

SALES DESK WORKFLOW FOR D365

Inside & Counter Sales

Streamlined workflows for inside and counter sales teams. **Quote, ship, and serve customers faster**, without leaving Microsoft Dynamics 365.

WHAT IT SOLVES

Inside and counter-sales reps work at the pace of a phone call: look up pricing, check inventory, quote, and convert, all in one interaction. Hunting through ERP screens breaks that pace. Inside & Counter Sales sits on top of D365 and gives reps **one fast, focused surface for everything they do in a shift**.

WHAT YOU CAN EXPECT

► Faster service

Reps stop hunting through ERP screens.

► AI product search

The right product found in seconds.

► Better accuracy

Real-time pricing & inventory by branch.

► Customer visibility

Buying patterns surface; reps up-sell with context.

► Branch control

Branches, users & payment methods, managed.

► One source of truth

Quotes, orders & customers never drift.

CORE MODULES

- 1 Interface:** purpose-built sales-desk surface with AI search.
- 2 Lookup:** real-time inventory, pricing & external catalogs.
- 3 Integration:** Outlook and Teams, inside the workflow.
- 4 Counter:** POS-style flow for walk-in, cash & one-time customers.
- 5 Foundation:** native D365 F&O; data stays in the system of record.

FLAGSHIP: ORDER AND PAY

A lightweight POS built directly into D365 F&O: **create order** → **process payment** → **complete**. One uninterrupted flow, no separate retail system, no retraining. The fastest path from customer arrival to fulfilled order.

AT A GLANCE

PRODUCT	Inside & Counter Sales
TYPE	ISV Solution, native to D365
PLATFORM	Microsoft Dynamics 365 F&O
BUILT FOR	Sales desk & counter reps
FLAGSHIP	Order and Pay: built-in light POS
SCOPE	30+ features across the sales desk
VENDOR	Vyas Consulting (VyasTec)

WHY PARTNER WITH VYAS

A trusted D365 ISV with two decades of distribution expertise.

Global ISV specializing in Microsoft Dynamics 365 business applications for the distribution industry.

20+ years on Dynamics 365 and AX, **since 2002**. Precise, technically robust, cost-effective solutions.

WHERE IT PAYS OFF

Business cases

Three of many across the sales desk.

COUNTER BOTTLENECKS

BEFORE

Walk-in and cash sales need full customer setup or a separate retail POS, so checkout drags while the line grows.

AFTER

Order and Pay handles cash, one-time, and account customers in one uninterrupted flow: order, payment, done.

Arrival to fulfilled order, one flow

SCREEN-HUNTING MID-CALL

BEFORE

Stock, price, and history live in different ERP screens, so customers wait while reps click.

AFTER

One surface with **AI product search**, real-time inventory and pricing by branch, and external vendor catalogs for instant quoting.

Answers at the speed of the call

MANUAL ORDER CAPTURE

BEFORE

Orders arrive by email and WhatsApp as PDFs, photos, and text, and reps re-key each one by hand, slowly and with errors.

AFTER

Vyas AI OrderBuilder captures and parses them automatically into quotes or orders: item and customer mapping applied, reps notified, exceptions flagged on a dashboard.

From inbox to order, hands-free

CAPABILITY OVERVIEW

Features & the value they deliver

COUNTER & ORDERS

Order and Pay light POS: fast in-store checkout

Cash & one-time customers: sell without full setup

Quick return registration: minimal clicks, happier customers

CPQ: accurate configure-price-quote at entry

Assemble via light manufacturing: efficient kitting

FULFILMENT & PAYMENTS

Payment workbench: payments managed centrally

Proof of delivery & signature capture: fewer disputes

Backorder workbench: visibility that improves fulfilment

Free freight rules: sales & purchase thresholds

Split profit orders: fair sharing across branches

SPEED & SEARCH

AI product search: right product, faster

Search by authorized buyer: right account instantly

External catalogue items: quote without master records

Handheld & handwritten order capture: nothing missed

Configurable shortcut keys: rapid order entry

INSIGHT & CONTROL

Customer eScore dashboard: spot high-value & at-risk accounts

Procurement workbench: buying decisions in one place

Purchase lead-time calculator: fewer stockouts

Dynamic customer & product groups: no manual upkeep

Authorizations by customer & branch: controlled ordering