

Offline Sales

USER GUIDESYSTEM SOLUTIONS LLC. |
WWW.SYSSOLUTIONSLLC.COM

Description

The System Solutions Offline sales app allows your record sales when your Business Central database is offline. This connector allows you to sync your offline sales back to your Business Central database

Initial Setup

We need to install the Offline Sales Application to record sales.

Very first Login to the Offline Sales App

**BUSINESS CENTRAL
OFFLINE APPLICATION V 1.5**

User Name
SS

Password

Company
[Default Company]

POS In Use
None

Sign In

Developed By [System Solutions LLC](#)

Here the company is set to Default company

Fig. Login with the Master user (No need to select the company name here)

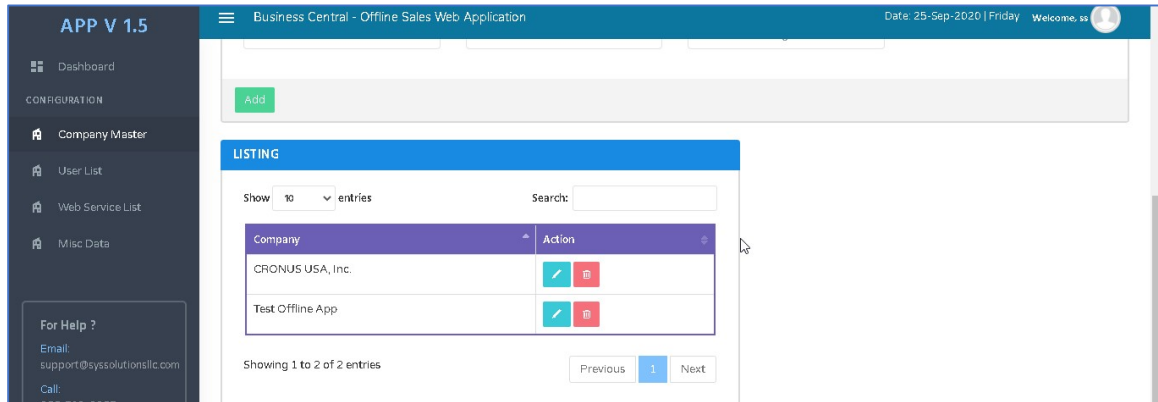
This Master user is used to create the Companies and Users. For rest of the users it's required to select the company name at the time of login.

Once we are logged into the master user next step is to create the company

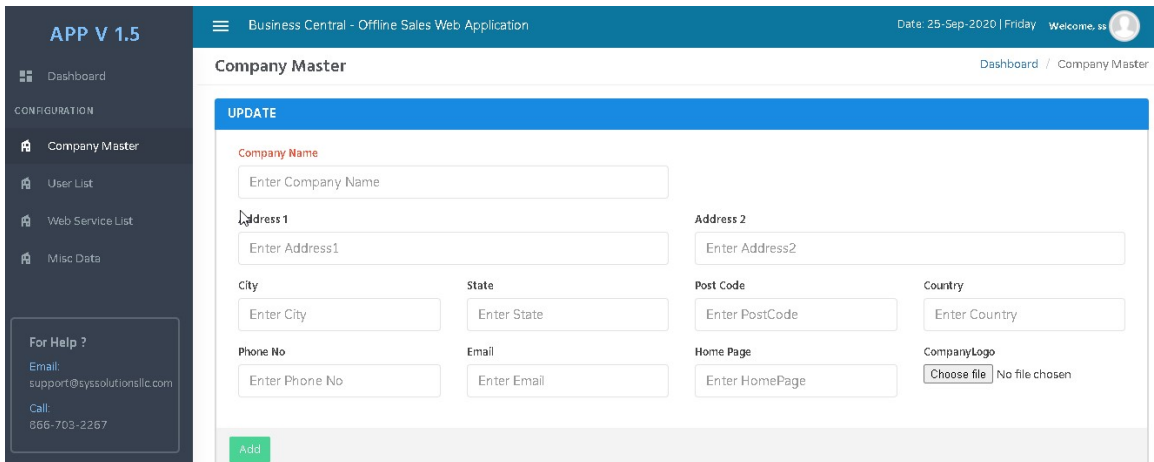
Company Creation

Click on Company Master from the Navigation just below configuration.

Once you click on the Company Master it will open up the list of the **companies created**.



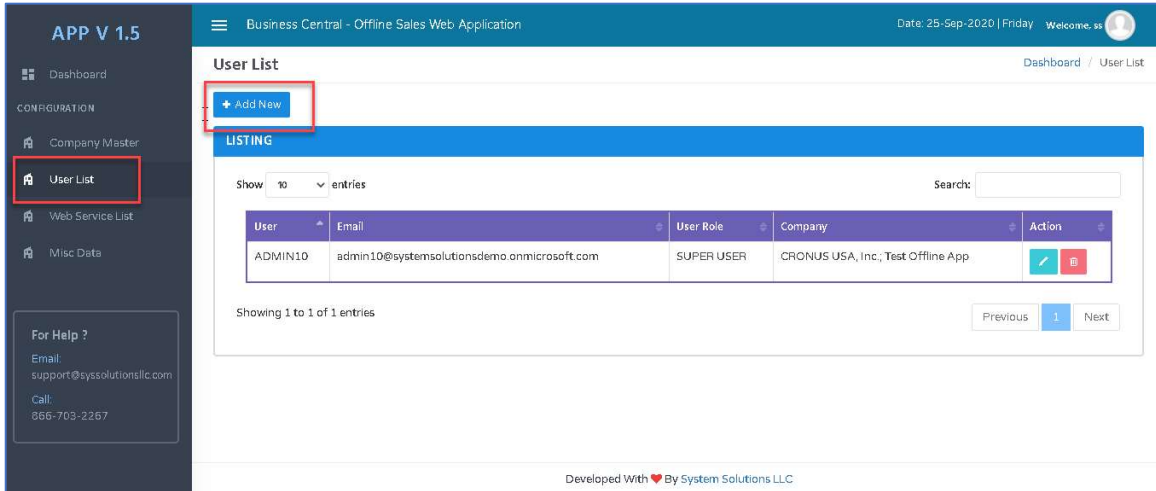
We can also create the new companies from here.



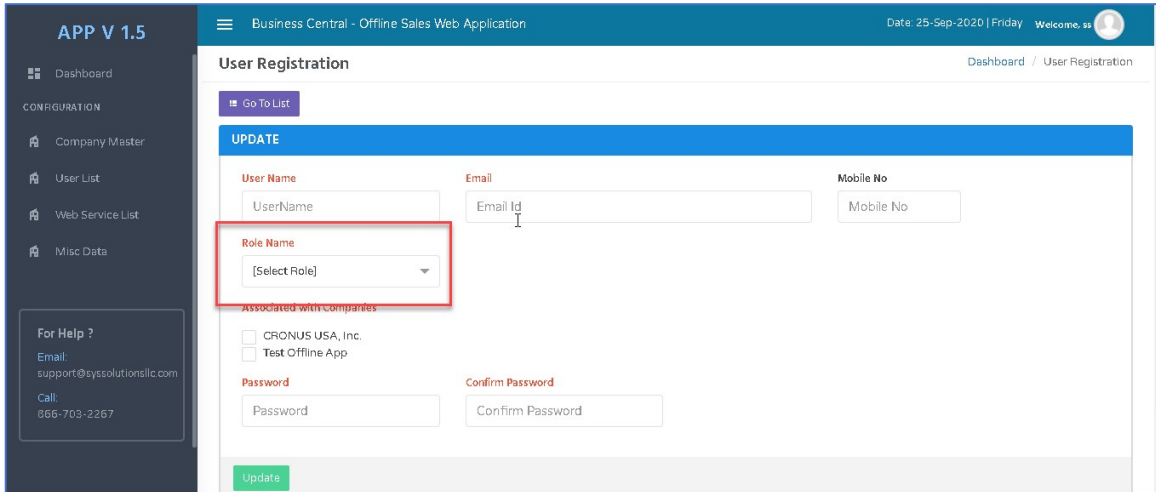
Make sure that the Company Name is the same as in Business Central and the correct Tenant ID is being referenced here. Enter in the rest of details for the company.

Creation of the Users:

Once we have the companies created, the next step will be to create the users. Make sure that while creating the user the user name and the password are as per Business Central user name and password. In order to create the user - click on User List below the company master. Once you click on the user list it will show the users associated to the company.



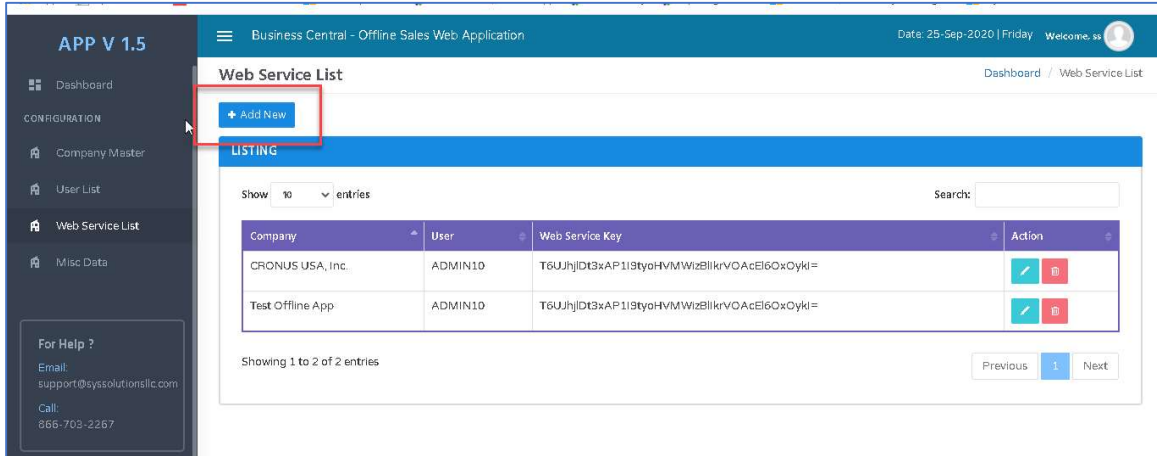
Click on the Add New button it will open a form to enter a user name, password and other details.



The difference between the super and the regular user is that the super user can enter the Web service details and Regular user cannot.

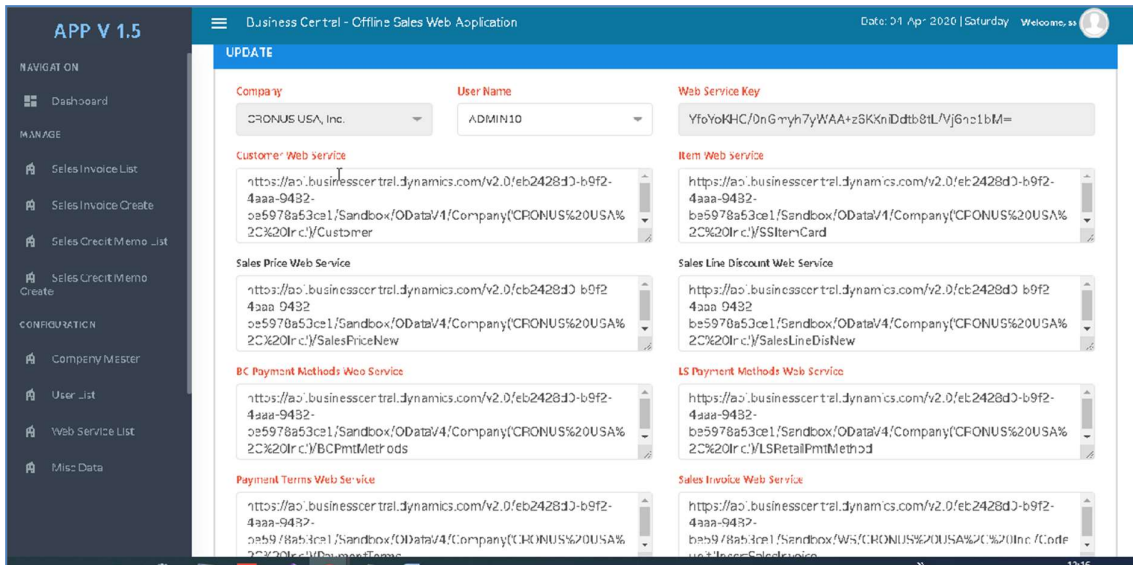
Web Service Details:

Next you need to define the web service details in the Offline Sales App. Click on the Web service list.



Click on Add New button.

We can select the **Company Name** and the **User Name** and we need to enter the web service details for all the pages that we need. Below is a filled in example of these details.



Now that this is setup we can sync transactions back into Business Central.

Sales Invoice/Credit Memo

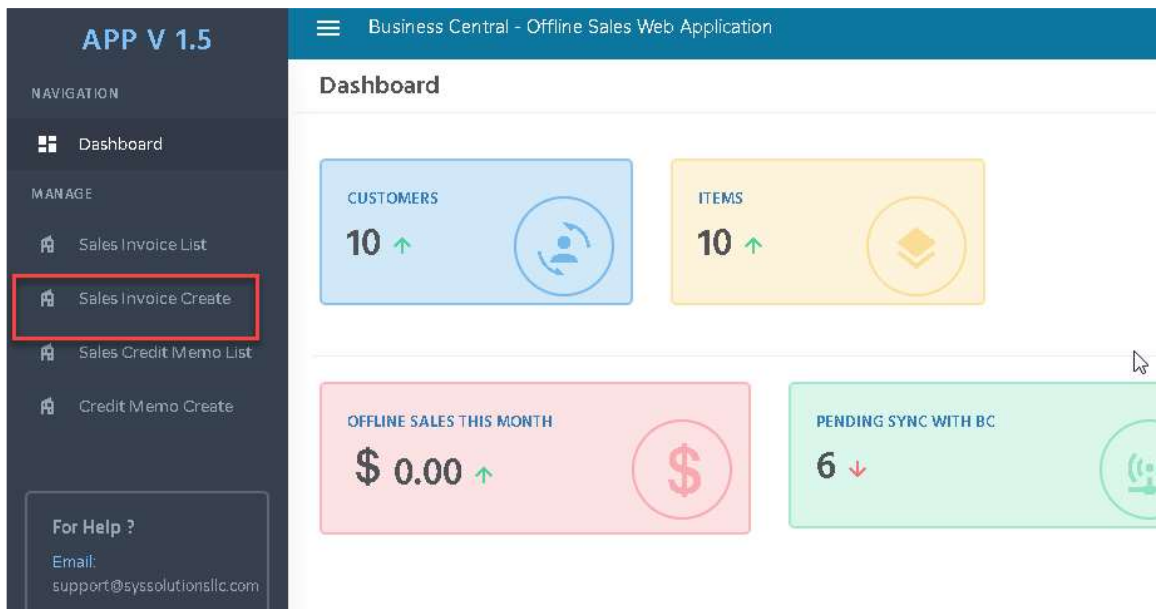
Below is the main dashboard of the App.



All these details like customer, are hyperlinked. The dashboard showcases if we have any pending invoice to be sync so that the user can take action.

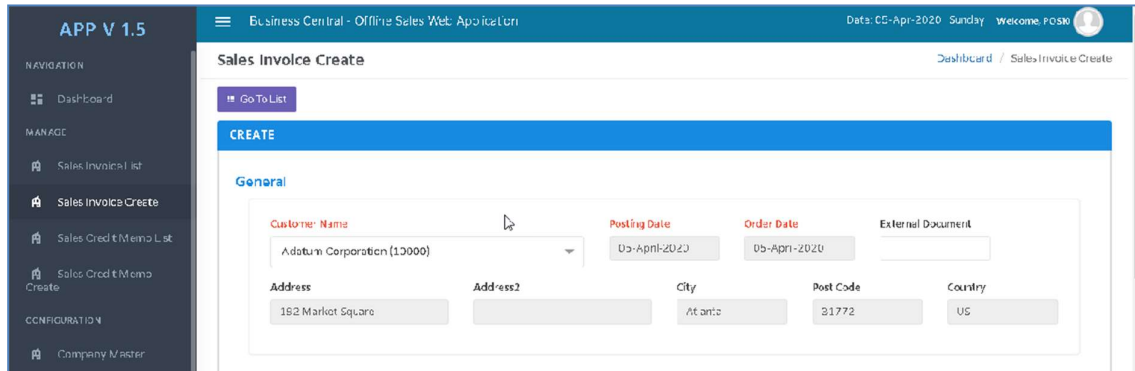
Creation of sales Invoice.

In order to create the Sales Invoice, go to the Sales Invoice Create Button from the navigation pane.



General Tab

Once user is in the Sales Invoice Create screen, you can select the customer and customer's address details will load. The document date and the posting date will be set to "TODAY" unless otherwise specified.



The screenshot shows the 'Sales Invoice Create' screen in Microsoft Dynamics 365. The interface includes a navigation pane on the left with 'Sales Invoice Create' selected. The main area is titled 'Sales Invoice Create' and features a 'CREATE' button. Below this, the 'General' tab is active, displaying a form with the following fields:

Customer Name	Posting Date	Order Date	External Document
Adatum Corporation (10000)	05-April-2020	05-April-2020	

Address	Address2	City	Post Code	Country
182 Market Square		Atlanta	31772	US

You can reference an external document if needed.

Line Tab

In sales line user can select the Item details from drop down. You can select item codes from the drop down, search items or scan in barcodes. Enter the quantity. The sale price and the line discount % will load based on setup. The tax area code and the tax group code will also setup ahead of time.

Line No	Item No / Barcode	Description	Unit of Measure Code	Location Code	Quantity	Unit Price Excl. Tax	Line Discount %	Line Disc. Amount	Line Amount Excl. Tax	Tax Area Code
#	1920-5 <input type="text" value="Add Barcode No"/>	ANTWERP Conference Table	PCS	[Select]	20	647.60	0.00	00.00	12956.00	ATLANTA, GA
10000	1896-5	ATHENS Desk	PCS		250	16.00	10.00	400.00	3600.00	ATLANTA, GA
TOTAL									3600.00	

Click on the plus button at the end of the line to add the next item.

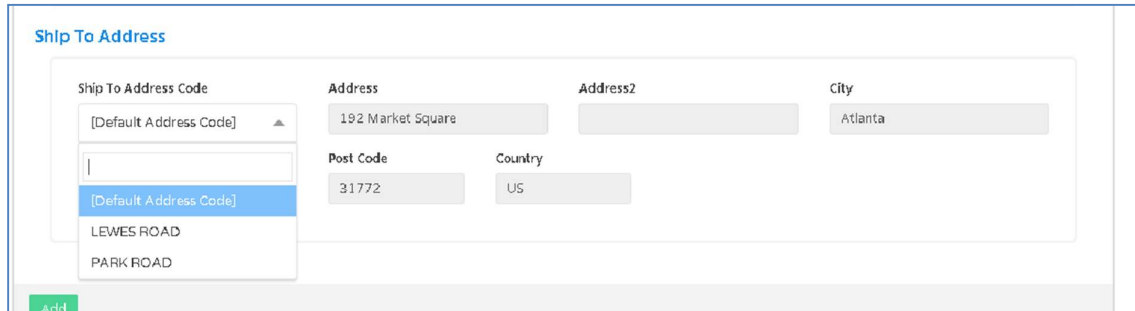
Invoice Details Tab

In the invoice details tab the user can mention the payment method and the payment terms code.

Payment Method	Payment Terms
[Select]	1M(8D)

Ship to Address Tab:

From Ship to address tab the user can select any ship to address details. By default, the address code will be same. Any other ship to addresses can be selected here and the details will update.



Ship To Address

Ship To Address Code: [Default Address Code] (dropdown menu includes LEWES ROAD, PARK ROAD)

Address: 192 Market Square

Address2: [Empty]

City: Atlanta

Post Code: 31772

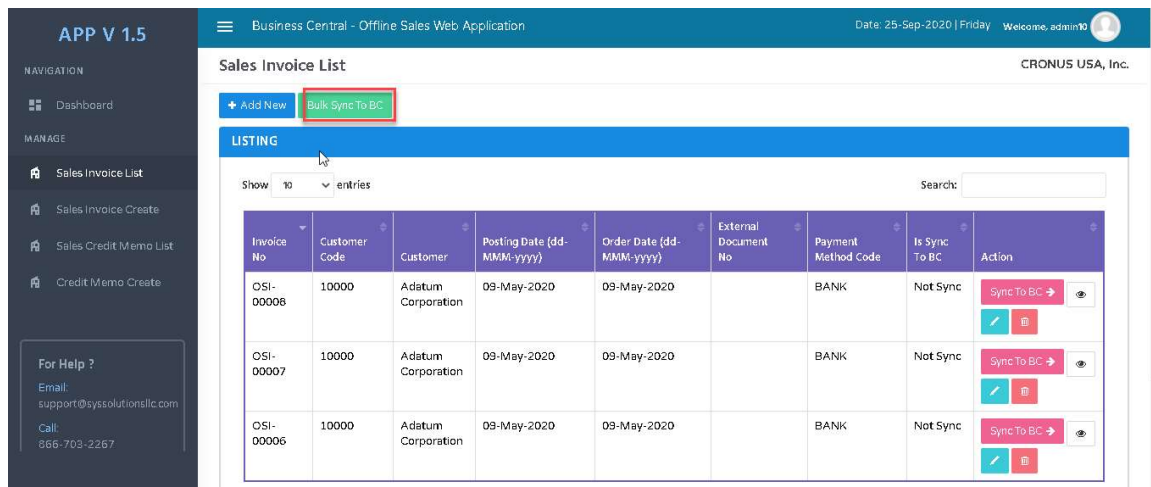
Country: US

Add

Once User clicks on the Add button the invoice details will be on the sales invoice list page.

Sales Invoice List:

Below is the Sales Invoice list Page



APP V 1.5

Business Central - Offline Sales Web Application

Date: 25-Sep-2020 | Friday

Welcome, admin10

CRONUS USA, Inc.

Sales Invoice List

+ Add New

Bulk Sync To BC

LISTING

Show 10 entries

Invoice No	Customer Code	Customer	Posting Date (dd-MMM-yyyy)	Order Date (dd-MMM-yyyy)	External Document No	Payment Method Code	Is Sync To BC	Action
OSI-00008	10000	Adatum Corporation	09-May-2020	09-May-2020		BANK	Not Sync	Sync To BC →
OSI-00007	10000	Adatum Corporation	09-May-2020	09-May-2020		BANK	Not Sync	Sync To BC →
OSI-00006	10000	Adatum Corporation	09-May-2020	09-May-2020		BANK	Not Sync	Sync To BC →

To sync your sales back to Business Central you have two options. You can sync each invoice individually or all at once with the bulk sync button.

Sales Credit Memo Create and List

The Sales Credit Memo Part is similar to the Sales Invoice Process

Business Central - Offline Sales Web Application Date: 05-Apr-2020 | Sunday Welcome, POS10

[Go To List](#)

CREATE

General

Customer Name [Select Customer Or No] **Posting Date** 05-April-2020 **Order Date** 05-April-2020 **External Document**

Address **Address2** **City** **Post Code** **Country**

Lines

Line No	Item No / Barcode	Description	Unit of Measure Code	Location Code	Quantity	Unit Price Excl. Tax	Line Discount %	Line Disc. Amount	Line Amount Excl. Tax	Tax Area Code	Tax Group Code	Tax Per
#	[Select] <input type="text" value="Add Barcode No"/>			[Select]	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				
TOTAL												

Invoice Details

Payment Method [Select] **Payment Terms** [Select] **Applies To Document Type** **Applies To Document No**

Ship To Address

Ship To Address Code **Address** **Address2** **City**

Post Code **Country**

Sales Credit Memo List Page:

Sales Credit Memo List Dashboard / Sales Credit Memo List

[+Add New](#)

LISTING

Show entries Search:

No	Customer	Posting Date	Order Date	External Document No	Payment Method Code	Is Async To BC
OSCM-00001	Adatum Corporation	02-April-2020	02-April-2020		CARD	False
OSCM-00002	School of Fine Art	02-April-2020	02-April-2020		BANK	False
OSCM-00003	Adatum Corporation	03-April-2020	03-April-2020		D	False

Showing 1 to 3 of 3 entries Previous **1** Next

APP V 1.5

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Date: 25-Sep-2020 | Friday

Welcome, admin10

CRONUS USA, Inc.

NAVIGATION

- Dashboard

MANAGE

- LS Sales Invoice List
- LS Sales Invoice Create

For Help ?
Email: support@sysolutionsllc.com
Call: 666-703-2267

LS Sales Invoice List

+ Add New Bulk Sync To BC

LISTING

Show 10 entries

Search:

Invoice No	Customer Code	Customer	Posting Date (dd-MMM-yyyy)	Order Date (dd-MMM-yyyy)	External Document No	Payment Method Code	Is Sync To BC	Action
OSI-00016	C00010	Walkin-CT	02-Sep-2020	02-Sep-2020		CARD	Not Sync	Sync To BC →
OSI-00015	C00010	Walkin-CT	20-Aug-2020	20-Aug-2020		CASH	Not Sync	Sync To BC →
OSI-00014	C00010	Walkin-CT	20-Aug-2020	20-Aug-2020		CASH	Not Sync	Sync To BC →

Installation Proce...docx

Offline App.pdf

Showall

Additional Questions? Contact Us.

<http://www.sysolutionsllc.com/page/About>

