by searching the **Tell Me**.

In the **SD Trade Counter Card Types** page, you can define the different card types that you when paying the transactions in the **SD Trade Counter Payment Screen**. If you have selected the **Card Type Required** option in the **SD Trade Counter Locations Setup**, users will be forced to choose the card type used when putting through a payment for the transaction. A breakdown of the different cards used is shown in the X and Z reports.

The **SD Trade Counter Card Types** contains the following fields (*Figure 7-9*).



The screenshot shows the 'SD Trade Counter Card Types' page. At the top, there is a back arrow, the page title 'SD Trade Counter Card Types', a 'Saved' status, and icons for bookmark, share, and refresh. Below the title is a search bar and buttons for '+ New', 'Edit List', and 'Delete'. The main content is a table with two columns: 'Code ↑' and 'Description'. The table contains the following rows:

Code ↑	Description
→ AMEX	American Express
GIFT CARD	Gift Card
ONE 4 ALL	One 4 ALL
VISA	VISA

Figure 7-9

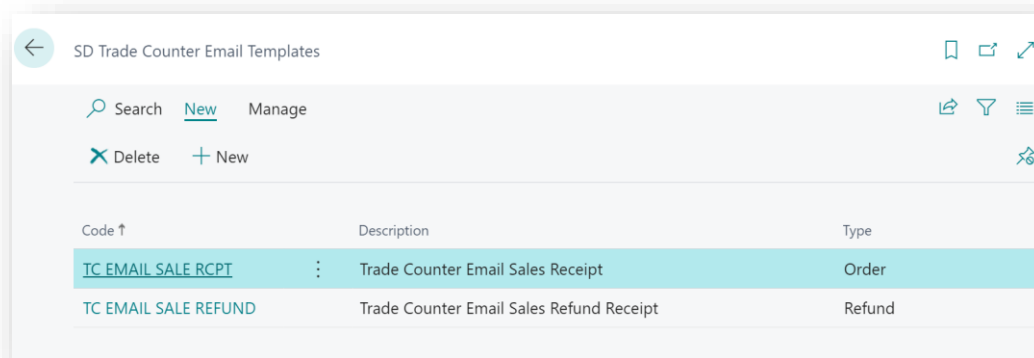
- **Code** - Enter a unique code to define the card.
- **Description** – Enter a user defined description to describe the card.

7.5 SD Trade Counter – Email Templates

The **SD Trade Counter Email Templates** is accessed from the **SD Trade Counter Card** or by searching the **Tell Me**.

In the **SD Trade Counter Email Templates** page, you can create email templates (with placeholder fields from the Sales Invoice Header or the Sales Credit Memo Header) used when emailing Sales Receipts or Sales Refunds to your customer when paying for transactions in the **SD Trade Counter Payment Screen**.

The **SD Trade Counter Email Templates** contains the following fields (*Figure 7-10*).



Code ↑	Description	Type
TC EMAIL SALE RCPT	Trade Counter Email Sales Receipt	Order
TC EMAIL SALE REFUND	Trade Counter Email Sales Refund Receipt	Refund

Figure 7-10

- **Code** - Enter a unique code to define the email template.
- **Description** – Enter a user defined description
- **Type** – Specifies if the template is for an Order or a Refund.

Select the **+New** action to create a new template or the **Edit** action to edit an existing template. You can select placeholder fields to display variable data in the email subject and body (*Figure 7-11*).

Edit - SD Trade Counter Email Template - TC EMAIL SALE RCPT

General

Code TC EMAIL SALE RCPT Description Trade Counter Email Sales Receipt

Type Order

Subject

Sales Receipt [Sales Invoice Header:No.]

Content

Hi,

Please find attached a receipt for your order [Sales Invoice Header:Order No.] which was invoiced as invoice [Sales Invoice Header:No.]

Thank you for your custom,

Cronus International Ltd.

OK Cancel

Figure 7-11

7.6 SD Trade Counter – Till Login

Users must log in to a till in SD Trade Counter before they can create Orders, Quotes or Refunds in SD Trade Counter. The cues and actions in the SD Trade Counter Role Centres are disabled until the user logs in to a till. The **SD Trade Counter Till Login** is accessed from the **SD Trade Counter Role Centre**, by selecting the **Log In/Log Out** action cue (*Figure 7-12*).

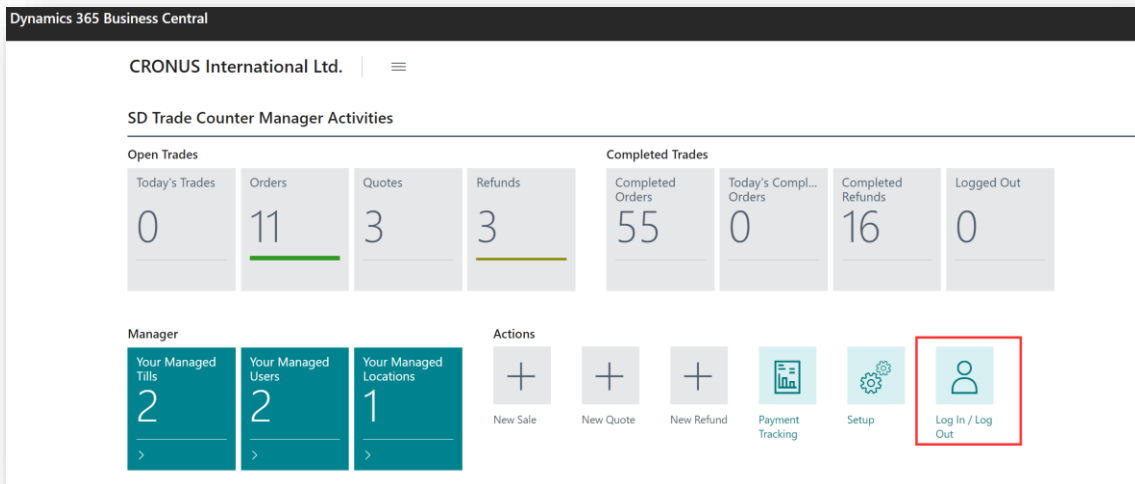


Figure 7-12

The **SD Trade Counter Till Login** page contains the following fields (*Figure 7-13*). Choose the **Log In**, **Log Out** or **Change Till** buttons as required.

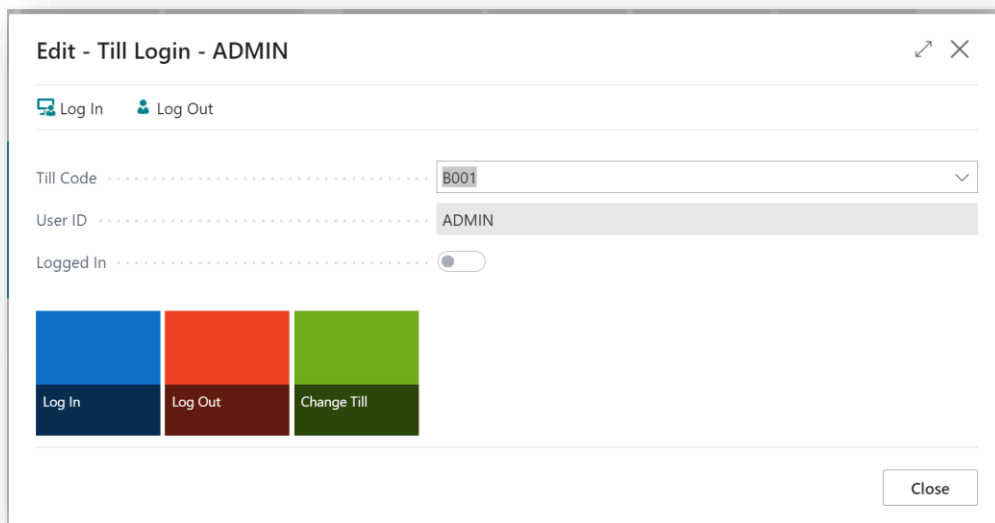
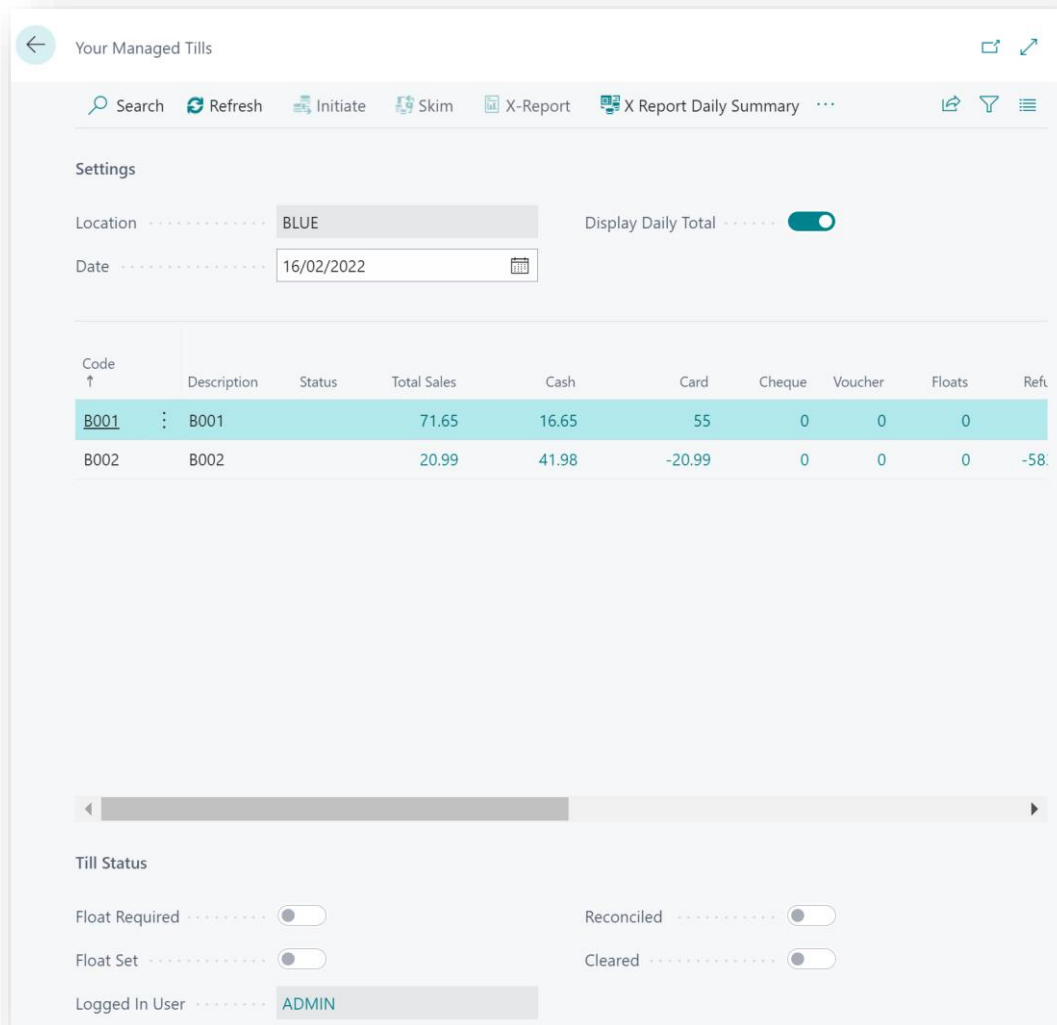


Figure 7-13

- **Till Code** - Choose the Till Code that you want to log in to.
- **User ID** – Defaults to your Dynamics 365 Business Central User ID.

If the **Till Balance Reconciliation** option in the **SD Trade Counter Location Setup** has been switched on for the till location, then before logging into a till the till must be initiated by a manager. When initiating a till you can set the float for the till.

Tills are initiated by managers using the SD Trade Counter Your Managed Tills page (*Figure 7-14*).



Your Managed Tills

Search Refresh Initiate Skim X-Report X Report Daily Summary

Settings

Location BLUE Display Daily Total

Date 16/02/2022

Code	Description	Status	Total Sales	Cash	Card	Cheque	Voucher	Floats	Ref.
B001	B001		71.65	16.65	55	0	0	0	
B002	B002		20.99	41.98	-20.99	0	0	0	-58.

Till Status

Float Required Reconciled

Float Set Cleared

Logged In User ADMIN

Figure 7-14

7.7 SD Trade Counter – Your Managed Tills

As mentioned above, users must log in to a till in SD Trade Counter before they can create Orders, Quotes or Refunds in SD Trade Counter. If the **Till Balance Reconciliation** option in the **SD Trade Counter Location Setup** has been switched on for the till location, then before logging into a till, the till must be initiated by a manager (*Figure 7-15*).

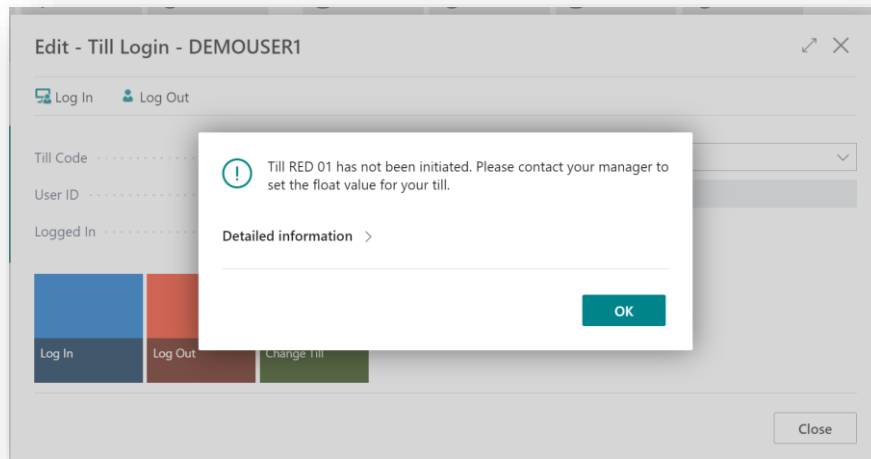


Figure 7-15

Tills are initiated by managers using the **SD Trade Counter Your Managed Tills** page. The **SD Trade Counter Your Managed Tills** is accessed from the **SD Trade Counter Role Centre**, by selecting the **Your Managed Tills** action cue (*Figure 7-16*).

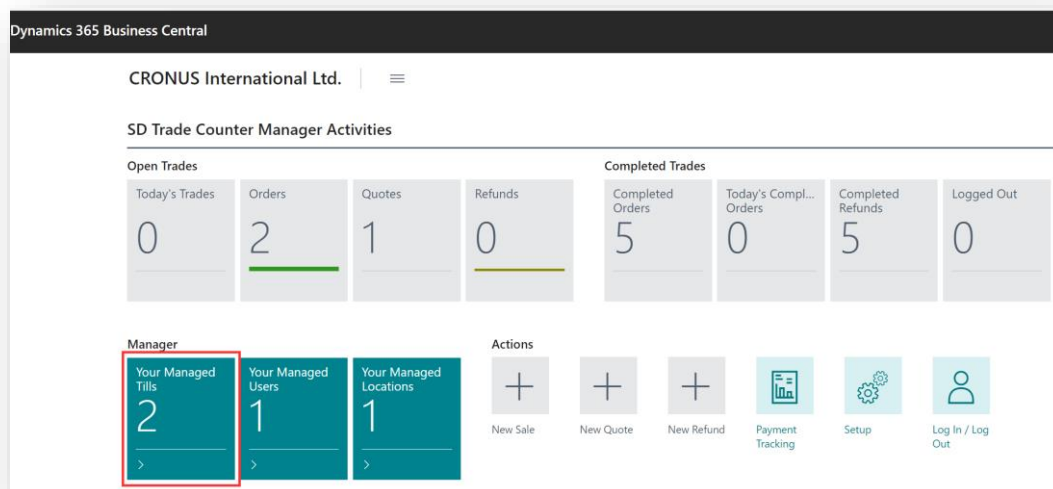
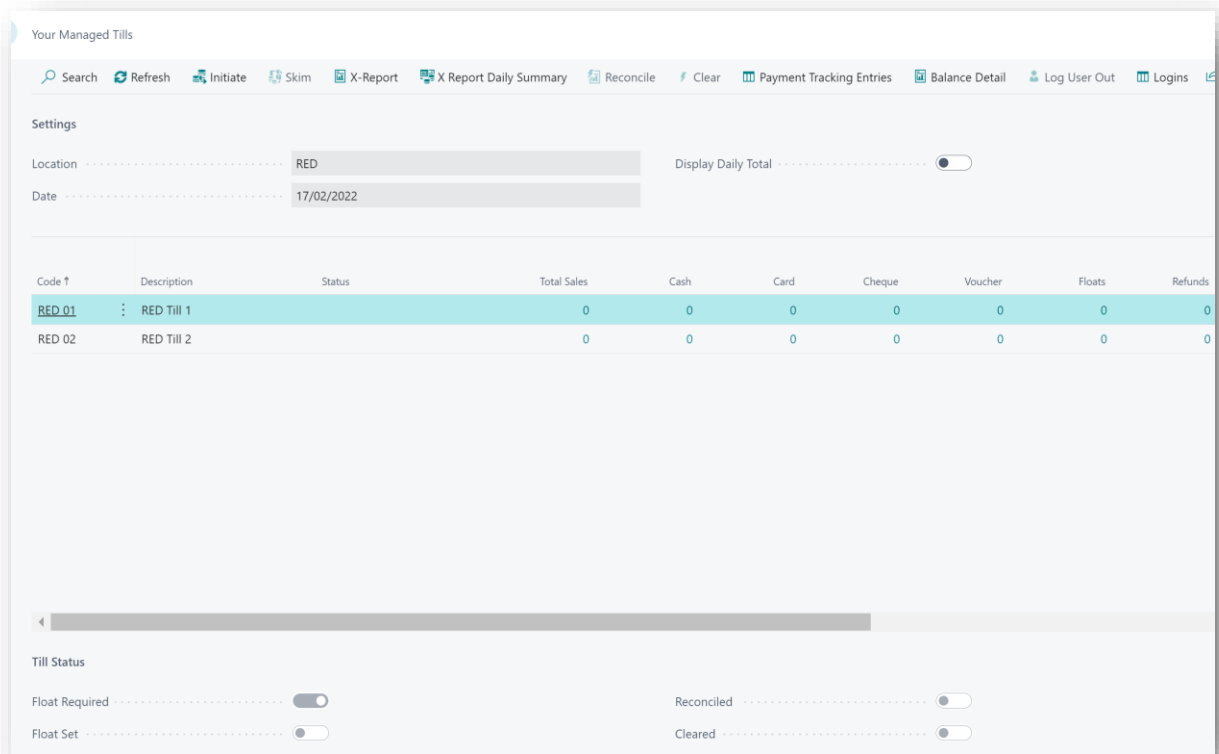


Figure 7-16

The **SD Trade Counter Your Manged Tills** opens (*Figure 7-17*).



Your Managed Tills

Search Refresh Initiate Skim X-Report X Report Daily Summary Reconcile Clear Payment Tracking Entries Balance Detail Log User Out Logins

Settings

Location RED Display Daily Total

Date 17/02/2022

Code ↑	Description	Status	Total Sales	Cash	Card	Cheque	Voucher	Floats	Refunds
RED 01	RED Till 1		0	0	0	0	0	0	0
RED 02	RED Till 2		0	0	0	0	0	0	0

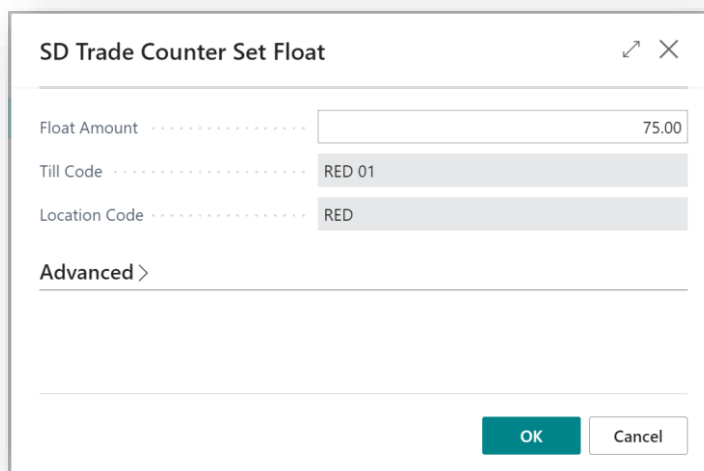
Till Status

Float Required Reconciled

Float Set Cleared

Figure 7-17

To initiate the till, from the menu, select the **Initiate** action. The **SD Trade Counter Set Float** opens and here you can enter a float for the till (*Figure 7-18*).



SD Trade Counter Set Float

Float Amount 75.00

Till Code RED 01

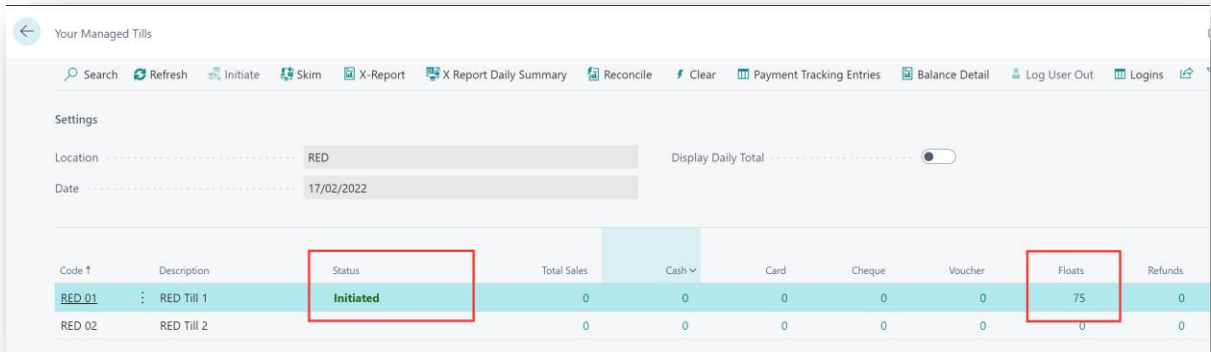
Location Code RED

Advanced >

OK Cancel

Figure 7-18

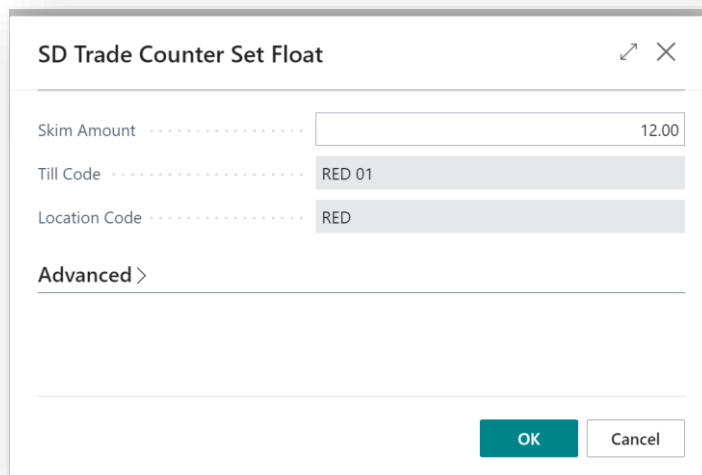
The till is then set to a status of **Initiated** and the float has been recorded (*Figure 7-19*).



Code †	Description	Status	Total Sales	Cash	Card	Cheque	Voucher	Floats	Refunds
RED 01	RED Till 1	Initiated	0	0	0	0	0	75	0
RED 02	RED Till 2		0	0	0	0	0	0	0

Figure 7-19

If you need to take any skims from the till during the day, choose the **Skim** action. The **SD Trade Counter Set Float** opens and here you can enter the skim amount that has been taken from the till (*Figure 7-20*).



SD Trade Counter Set Float ↗ ✕

Skim Amount

Till Code RED 01

Location Code RED

Advanced >

Figure 7-20

The skim has been recorded in the SD Trade Counter Payment Tracking table (*Figure 7-21*).

Your Managed Tills

Search Refresh Initiate Skim X-Report X Report Daily Summary Reconcile Clear Payment Tracking Entries Balance Detail Log User Out Logins

Settings

Location RED Display Daily Total

Date 17/02/2022

Code ↑	Cheque	Voucher	Floats	Refunds ↓	Skims	Balance	Difference	No. of Orders	No. of Completed Quotes	No. of Refunds	Logged In User
RED_01	0	0	75	0	-12	63	0	0	0	0	DEMOUSER1
RED_02	0	0	0	0	0	0	0	0	0	0	-

Figure 7-21

As transactions are put through SD Trade Counter and recorded in the **SD Trade Counter Payment Screen**, the **Your Managed Tills** page is updated. You can drill through on the values to see the transactions logged in the SD Trade Counter Payment Tracking table (Figure 7-22).

Your Managed Tills

Search Refresh Initiate Skim X-Report X Report Daily Summary Reconcile Clear Payment Tracking Entries Balance Detail Log User Out Log

Settings

Location RED Display Daily Total

Date 17/02/2022

Code ↑	Description	Status	Total Sales	Cash	Card	Cheque	Voucher	Floats	Refunds	Skims	Balance	Difference	No. of Orders
RED_01	RED Till 1	Initiated	27.49	9.99	1.5	16	0	75	0	-12	72.99	0	3
RED_02	RED Till 2		0	0	0	0	0	0	0	0	0	0	0

Figure 7-22

Choose the **Payment Tracking Entries** action to view the payments that have been logged in the SD Trade Counter Payment Screen (Figure 7-23).

SD Trade Counter Till Balance

Search Reports

Entry No. ↓	Till Code ▼	Document Type	Document No.	Document Amount	Sale Amount	Cash Amount	Card Amount	Cheque Amount	Voucher Amount	Change Amount	Cash Balance	Location ▼	Customer Account	Customer Name
42	RED_01	Credit	104027	-5.5	-5.5	0	-5.5	0	0	0	0	RED	C00010	TC Cash Sale
42	RED 01	Invoice	103103	16	16	0	0	16	0	0	0	RED	C00010	TC Cash Sale
41	RED 01	Invoice	103102	7	7	0	7	0	0	0	0	RED	C00010	TC Cash Sale
40	RED 01	Invoice	103101	9.99	9.99	10	0	0	0	-0.01	9.99	RED	C00010	TC Cash Sale
39	RED 01	Skim	-	0	-12	-12	0	0	0	0	-12	RED	-	-
38	RED 01	Initiate	-	0	75	75	0	0	0	0	75	RED	-	-

Figure 7-23

You can also check the **Logins** to the till by choosing the **Logins** action (Figure 7-24).

SD Trade Counter Till Logins

Search

Login No. ↓	User ID	Till Code ▼	Status	Location	Logged In At	Logged Out At	Transactions
9	DEMOUSER1	RED_01	Logged In	RED	17/02/2022 15:01		4
3	DEMOUSER1	RED 01	Logged Out	RED	15/02/2022 13:08	17/02/2022 14:33	0
2	DEMOUSER1	RED 01	Logged Out	RED	15/02/2022 12:24	15/02/2022 13:04	2

Figure 7-24

Print the X Report (*Figure 7-25*) by selecting the **X Report** action. The X Report is a snapshot report and will show you the current balance of the till since the last till initiation. If the till has been reconciled multiple times in the day, the **X Report Daily Summary** will show you all the figures for the till in the day.

X-Report	
Location:	RED
Till:	RED 01
Date:	17/02/2022
Status:	Initiated
Printed By:	DEMOUSER1
Printed At:	17/02/2022 15:41
Sales Total:	27.49
Cash:	9.99
Voucher:	0.00
Cheque:	16.00
Card:	1.50
VISA	1.50
Floats:	75.00
Cash In:	9.99
Refunds:	0.00
Skims:	-12.00
Balance:	72.99
Sales:	3
Refunds:	1
Quotes:	0

Figure 7-25

To close out the till, select the **Reconcile** action. This runs the Z Report (*Figure 7-26*), where you can enter the till amount counted. Running the Z Report logs the user out of the till. You can also choose the **Log User Out** action to log a user out of a till anytime during the day.

Z-Report	
Location:	RED
Till:	RED 01
Status:	Reconciled
Printed by:	DEMOUSER1
Printed At:	17/02/2022 15:44
Sales Total:	27.49
Cash:	9.99
Voucher:	0.00
Cheque:	16.00
Card:	1.50
Floats:	75.00
Cash In:	9.99
Refunds:	0.00
Skims:	12.00
Calculated Amount:	72.99
Closing Amount:	72.99
Difference:	0.00
Sales:	3
Refunds:	1
Quotes:	0

Figure 7-26

After running the Z report, the till is set to a status of **Reconciled** (Figure 7-27) and is ready to be initiated for the next day's trading.

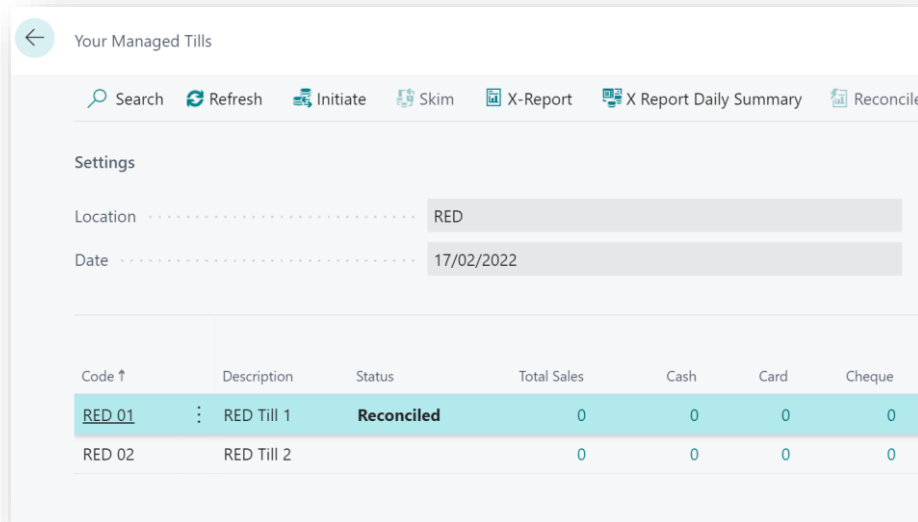


Figure 7-27

Choosing the **Display Daily Total** option allows you to enter a date to query on transactions recorded against tills on dates in the past (Figure 7-28).

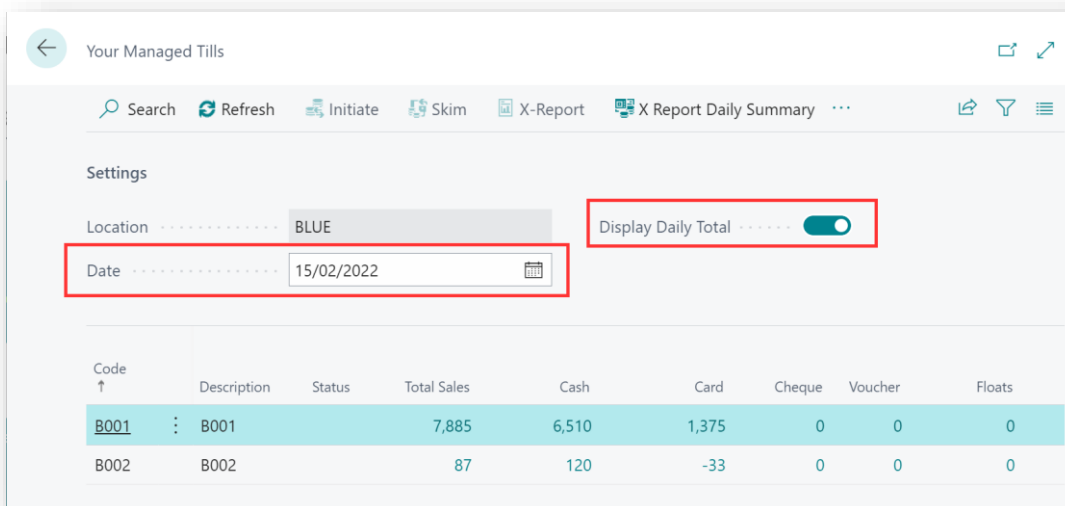


Figure 7-28

7.8 SD Trade Counter – New Sale, New Quote and New Refund

The steps to create an Order, Quote or Refund in SD Trade Counter are quite similar. To describe the SD Trade Counter functionality, we'll look at how to create a Sales Order. To create a new sale in SD Trade Counter, from the Role Centre choose the **New Sale** action cue (Figure 7-29).

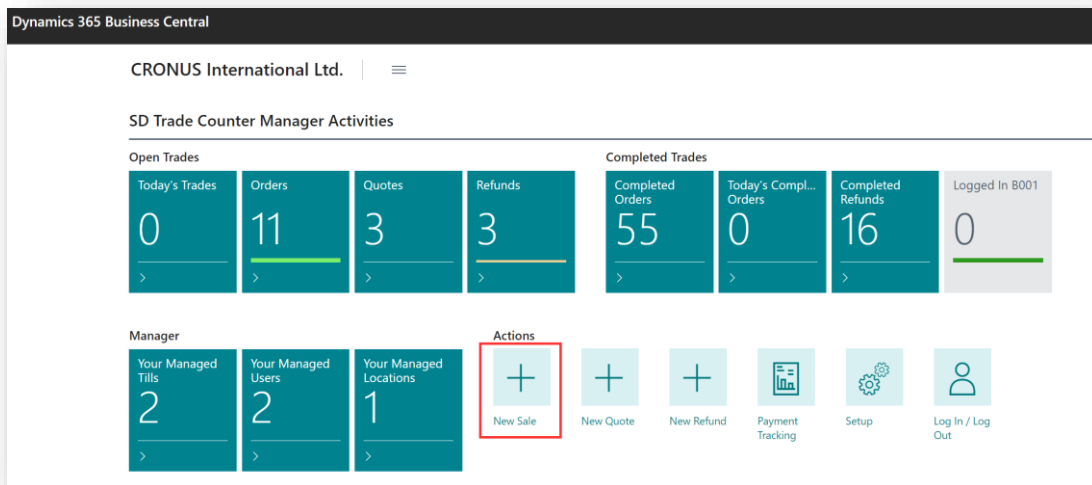


Figure 7-29

Choose a **Customer Type** of **Cash** or **Account** (Figure 7-30).

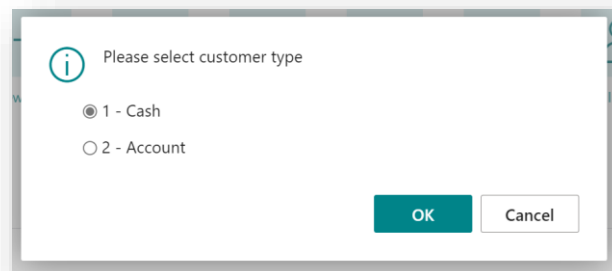


Figure 7-30

The **SD Trade Counter Order** page opens (Figure 7-31).

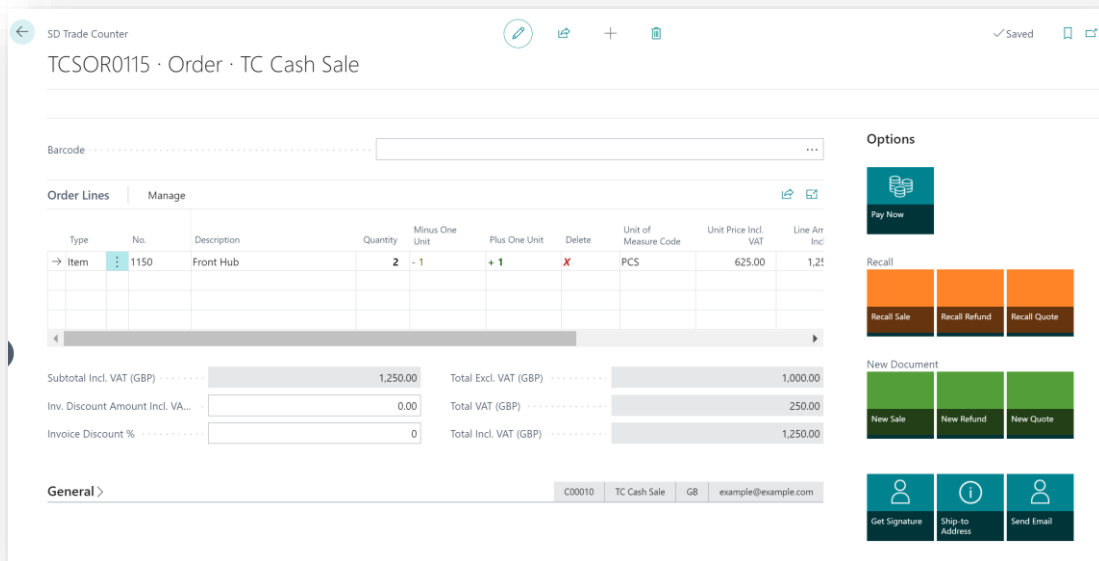


Figure 7-31

If you choose a **Customer Type** of **Cash**, the Customer is automatically set to the Cash Customer as defined in the **SD Trade Counter Locations Setup**. The Salesperson Code is set to the Salesperson Code of the current till user and the till location and till code are stamped on the Sales Header.

If you choose a **Customer Type** of **Account**, you are prompted to select a Customer from your list of existing Customers in Dynamics 365 Business Central. The Salesperson Code is set to the Salesperson Code of the current till user and the till location and till code are stamped on the Sales Header.

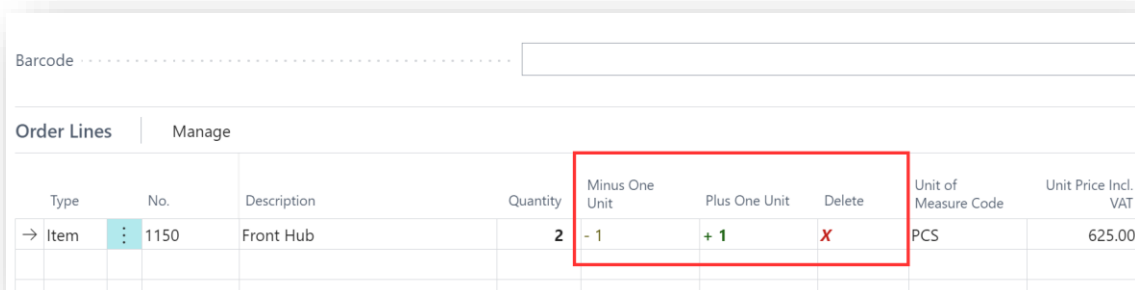
An extension to the Sales Header table, flags the Orders, Quotes and Refunds created in SD Trade Counter.

If you have turned on the **Use Barcode Scanning** option in the **SD Trade Counter Locations Setup** for this location and are scanning items into the Sales Order, for ease of user input, SD Trade Counter keeps the focus on the Barcode field and inserts a Sales Line and auto inserts a return line onto the next Sales Line.

If you scan a barcode and the item is not found in the standard Dynamics 365 Business Central Item Reference table, a Sales Line is not inserted, and the Barcode field is not cleared. This acts as a notification to the user that there is a problem with the setup of the barcode in the Item Reference table.

If you scan the same item twice, rather than creating a second Sales Line, the quantity on the line is updated. Barcodes for items are set up in the standard Dynamics 365 Business Central Item Reference table. Create an Item Reference for the item with a **Reference Type** of **Bar Code**, the **Reference No** field contains the Barcode value.

SD Trade Counter is optimised for touch screen devices, and you can quickly increase or decrease the quantity of the Sales Line by selecting **+1** in the **Plus One Unit** column or by selecting **-1** in the **Minus One Unit** column. You can easily delete a sales line by selecting the X in the Delete column (*Figure 7-32*).



Type	No.	Description	Quantity	Minus One Unit	Plus One Unit	Delete	Unit of Measure Code	Unit Price Incl. VAT
→ Item	1150	Front Hub	2	- 1	+ 1	X	PCS	625.00

Figure 7-32

If you want to **cancel** or **pause** the sale, simply exit out of the SD Trade Counter page. If you have items entered on the order, you will be prompted to cancel the sale (*Figure 7-33*).

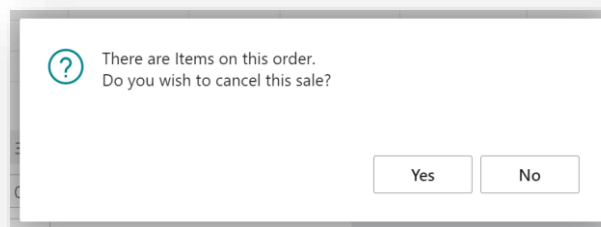


Figure 7-33

If you choose **Yes**, the order will be deleted. If you choose **No**, the SD Trade Counter Order page will close but the order will remain open. You can choose to **Recall** the order at a later stage using the **Recall** buttons in the **Options** FactBox (Figure 7-34) or by selecting from the cues in the **Open Trades** activity group in the SD Trade Counter Role Centres.

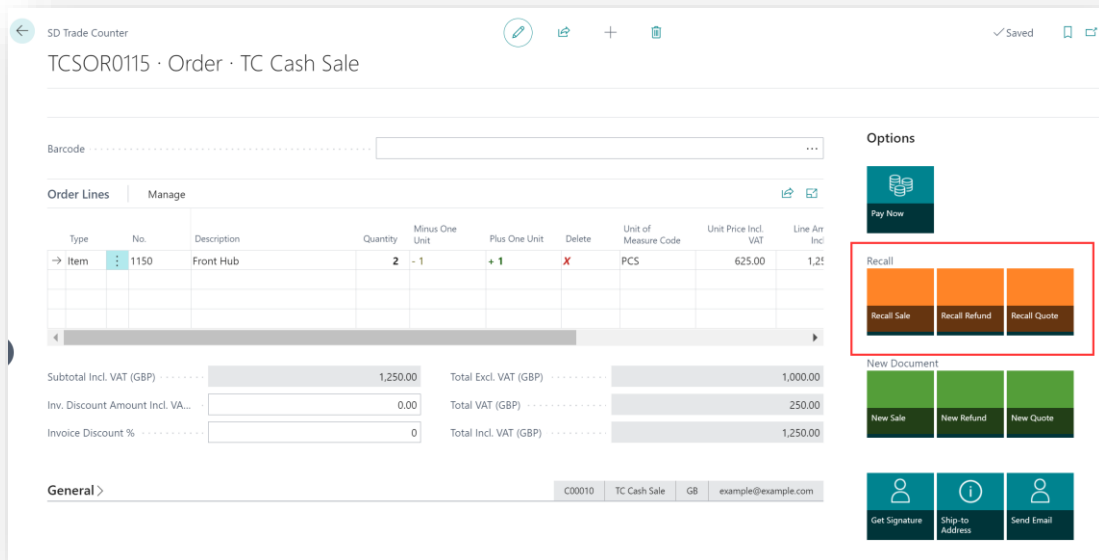


Figure 7-34

You can recall a quote, order or refund that was not created in SD Trade Counter by choosing the **Import Document** button in the **Options** FactBox (Figure 7-35) or by selecting the **Import Document** action cue in the SD Trade Counter Role Centres.

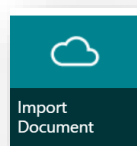


Figure 7-35

If you have turned on the option to Email Order Receipts in the **SD Trade Counter Location Setup**, you will see the Email Receipt option is switched on in the General FastTab, enter a value in the Sell-to E-Mail field (Figure 7-36). If you do not want to Email a receipt for this sale, simply turn the Email Receipt option off in the SD Trade Counter Sales Order.

General		Show more	
Location Code	BLUE	Sell-to Post Code	
Order No.	TCSOR0115	Sell-to Country/Region Code	GB
Sell-to Customer No.	C00010	Contact Details	
Sell-to Customer Name	TC Cash Sale	Sell-to Phone No.	
Sell-to Address		Sell-to E-Mail	example@example.com
Sell-to Address 2		Email Receipt	<input checked="" type="checkbox"/>

Figure 7-36

You can capture your customer's signature by selecting the Get Signature button and enter or update the Ship-to Address for the order by choosing the Ship-to Address button (Figure 7-37).

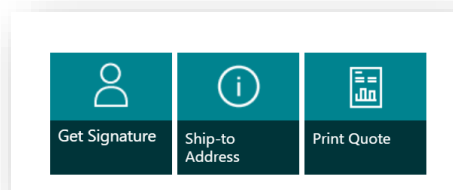


Figure 7-37

If the order is for a **Customer Type** of **Cash**, when you are ready to take payment for the order choose the **Pay Now** button in the SD Trade Counter Order page (Figure 7-38).

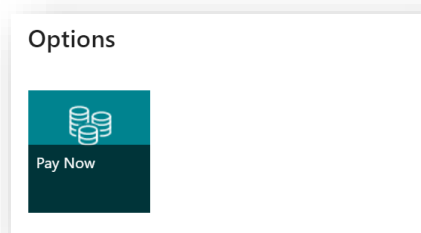


Figure 7-38

If the order is for a **Customer Type** of **Account**, when you are ready to take payment for the order, choose the **Pay Now** button if the customer wants to pay their invoice today, or, the **Sale on Account** button if the customer wants to put the sale onto their account and pay at a later date (Figure 7-39). If you choose the **Sale on Account** button you are prompted to Ship, Invoice or Ship and Invoice as per standard Dynamics NAV 365 Business Central.

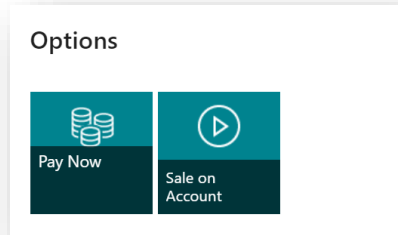


Figure 7-39

Whether the order is for a **Customer Type of Cash** or a **Customer Type of Account**, when you choose the **Pay Now** button the **SD Trade Counter Payment Screen** opens (Figure 7-40).

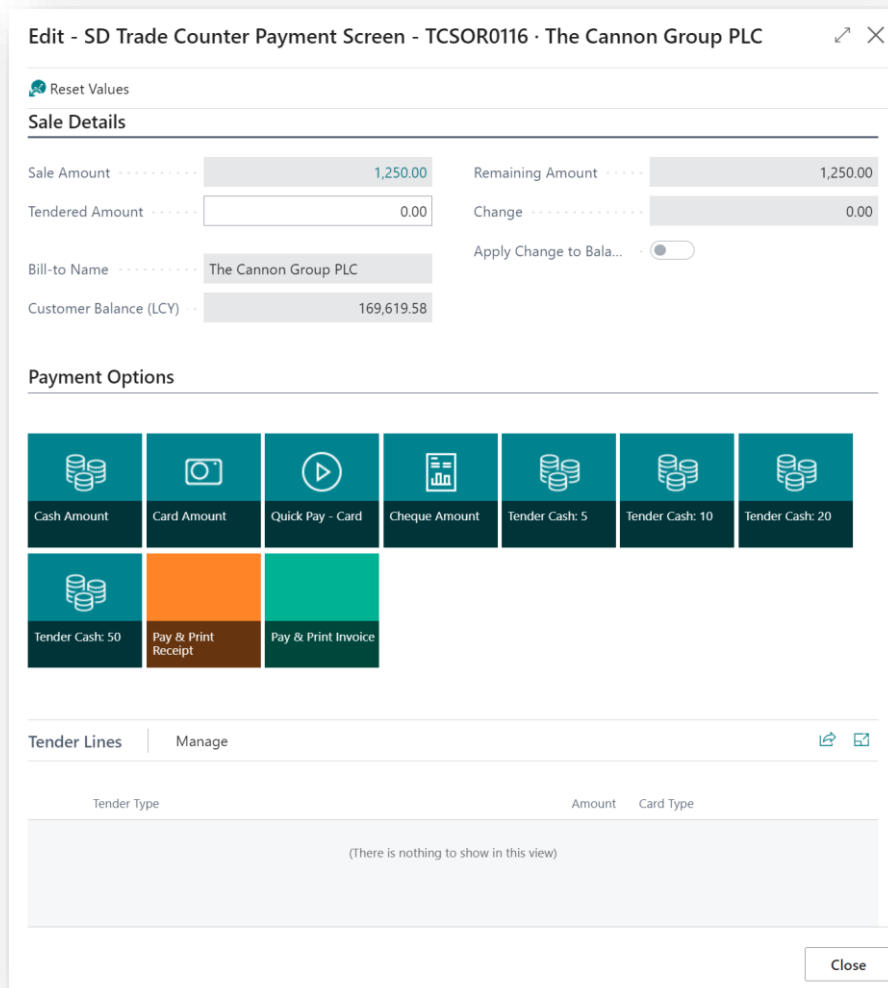


Figure 7-40

If your customer is paying by Cash (in full or in part), enter the amount tendered in the **Tendered Amount** field and select the **Cash Amount** button (*Figure 7-40*). A record is inserted into the Tender Lines. The **Remaining Amount** and the **Change** are updated accordingly.

If your customer hands you a note for 5, 10, 20 or 50 you can choose the **Tender Cash: 5**, **Tender Cash: 10**, **Tender Cash: 15**, **Tender Cash: 20** to quickly insert a record for the cash amount into the Tender Lines without having to enter an amount in the **Tendered Amount** field (*Figure 7-40*).

If your customer is paying part of the transaction by Card, enter the card amount in the **Tendered Amount** field and select the **Card Amount** button (*Figure 7-40*). A record is inserted into the Tender Lines. The **Remaining Amount** and the **Change** are updated accordingly.

If your customer is paying by Cheque (in full or in part), enter the amount tendered in the **Tendered Amount** field and select the **Cheque Amount** button (*Figure 7-40*). A record is inserted into the Tender Lines. The **Remaining Amount** and the **Change** are updated accordingly.

If the order is for a **Customer Type of Account** and your customer has tendered more the Sale Amount, they can choose to apply the change to the account rather than accepting the change by switching on the option **Apply Change to Balance** (*Figure 7-40*).

If your customer is paying the full amount or a partial amount of the transaction by Card, select the **Quick Pay - Card** button (*Figure 7-40*).

When taking payment for multi tender where there will be a cash payment and a card payment for the one order, there are two till transactions recorded in the SD Payment Tracking table.

When you are ready to process the payment, choose either **Pay & Print Receipt** or **Pay & Print Invoice** (*Figure 7-40*). Both actions Ship and Invoice the Order in the background.

If you have a Payment Method Code with a balancing account setup for the Cash Customer, a payment is created for the transaction as per standard Dynamics 365 Business Central. If you do not have a Payment Method Code with a balancing account setup for the Cash Customer, then SD Trade Counter creates a payment for the transaction and allocates the payment against the invoice. When the payment is created, the details of the Tender Lines are written to the **SD Trade Counter Payment Tracking** table.

Pay & Print Receipt will print the Till Receipt Report defined in the SD Trade Counter Locations setup.

Pay & Print Invoice will print the Invoice Report defined in the SD Trade Counter Locations setup.

8 Published Events in SD Trade Counter

We have published a number of events in SD Trade Counter that can be subscribed to by event subscribers to implement specific custom functionality .



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