User Guide for Microsoft Dynamics 365 Business Central

Product: SD Trade Counter

Release: D365 BC V24+

Revision: September 2024

1 Contents

User Guide: SD Trade Counter

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 *(Figure 2-1)*.

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.
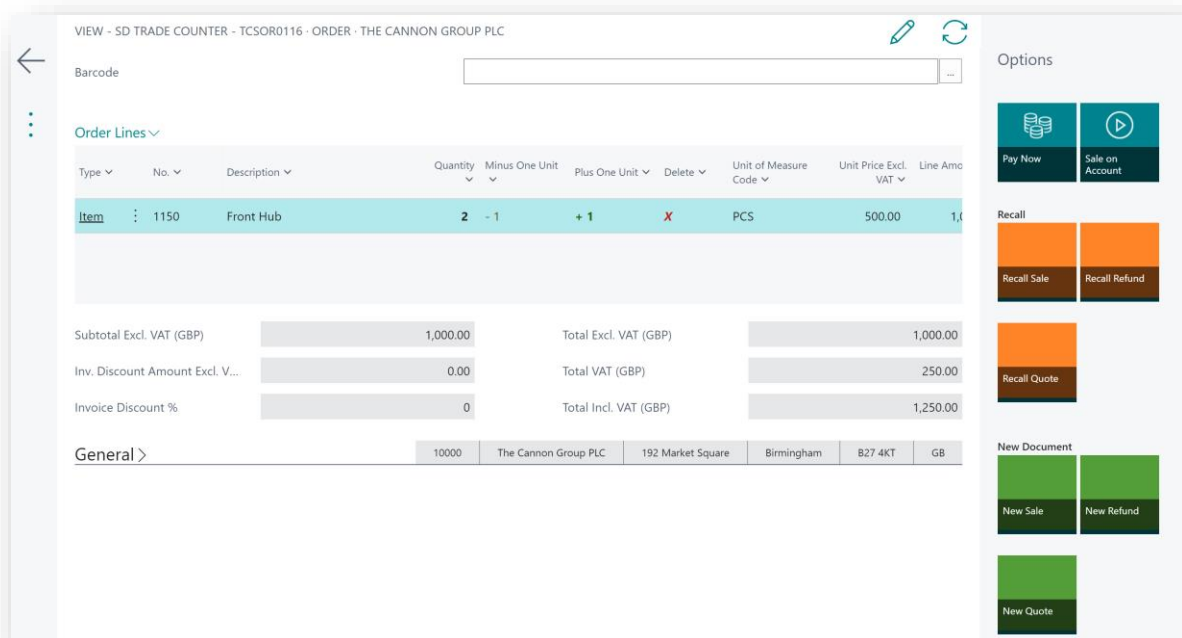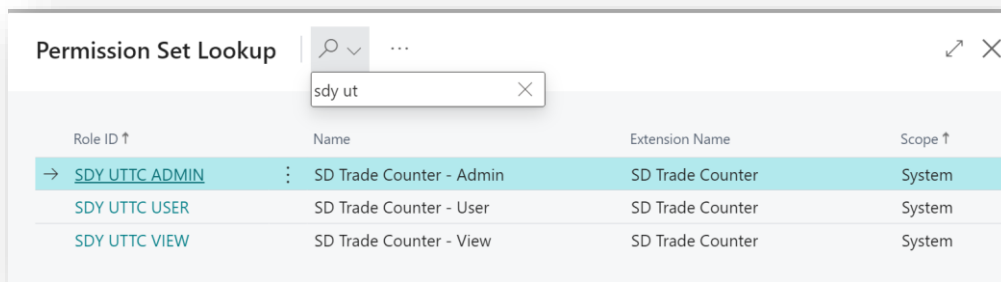

Figure 2-1

3   Installing SD Trade Counter

SD Trade Counter is available to download from AppSource or you can install the App from within Business Central using Extension Marketplace.

The **Allow HttpClient Requests** option is automatically enabled on install of 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 licence. The **Allow HttpClient Requests** option is automatically enabled on install of SD Trade Counter.

3.1   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)*.

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.

3.2   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 3-2)*.
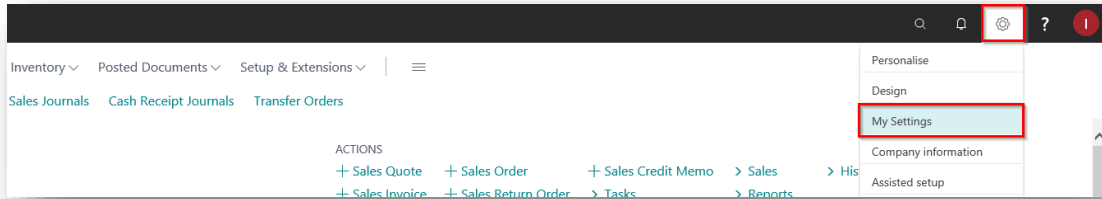

Figure 3-2

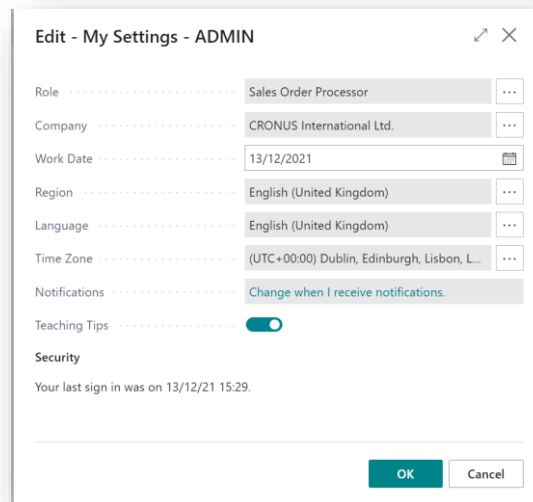2. In the **My Settings** page, on the **Role** field, select the **AssistEdit** icon *(Figure 3-3)*.

Figure 3-3

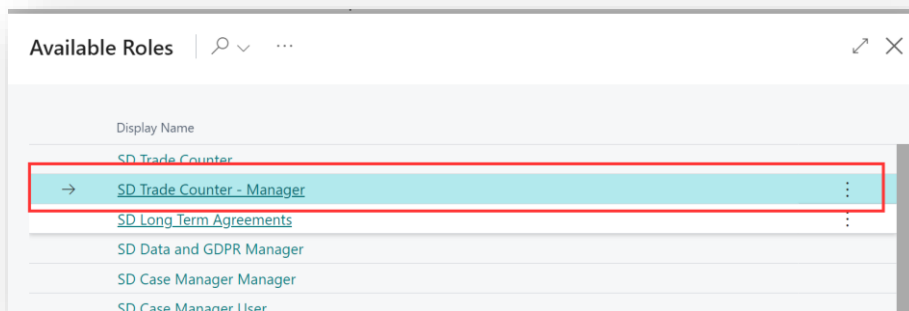3. You should see **SD Trade Counter** – **Manager** in the list of Roles *(Figure 3-4)*.

Figure 3-4

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 3-5)*.
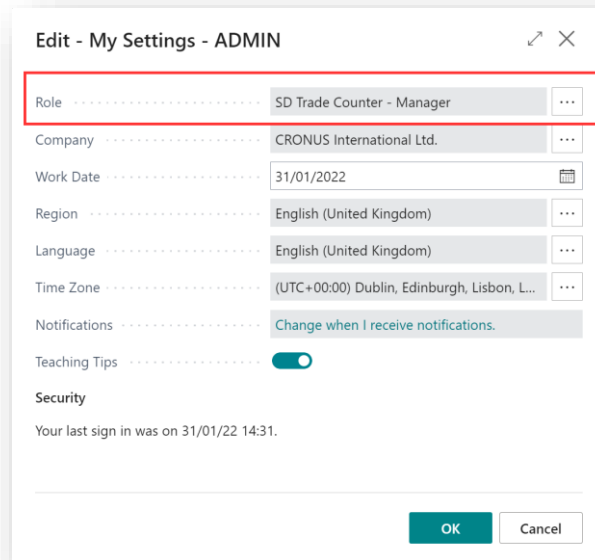

Figure 3-5

3.3   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 3-6)*.
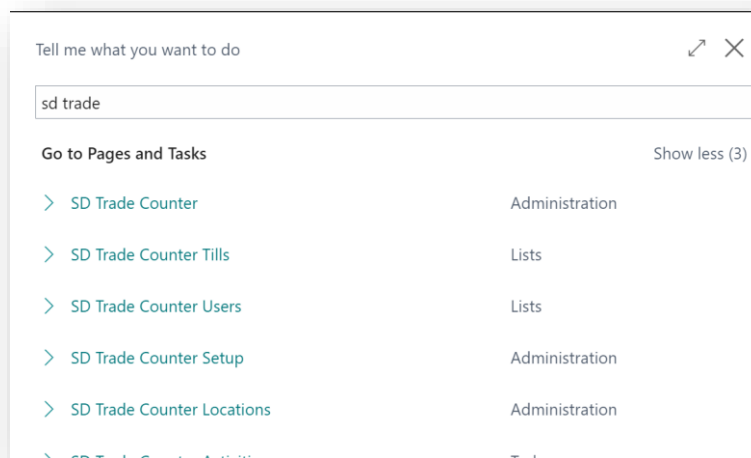

Figure 3-6

3.4   Bookmarking the SD Trade Counter Pages to Your Role Centre

For easy access to SD Trade Counter, you can bookmark the SD Trade Counter Activities page to your default Role Centre.

Search for **SD Trade Counter Activities** in the Tell Me and choose the Book Mark action to the right of the result *(Figure 3-7)*.
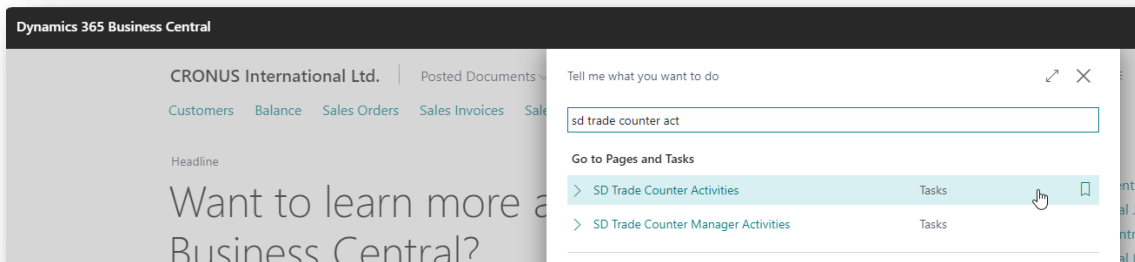

Figure 3-7

The SD Trade Counter Activities page is now available in the navigation menu on your Role Centre *(Figure 3-8)*.
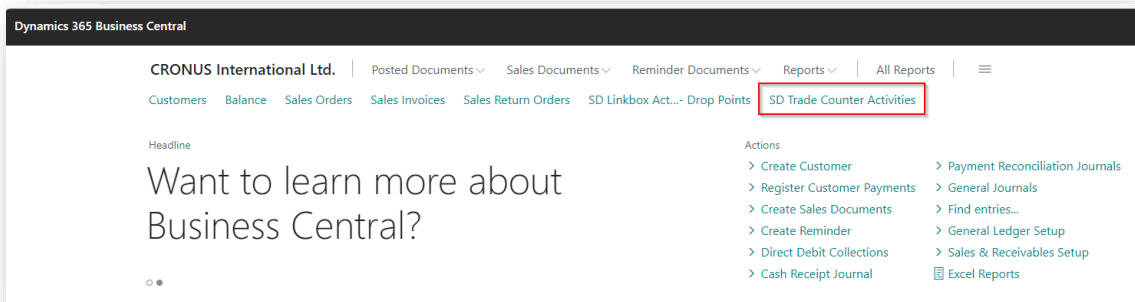

Figure 3-8

3.5   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. When the **SD Trade Counter Setup** card opens, you will be prompted that "Your license is invalid". Choose **OK** *(Figure 3-9)*.

Figure 3-9

2. You are then prompted that "Your SD Trade Counter license needs to be validated". Choose **Yes** *(Figure 3-10)*.
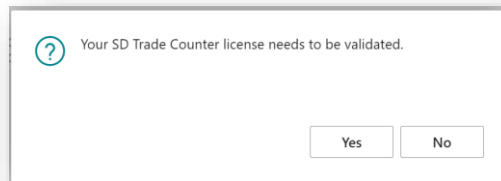

Figure 3-10

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

3.5.1   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 30 day trial:

1. In the **Activate your Product** page *(Figure 3-11)*
   Enter your company name in **Company Name**
   Enter your company email in **Email**
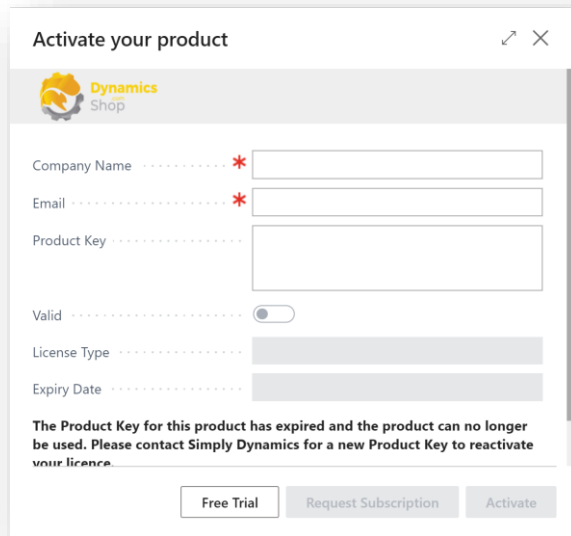   Choose **Free Trial.**

Figure 3-11

2. You are then prompted to choose **Yes** to activate your free trial. Choose **Yes** *(Figure 3-12)*.
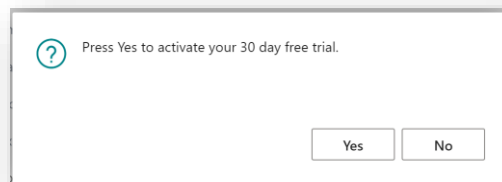

Figure 3-12

3. 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 3-13)*.
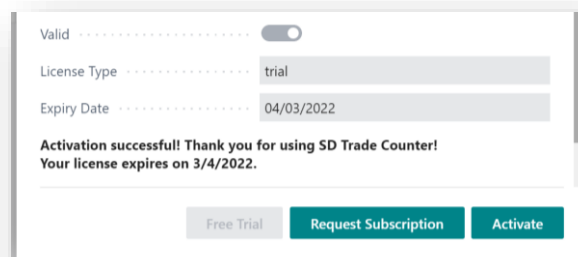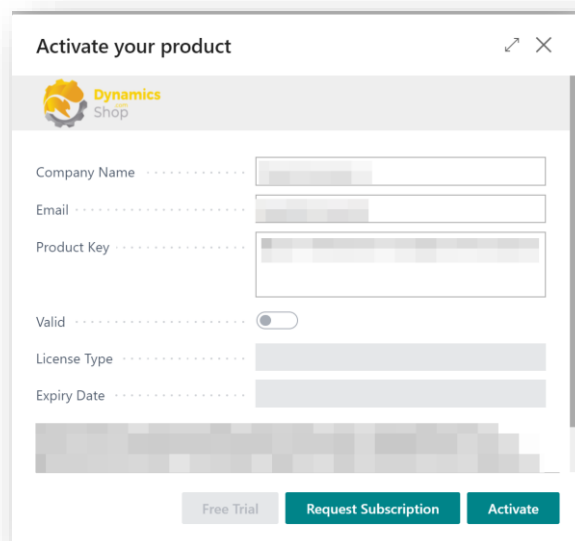

Figure 3-13

4. Choose **Finish** to exit the page.

5. When your Free Trial has expired, choose **Request Subscription** to request a Product Key from Simply Dynamics.

3.5.2   Activating the SD Trade Counter Licence with a Product Key

Take the following steps if you have received a Product Key from Simply Dynamics Ltd.:

1. In the **Activate your product** page *(Figure 3-14)*:
   Enter your company name in **Company Name.**
   Enter your company email in **Email.**
   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 3-14

1. The **Activate your product** page will update to display a message that the activation was successful. The expiry date will depend on the expiration date of your subscription licence.

2. Choose **Finish** to exit the page.

4 Setup and Configuration

4.1 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 4-1)*.
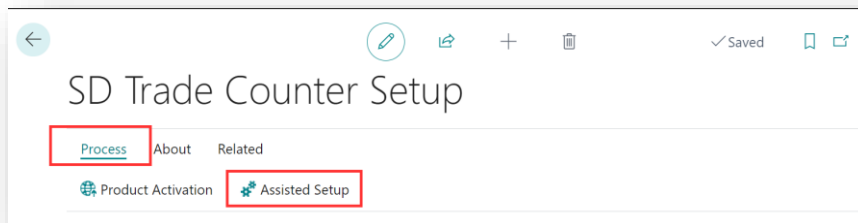

Figure 4-1

2. The **Assisted Setup Wizard** is displayed and guides you through set up. Choose **Next** *(Figure 4-2)*.
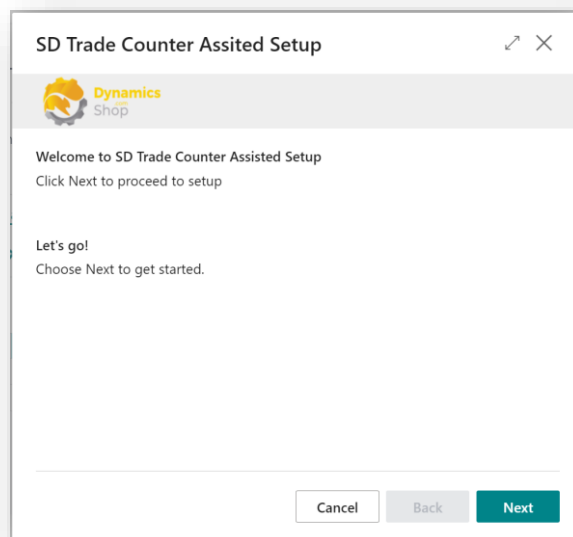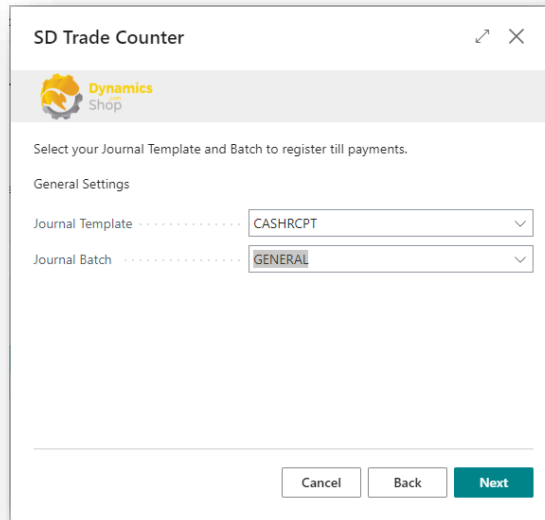

Figure 4-2

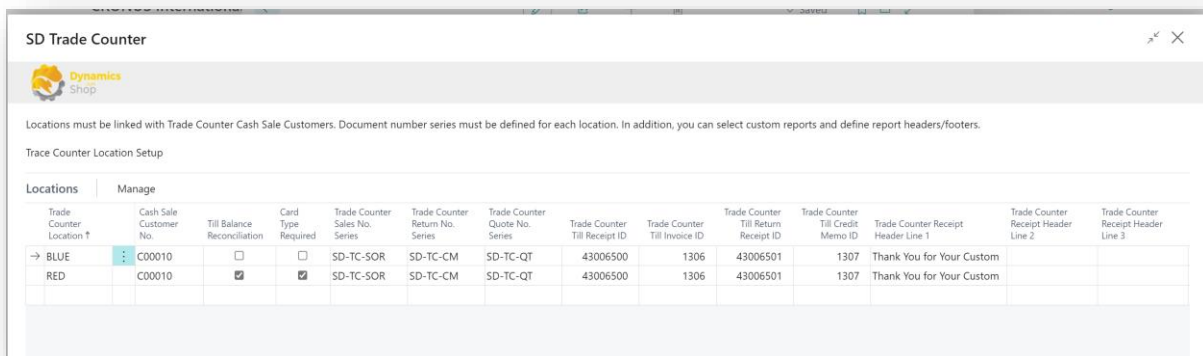3. Choose a Journal Template and Journal Batch to register till payments. Choose **Next** *(Figure 4-3)*.

Figure 4-3

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 4-4)*.

Figure 4-4

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
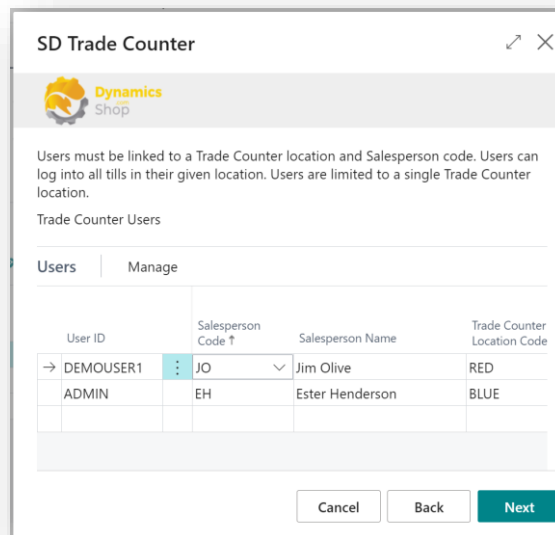
User Guide: SD Trade Counter

Next *(Figure 4-5)*.

Figure 4-5

6. Assign your Users a Trade Counter Location and a Salesperson Code. Choose **Next** *(Figure 4-6)*.

Figure 4-6

7. Choose **Finish** *(Figure 4-7)*.
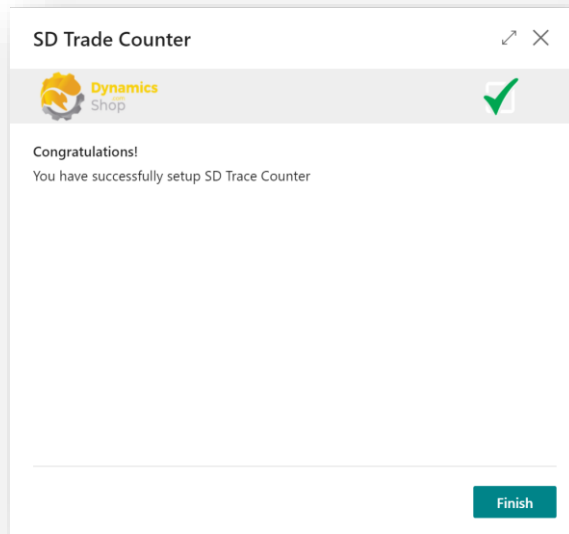
Figure 4-7

5   Using SD Trade Counter

5.1   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 5-1)*, or, by searching for **SD Trade Counter Setup** in the **Tell Me**.
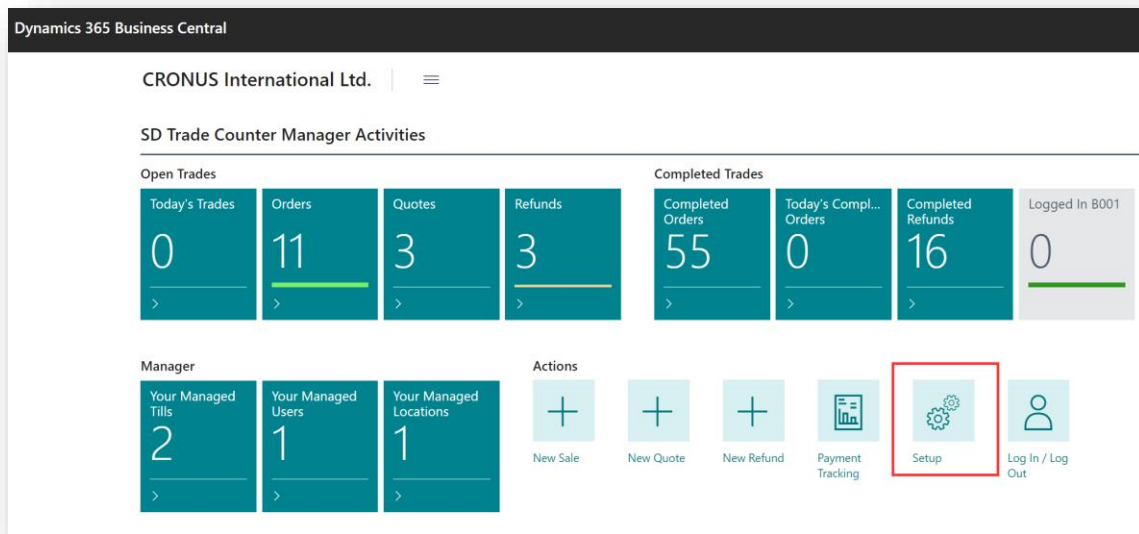
Figure 5-1

The **SD Trade Counter Setup** contains the following fields in the **General** FastTab *(Figure 5-2)*.
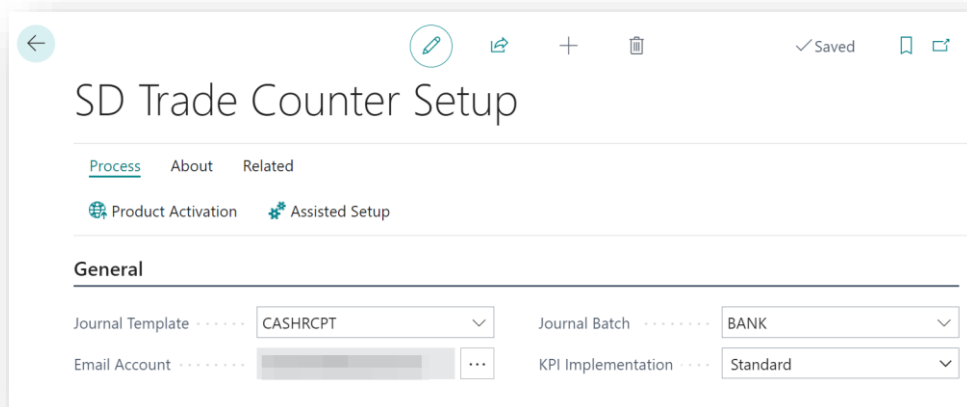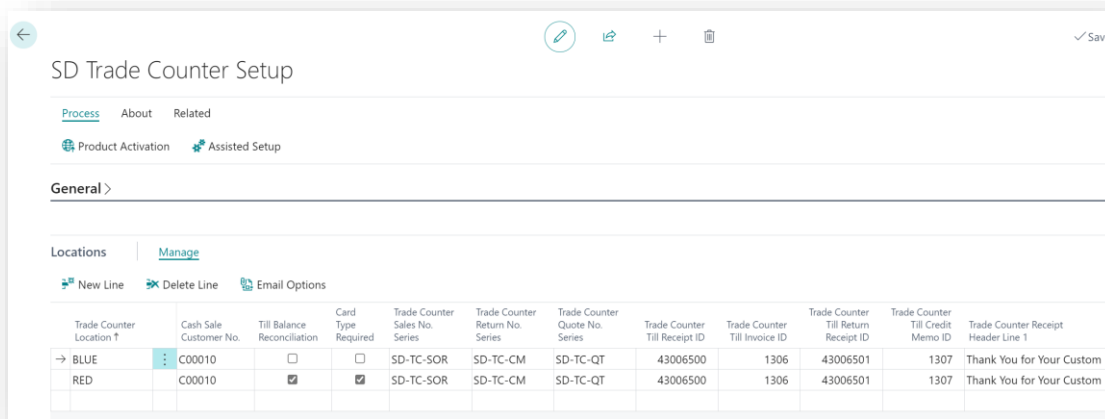
Figure 5-2

- **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 5-3)*.

Figure 5-3

- **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 5-4)*. Drilling through on these action cues brings you to the associated setup page.
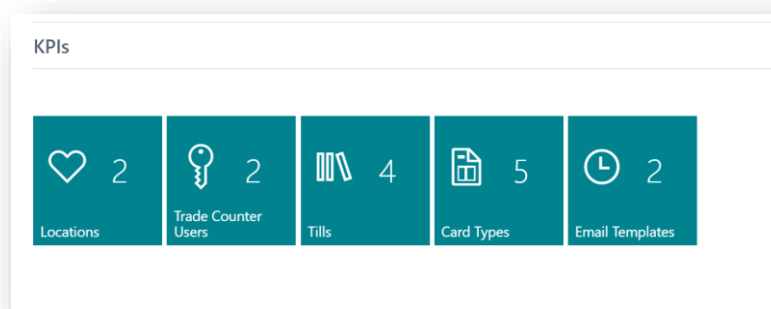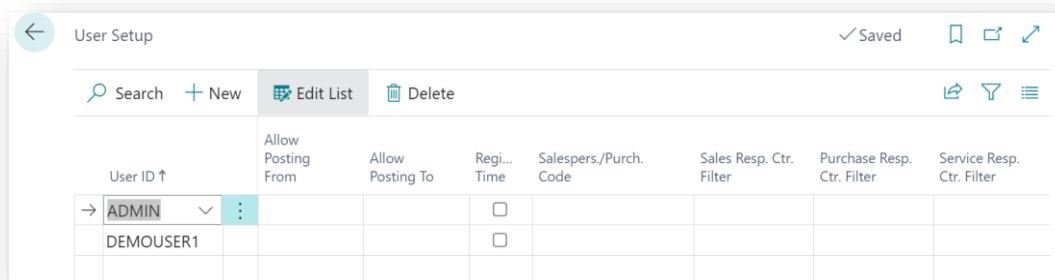
Figure 5-4

- **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.

5.2   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 5-5)*.

Figure 5-5

The **SD Trade Counter User Setup** contains the following fields *(Figure 5-6)*.

Figure 5-6

- **User ID –** Select the Dynamics 365 Business Central User.

- **Salesperson Code** – Select a **Salesperson/Purchaser 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.

5.3   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**.
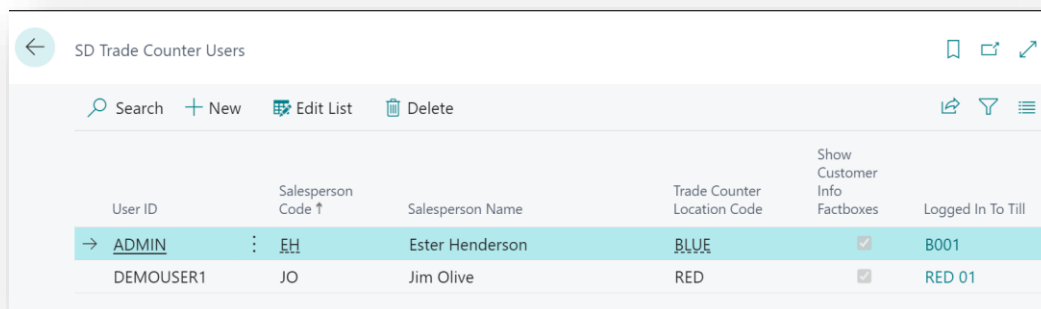
The **SD Trade Counter Till Definitions** contains the following fields *(Figure 5-7)*.

Figure 5-7

- **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 5-8)*:
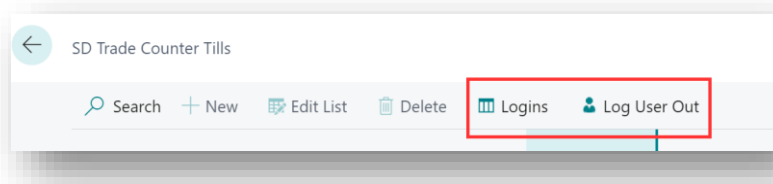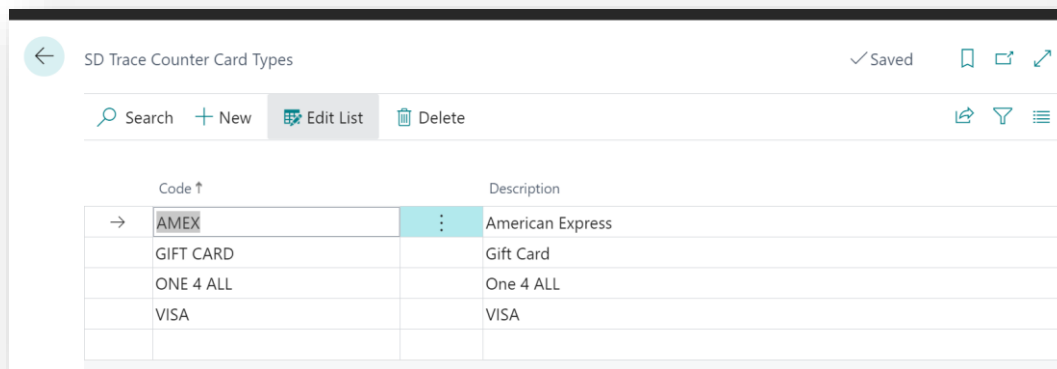

Figure 5-8

- **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.

5.4 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 5-9)*.
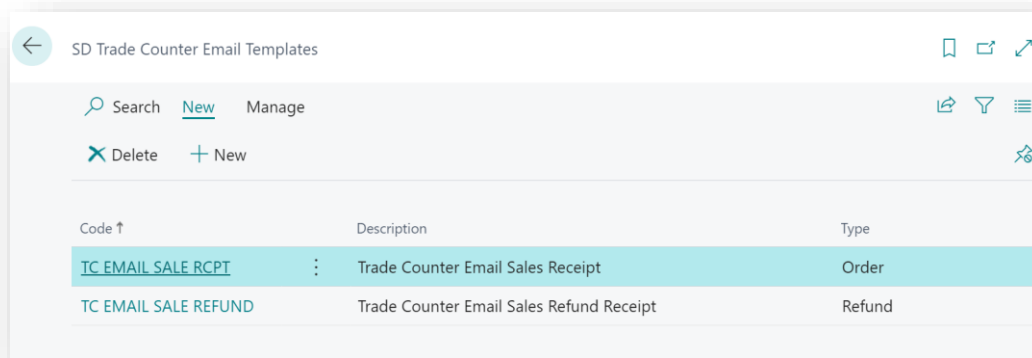

Figure 5-9

- **Code** - Enter a unique code to define the card.

- **Description** – Enter a user defined description to describe the card.

5.5 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 5-10)*.

Figure 5-10

- **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 5-11)*.

Figure 5-11

5.6 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 5-12)*.
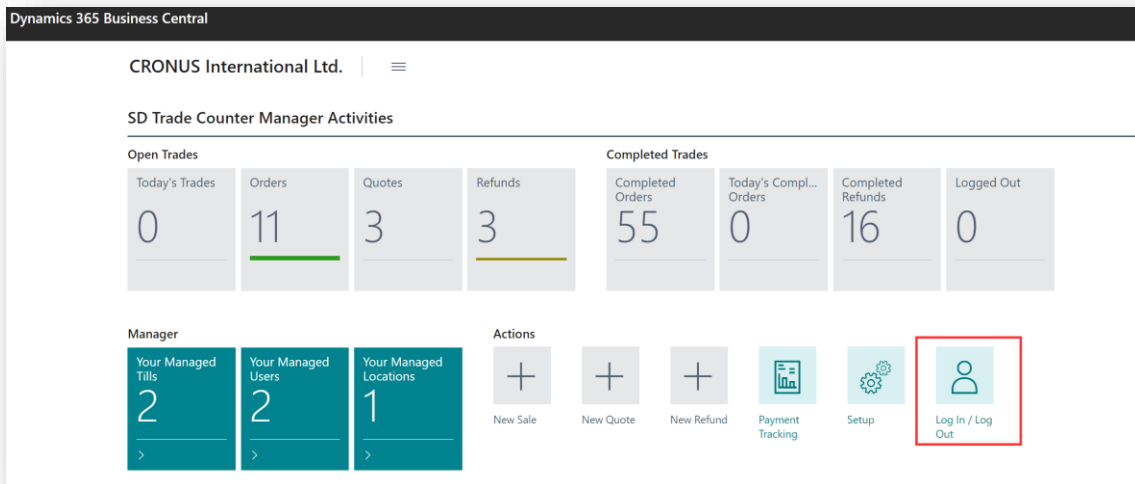

Figure 5-12

The **SD Trade Counter Till Login** page contains the following fields *(Figure 5-13).* Choose the **Log In**, **Log Out** or **Change Till** buttons as required.
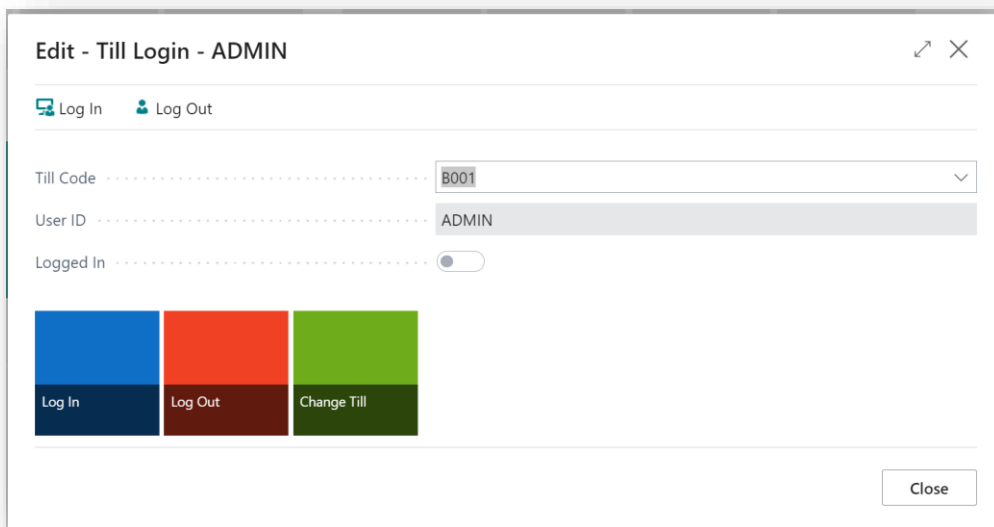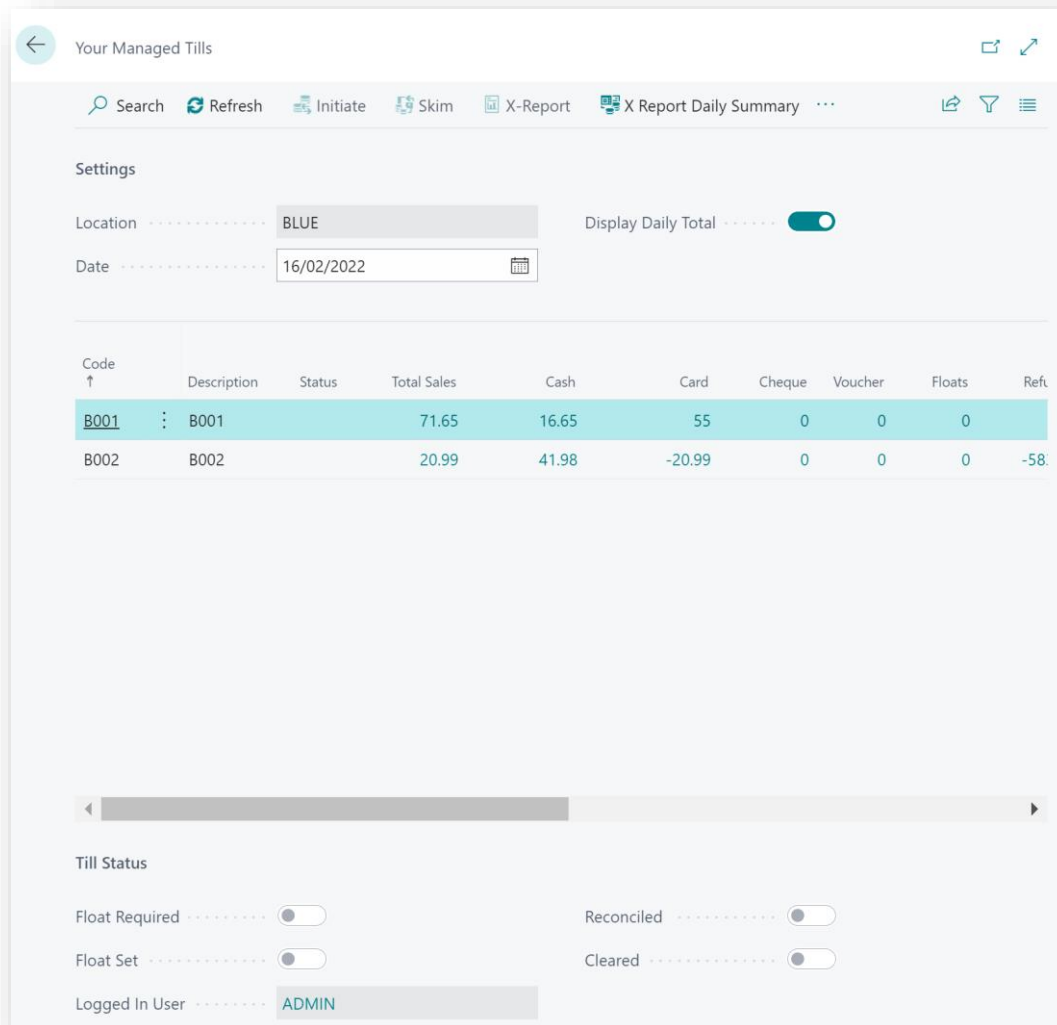
Figure 5-13

- **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 5-14).*

Figure 5-14

5.7   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 5-15)*.
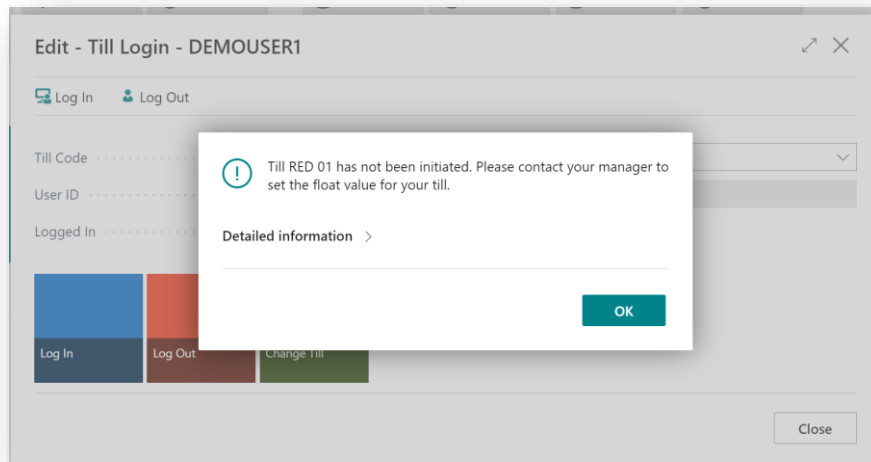
Figure 5-15

Tills are initiated by managers using the **SD Trade Counter Your Managed Tills** page. The **SD SD Trade Counter Your Managed Tills** is accessed from the **SD Trade Counter Role Centre**, by selecting the **Your Managed Tills** action cue *(Figure 5-16)*.
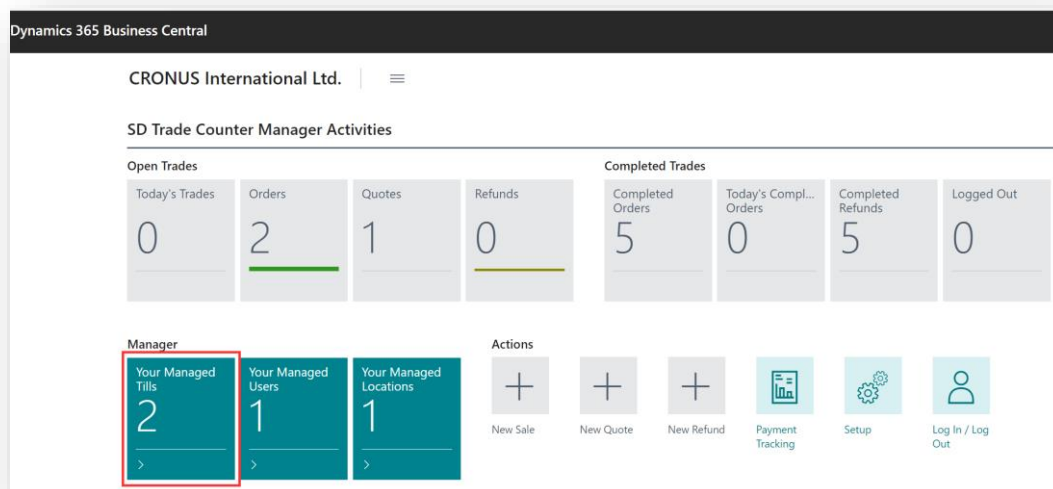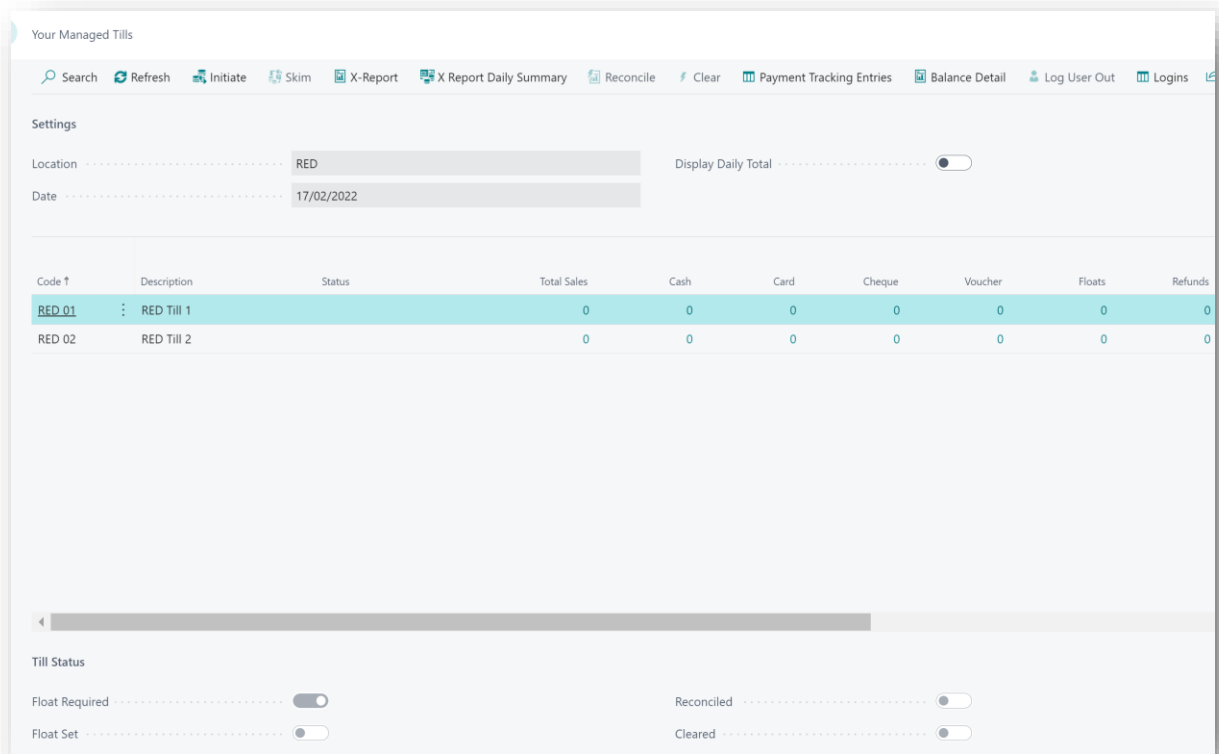
Figure 5-16

The **SD Trade Counter Your Manged Tills** opens *(Figure 5-17)*.

Figure 5-17

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 5-18)*.
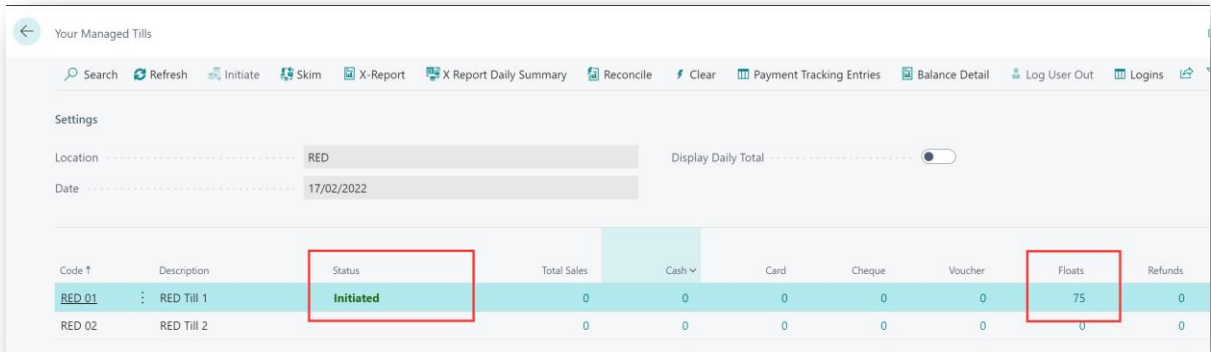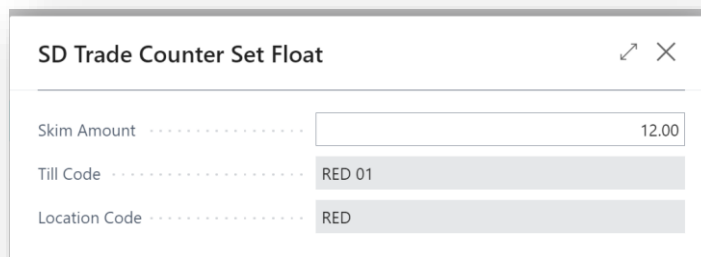
Figure 5-18

The till is then set to a status of **Initiated** and the float has been recorded *(Figure 5-19)*.

Figure 5-19

If you need to take any skims from the till during the day, choose the **Skim** action. The **SD Trade Counter Set Floa**t opens and here you can enter the skim amount that has been taken from the till *(Figure 5-20)*.
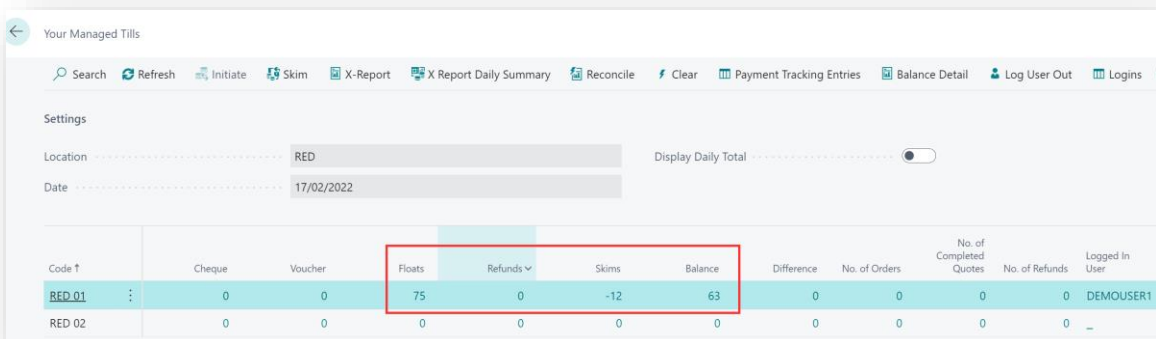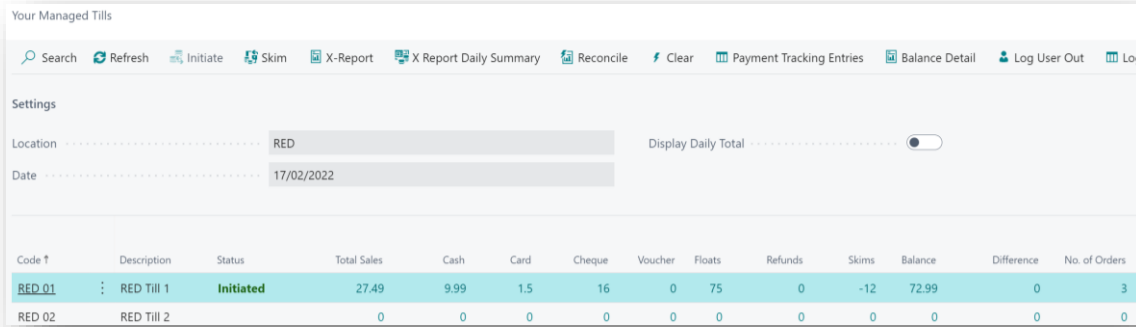
Figure 5-20

The skim has been recorded in the SD Trade Counter Payment Tracking table *(Figure 5-21)*.

Figure 5-21
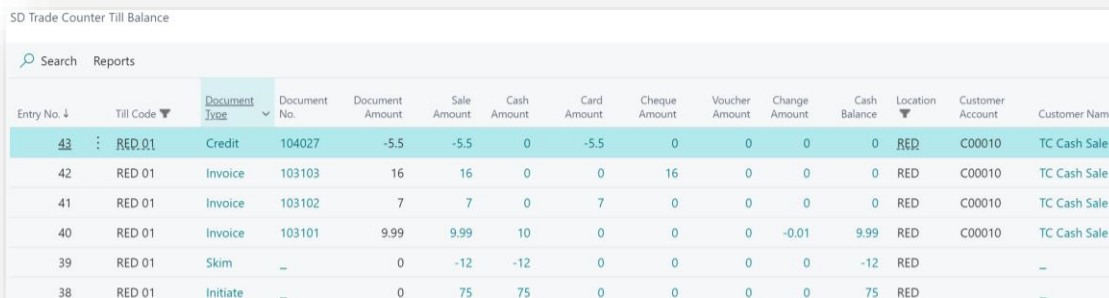
As transactions are put through SD Trade Counter and recorded in the **SD Trade Counter Payment Screen,** the **Your Managed Tills** page is updated. You can drill through on the values to see the transactions logged in the SD Trade Counter Payment Tracking table *(Figure 5-22)*.
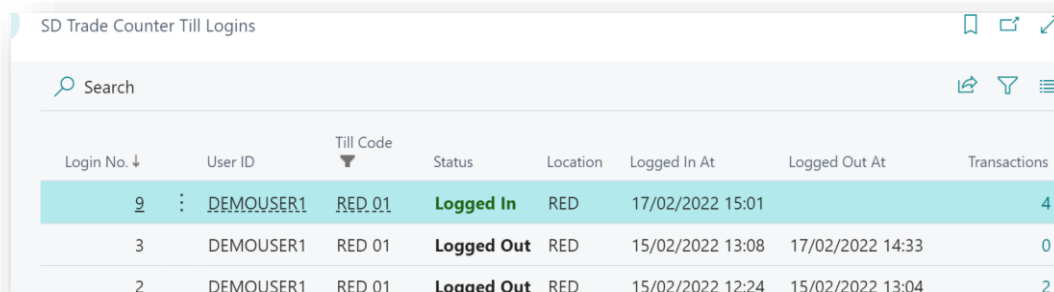
Figure 5-22

Choose the **Payment Tracking Entries** action to view the payments that have been logged in the SD Trade Counter Payment Screen *(Figure 5-23)*.

Figure 5-23

You can also check the **Logins** to the till by choosing the **Logins** action *(Figure 5-24)*.

Figure 5-24

Print the X Report *(Figure 5-25)* 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 5-25

To close out the till, select the **Reconcile** action. This runs the Z Report *(Figure 5-26)*, 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 5-26

After running the Z report, the till is set to a status of **Reconciled** *(Figure 5-27)* and is ready to be initiated for the next day's trading.
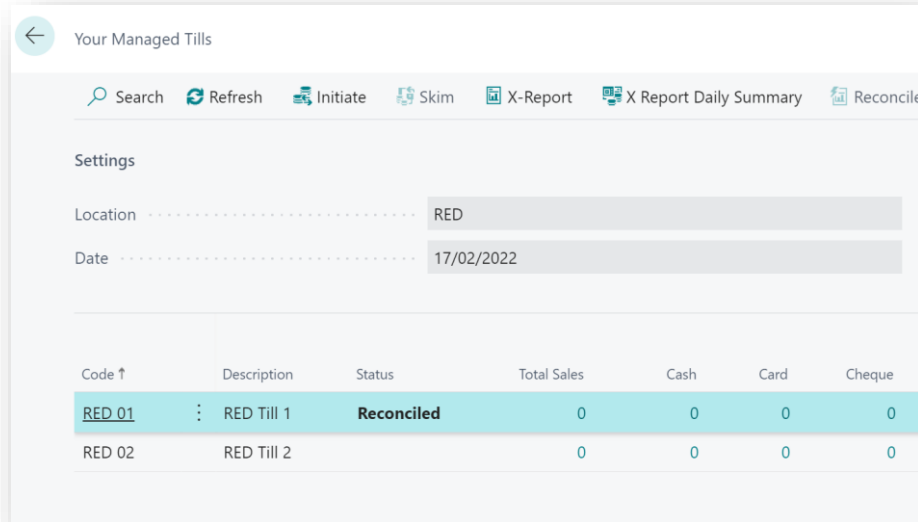
Figure 5-27

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 5-28)*.

Figure 5-28
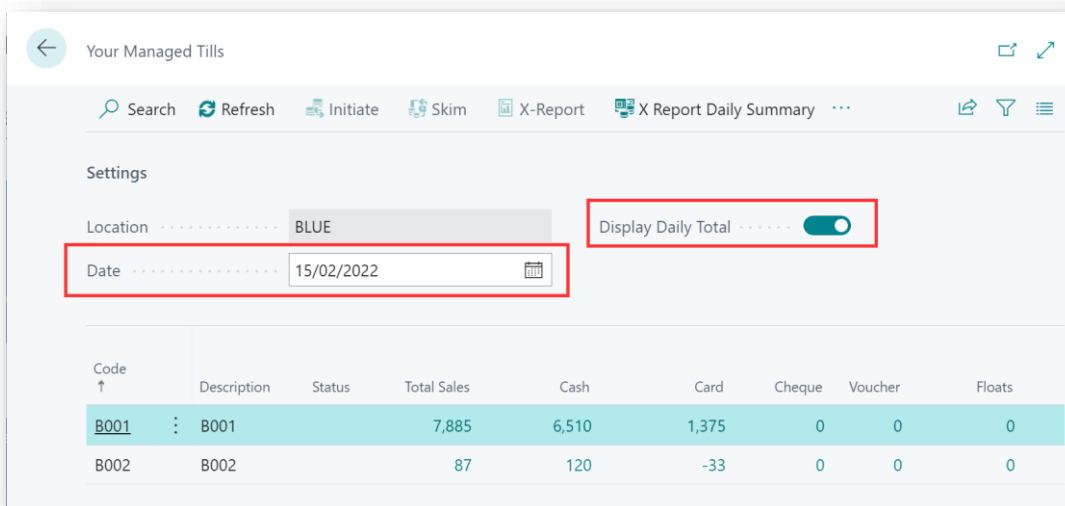
User Guide: SD Trade Counter

5.8   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 5-29)*.
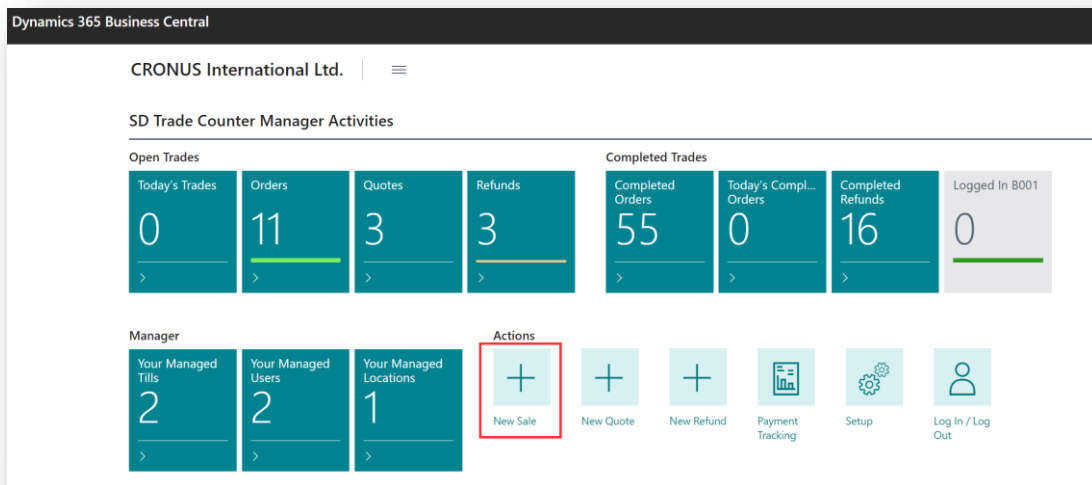
Figure 5-29

Choose a **Customer Type** of **Cash** or **Account** *(Figure 5-30)*.
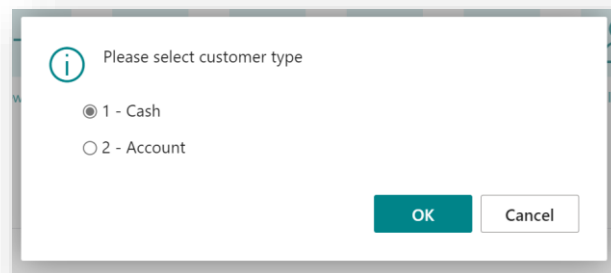
Figure 5-30

The **SD Trade Counter Order** page opens *(Figure 5-31)*.
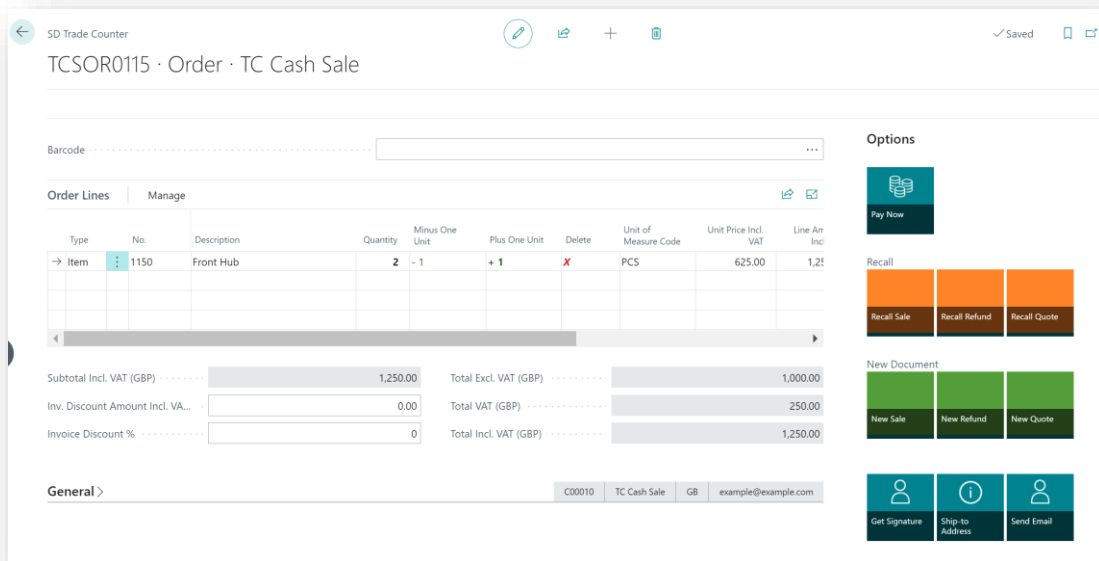
Figure 5-31

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 Refence table. Create an Item Reference for the item with a **Reference Type** of **Bar Code**, the **Reference No** field contains the Barcode value.
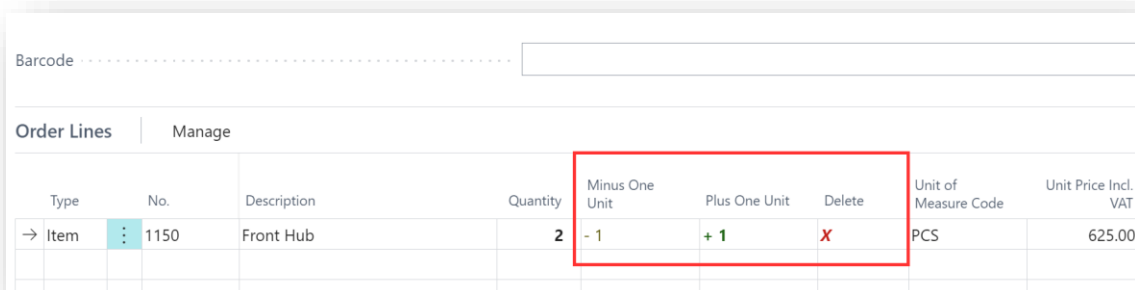
SD Trade Counter is optimised for touch screen devices, and you can quickly increase or decrease the quantity of the Sales Line by selecting **+1** in the **Plus One Unit** column or by selecting **-1** in the **Minus One Unit** column. You can easily delete a sales line by selecting the X in the Delete column *(Figure 5-32)*.

Figure 5-32

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 5-33)*.
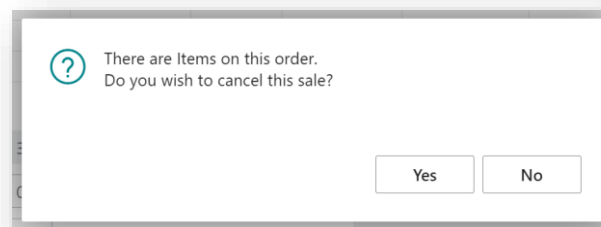
Figure 5-33

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 5-34)* or by selecting from the cues in the **Open Trades** activity group in the SD Trade Counter Role Centres.
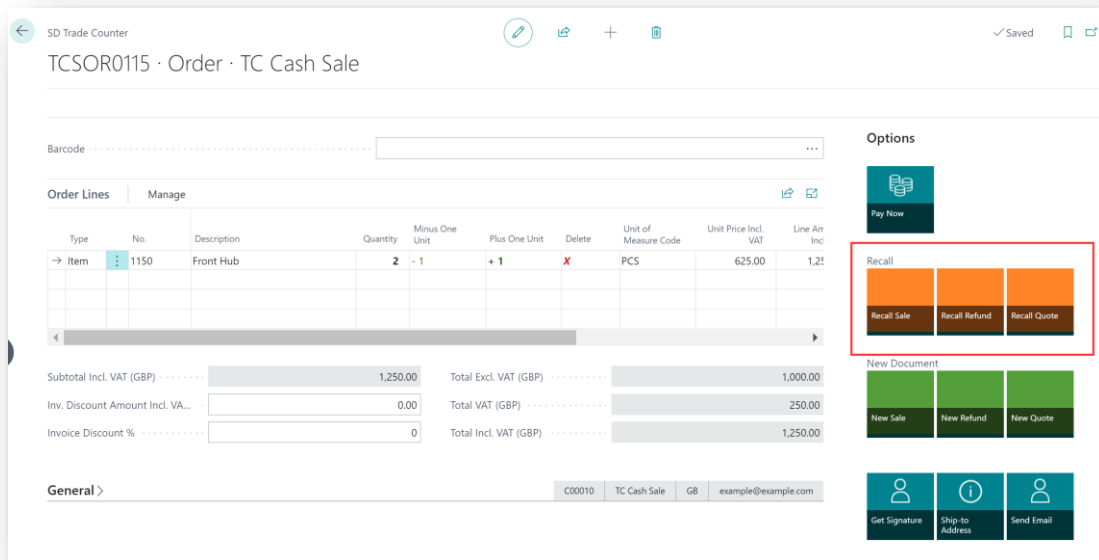
Figure 5-34

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 5-35)* or by selecting the **Import Document** action cue in the SD Trade Counter Role Centres.
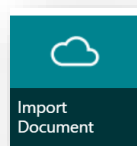
Figure 5-35

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 5-36)*. 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.
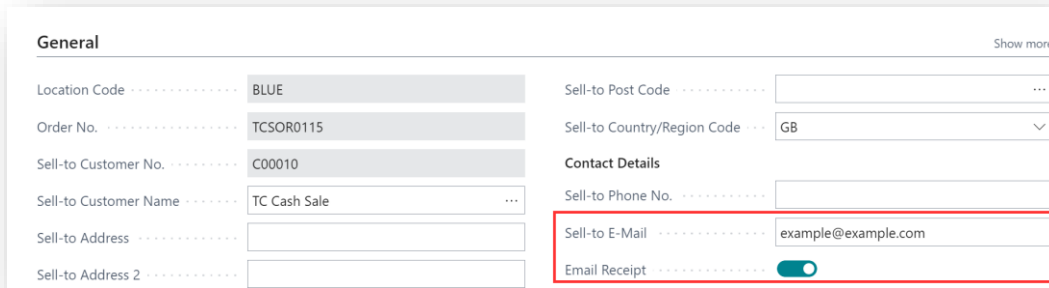
Figure 5-36

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 5-37)*.
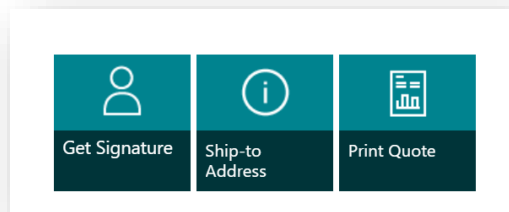
Figure 5-37

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 5-38)*.
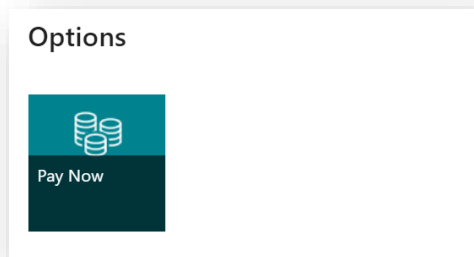
Figure 5-38

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 5-39)*. 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 5-39

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 5-40)*.

Figure 5-40

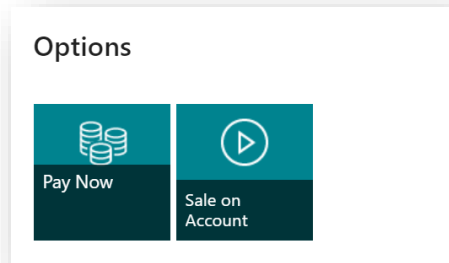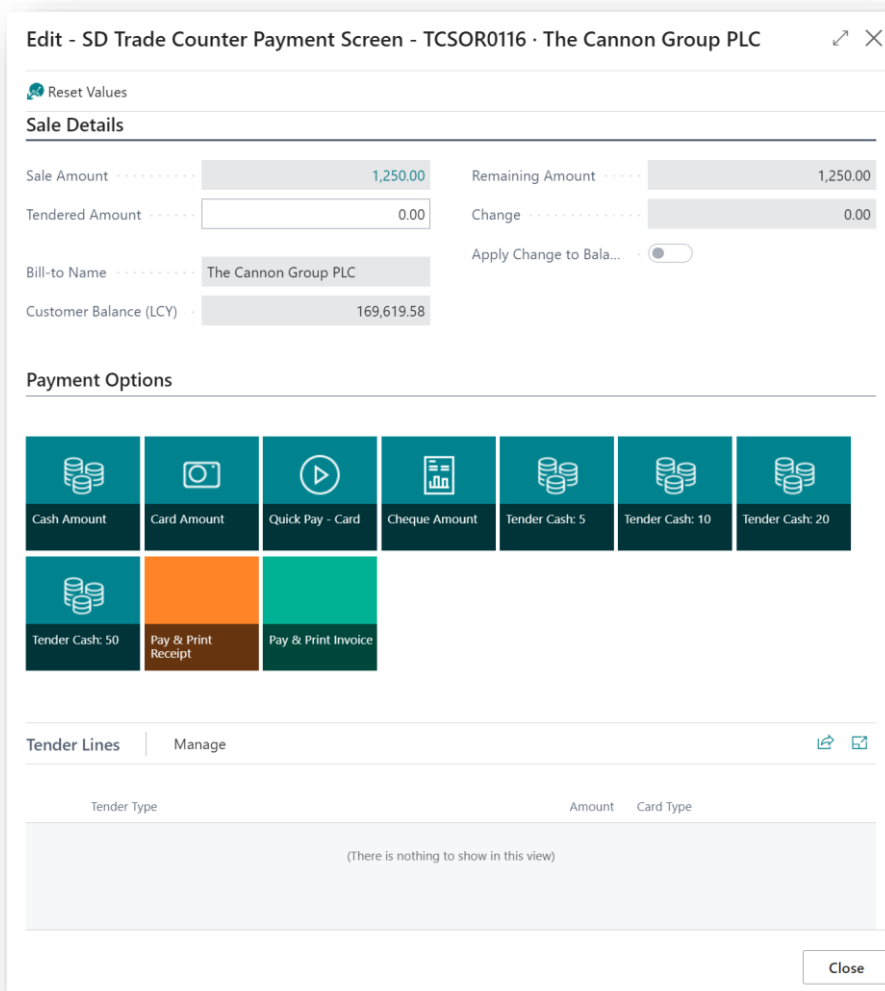If your customer is paying by Cash (in full or in part), enter the amount tendered in the **Tendered Amount** field and select the **Cash Amount** button *(Figure 5-40)*. A record is inserted into the Tender Lines. The **Remaining Amount** and the **Change** are updated accordingly.

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 5-40)*.

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 5-40)*. 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 5-40)*. 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 5-40)*.

If your customer is paying the full amount or a partial amount of the transaction by Card, select the **Quick Pay - Card** button *(Figure 5-40)*.

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 5-40)*. 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.

6 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.

7 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 7-1)*.
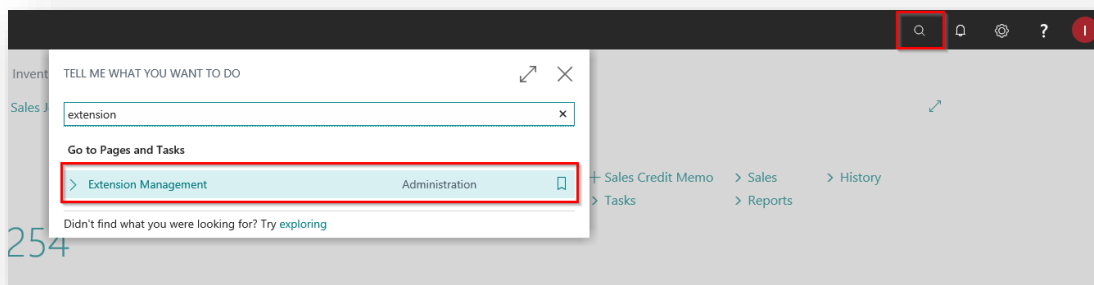

Figure 7-1

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

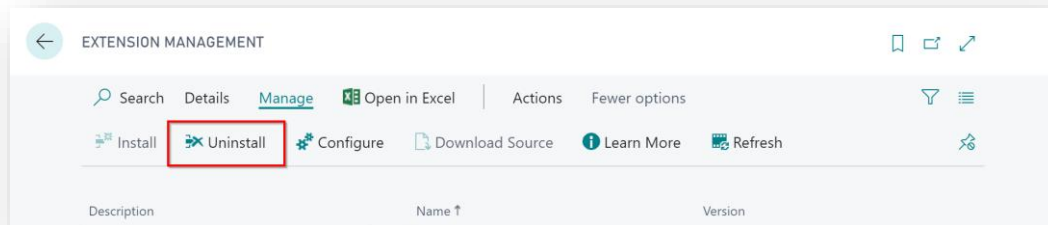3. Select the **SD Trade Counter** App and choose the **Uninstall** Action *(Figure 7-2)*.

Figure 7-2

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