

idealpos Update History

Idealpos 7.1 Build 6

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Back Office

Activity Log – Show when Stock Manage has uploaded data

This function adds a pop-up prompt which will appear when attempting to update Stock Levels from a Stocktake when there are Stock Manage Stocktake counts that are still waiting to be processed.

This particular function will assist customers who have specific terminals that are licenced for Stock Manage and other terminals which do not have a Stock Manage licence. This prompt therefore prevents unprocessed Stock Manage Stocktake counts from being missed when updating Stock Level counts for a Stocktake.

To demonstrate and use this function, follow the below steps:

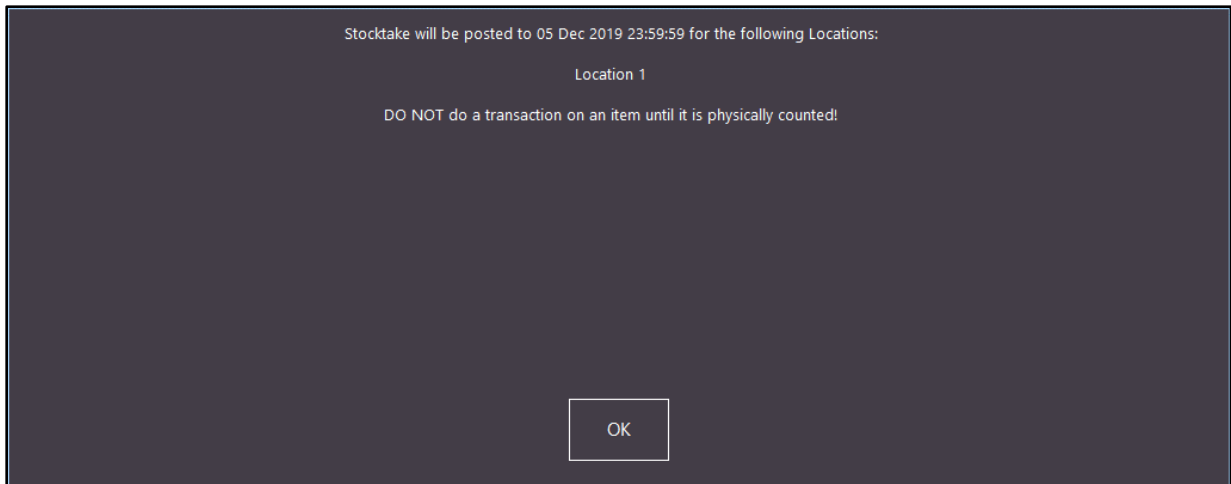
Note that the below steps involve starting a Stocktake for the purpose of demonstrating this function. If you have an active Stocktake in progress, we recommend either completing the Stocktake, or demonstrate/test this function on a different environment which is separate to the one the Stocktake is being completed in.

1. Start a Stocktake by going to Stocktake > Start Stocktake
Click in the "Click to Start Stocktake" column next to Location, then press "Start Stocktake" on the bottom-right corner of the screen.

	Location	Stocktake Started?	Click to Start Stocktake
1	Location 1	No	START
2	Location 2	No	
3	Location 3	No	
4	Location 4	No	
5	Location 5	No	
20	Location 20	No	

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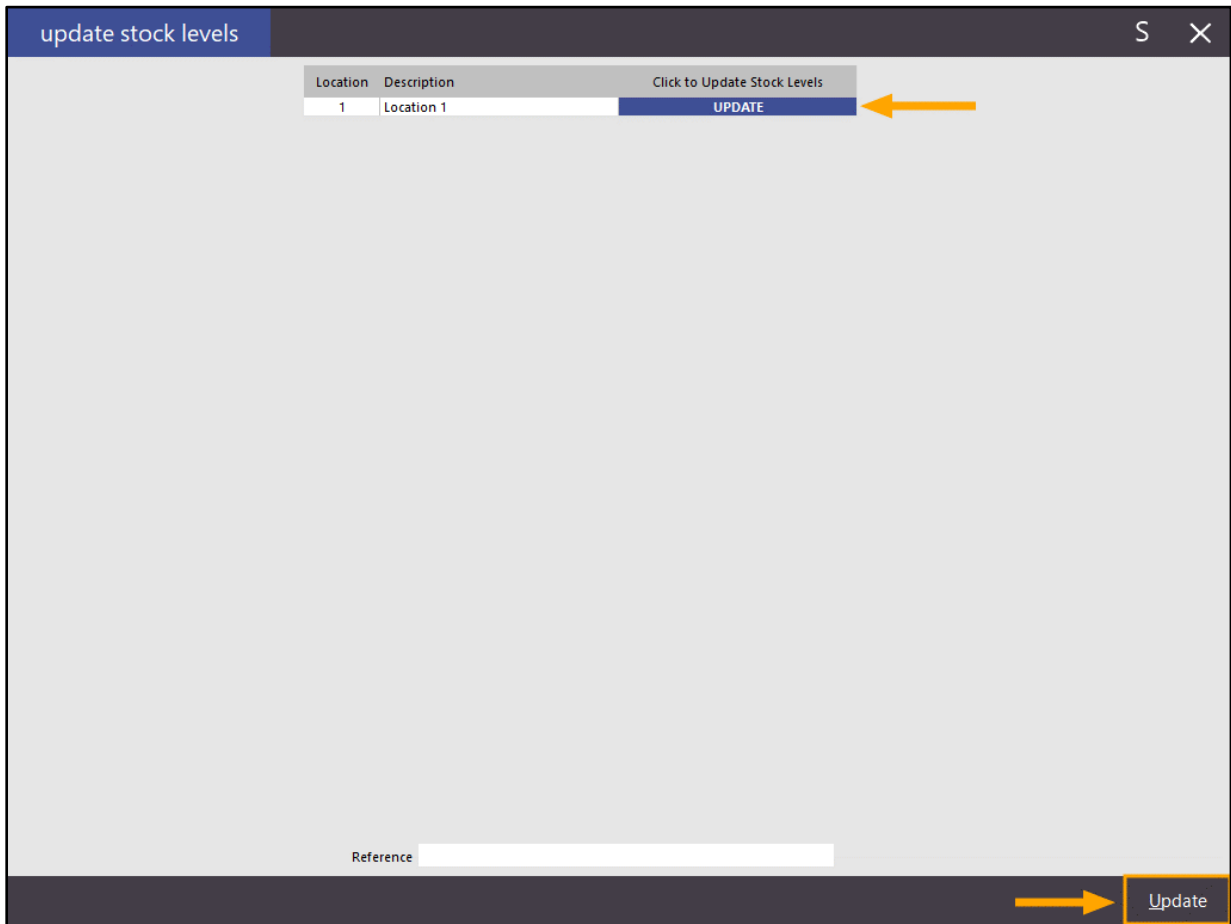
- Dismiss the following prompt by pressing "OK"



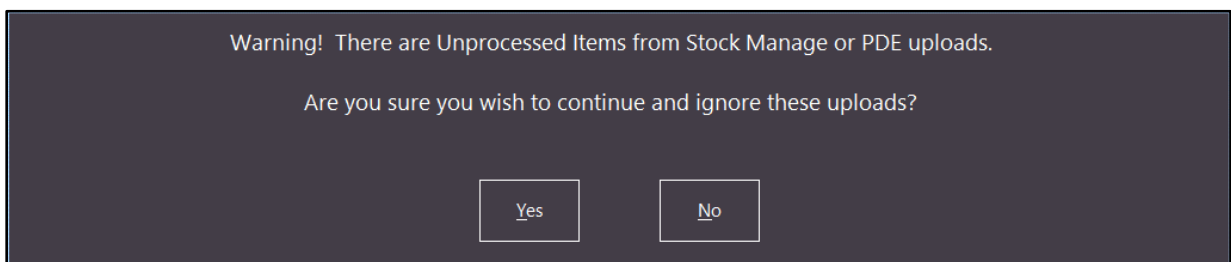
- Using Stock Manage on a mobile device, go to Data Control > Download. Then in Stock Manage, go to the Stocktake option and add items to the Stocktake. Return to the main Stock Manage menu, then select "Data Control" and upload the Stocktake to Idealpos
- Return to Idealpos and go to: Stocktake > Enter Stocktake. Enter counts for a few Stock Items, then close the Enter Stocktake window.

enter stocktake					
Stock Code	Description	Department	Stock Level	Stocktake	
120005	HAWAIIAN PIZZA	FROZEN	4	5	
120006	SUPREME PIZZA	FROZEN	3	7	
120007	READY MEAL CHICKEN	FROZEN	6	8	
120008	READY MEAL BEEF	FROZEN	2		
120009	FRESH PASTA	FROZEN	9		

5. Go to Stocktake > Update Stock Levels > Click into the "Click to Update Stock Levels" column next to the location to update counts, then press the "Update" button on the bottom-right corner.



6. The following prompt will be displayed which indicates that there are unprocessed items from Stock Manage or PDE uploads.



When this prompt is displayed, the user is given the opportunity to go back and process the unprocessed Stock Manage or PDE uploads.

To cancel the update of the Stock Counts, press "No".

Otherwise, if you want to ignore the Stock Manage or PDE uploads, press the "Yes" button.

If you choose to ignore the Stock Manage or PDE uploads, those Stock Manage uploads will remain in the system and can be processed at a later time when required via the Stock Manage > Process Stocktake menu in Idealpos.

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Coupon Promotions

Keep Serialised Coupon in unredeemed state if added to a sale but not applied

This function improves on the logic used by Idealpos when adding Coupons to a sale.

Previous to this change, serialised Coupons would become marked as redeemed if they were added to a sale but not applicable in that sale. After this change, serialised Coupons will only become marked as redeemed once they've been added and applied to that sale (i.e. caused a trigger to occur in the sale such as adding a bonus item, triggering a discount, etc.).

To demonstrate this function, we will use a Coupon Promotion built into the Idealpos Demo Database.

Using the Idealpos Demo Database, go to:

File > Sales > Promotions > Coupon Promotions

Check and ensure that a Coupon Promotion exists for "Next Day Free Rides".

The Coupon Promotion should appear as follows:

The screenshot shows the 'coupon promotion 1' configuration window with the following details:

- Description:** Next Day Free Rides
- Group:** Coupons
- POS:** (dropdown)
- Customer Type:** (dropdown)
- Multiple Trips
- From:** 01/10/2016 00:00
- to:** 01/01/2020 00:00
- Continuous
- During Specific Times
- Discount Type:** % Discount off Items: 100
- One Item Only
- Serialized Tracking
- Print Only
- Redeem at POS:** (dropdown)
- Redeem from:** 01 Oct 2016 00:00
- to:** 01 Oct 2017 00:00
- OR:** 1 Days from Print Date
- Apply Discount to:** All Items, Only Items Below
- Trip Conditions Set 1:** Buy 1 of items below. Includes DPT 701 ADMISSIONS.
- Trip Conditions Set 2:** And Buy 1 of items below. Includes DPT 702 RIDES.

The Coupon Promotion is configured as follows:

Trip Conditions Set 1:

Trip by Quantity: Buy 1 of items below

Department: 701 – Admissions

Trip Conditions Set 2:

Trip by Quantity: Buy 1 of items below

Department: 702 – Rides

Discount Type: % Discount off Items: 100%
 One Item Only: Unchecked
 Serialised Tracking: Enabled
 Apply Discount to: Only Items Below
 Department: 702 – Rides

Once the promotion has been confirmed to be active (From/To Date Range current) and configured as above, close the Coupon Promotion screen and any other Promotion windows, then open the POS screen by pressing the POS button on the top-left corner of the Back-Office dashboard.

Click on the SERVICES tab at the bottom of the screen, then add the following items to the sale:

- SINGLE ADULT ADMISSION
- ALL RIDES ALL DAY

The screenshot shows a POS interface with the following elements:

- Header:** 09 Dec 13:28 Adult ID: 09-Dec-2001, Jeremy PRICE 1
- Item List:**

SINGLE ADULT ADMISSION	1	25.00
ALL RIDES ALL DAY	1	25.00
- Summary:** 2x \$50.00
- Keypad:**

RECEIPT	CLERK	7	8	9	CL
PRICE LEVEL	5% ST DISC	4	5	6	NO SALE
CUSTOMER	5% ITEM	1	2	3	X
BAR TAB	REFUND				
PENDING	VOID SALE				
TABLE MAP	VOID	0	.	ENTER	
- Menu Grid:**

NEW MEMBER		SINGLE ADULT ADMISSION	STUDENT ADMISSION	ALL RIDES ALL DAY		DRY CLEANING SERVICES
MEMBERSHIP	ANNUAL RENEWAL	SINGLE CHILD 1-3 ADMISSION	SINGLE CHILD 3-12 ADMISSION	ALL RIDES 2 HOURS	LEVEL 2 RIDES UNTIL 1PM	
BI-ANNUAL MEMBERSHIP	BI-ANNUAL RENEWAL	SINGLE CHILD 13-18 ADMISSION	FAMILY ADMISSION	LEVEL 2 RIDES ALL DAY		PICKUP DATE
5 YEAR MEMBERSHIP	5 YEAR RENEWAL	PENSIONER ADMISSION	VISITOR (NO RIDES) ADMISSION	ALL RIDES UNTIL 5PM	LEVEL 2 RIDES UNTIL 5PM	
				MINI GOLF ONLY		
- Bottom Navigation:**

DRINKS	CAFE	TAP BEER	SPIRITS	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL	MANAGER
	RESTAURANT	BOTTLE BEER & RTD	WINE				SERVICES	ADMIN

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Press ENTER to go to the Tender screen, then select a tender type/amount to finalise the sale.
A Coupon Promotion will be printed similar to the below.




The Coupon will only apply a discount to any items sold from Department 702 – Rides.
Therefore, adding this coupon to a sale with items other than rides will leave the coupon in an unredeemed state.

To demonstrate this, go to the MANAGER tab on the POS Screen, then enter the Coupon Code (printed at the bottom of the Coupon – in the above example, the Coupon Code is 64001) and press the “COUPON PROMO” button. You can then add a Cappuccino item to the sale and tender the sale.

09 Dec 13:37 Adult ID: 09-Dec-2001
Jeremy PRICE 1
✕

<p>COUPON: 64001 0.00</p> <p>CAPPUCCINO 1 3.50</p>	<table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <tr> <td style="background-color: #2c5e8c; color: white;">RECEIPT</td> <td style="background-color: #2c5e8c; color: white;">CLERK</td> <td>7</td> <td>8</td> <td>9</td> <td>CL</td> </tr> <tr> <td style="background-color: #2c5e8c; color: white;">PRICE LEVEL</td> <td style="background-color: #e67e22; color: white;">5% ST DISC</td> <td rowspan="2">4</td> <td rowspan="2">5</td> <td rowspan="2">6</td> <td rowspan="2">NO SALE</td> </tr> <tr> <td style="background-color: #2c5e8c; color: white;">CUSTOMER</td> <td style="background-color: #e67e22; color: white;">5% ITEM</td> </tr> <tr> <td style="background-color: #2c5e8c; color: white;">BAR TAB</td> <td style="background-color: #e67e22; color: white;">REFUND</td> <td>1</td> <td>2</td> <td>3</td> <td>X</td> </tr> <tr> <td style="background-color: #2c5e8c; color: white;">PENDING</td> <td style="background-color: #e67e22; color: white;">VOID SALE</td> <td rowspan="2">0</td> <td rowspan="2">.</td> <td colspan="2" rowspan="2">ENTER</td> </tr> <tr> <td style="background-color: #2c5e8c; color: white;">TABLE MAP</td> <td style="background-color: #e67e22; color: white;">VOID</td> </tr> </table>	RECEIPT	CLERK	7	8	9	CL	PRICE LEVEL	5% ST DISC	4	5	6	NO SALE	CUSTOMER	5% ITEM	BAR TAB	REFUND	1	2	3	X	PENDING	VOID SALE	0	.	ENTER		TABLE MAP	VOID
RECEIPT	CLERK	7	8	9	CL																								
PRICE LEVEL	5% ST DISC	4	5	6	NO SALE																								
CUSTOMER	5% ITEM																												
BAR TAB	REFUND	1	2	3	X																								
PENDING	VOID SALE	0	.	ENTER																									
TABLE MAP	VOID																												

1x
\$3.50

<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="padding: 5px;">CASH</td><td style="width: 50px;"></td></tr> <tr><td style="padding: 5px;">EFTPOS</td><td></td></tr> <tr><td style="padding: 5px;">ACCOUNT</td><td></td></tr> <tr><td style="padding: 5px;">LAYBY</td><td></td></tr> <tr><td style="padding: 5px;">GIFT VOUCHER</td><td></td></tr> <tr><td style="padding: 5px;">CREDIT NOTE</td><td></td></tr> <tr><td style="padding: 5px;">POINTS</td><td></td></tr> <tr><td style="padding: 5px;">ROOM CHARGE</td><td></td></tr> </table>	CASH		EFTPOS		ACCOUNT		LAYBY		GIFT VOUCHER		CREDIT NOTE		POINTS		ROOM CHARGE		<div style="text-align: center; font-size: 24px; font-weight: bold; background-color: white; padding: 10px; border: 1px solid black;">3.50</div> <p style="text-align: center; margin-top: 10px;">Balance 3.50</p> 
CASH																	
EFTPOS																	
ACCOUNT																	
LAYBY																	
GIFT VOUCHER																	
CREDIT NOTE																	
POINTS																	
ROOM CHARGE																	

Now start a new sale, go to the MANAGER tab, enter the same Coupon number then press the COUPON PROMO button.

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Click on the SERVICES tab on the POS screen, then add "ALL RIDES ALL DAY".
The discount from the Coupon will be applied to the sale.

09 Dec 13:40 Adult ID: 09-Dec-2001
Jeremy PRICE 1

COUPON: 64001		-25.00						
ALL RIDES ALL DAY	1	25.00	RECEIPT	CLERK	7	8	9	CL
			PRICE LEVEL	5% ST DISC	4	5	6	NO SALE
			CUSTOMER	5% ITEM				
			BAR TAB	REFUND	1	2	3	X
			PENDING	VOID SALE				
			TABLE MAP	VOID	0	.	ENTER	
1x		Discounts(+/-)	-25.00	\$0.00				

NEW MEMBER		SINGLE ADULT ADMISSION	STUDENT ADMISSION	ALL RIDES ALL DAY		DRY CLEANING SERVICES	
MEMBERSHIP	ANNUAL RENEWAL	SINGLE CHILD 1-3 ADMISSION	SINGLE CHILD 3-12 ADMISSION	ALL RIDES 2 HOURS	LEVEL 2 RIDES UNTIL 1PM		
BI-ANNUAL MEMBERSHIP	BI-ANNUAL RENEWAL	SINGLE CHILD 13-18 ADMISSION	FAMILY ADMISSION	LEVEL 2 RIDES ALL DAY		PICKUP DATE	
5 YEAR MEMBERSHIP	5 YEAR RENEWAL	PENSIONER ADMISSION	VISITOR (NO RIDES) ADMISSION	ALL RIDES UNTIL 5PM	LEVEL 2 RIDES UNTIL 5PM		
				MINI GOLF ONLY			

DRINKS	CAFE	TAP BEER	SPIRITS	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL	MANAGER
	RESTAURANT	BOTTLE BEER & RTD	WINE				SERVICES	ADMIN

Finalise the sale by pressing the "ENTER" button, then select a tender type/amount.

Repeat the above steps to redeem the same coupon for RIDES ALL DAY and the Coupon is now marked off as redeemed, making it no longer possible to redeem the Coupon a second time.

This demonstrates that the Coupon is only marked as redeemed when it has been added to a sale which contains items that the Coupon is applicable to.

Coupon already redeemed on
09 Dec 2019 13:43 (Audit 1493-1)

OK

Customers

Add Customer Code Field to the Fast Add New Customers Window

This function adds the Customer Code field to the Fast Add New Customers window.

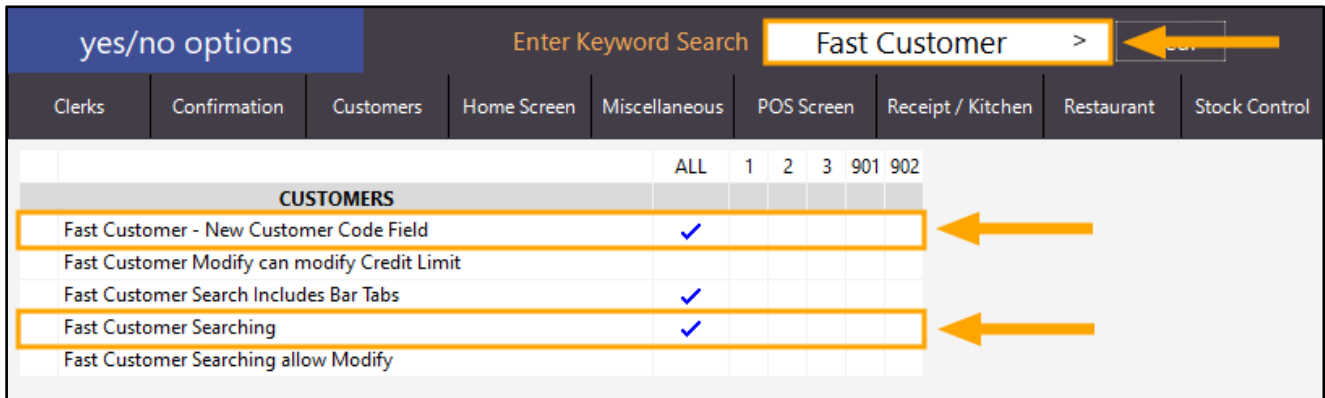
This feature may be useful for users who manage their own Customer Codes and want to use the Fast Add New Customers window. These types of users may now use the Fast Add New Customers Window.

To configure and use this function, go to:

Setup > Yes/No Options > Enter "Fast Customer" into the "Enter Keyword Search" field.

Enable the following Yes/No Options:

- Fast-Customer – New Customer Code Field
- Fast Customer Searching



The screenshot shows a software interface with a search bar containing 'Fast Customer' and a 'SEARCH' button. Below the search bar is a table with columns for 'ALL', '1', '2', '3', '901', and '902'. The table lists several options under the heading 'CUSTOMERS'. Two options are checked with blue checkmarks: 'Fast Customer - New Customer Code Field' and 'Fast Customer Searching'. Yellow arrows point to the search bar and the checked rows.

	ALL	1	2	3	901	902
CUSTOMERS						
Fast Customer - New Customer Code Field	✓					
Fast Customer Modify can modify Credit Limit						
Fast Customer Search Includes Bar Tabs	✓					
Fast Customer Searching	✓					
Fast Customer Searching allow Modify						

Close the Yes/No Options window, then from the main Idealpos back-office dashboard, press the "POS" button on the top-left corner of the screen.

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Press the "Customer" button on the main POS screen, then press the "New Customer" button to add a new Customer.

customers ✕

Account Customer	Theresa Andrews	Bar Tab 5001	Bar Tab 5002	Bar Tab 5003	Bar Tab 5004	Bar Tab 5005	Bar Tab 5006	Bar Tab 5007	Bar Tab 5008
Bar Tab 5009	Bar Tab 5010	Bar Tab 5011	Bar Tab 5012	Bar Tab 5013	Bar Tab 5014	Bar Tab 5015	Bar Tab 5016	Bar Tab 5017	Bar Tab 5018
Bar Tab 5019	Bar Tab 5020	Bar Tab Customer	Big Ted's Real Estate	Bjorn	Rebecca Brinkle	Bronze	BOB BROWN	Talia Brown	Sarah Charlton
JANE CITIZEN	Customer 123456	Customer 888888	Gold	Alan Graham	Ben Harrison	Hiroku	MARY JANE	Jeremy (Owner)	Layby Customer
Life	Chloe Lopez	Master Account	Melissa	Steve Murray	Betty Phillips	Platinum	Points Customer	Isabelle Romero	Silver

| Name Phone Company Code

q	w	e	r	t	y	u	i	o	p	7	8	9	/	@
a	s	d	f	g	h	j	k	l	#	4	5	6	:	!
↑	z	x	c	v	b	n	m	&	%	1	2	3	New Customer	
CL	backspace			\	?	0	.	-						

The New Customer window will appear and the Customer Code field is now available at the top of the screen. This field can be used to manually enter the Customer Code as required. After entering the Customer Code, fill out the required fields for the Customer, then press the "OK" button on the bottom-right corner of the screen.

The screenshot shows a mobile application window titled "customers" with a close button (X) in the top right corner. The form contains the following fields:

- Code: 22 (highlighted with a yellow box and an arrow)
- Last Name: [text input]
- First Name: [text input]
- Scan Code: [text input]
- Email: [text input]
- Address: [text input]
- Suburb: [text input]
- State: [dropdown menu]
- Company: [text input]
- Customer Type: ACCOUNTS (dropdown menu)
- Phone: [text input]
- Mobile: [text input]
- DOB: [text input]
- Mail Out:
- Post Code: [text input]

A keyboard overlay is visible at the bottom of the screen, featuring a blue "OK" button in the bottom right corner. The keyboard includes letters, numbers, symbols, and function keys like "CL", "backspace", and "?".

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Delivery Interface

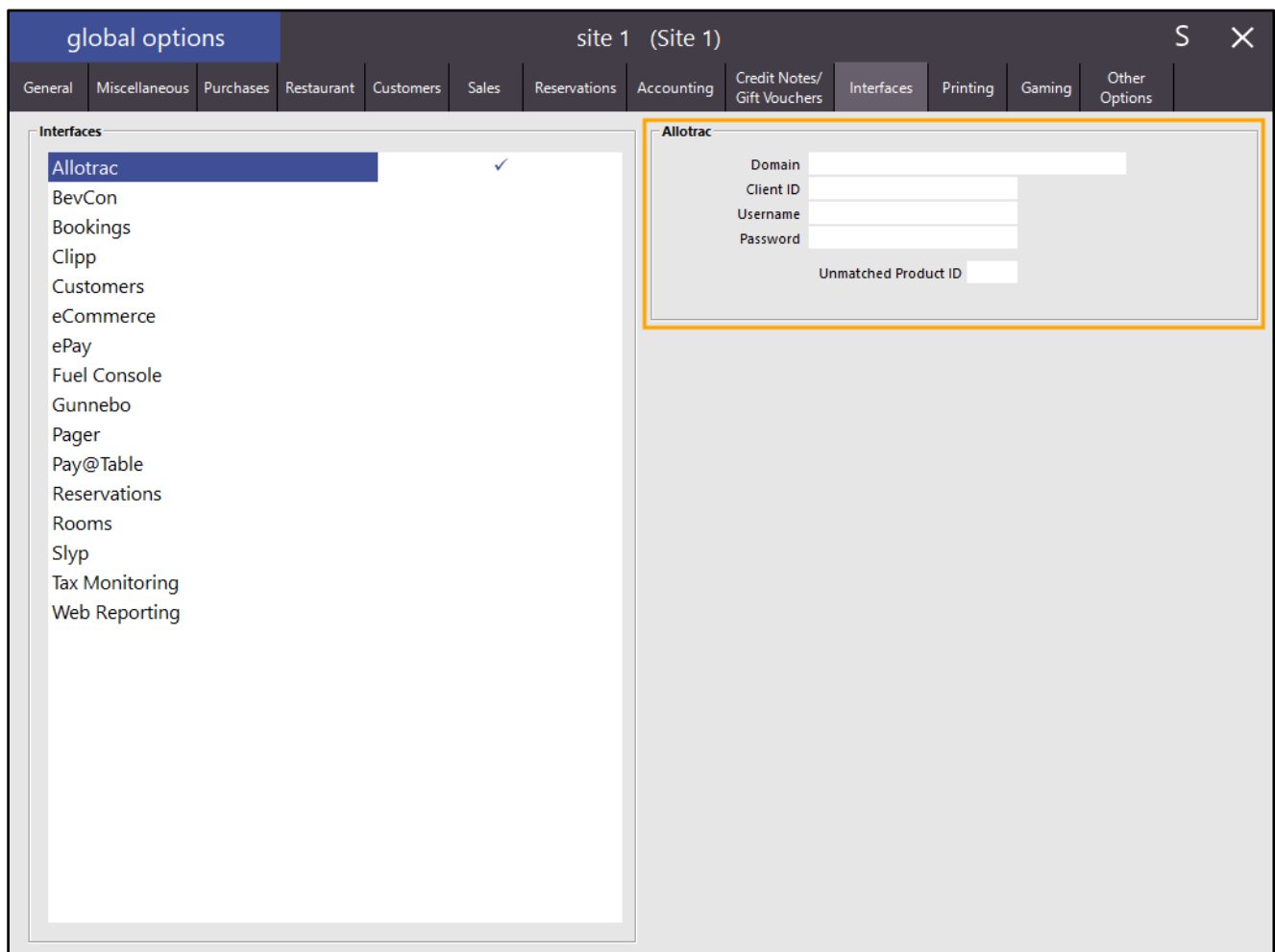
Allotrac Transport Management System

This function adds the ability to configure Idealpos so that it sends jobs to the Allotrac Transport Management System. As this integration involves numerous steps to configure and use, we recommend that you review the Allotrac Transport Management System topic in the Idealpos User Guide for more information about configuring and using this integration.

The Allotrac Transport Management System topic is available in our User Guide by clicking on the below link:

[https://userguide.idealpos.com.au/#Delivery Interface/Allotrac Interface/Allotrac Interface.htm](https://userguide.idealpos.com.au/#Delivery%20Interface/Allotrac%20Interface/Allotrac%20Interface.htm)

The Allotrac Interface is configured via Setup > Global Options > Interfaces > Allotrac
Refer to the link above for more information about configuring and using this interface.



Export Data

Automatic and Manual Stock Item Export of Web Store Items

This function adds the ability to Automatically and Manually export Web Store Items only.

Some customers may require the ability to only export Web Store Items from Idealpos.

By only exporting Web Store Items from Idealpos, the size of the export file will be reduced and may also improve the speed when only importing Web Store items into the Web Store interface/integration.

To configure the Automatic Export of Web Store Items, go to:

Setup > POS Terminals > Select Terminal > Modify > Import/Export

In the "Export Stock Items" field, select the option "Webstore Items Only".

Configure any other details as required for the export such as:

- Export Folder
- Export Daily at/Or every # minutes
- Filename
- Any other required checkboxes as required

The screenshot displays the 'pos terminals' configuration window, specifically the 'Import / Export' tab. The interface is divided into several sections:

- Automatic Export Settings:** This section is on the left. It includes fields for 'Export Folder' (C:\IdealposExport\), 'Delete files older than' (7 days), 'Export Stock Items' (set to 'Webstore Items Only' and highlighted with an orange box and arrow), 'Department Range', 'Filter by Attribute Type', 'Export Daily at' (Or every 60 minutes), 'Filename' (AutoExport.txt), and several checkboxes for filename options (Append Date/Time, Site Name, Venue ID, and Discontinued Items). At the bottom, it has 'Export Sales Format' (No Daily Export) and 'Sales From' (All POS Terminals).
- Automatic Import Settings:** This section is on the right. It includes 'Import Folder' (C:\IdealposExport\Lightyear), 'Delete files older than' (7 days), a checked 'Delete files after importing' checkbox, 'Filename' (Import Stock Items), and a checked 'If imported items exist, update selling prices' checkbox. Below this is another 'Filename' field for 'Import Promotions'.
- Supplier Invoices:** This section is at the bottom right. It has a checked 'Automatically Import Supplier Invoices' checkbox, fields for 'Retrieve Location from Filename' (Right of / Left of), and 'Retrieve Supplier from Filename' (Right of / Left of). It also includes checkboxes for 'Automatically Add/Modify Stock Items during Import' (with sub-options for Update Description, Department, and Sell Price) and 'Automatically Process Invoices after Import Complete'.
- IBA Interface:** This section is at the bottom left, containing fields for 'Daily Import/Export Time', 'Username', 'Password', 'Import Promotions' checkbox, 'State Code', 'Exclude Batch', 'Store Code', 'Zone', 'POS Range', and 'Promotion Group'.
- Price Book:** This section is in the middle bottom, containing a 'Liquology Sales Export Time' field.

The bottom of the window features a 'Keyboard' button and a close 'X' icon in the top right corner.

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Close the POS Terminals window, then go to: File > Stock Control > Stock Items

Open a Stock Item which is required on the Web Store, then enable the "Web Store" checkbox so that the item will be included in the Web Store Export.

The screenshot shows the 'stock items' configuration window for 'CAPPUCINO'. The window has tabs for 'General', 'Advanced', and 'Indirect Item'. The 'Indirect Item' tab is selected. The 'Other Options' section has the 'Web Store' checkbox checked and highlighted with an orange box and an arrow. Other options include 'Stock Control', 'Indirect Item', 'Non-Accumulating', 'Scale', 'Inhibit Discounts', 'Inhibit Voids', 'Manufactured Item', 'Instruction', and 'Print Red'. The 'Purchasing' section shows 'Purchase Category 2' and 'BEVERAGE'. The 'Printer Settings' section has 'Receipt Printer' and 'COFFEE' checked. The 'Selling Prices (inc Tax)' table shows prices from 3.50 to 0.00 with a profit percentage of 90.75. The 'Cost Prices (ex Tax)' section shows a standard cost of 0.2942. The 'Tax Settings (Selling)' section has 'GST' checked. The 'Attributes' section has five dropdown menus. The bottom bar contains 'Keyboard' and 'Save' buttons.

PRICE	PRICE	Profit%
PRICE 1	3.50	90.75
PRICE 2	5.00	93.53
PRICE 3	0.00	
PRICE 4	0.00	
PRICE 5	0.00	
PRICE 6	0.00	
PRICE 7	0.00	
PRICE 8	0.00	
PRICE 9	0.00	
PRICE 10	0.00	
PRICE 11	0.00	
PRICE 12	0.00	

Cost	Value
Standard Cost	0.2942
Last Cost	0.2942
Average Cost	0.2942

Repeat the above process for each item that needs to be included in the Web Store export.

Alternatively, you can use the "Range Programming" function to enable the Web Store item for a range of Stock Items.

This function is available via:

Utilities > Range Programming > Stock Items

When using Range Programming, we recommend that you take care and precaution as it is possible to modify settings/fields for all your Stock Items at once.

The Web Store Items will be included in the Web Store Export which will take place as per the Import/Export configuration which has been configured in the above steps.

In addition to the "Webstore Items Only" format, the Web Store Items option has also been implemented in the Automatic Export Format which can be configured by going to: Utilities > Export Data > Stock Items

Select the Automatic Export Format, then enable the "Webstore Items Only" checkbox, then finally press the "Save Format" button on the bottom-right corner of the screen. Before Saving the format, you may also want to specify specific fields to be included in the Automatic Export Format.

export stock items

Export Automatic Export Format

Export Specific Fields by Range

1	CODE	2	DESCRIPTION	3	LAST COST	4	PRICE 1
5		6		7		8	
9		10		11		12	
13		14		15		16	
17		18		19		20	
21		22		23		24	

Clear

Include Headers

Webstore Items Only

Remove Padding

Prices in Cents

Save Format

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Export Stock Items – Option to have Prices in Cents

This function adds the ability to export Stock Items with the price listed in cents in the export file. This function is available when exporting using the "Automatic Export Format".

To use this function, go to: Utilities > Export Data > Stock Items

From the Export format dropdown box, select the "Automatic Export Format".

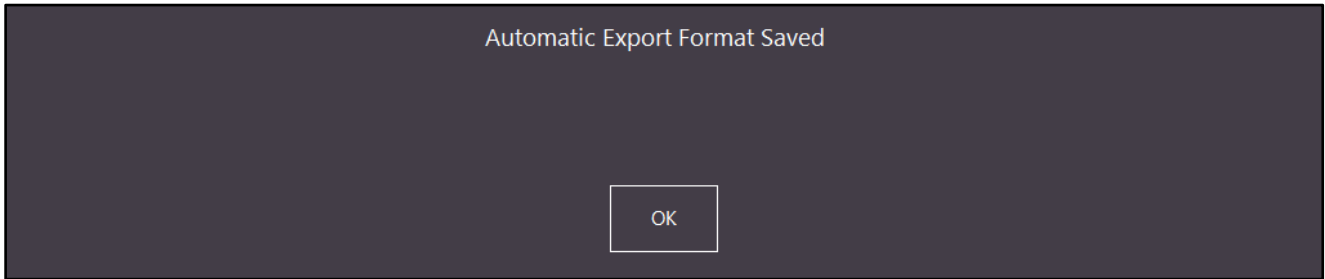
Prices in Cents is available from the bottom-right corner of the window which can be used to enable this function.

Note that if the Automatic Export Format hasn't previously been used/saved, you may need to select the specific fields that you require in the exported data.

The screenshot shows a window titled "export stock items" with a close button in the top right corner. At the top, there is a dropdown menu labeled "Export" with "Automatic Export Format" selected. A yellow arrow points to this dropdown. Below this is a section titled "Export Specific Fields by Range" containing 24 numbered dropdown menus (1-24) and a "Clear" button. To the right of this section are three checkboxes: "Include Headers" (unchecked), "Webstore Items Only" (unchecked), "Remove Padding" (unchecked), and "Prices in Cents" (checked). A yellow arrow points to the "Prices in Cents" checkbox. In the bottom right corner, there is a "Save Format" button.

Once you have selected the required fields and ensured that the "Prices in Cents" option is enabled, press the "Save Format" button on the bottom-right corner of the screen.

An "Automatic Export Format Saved" message will appear, indicating that the format was saved successfully. Press the "OK" button to dismiss the prompt.



This format will be used when data is exported using the Automatic Export Format.

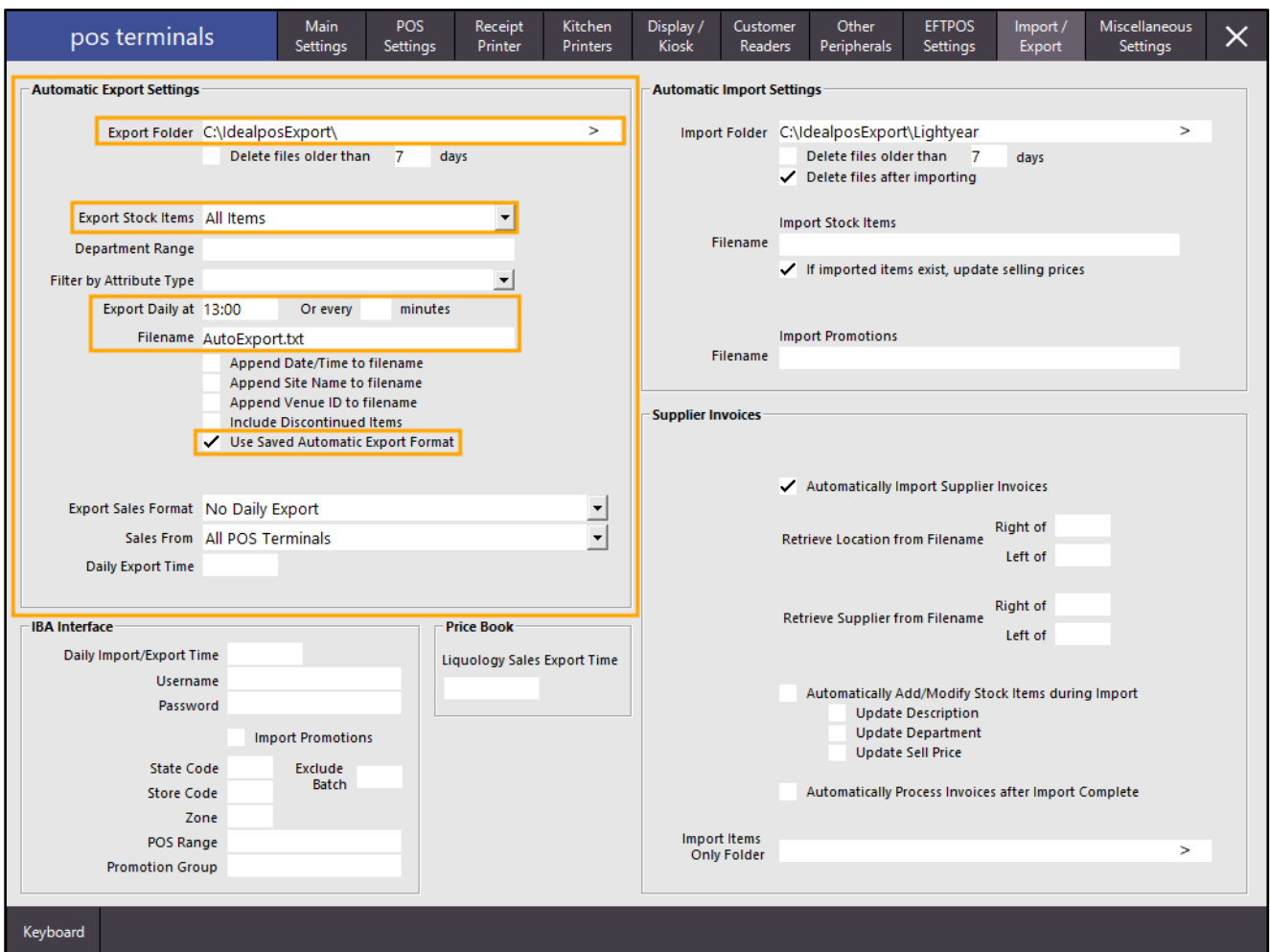
In order to use the Automatic Export format, you will need to configure an Automatic Export in Idealpos.

To do this, go to: Setup > POS Terminals > Modify > Import/Export > Automatic Export Settings

In the Automatic Export Settings, configure the details as required.

The key details which are required are:

- Export Folder
- Export Stock Items – All items
- Export Daily at (enter in 24 hour format)/Or every # minutes
- Filename
- Use Saved Automatic Export Format



idealpos Update History

Once configured, close the POS Terminals configuration screen, then wait until the time configured in the "Daily Export at" has lapsed.

The Automatic Export file will be created in the Export Folder as configured above.

When "Prices in Cents" is enabled, the decimal place in the price is completely omitted.

Whereas when "Prices in Cents" is disabled, the decimal place will appear for all prices in the export file.

In the below example, the sample export file was produced with the Prices in Cents option disabled:

```
110002", "CHEESE CAULIFLOWER", "1.85", "6.00"  
110003", "CHATS POTATOES", "1.10", "6.00"  
110004", "TOMATO SALAD", "0.90", "5.00"  
111001", "LAMB & FETTA PIZZA", "9.65", "16.50"  
111002", "SOME LIKE IT HOT PIZZA", "9.85", "17.00"  
111003", "MUSHROOM PIZZA", "8.65", "15.00"
```

In the below example, the sample export file was produced with the Prices in Cents option enabled:

```
110002", "CHEESE CAULIFLOWER", "185", "600"  
110003", "CHATS POTATOES", "110", "600"  
110004", "TOMATO SALAD", "90", "500"  
111001", "LAMB & FETTA PIZZA", "965", "1650"  
111002", "SOME LIKE IT HOT PIZZA", "985", "1700"  
111003", "MUSHROOM PIZZA", "865", "1500"
```

Export Stock Items – Option to Remove Padding

This function adds the ability to export Stock Items without padding (i.e. any white will be removed). This function is available when exporting using the "Automatic Export Format".

To use this function, go to: Utilities > Export Data > Stock Items

From the Export format dropdown box, select the "Automatic Export Format".

Remove Padding is available from the bottom-right corner of the window which can be used to enable this function.

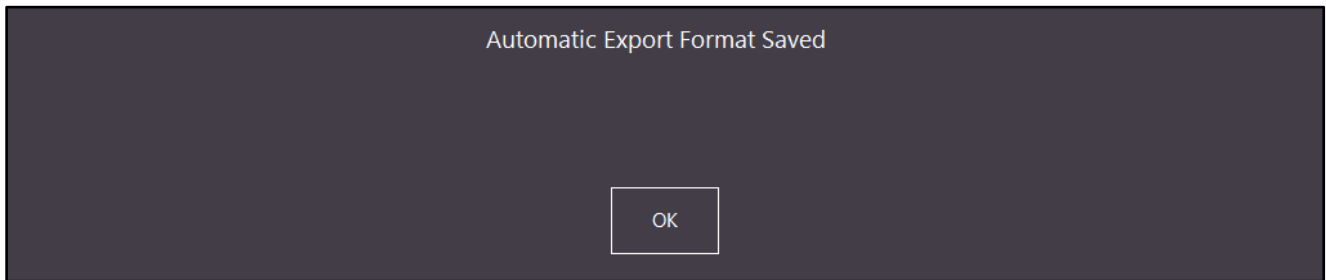
Note that if the Automatic Export Format hasn't previously been used/saved, you may need to select the specific fields that you require in the exported data.

The screenshot shows a window titled "export stock items" with a close button in the top right corner. At the top, there is a dropdown menu labeled "Export" with "Automatic Export Format" selected. A yellow arrow points to this dropdown. Below this is a section titled "Export Specific Fields by Range" containing a grid of 24 dropdown menus, numbered 1 through 24. A "Clear" button is located below the grid. To the right of the grid is a checkbox labeled "Include Headers" which is checked. At the bottom right of the grid area, there are three checkboxes: "Webstore Items Only" (unchecked), "Remove Padding" (checked), and "Prices in Cents" (unchecked). A yellow arrow points to the "Remove Padding" checkbox. In the bottom right corner of the window, there is a "Save Format" button.

idealpos Update History

Once you have selected the required fields and ensured that the "Prices in Cents" option is enabled, press the "Save Format" button on the bottom-right corner of the screen.

An "Automatic Export Format Saved" message will appear, indicating that the format was saved successfully. Press the "OK" button to dismiss the prompt.



This format will be used when data is exported using the Automatic Export Format.

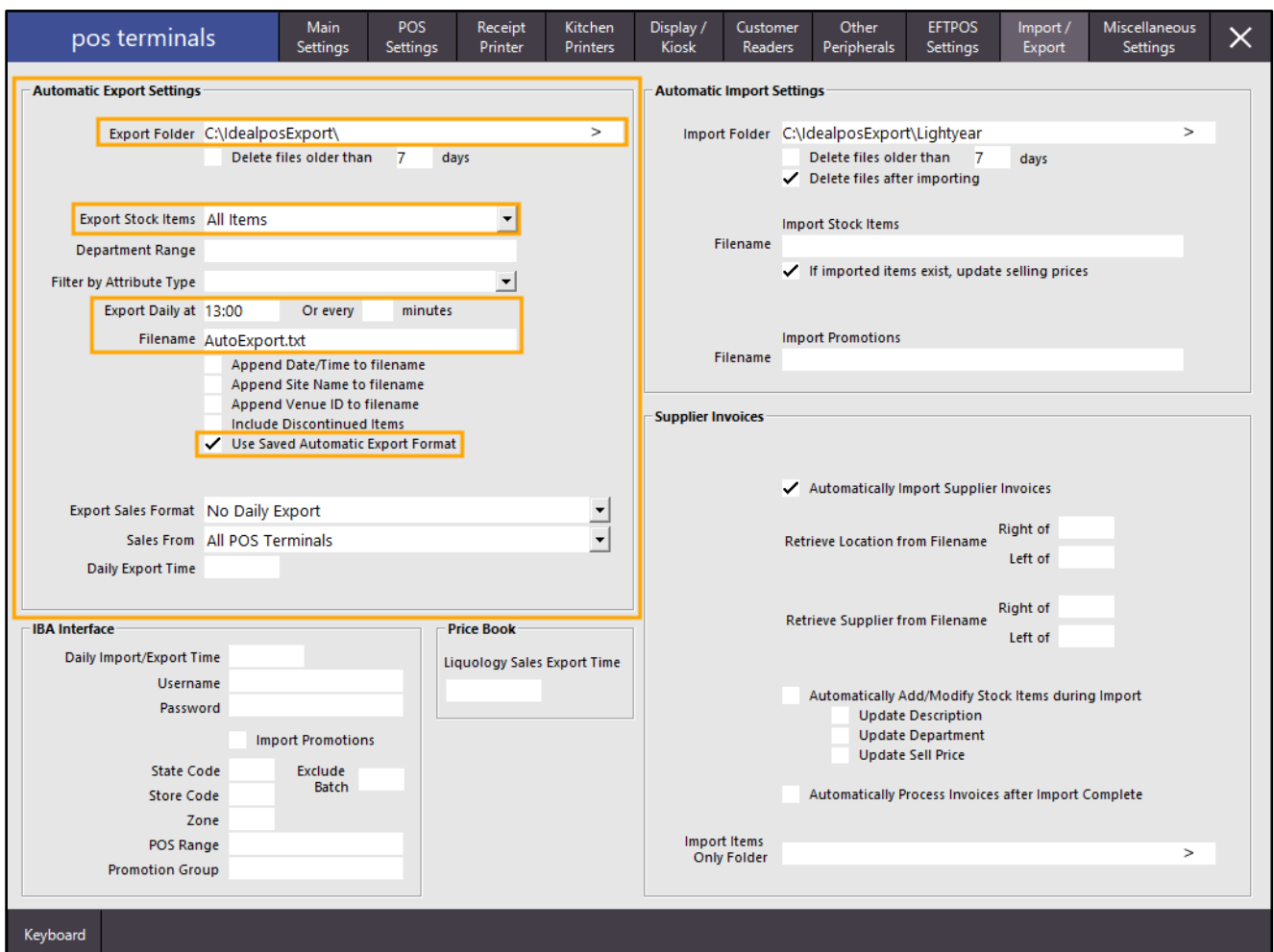
In order to use the Automatic Export format, you will need to configure an Automatic Export in Idealpos.

To do this, go to: Setup > POS Terminals > Modify > Import/Export > Automatic Export Settings

In the Automatic Export Settings, configure the details as required.

The key details which are required are:

- Export Folder
- Export Stock Items – All items
- Export Daily at (enter in 24 hour format)/Or every # minutes
- Filename
- Use Saved Automatic Export Format



Once configured, close the POS Terminals configuration screen, then wait until the time configured in the "Daily Export at" has lapsed.

The Automatic Export file will be created in the Export Folder as configured above.

When "Remove Padding" is enabled, any white space in each line of the exported data is omitted, simply being separated by commas.

Whereas when "Remove Padding" is disabled, any white space in each line will be included in the output file.

In the below example, the sample export file was produced with the Remove Padding option disabled (white space included in each line):

```
"      110002", "CHEESE CAULIFLOWER", "1.85", "6.00"  
"      110003", "CHATS POTATOES", "1.10", "6.00"  
"      110004", "TOMATO SALAD", "0.90", "5.00"  
"      111001", "LAMB & FETTA PIZZA", "9.65", "16.50"  
"      111002", "SOME LIKE IT HOT PIZZA", "9.85", "17.00"  
"      111003", "MUSHROOM PIZZA", "8.65", "15.00"
```

In the below example, the sample export file was produced with the Prices in Cents option enabled (white space omitted from each line):

```
"110002", "CHEESE CAULIFLOWER", "1.85", "6.00"  
"110003", "CHATS POTATOES", "1.10", "6.00"  
"110004", "TOMATO SALAD", "0.90", "5.00"  
"111001", "LAMB & FETTA PIZZA", "9.65", "16.50"  
"111002", "SOME LIKE IT HOT PIZZA", "9.85", "17.00"  
"111003", "MUSHROOM PIZZA", "8.65", "15.00"
```

idealpos Update History

Ishida ScaleLink Export – Option To Set Price Level

This function adds the ability to set a Price Level for the exported Stock Items when using the Ishida ScaleLink Export format. Previous to this change, the Ishida ScaleLink Export would push Price Level One, regardless of what the POS Terminal Price Level was locked to. With this change, the Price Level can now be specifically defined in the Automatic Export Settings so that the desired Price Level is exported.

To configure and use this function, go to:

Setup > POS Terminals > Select Terminal > Modify > Import/Export

From the "Export Stock Items" dropdown box, select "Ishida ScaleLink Export".

A Price Level field will be displayed to the right-hand side of the Export Stock Items dropdown box.

Enter a desired Price Level between 1 to 12 that you want to use for the Ishida ScaleLink Link Export.

Enter or update any other configuration options as required:

The screenshot displays the 'pos terminals' application window with several configuration panels. The 'Automatic Export Settings' panel is the primary focus, showing the following configuration:

- Export Folder:** C:\IdealposExport\
- Delete files older than:** 7 days
- Export Stock Items:** Ishida ScaleLink Export (highlighted with a yellow box)
- Price Level:** 1 (highlighted with a yellow box)
- Department Range:** (empty)
- Filter by Attribute Type:** (empty)
- Export Daily at:** Or every 1 minutes
- Filename:** AutoExport.txt
- Options:** Append Date/Time to filename, Append Site Name to filename, Append Venue ID to filename, Include Discontinued Items (all unchecked)
- Export Sales Format:** No Daily Export
- Sales From:** All POS Terminals
- Daily Export Time:** (empty)

Other visible panels include:

- Automatic Import Settings:** Import Folder (C:\IdealposExport\Lightyear), Delete files older than (7 days), Delete files after importing (checked), Import Stock Items (Filename: empty), If imported items exist, update selling prices (checked), Import Promotions (Filename: empty).
- Supplier Invoices:** Automatically Import Supplier Invoices (checked), Retrieve Location from Filename (Right of: empty, Left of: empty), Retrieve Supplier from Filename (Right of: empty, Left of: empty), Automatically Add/Modify Stock Items during Import (unchecked), Update Description (unchecked), Update Department (unchecked), Update Sell Price (unchecked), Automatically Process Invoices after Import Complete (unchecked), Import Items Only Folder (empty).
- IBA Interface:** Daily Import/Export Time, Username, Password, Import Promotions (unchecked), State Code, Store Code, Zone, POS Range, Promotion Group, Exclude Batch.
- Price Book:** Liquology Sales Export Time.

The export file will be saved to the Export Folder using the Filename configured at the time or interval configured. All Stock Items included in the export will be exported using the Price Level that has been defined.

Global Options

Global Options – Consolidated area for Interface Setup

This function has consolidated the Interfaces and Interfaces 2 tabs into a single tab in Global Options.

This change was made in order to add the ability for us to add new interfaces without creating an Interfaces 3 tab.

All Interfaces are now displayed in a list within a single Interfaces tab.

You can see which interfaces are enabled/configured by either a tick next to the name, or the type of Interface that has been selected. Once an interface has been configured, either a tickbox will appear next to the Interface name, or the Interface Type will appear next to the Interface name.

To use this function, go to: Setup > Global Options > Interfaces

A list of interfaces will be displayed on the left-hand side of the screen.

Select the interface to display the options available for configuring that interface.

Once an Interface has been configured, it will either show a tickbox or the Interface Type, depending on what the Interface Type is. Also note that some Interfaces will need to be licenced and configured in order for them to display the tickbox or the Interface Type next to the Interface.

In the below example, the eCommerce Interface has been enabled and the Reservations Interface has been configured with the Interface Type of ResDiary.

The screenshot shows the 'Global Options' window for 'site 1 (Site 1)'. The 'Interfaces' tab is active, displaying a list of interfaces on the left and configuration options for the selected 'Reservations' interface on the right.

Interfaces List:

- Allotracc
- BevCon
- Bookings
- Clipp
- Customers
- eCommerce ✓
- ePay
- Fuel Console
- Gunnebo
- Pager
- Pay@Table
- Reservations ResDiary**
- Rooms
- Slyp
- Tax Monitoring
- Web Reporting

Reservation Interface Configuration:

- Interface Type: ResDiary
- Send Transaction Details
- Link to User-Defined Status Buttons**
- Drinks Served: DRINKS AWAY
- Entree Served: ENTREE AWAY
- Main Served: MAINS AWAY
- Dessert Served: DESSERT AWAY
- Customer Type: RESERVATION

idealpos Update History

POS Screen Setup – Grids

Order Number Function – Support for Auto Text on Grids

This function adds the ability to configure an Order Number button on a POS Screen Grid with Auto Text. Using the Auto Text option within the Order Number function allows a default Order Number to be used when pressing the Order Number button.

Note that this function (Auto Text in the Order Number function) was previously available from the POS Screen Layout, but this change enables it to be used within a POS Screen Grid.

To configure and use this function, go to:

Setup > POS Screen > Grids

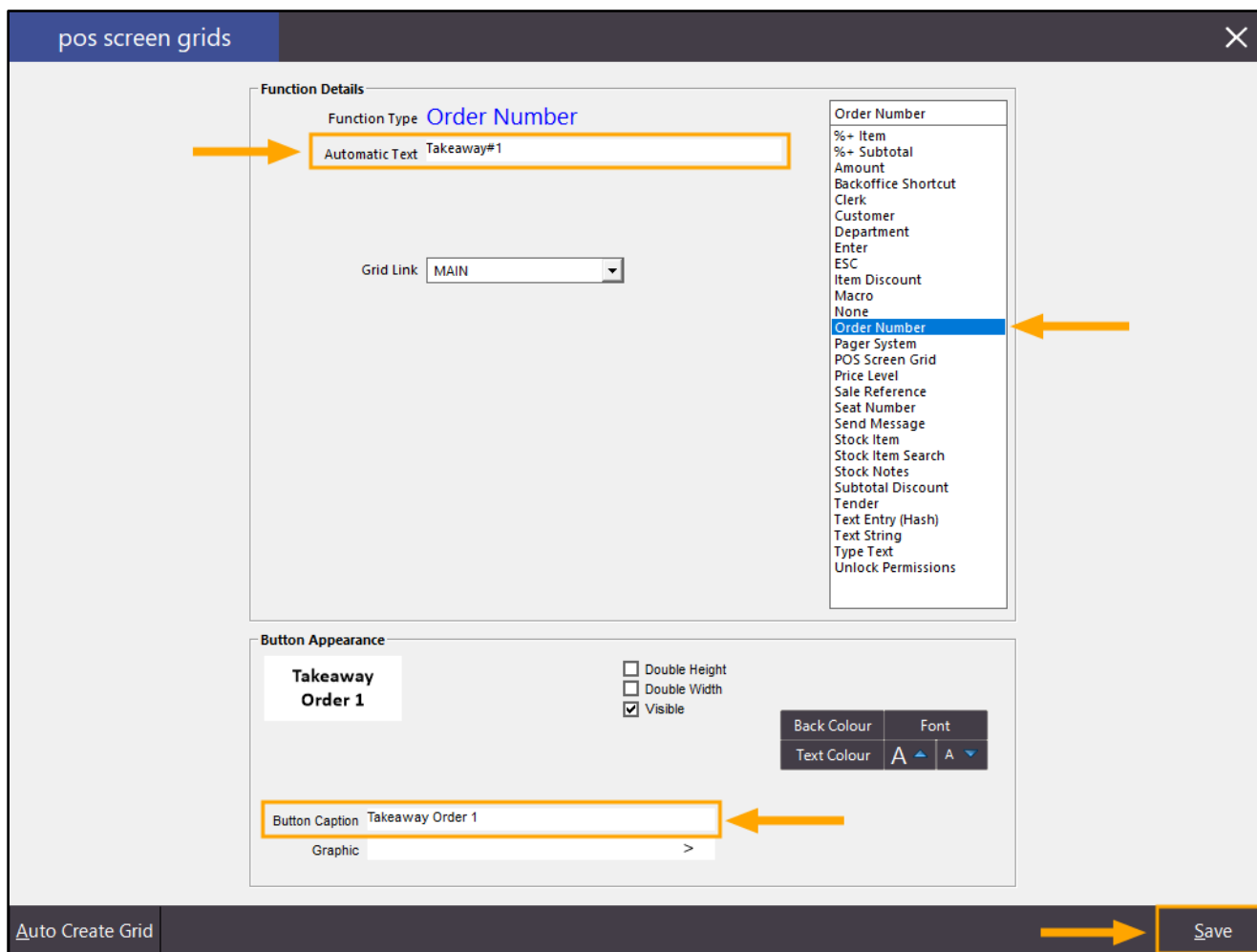
Select the grid from the list, then press "Items".

Alternatively, press the "Add" button on the bottom-right corner to create a new POS Screen Grid.

The screenshot displays the 'pos screen grids' interface. At the top, there is a 'Code Search' field with a magnifying glass icon and a search button. Below this is a table with the following columns: 'Code', 'Description', 'Width', 'Height', 'Minimum', and 'Maximum'. The table lists various grid items, with '11 POS Screen Grid' highlighted. A yellow arrow points to the right side of the table, indicating a scroll or selection action. At the bottom, there is a navigation bar with buttons for 'Items', 'Import', 'Export', 'Delete', 'Add', and 'Modify'. A yellow arrow points to the 'Items' button.

Code	Description	Width	Height	Minimum	Maximum
11	POS Screen Grid	9	6		
21	BREAD CHOICE	9	6		
22	SANDWICH SPREADS	9	6		
23	MEATS	9	6		
24	CHEESE SELECTION	9	6		
25	SALADS 1 FREE	9	6		
26	SALADS 2 FREE	9	6		
27	SALADS 3 FREE	9	6		
28	SALADS CHARGED	9	6		
29	MEAT EXTRA	9	6		
30	BURGER BUN	9	6		
31	BURGER SAUCE	9	6		
32	BURGER SAUCE 1	9	6		

Then select the Order Number function from the list available on the right-hand side of the screen. The Automatic Text field will become available towards the top of the screen. Enter an order number into the Automatic Text field. This number can be alpha-numeric and will be automatically assigned to any order when the button is pressed. Also ensure that you also assign a Button Caption which will be displayed on the button and if required, the background colour, font, text colour and size can also be adjusted as required. Once complete, press the "Save" button on the bottom-right corner of the screen.



If multiple Order Number buttons are required, repeat the above process. Once complete, you may close the POS Screen Grid.

idealpos Update History

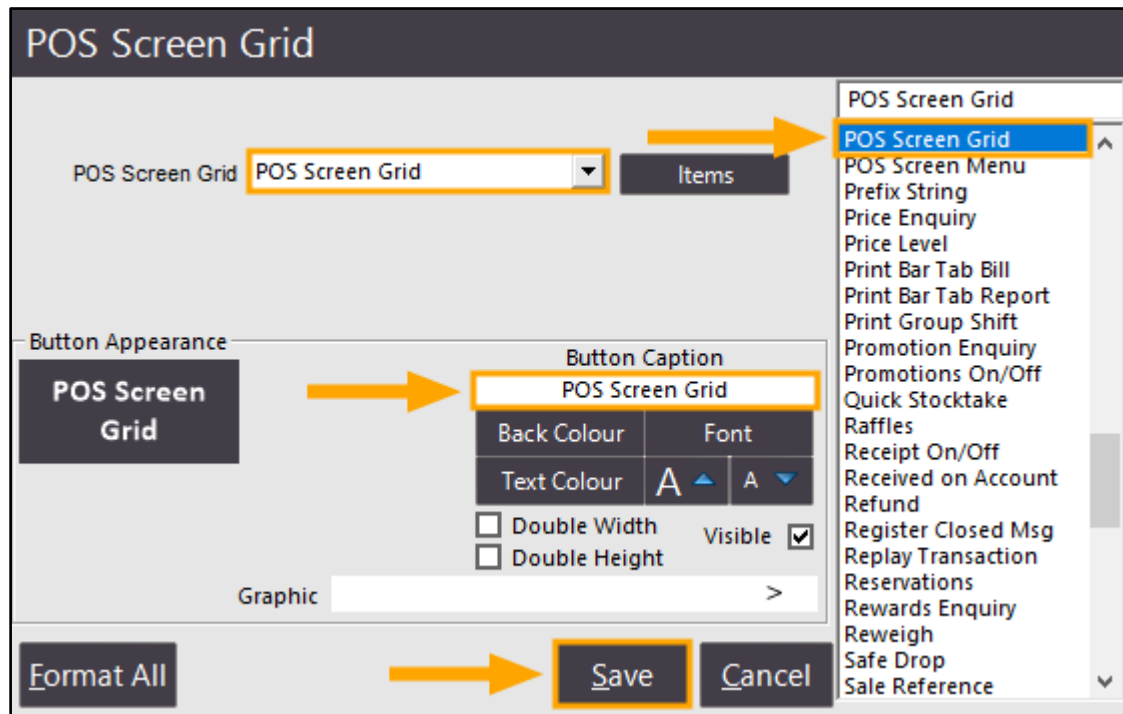
If the Order Number button was added to an existing POS Screen Grid, you may skip this step and proceed to using the button.

Otherwise, you will need to complete the next step in order to link a button on the POS Screen Layout to the POS Screen Grid that was created above.

Go to: Setup > POS Screen > POS Screen Setup > Select a Layout > Buttons

Select a blank POS Screen Button, then configure the button by selecting the "POS Screen Grid" function from the list. Finally, select the name of the POS Screen Grid from the dropdown list.

You may also name the POS Screen Grid as required and once complete, press the "Save" button to save the change.



Close the POS Screen Layout window, then open the POS screen.

Add Items to the order, then press the button on the POS Screen which is configured to open the POS Screen Grid. In the below example, the button which opens the POS Screen grid was created within the Restaurant tab.

04 Dec 10:31 Adult ID: 04-Dec-2001
 Jeremy PRICE 1

\$10.00

3x

CAPPUCCINO	1	3.50	RECEIPT	CLERK	7	8	9	CL
FLAT WHITE	1	3.50	PRICE LEVEL	5% ST DISC	4	5	6	NO SALE
SHORT BLACK	1	3.00	CUSTOMER	5% ITEM	1	2	3	X
			BAR TAB	REFUND	0	.	ENTER	
			PENDING	VOID SALE				
			TABLE MAP	VOID				

GARLIC BREAD	PASTA	BEEF	SALMON	LAMB SHANKS -2	BUTTERED BEANS	DANISH	BLUE CHEESE	KEYBOARD
SCALLOPS	DUCK	LAMB	EYE FILLET	KANGAROO 5	CHATS POTATOES	PAVLOVA	CHEDDAR	
KOPTAS	SEAFOOD	VEGE DISH	PORTERHOUSE	MUSHROOM RISOTTO	TOMATO SALAD	ICE CREAM	GHOUDA	SEAT
COB LOAF	CAESAR SALAD	PORK	DUCK BREAST	BEEF STROGANOFF	CHEESE CAULIFLOWER	SORBETS	CAMEMBERT	ENTREE AS MAIN
SPECIALS	OPEN STOCK ITEM	OPEN STOCK ITEM INSTRUCTION	POS Screen Grid ←			CHOC TART	CHEESE PLATTER 2	WITH
							CHEESE PLATTER 3	WITHOUT

DRINKS	CAFE	TAP BEER	SPIRITS	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL	MANAGER
	RESTAURANT	BOTTLE BEER & RTD	WINE				SERVICES	ADMIN

idealpos Update History

The POS Screen grid will appear with the Order Number button.

Press the button to assign an Order Number to the order using the text that was configured in the Automatic Text field.

The screenshot displays the idealpos POS interface. At the top left, it shows the date and time '04 Dec 10:37' and the user 'Jeremy PRICE 1'. The main order grid lists three items: CAPPUCINO (1 unit, 3.50), FLAT WHITE (1 unit, 3.50), and SHORT BLACK (1 unit, 3.00). To the right of the grid is a keypad with buttons for RECEIPT, CLERK, 7, 8, 9, CL, PRICE LEVEL, 5% ST DISC, 4, 5, 6, NO SALE, CUSTOMER, 5% ITEM, BAR TAB, REFUND, 1, 2, 3, X, PENDING, VOID SALE, TABLE MAP, VOID, 0, ., and ENTER. Below the grid, the quantity '3x' and the total amount '\$10.00' are displayed. A yellow arrow points to a 'Takeaway Order 1' button. At the bottom right, there is a 'Back' button. The bottom of the screen features a category menu with buttons for DRINKS, CAFE, TAP BEER, SPIRITS, COCKTAILS, FRUIT & VEG, GROCERY, RETAIL, and MANAGER. The CAFE category is expanded to show RESTAURANT, BOTTLE BEER & RTD, and WINE. The RETAIL category is expanded to show SERVICES and ADMIN.

Item	Quantity	Price
CAPPUCINO	1	3.50
FLAT WHITE	1	3.50
SHORT BLACK	1	3.00

3x \$10.00

Takeaway Order 1

Back

DRINKS	CAFE	TAP BEER	SPIRITS	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL	MANAGER
	RESTAURANT	BOTTLE BEER & RTD	WINE				SERVICES	ADMIN

After the button is pressed, the Order Number will be assigned to the order using the text that was entered into the Automatic Text field.

04 Dec 10:42 Adult ID: 04-Dec-2001
Jeremy PRICE 1

O# Takeaway#1

CAPPUCCINO	1	3.50	RECEIPT	CLERK	7	8	9	CL
FLAT WHITE	1	3.50	PRICE LEVEL	5% ST DISC	4	5	6	NO SALE
SHORT BLACK	1	3.00	CUSTOMER	5% ITEM	1	2	3	X
			BAR TAB	REFUND				
			PENDING	VOID SALE				
			TABLE MAP	VOID	0	.	ENTER	
3x \$10.00								
GARLIC BREAD	PASTA	BEEF	SALMON	LAMB SHANKS -2	BUTTERED BEANS	DANISH	BLUE CHEESE	KEYBOARD
SCALLOPS	DUCK	LAMB	EYE FILLET	KANGAROO 5	CHATS POTATOES	PAVLOVA	CHEDDAR	
KOFTAS	SEAFOOD	VEGE DISH	PORTERHOUSE	MUSHROOM RISOTTO	TOMATO SALAD	ICE CREAM	GHOUDA	SEAT
COB LOAF	CAESAR SALAD	PORK	DUCK BREAST	BEEF STROGANOFF	CHEESE CAULIFLOWER	SORBETS	CAMEMBERT	ENTREE AS MAIN
SPECIALS	OPEN STOCK ITEM	OPEN STOCK ITEM INSTRUCTION	POS Screen Grid		CHOC TART	CHEESE PLATTER 2	WITH	
							CHEESE PLATTER 3	WITHOUT
DRINKS	CAFE	TAP BEER	SPIRITS	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL	MANAGER
	RESTAURANT	BOTTLE BEER & RTD	WINE				SERVICES	ADMIN

The order can then be finalised by pressing the ENTER button, then press a tender amount. The Kitchen Docket and final customer receipt will both show the Order Number from the Automatic Text field.

* ORDER Takeaway#1 *

Jeremy 04-Dec-2019
10:50:42

1x CAPPUCCINO
1x FLAT WHITE
1x SHORT BLACK

IDEALPOS

1/212 Curtin Ave West
Eagle Farm QLD 4009
Australia

TAX INVOICE
123-456-789-11

#001434-1 Jeremy 04-Dec-2019 10:50:42

*** ORDER Takeaway#1 ***

-----BEVERAGE-----

CAPPUCCINO*	\$3.50
FLAT WHITE*	\$3.50
SHORT BLACK*	\$3.00
TOTAL	\$10.00
GST Subtotal	\$10.00
GST Amount	\$0.91
CASH	\$10.00
FOOD TOTAL	\$0.00
BEVERAGE TOTAL	\$10.00
Other Categories TOTAL	\$0.00

*indicates taxable supply

Powered by Idealpos

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POS Terminals

Support for Idealpos ARK Cash Drawer

This function adds support for the Idealpos ARK Cash Drawer to Idealpos.

The steps to configure the Idealpos ARK Cash Drawer are fairly straight-forward.

Simply go to: Setup > POS Terminals > Select Terminal > Modify > Other Peripherals

Under the Cash Drawer section, select the "Idealpos ARK" option from the Connection dropdown box.

The screenshot displays the 'pos terminals' configuration window with the 'Other Peripherals' tab selected. The 'Cash Drawer' section is highlighted, showing the following settings:

- Connection:** Idealpos ARK (selected in a dropdown menu)
- Test:** A button next to the connection dropdown.
- Pulses:** 125
- ASCII Character:** 0
- Baud:** 19200
- 2nd Drawer:** None (selected in a dropdown menu)
- Test:** A button next to the 2nd drawer dropdown.

Other peripheral sections visible include:

- Caller ID Modem:** Type: Custom, Connection: None, Settings: 2400,n,8,1, Init String: (empty)
- Talaris NMD Cash Dispenser:** Connection: None
- Flexi-NET POS-Debit Interface:** Connection: None
- Sprint Liquor Gun Interface:** Connection: None
- Gilbarco T24 Transac Console:** Connection: None, Settings: 4800,e,7,1

At the bottom left, a 'Keyboard' section is partially visible with 'Type: Keyboard Wedge' selected.

Restaurant

Prompt for Covers uses Default Covers when Occupying new table

This change updates the logic that is used to display the number of covers in the Covers Prompt that appears in Idealpos when selecting a table from the table map. As part of this change, a prompt has also been introduced when entering a number of covers that exceeds 99.

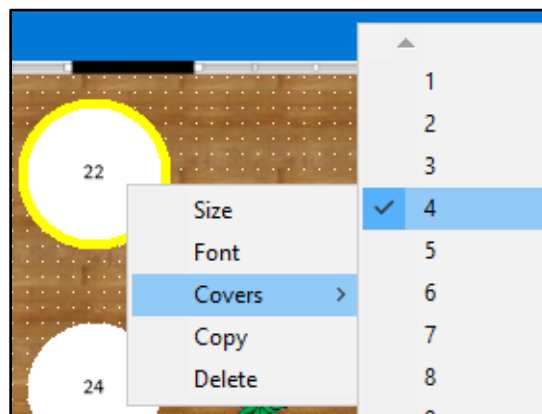
Previous to this change, the Default Covers that were set for a table were not fixed, which meant that when you saved an order to a table and you entered a number of covers that were different to the default number of covers, the default covers for the table were then modified with the newly entered number of covers. After the table was paid and the next time the table was used, the newly entered number of covers were displayed in the Covers Prompt instead of the default covers that were originally set for the table.

After this change, the Default Covers that are set for a table are now fixed, which means that when you save an order to a table and you enter a number of covers for the table which differs to the Default Covers, the next time the table is used, the default number of covers will appear in the Covers Prompt instead of the number of covers that were last used for the table.

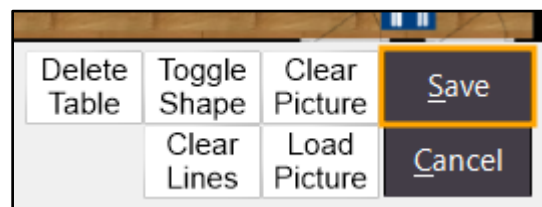
There is no configuration involved to enable this as this logic/behaviour has been hard-coded into Idealpos.

To use this function, go to: Setup > Restaurant > Table Maps > Select Map > Modify.

Right-click on a table, select "Covers" then click on the number of Covers that you want to set as the default number for the table.



You may repeat the above process for all tables that you want to set a Default number of covers. Once completed, press the "Save" button on the bottom-right corner of the screen.



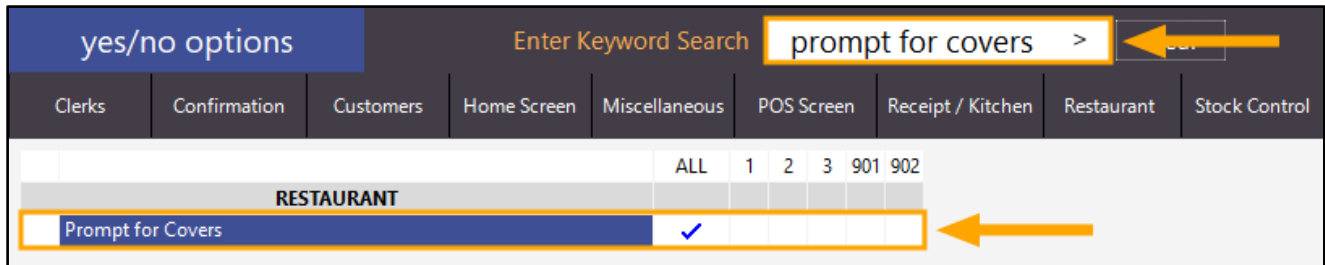
idealpos Update History

Close the Table Maps screen.

Go to: Setup > Yes/No Options and ensure that the below options are configured as follows:

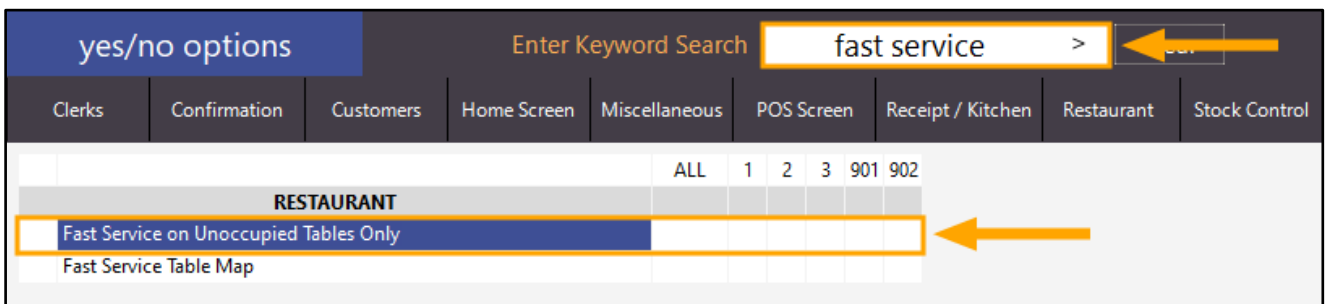
- Prompt for Covers – Enabled/Checked
- Fast Service on Unoccupied Tables Only – Disabled/Unchecked

The configuration of these Yes/No Options is shown below:



The screenshot shows the 'yes/no options' interface. The search bar contains 'prompt for covers'. The 'RESTAURANT' section is expanded, and the 'Prompt for Covers' option is highlighted with a blue bar and a checked checkbox. A yellow arrow points to the search bar, and another points to the checkbox.

yes/no options		Enter Keyword Search		prompt for covers >		SEARCH			
Clerks	Confirmation	Customers	Home Screen	Miscellaneous	POS Screen	Receipt / Kitchen	Restaurant	Stock Control	
				ALL	1	2	3	901	902
RESTAURANT									
Prompt for Covers				✓					

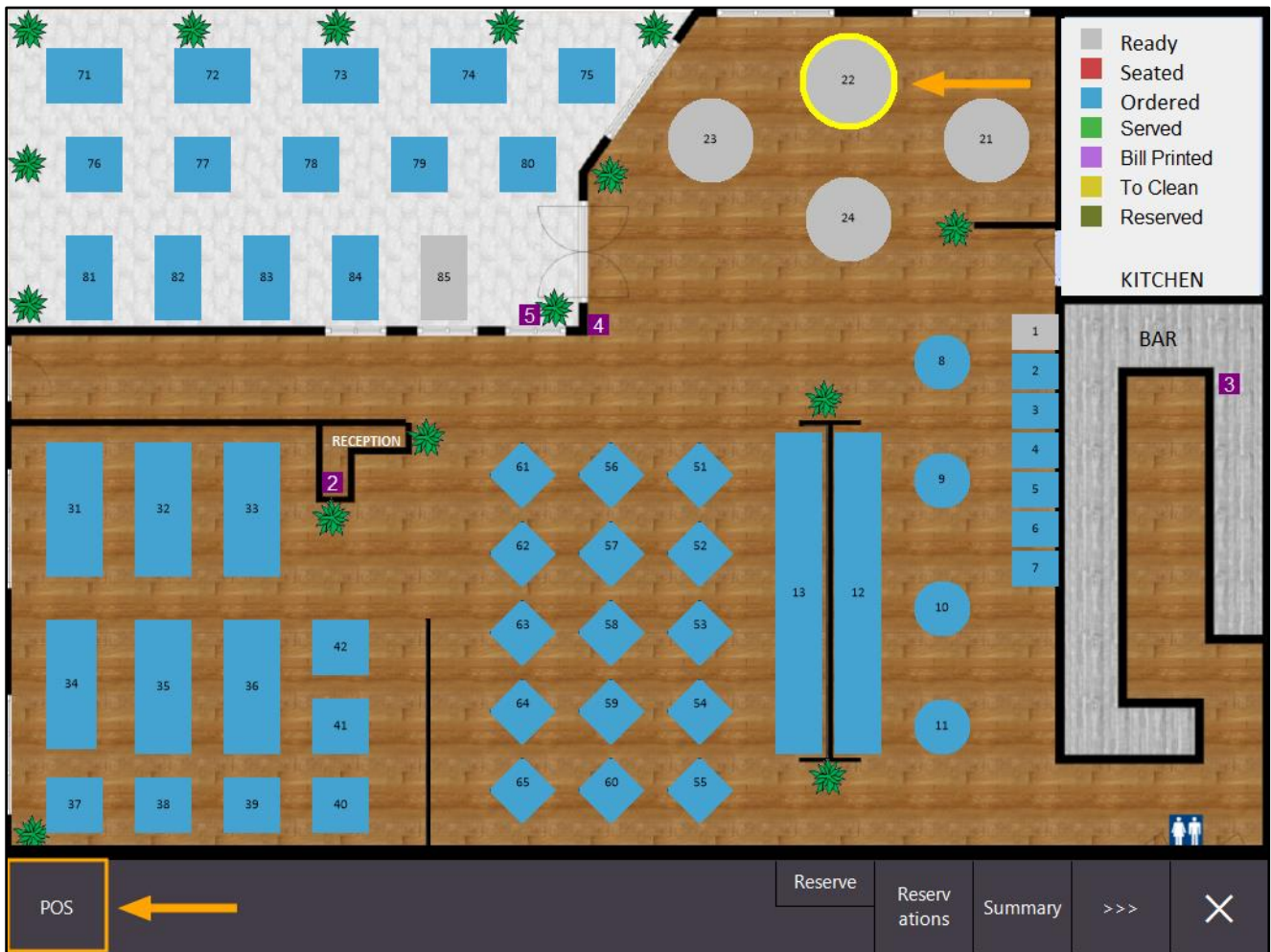


The screenshot shows the 'yes/no options' interface. The search bar contains 'fast service'. The 'RESTAURANT' section is expanded, and the 'Fast Service on Unoccupied Tables Only' option is highlighted with a blue bar and an unchecked checkbox. A yellow arrow points to the search bar, and another points to the checkbox.

yes/no options		Enter Keyword Search		fast service >		SEARCH			
Clerks	Confirmation	Customers	Home Screen	Miscellaneous	POS Screen	Receipt / Kitchen	Restaurant	Stock Control	
				ALL	1	2	3	901	902
RESTAURANT									
Fast Service on Unoccupied Tables Only									
Fast Service Table Map									

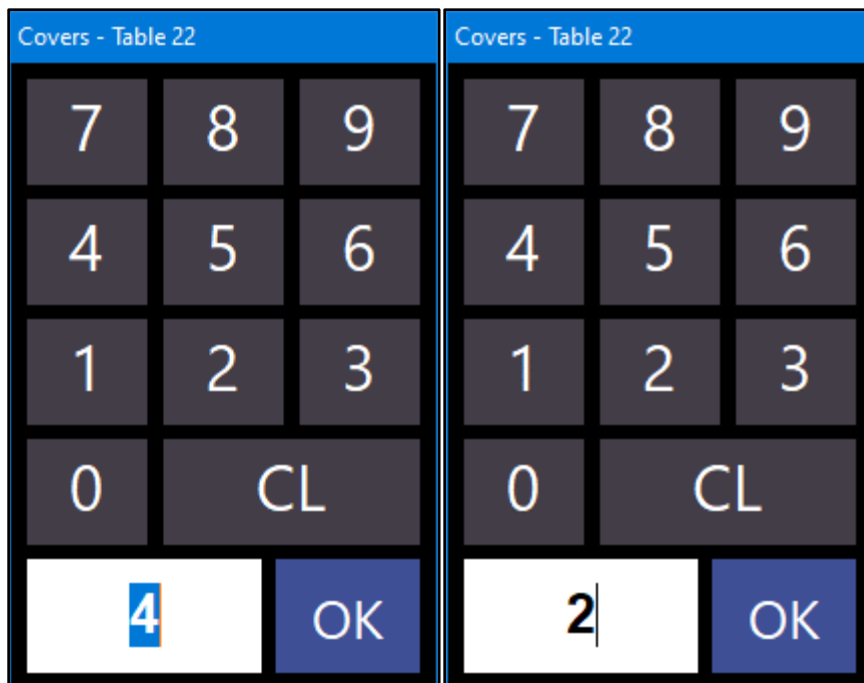
Once the Yes/No options have been configured, close the Yes/No Options window, then open the POS Screen by pressing the "POS" button from the top-left corner of the back-office dashboard.

From the POS screen, press the "Table Map" button, then select a table from the map and press the "POS" button on the bottom-left corner of the screen.



The Covers prompt will be displayed and will show the default number of covers for the table.

The example on the left is the default number of covers for the table and the example on the right is the number of covers that have been manually entered for this particular sale.



idealpos Update History

After pressing "OK" to the Covers prompt, the POS screen is displayed. Add any required items to the order, then press the "Table Map" button to save the sale to the table. The number of entered Covers are displayed on the left-hand side of the screen in the centre in brackets as indicated below.

The screenshot displays the POS interface with the following elements:

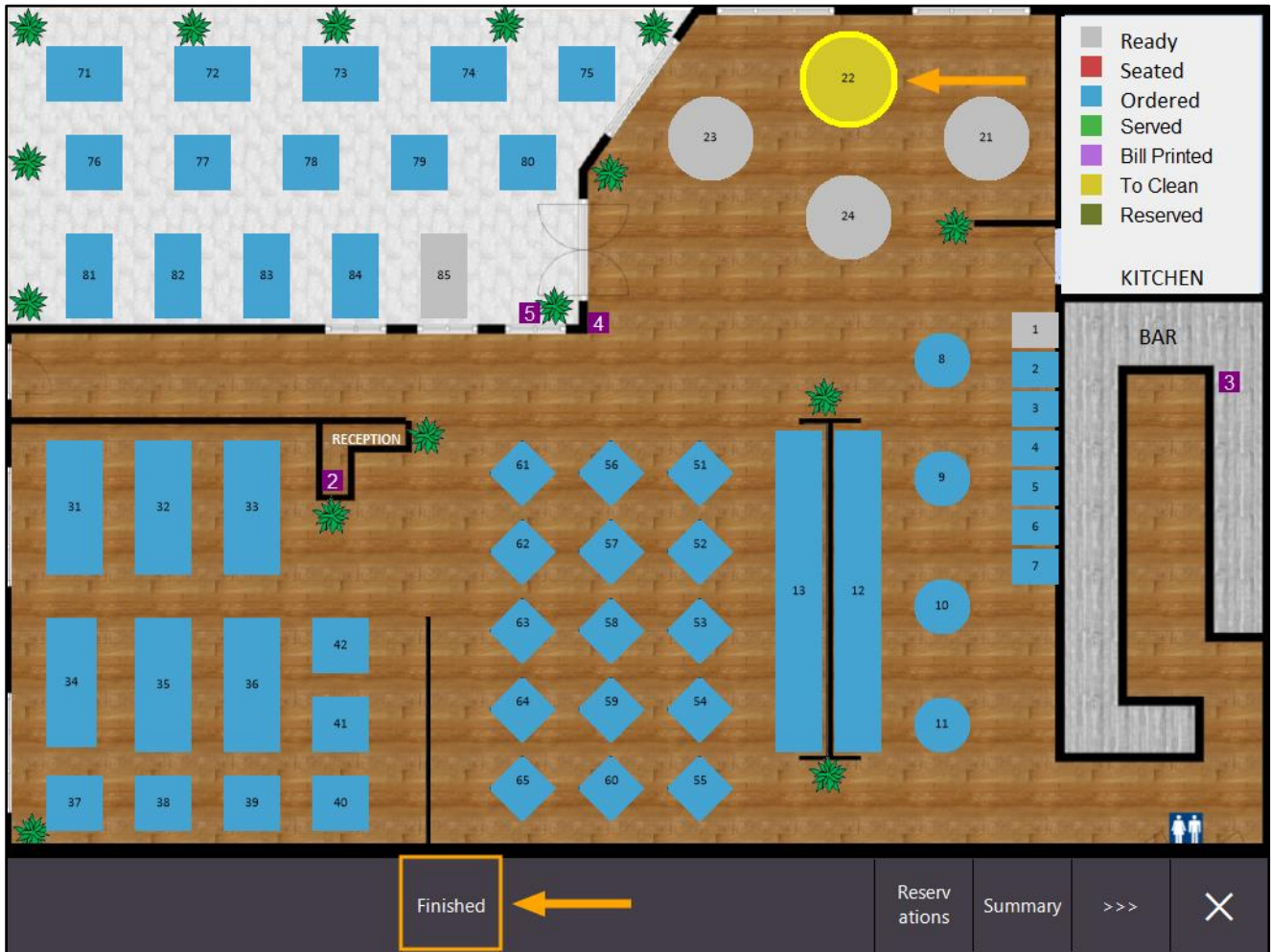
- Order Summary (Top Left):**

CAPPUCCINO	1	3.50
FLAT WHITE	1	3.50
- Navigation Buttons (Top Right):** RECEIPT, CLERK, 7, 8, 9, CL, PRICE LEVEL, 5% ST DISC, 4, 5, 6, NO SALE, CUSTOMER, 5% ITEM, BAR TAB, REFUND, 1, 2, 3, X, PENDING, VOID SALE.
- Table Map Section (Middle):**
 - Table 22 (2) ←
 - TABLE SALE
 - \$7.00
 - TABLE MAP
 - VOID
 - 0 . ENTER
- Product Menu (Bottom):**

CAPPUCCINO	FLAT WHITE	LATTE	CHAI	SHORT BLACK	LONG BLACK	MOCHA	HOT CHOC	TEA
EXTRA HOT	SKINNY	DECAF	1 SUGAR	TAKEAWAY	SMALL	ICED DRINK	WATER	KEYBOARD
EXTRA CHOC	SOY	WEAK	2 SUGAR	MARSH MALLOW	MEDIUM	MILKSHAKE	JUICE	ORDER NUMBER
NO CHOC	ALMOND	DOUBLE SHOT	3 SUGAR	EQUAL	LARGE	SMOOTHIE	SOFTDRINK	REWARDS ENQUIRY
DRINKS	CAFE	TAP BEER	SPIRITS	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL	MANAGER
	RESTAURANT	BOTTLE BEER & RTD	WINE				SERVICES	ADMIN

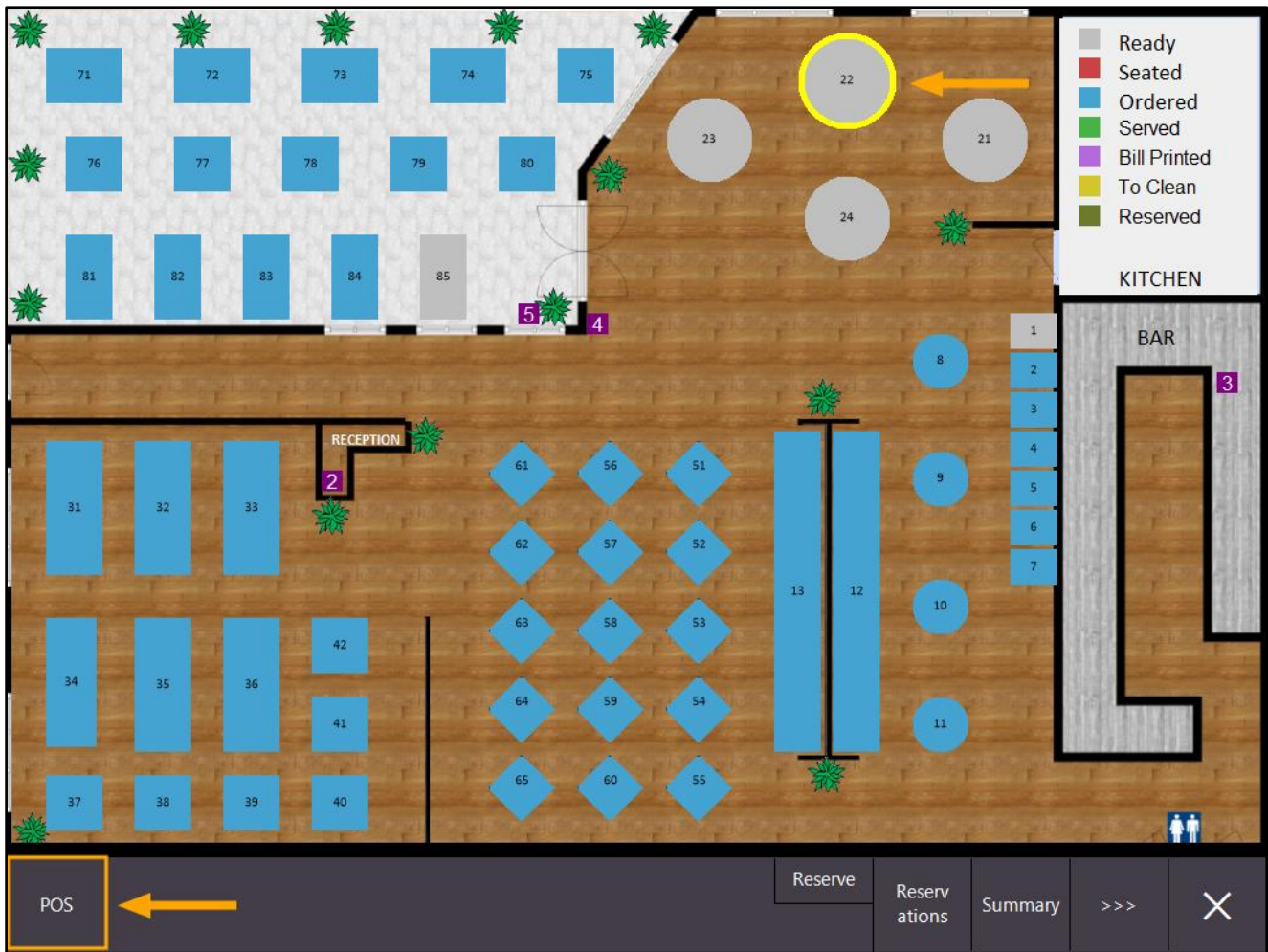
Press the "Table Map" button to save the sale to the table and to go to the Table Map screen.
 Select the table from the Table Map and press the "Pay All" button.
 Press the "ENTER" button, select a tender type to finalise the sale.

The Table Map will be displayed and depending on how your system is setup, the table status may appear as "To Clean". If required, select the table and press the "Finished" button.

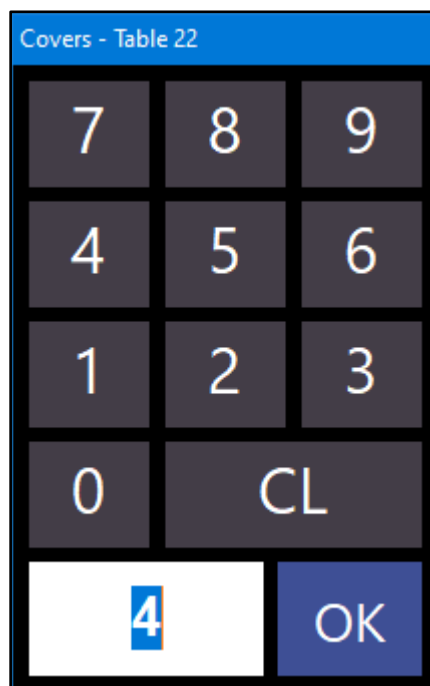


idealpos Update History

You can now select the same table and press the "POS" button.



The Prompt for Covers window will appear, and the number of covers displayed will be the Default Covers that were set for the Table via Setup > Restaurant > Table Maps > Modify (in this case, the number of default covers were set to 4), not the number of covers that were entered for the table the last time it was used (the last time the table was used in the above example, 2 covers were entered for the table).



In addition to the above change, when entering a number of Covers which exceeds 99 as per the below example, a prompt will be displayed to confirm:

Covers - Table 22

7	8	9
4	5	6
1	2	3
0	CL	
100		OK

Pressing “Yes” will proceed to the Table Map with the entered number of covers, or pressing No will return to the Covers Prompt so that you can enter a smaller number of Covers.

You have entered a large number of covers!

Are you sure you want to continue?

idealpos Update History

Stock Purchases

Due Date on Supplier Invoices for Xero Accounting

This function adds the ability to set the payment due date days for any supplier and to send that final Due Date to Xero Accounting.

The way this function works is by specifying a number of days in the Payment Due Date Days field of the Supplier (typically, this is the number of days that the Supplier requires the Invoice to be paid by).

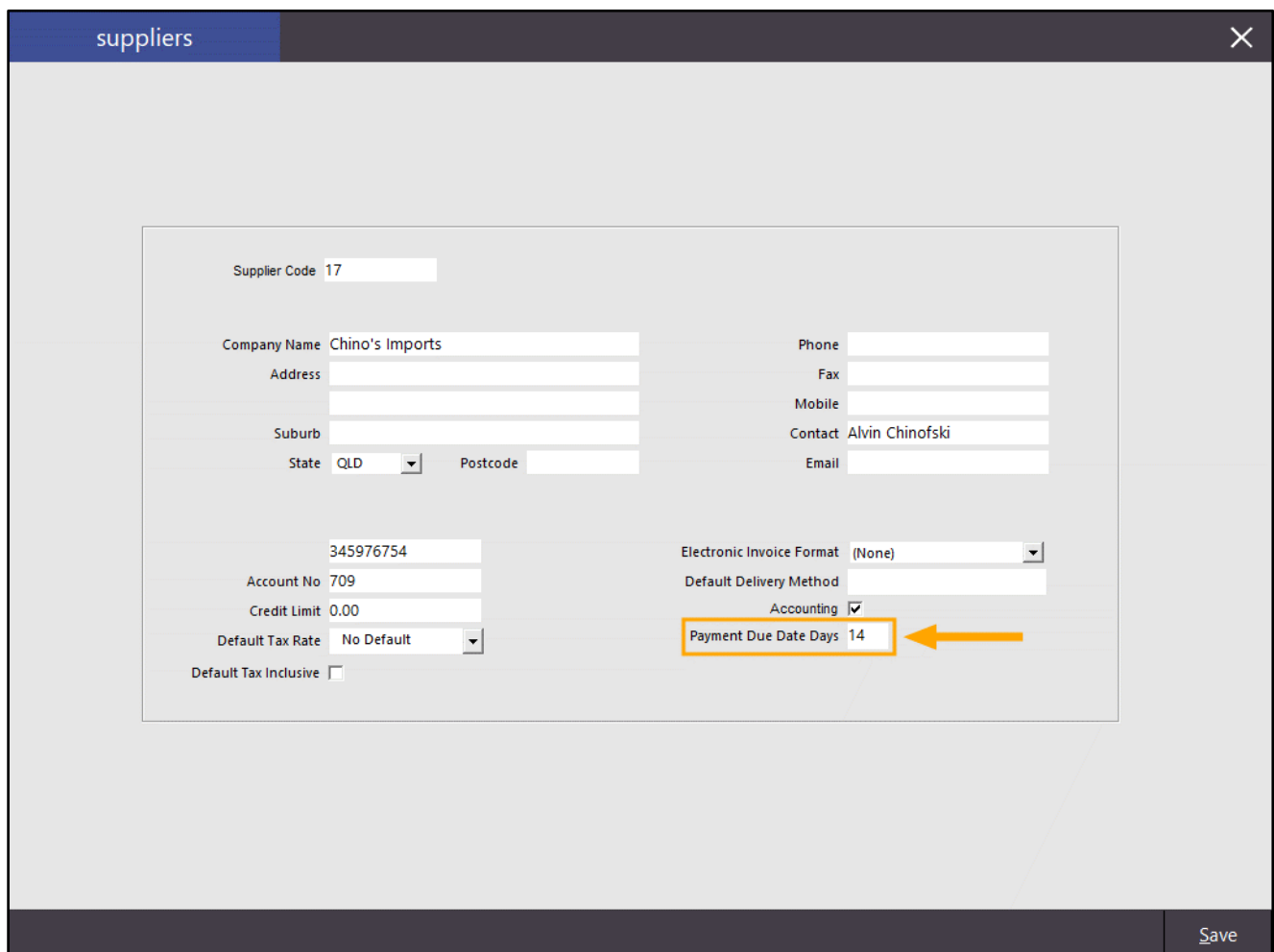
Then when a Stock Receive/Invoice is created in Idealpos for that Supplier, the Due Date for the Invoice is calculated by adding the number of Payment Due Date Days to the Invoice Date. The Invoice is then sent to Xero Accounting and will include the Due Date for payment.

To configure and use this function, go to: File > Suppliers > Suppliers

Select the Supplier from the list, then press "Modify"

The default Payment Due Date Days will be "14", however, you will want to set this to the number of days that the Supplier requires payment from the Invoice Date.

Once the Payment Due Date Days have been updated, press "Save" on the bottom-right corner to save the change.



The screenshot shows the 'suppliers' form in the Idealpos application. The form is titled 'suppliers' and has a close button (X) in the top right corner. The form contains several fields for supplier information:

- Supplier Code: 17
- Company Name: Chino's Imports
- Address: (empty)
- Suburb: (empty)
- State: QLD (dropdown)
- Postcode: (empty)
- Phone: (empty)
- Fax: (empty)
- Mobile: (empty)
- Contact: Alvin Chinofski
- Email: (empty)
- Account No: 345976754
- Credit Limit: 709
- Default Tax Rate: No Default (dropdown)
- Default Tax Inclusive:
- Electronic Invoice Format: (None) (dropdown)
- Default Delivery Method: (empty)
- Accounting:
- Payment Due Date Days: 14 (highlighted with a yellow box and an arrow pointing to it)

The 'Save' button is located in the bottom right corner of the form.

Go to Transactions > Stock Control > Stock Purchases

Select an Invoice, then press "Modify".

Ensure that the correct "Date of Invoice" has been entered.

The date displayed in the "Due Date" field will be automatically updated based off the Invoice Date.

If required, you can also change the date displayed in the Due Date field from the default value.

Note however that if you modify the Invoice Date, the Due Date will be re-calculated using the Payment Due Date Days configured in the Supplier.

stock received

Purchase Type: Stock Received Location: Location 1

Supplier: 17 Chino's Imports Purchase Order No: Invoice No: Date of Invoice: 05/12/2019 Stock Process Date: 05/12/2019 Due Date: 19/12/2019 Tax Inc:

Stock Code	Supplier Code	Description	Quantity	Unit Cost	Disc %	Tax 1	Total	Last Cost
903001		STANLEY SHOVEL	8	17.85	0.00	GST	142.80	
903002		STANDARD SHOVEL	6	11.65	0.00	GST	69.90	
903003		GARDEN SPADE	5	12.35	0.00	GST	61.75	
903004		GARDEN FORK	7	12.35	0.00	GST	86.45	
903005		CROWBAR SMALL	16	16.5	0.00	GST	264.00	
903006		CROWBAR LARGE	8	18.65	0.00	GST	149.20	
903007		SHOVEL HANDLE	9	6.55	0.00	GST	58.95	
903501		SMALL TERRACOTTA POT	5	3.5	0.00	GST	17.50	
903502		MED TERRACOTTA POT	9	5.5	0.00	GST	49.50	
903503		LARGE TERRACOTTA POT	8	6.5	0.00	GST	52.00	
903504		TERRACOTTA BASE	7	4	0.00	GST	28.00	
903505		SMALL PLASTIC POT	9	2.6	0.00	GST	23.40	
903506		MED PLASTIC POT	8	2.9	0.00	GST	23.20	
903507		LARGE PLASTIC POT	5	3.4	0.00	GST	17.00	
903508		PLASTIC BASE	14	2.3	0.00	GST	32.20	

8x STANLEY SHOVEL (903001) @ \$17.85 each 9 on Order

Subtotal: 1075.85

Freight: 0.00

Admin Fee: 0.00

Tax: 107.59

Invoice Total: 1183.44

Save

Once the Invoice is correct, press the "Save" button on the bottom-right corner.

idealpos Update History

Select the Invoice from the list of Stock Purchases, then press "Process".

The screenshot shows the 'stock purchases' window with a table of records. The second row is highlighted in blue, and a yellow arrow points to the '\$1,075.85' value in the 'Total' column. At the bottom right, a yellow arrow points to the 'Process' button.

Code	Supplier Name	Date	Type	Order No.	Invoice No.	Details	Processed	Location	Total
17	Chino's Imports	01/12/2019	Invoice	20191205			No	Location 1	\$4.00
17	Chino's Imports	05/12/2019	Invoice				No	Location 1	\$1,075.85
17	Chino's Imports	17/06/2019	Order	11			No	Location 1	\$17.85
3	Coca Cola	14/10/2019	Invoice	14	20191014	20191014	No	Location 1	\$64.83

Buttons: Add, Modify, Delete, Copy, View, Email, Import, Export, Labels, Items Only, Process

Filters: Show Purchase Orders, Show Stock Received, Show Orders NOT Received, Show Tax Inclusive, Send to Label Printing

Once the Invoice has been Processed, go to: Accounting > Supplier Invoices
Click into the "Send?" field next to the Invoice, then Send the Invoice to the Accounting package.

The screenshot shows the 'supplier invoices' window with a table of invoice records. The first row is highlighted in blue.

Date	Invoice #	Supplier	Amount	Sent to Accounting	Send?
Wednesday 29/06/2016 08:48:31	35136511	CARLTON UNITED BREWERIES	332.20	No	

Once the Invoice has been sent to the Accounting package, a "Successful Transfer to Accounting!" prompt will be displayed.

A dark gray dialog box with the text "Successful Transfer to Accounting!" centered at the top. Below the text is a white rectangular button with the text "OK" centered inside.

From this point on, you can follow the standard procedure when handling invoices in your Xero Accounting package. For more information about using Xero Accounting with Idealpos, please visit the [Supplier Invoices](#) page within the [Xero API Accounting Interface](#) topic of the Idealpos User Guide.

Yes/No Options

Yes/No Option – Auto-Enable Stock Items in Location when modified

This Yes/No option adds the ability to control if a Stock Item is automatically enabled in a location when it is modified from that same location.

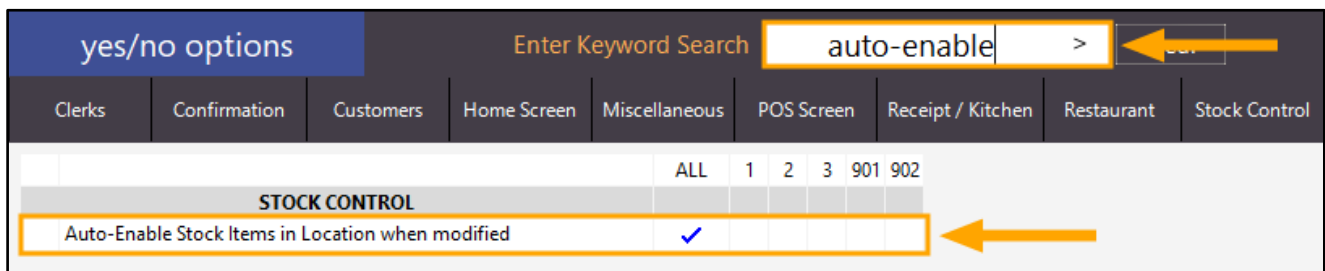
Each Location in Idealpos has a tickbox option called "Auto Enable Stock Items".

When this tickbox is enabled, Stock Items are automatically enabled in all locations which have the option ticked at the time the Stock Item is created. When a Stock Item is modified from a selected location, it would also become automatically enabled in that location if the "Auto Enable Stock Items" tickbox was checked.

This change now enables this behaviour to be controlled so that when Stock Items are modified from a specific location, the Stock Item will or won't be automatically enabled depending if the "Auto Enable Stock Items" option ticked.

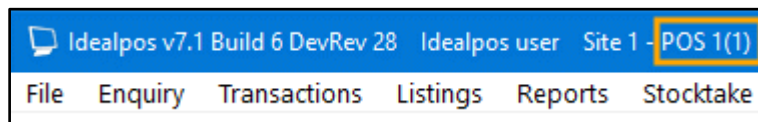
To configure and use this function, go to: Setup > Yes/No Options

Enter Keyword Search: "auto-enable", then disable the setting "Auto-Enable Stock Items in Location when modified"



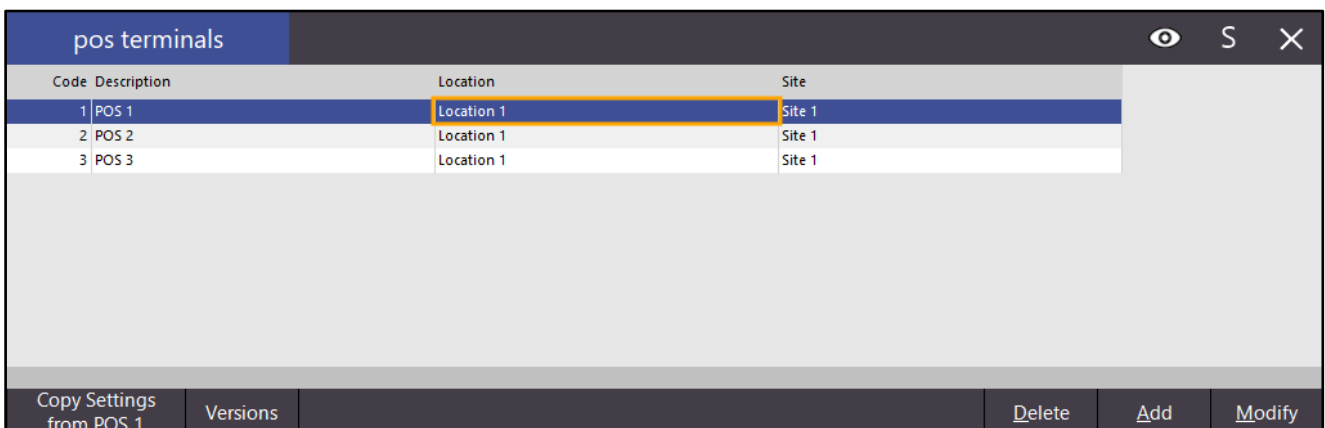
Close the Yes/No options window.

To demonstrate the usage of this function, we will need to identify which location the current POS terminal is in. At the top of the Idealpos window, the POS Terminal name and number are displayed as per the below example:



Then go to Setup > POS Terminals

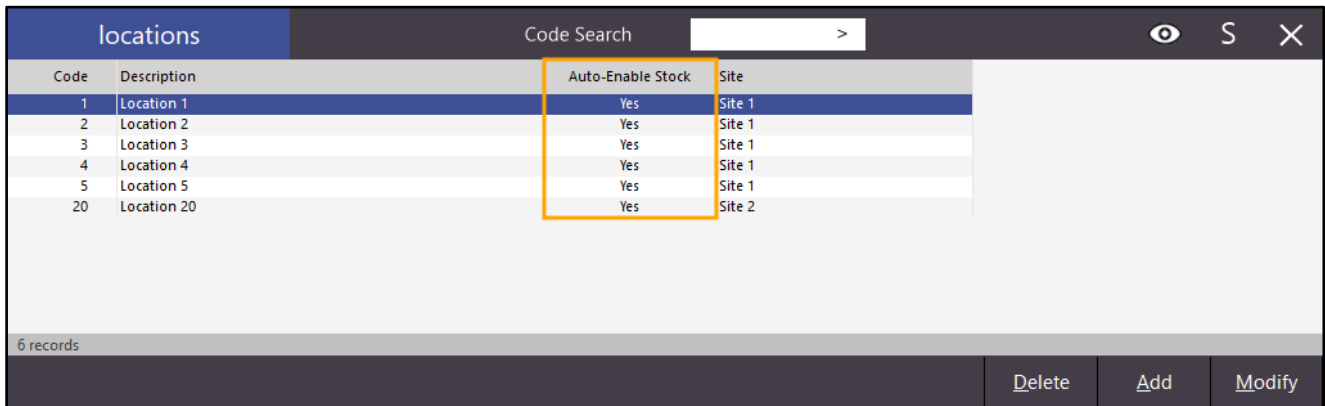
Find the current POS terminal that matches the terminal displayed in the previous step to determine the Location that the POS terminal exists in. The below example shows that POS 1 exists in Location 1.



idealpos Update History

Close the POS Terminals window, then go to:
File > Stock Control > Locations

A list of locations will be displayed and will show the status of the Auto-Enable Stock setting as shown below.

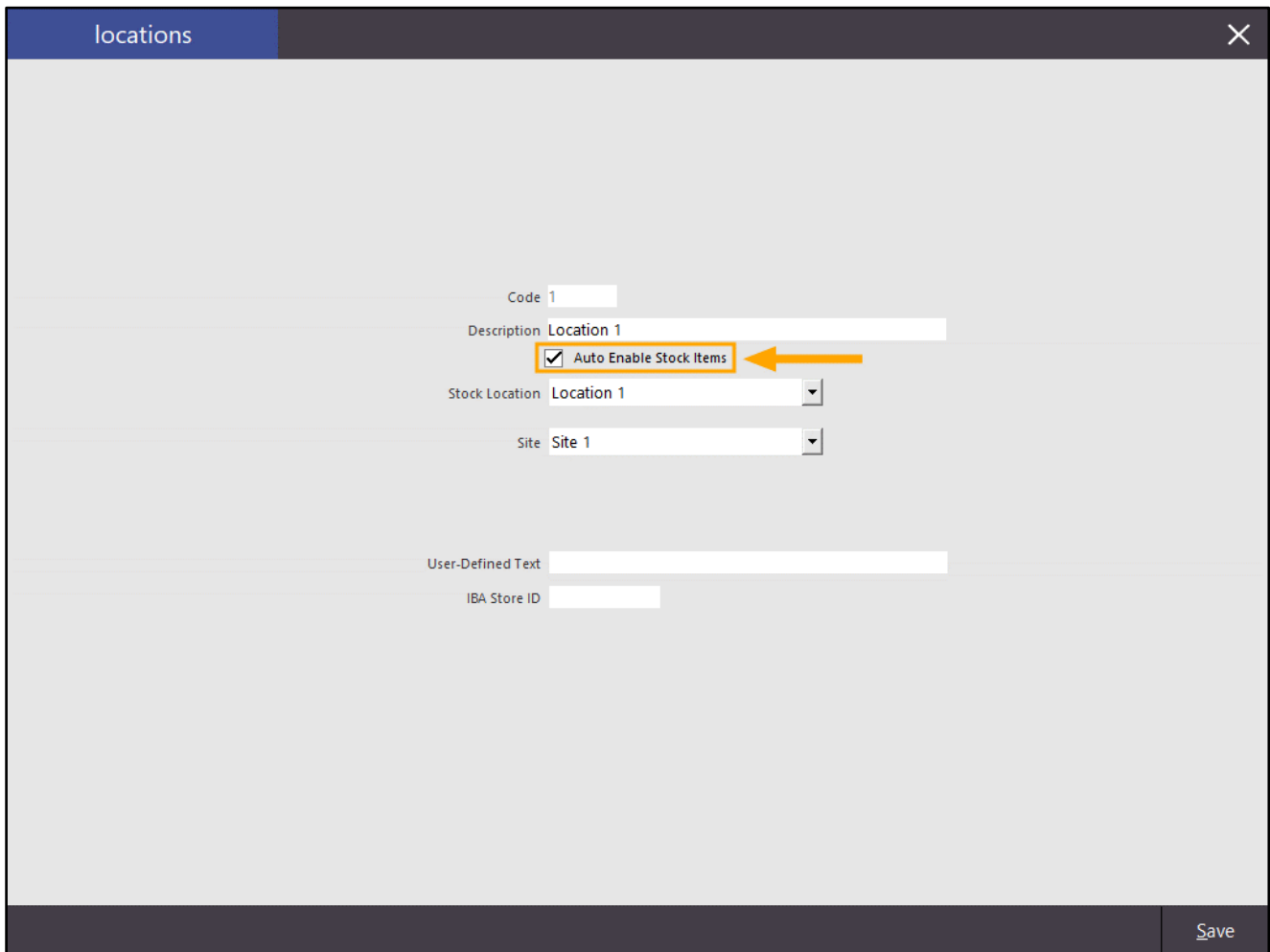


Code	Description	Auto-Enable Stock	Site
1	Location 1	Yes	Site 1
2	Location 2	Yes	Site 1
3	Location 3	Yes	Site 1
4	Location 4	Yes	Site 1
5	Location 5	Yes	Site 1
20	Location 20	Yes	Site 2

6 records

Delete Add Modify

Ensure that the location which the current POS Terminal is located in has the "Auto Enable Stock Items" option enabled, then press "Save" to save the change.



locations

Code 1

Description Location 1

Auto Enable Stock Items

Stock Location Location 1

Site Site 1

User-Defined Text

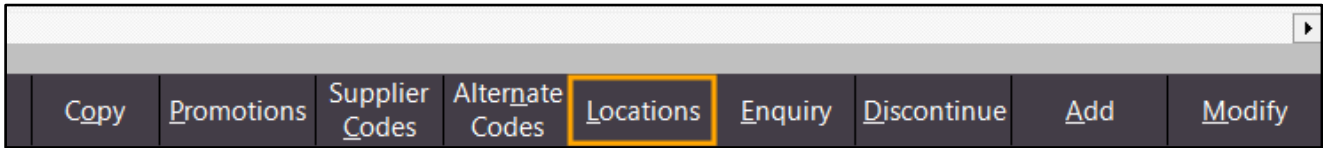
IBA Store ID

Save

Close the Locations window, then go to: File > Stock Control > Stock Items

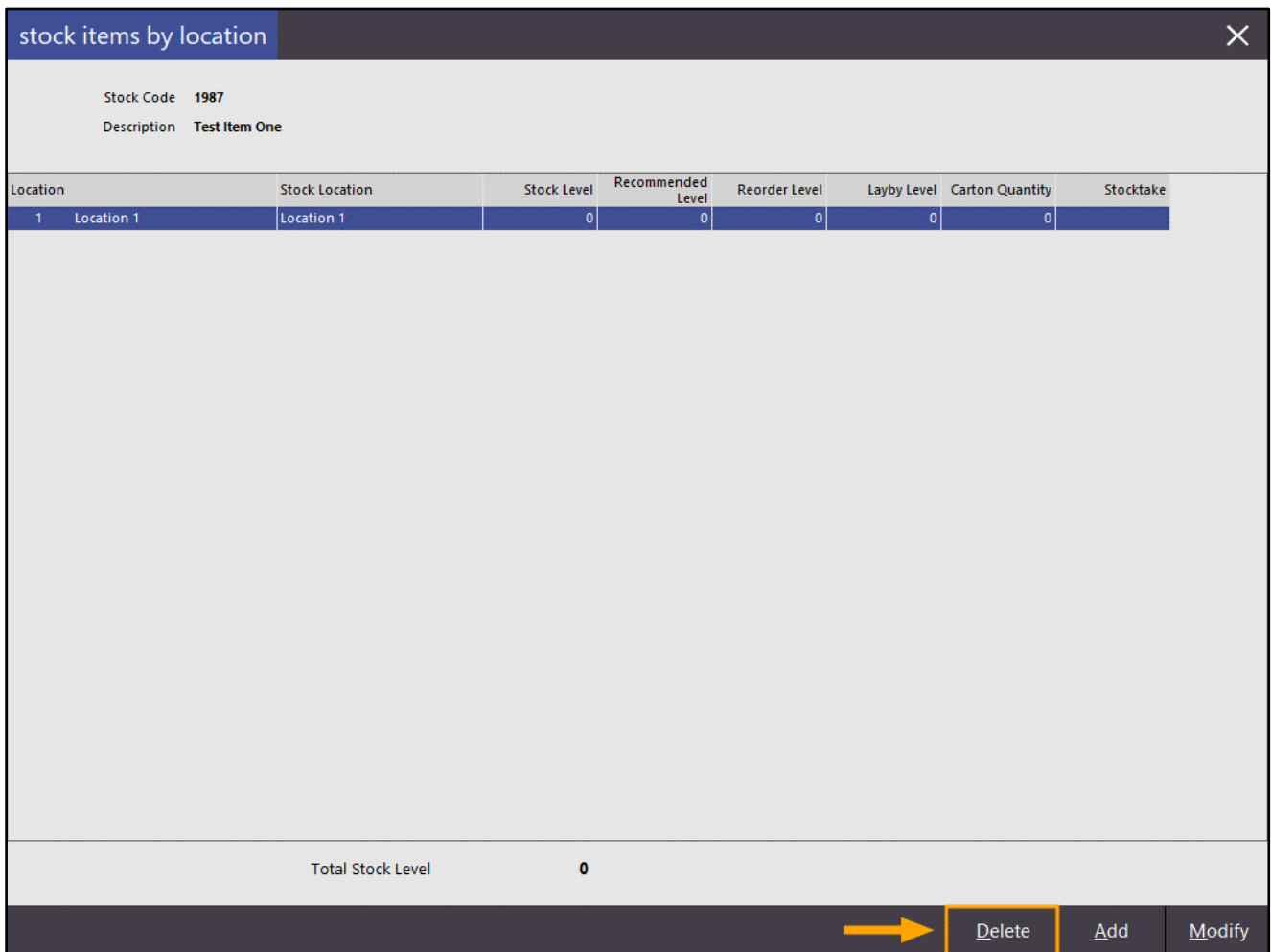
Search for an unused Stock Item, then select the item.

Press the "Locations" button on the bottom-right corner of the screen.

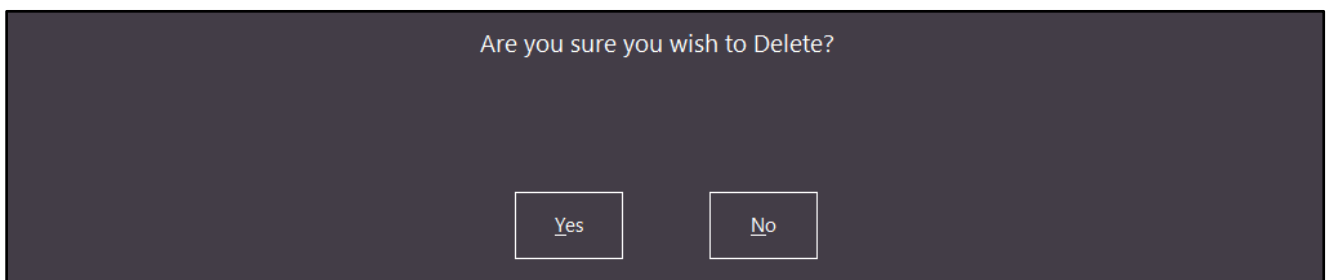


A list of locations which the selected Stock Item is currently enabled in will be displayed.

If the Stock Item is currently enabled in the same location as the POS Terminal, remove the item from the location by selecting the Location then pressing the "Delete" button on the bottom-right corner of the screen.



Press "Yes" to confirm and delete the Location.



idealpos Update History

Close the Stock Items By Location window, then double-click on the Stock Item to modify it.

Make any number of changes to the Stock Item, then press the "Save" button on the bottom-right corner of the screen. In the below example, each of the Selling Prices were modified.

PRICE	Price	Profit%
PRICE 1	1.00	
PRICE 2	2.00	
PRICE 3	3.00	
PRICE 4	4.00	
PRICE 5	5.00	
PRICE 6	6.00	
PRICE 7	7.00	
PRICE 8	8.00	
PRICE 9	9.00	
PRICE 10	10.00	1.10
PRICE 11	11.00	10.10
PRICE 12	12.00	17.60

Cost	Value
Standard Cost	8.9900
Last Cost	8.9900
Average Cost	8.9900

After pressing "Save" to make the change, ensure the Stock Item is selected from the list of items, then press the "Locations" button.

Copy Promotions Supplier Codes Alternate Codes **Locations** Enquiry Discontinue Add Modify

A list of Locations will be displayed.
The Stock Item will not be enabled in any new locations.

stock items by location								✕
Stock Code		1987						
Description		Test Item One						
Location	Stock Location	Stock Level	Recommended Level	Reorder Level	Layby Level	Carton Quantity	Stocktake	
Total Stock Level		0						
						Delete	Add	Modify

idealpos Update History

If the Yes/No Option "Auto-Enable Stock Items in Location when modified" is enabled and the Location which the terminal resides in also has the "Auto Enabled Stock Items" option enabled, then any changes or modifications to the Stock Item made from the terminal will result in the Stock Item being enabled.

stock items by location								✕
Stock Code		1987						
Description		Test Item One						
Location	Stock Location	Stock Level	Recommended Level	Reorder Level	Layby Level	Carton Quantity	Stocktake	
1	Location 1	0	0	0	0	1		
Total Stock Level		0						
						Delete	Add	Modify

Yes/No Option – Fast Service on Unoccupied Tables Only

This function improves the serving speed when selecting Unoccupied tables from the Table Map.

When this Yes/No option is enabled and you select an unoccupied table from the Table Map, Idealpos will automatically initiate a sale for the selected table and return to the POS screen, allowing items to be added to the table. By enabling this setting, the step of having to press the "POS" button after selecting a table is removed, therefore improving the speed of serving the customer and saving items to a table.

Note that when this Yes/No Option is enabled, the Yes/No option "Prompt for Covers" will be overridden in the case when there are no items in the sale, pressing the Table Map button and selecting a table. In this particular case, the default number of covers configured for the table will be used.

If you need to specify the number of covers for a table when using this Yes/No option, you can alternatively add the items to the sale first, press the Table Map button, then select a table from the Table Map – the Covers Prompt will be displayed.

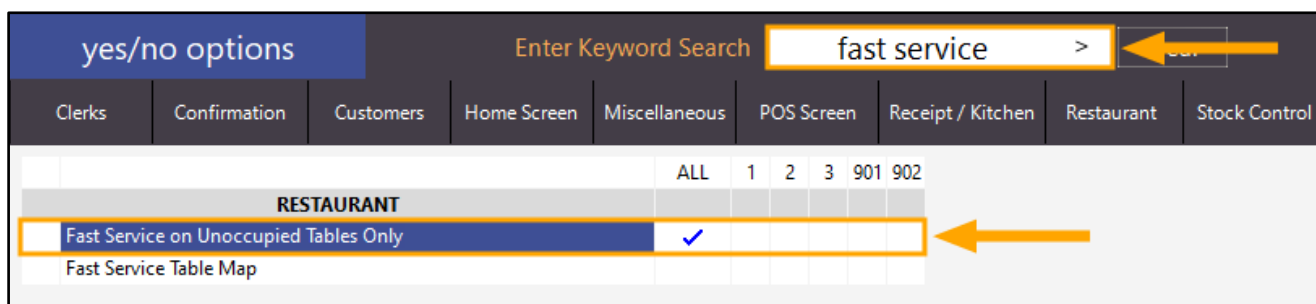
Also note that when Fast Service on Unoccupied Tables option is enabled, the following functions will be unavailable:

- Reserve an Unoccupied Table
- Occupy function (when Yes/No option "Inhibit Occupy Table Function" is disabled)

To configure and use this function, go to: Setup > Yes/No Options

Enter "fast service" into the Enter Keyword Search field.

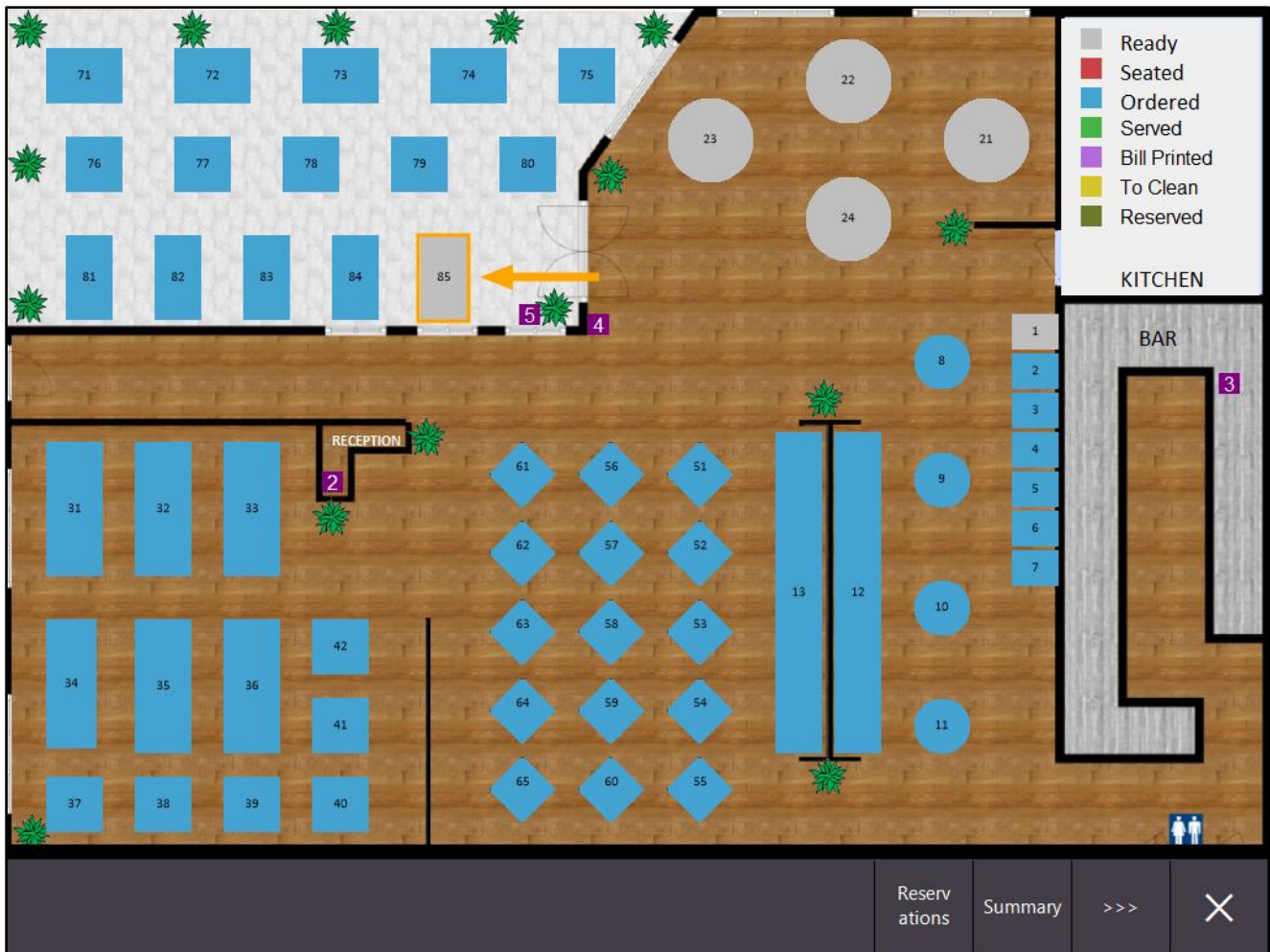
Then enable the Yes/No Option "Fast Service on Unoccupied Tables Only"



Close the Yes/No Options screen, then go to the POS Screen by pressing the "POS" button on the top-left corner of the back-office screen.

idealpos Update History

Press the Table Map button from the POS Screen, then select an unoccupied table.



After selecting the Unoccupied table, Idealpos will go straight to the POS screen where items can be added to the order. The selected Table Number will also be displayed on the POS screen indicating that any items added to the sale will be saved to the table.










06 Dec 10:52 Adult ID: 06-Dec-2001
Jeremy PRICE 1
✕

	RECEIPT	CLERK	7	8	9	CL
	PRICE LEVEL	5% ST DISC				
	CUSTOMER	5% ITEM	4	5	6	NO SALE
	BAR TAB	REFUND				
	PENDING	VOID SALE	1	2	3	X
	TABLE MAP	VOID	0	.	ENTER	

Table 85 (10)

←

TABLE SALE
\$0.00

								
CAPPUCCINO	FLAT WHITE	LATTE	CHAI	SHORT BLACK	LONG BLACK	MOCHA	HOT CHOC	TEA
EXTRA HOT	SKINNY	DECAF	1 SUGAR	TAKEAWAY	SMALL	ICED DRINK	WATER	KEYBOARD
EXTRA CHOC	SOY	WEAK	2 SUGAR	MARSH MALLOW	MEDIUM	MILKSHAKE	JUICE	ORDER NUMBER
NO CHOC	ALMOND	DOUBLE SHOT	3 SUGAR	EQUAL	LARGE	SMOOTHIE	SOFTDRINK	REWARDS ENQUIRY
DRINKS	CAFE	TAP BEER	SPIRITS	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL	MANAGER
	RESTAURANT	BOTTLE BEER & RTD	WINE				SERVICES	ADMIN

idealpos Update History

Add any required items to the table, then press the "Table Map" button.
Items added to the order will be saved to the table and a Kitchen Docket will be printed.

06 Dec 10:54 Adult ID: 06-Dec-2001
Jeremy PRICE 1
✕










<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">CAPPUCCINO</td> <td style="text-align: center; padding: 2px;">1</td> <td style="text-align: right; padding: 2px;">3.50</td> </tr> <tr> <td style="padding: 2px;">FLAT WHITE</td> <td style="text-align: center; padding: 2px;">1</td> <td style="text-align: right; padding: 2px;">3.50</td> </tr> <tr> <td style="padding: 2px;">SHORT BLACK</td> <td style="text-align: center; padding: 2px;">1</td> <td style="text-align: right; padding: 2px;">3.00</td> </tr> </table>	CAPPUCCINO	1	3.50	FLAT WHITE	1	3.50	SHORT BLACK	1	3.00		RECEIPT	CLERK	7	8	9	CL
CAPPUCCINO	1	3.50														
FLAT WHITE	1	3.50														
SHORT BLACK	1	3.00														
			PRICE LEVEL	5% ST DISC	4	5	6	NO SALE								
			CUSTOMER	5% ITEM												
			BAR TAB	REFUND	1	2	3	X								
			PENDING	VOID SALE												
			TABLE MAP	VOID	0	.	ENTER									

Table 85 (10)
3x

TABLE SALE

\$10.00

➔

								
CAPPUCCINO	FLAT WHITE	LATTE	CHAI	SHORT BLACK	LONG BLACK	MOCHA	HOT CHOC	TEA
EXTRA HOT	SKINNY	DECAF	1 SUGAR	TAKEAWAY	SMALL	ICED DRINK	WATER	KEYBOARD
EXTRA CHOC	SOY	WEAK	2 SUGAR	MARSH MALLOW	MEDIUM	MILKSHAKE	JUICE	ORDER NUMBER
NO CHOC	ALMOND	DOUBLE SHOT	3 SUGAR	EQUAL	LARGE	SMOOTHIE	SOFTDRINK	REWARDS ENQUIRY
DRINKS	CAFE	TAP BEER	SPIRITS	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL	MANAGER
	RESTAURANT	BOTTLE BEER & RTD	WINE				SERVICES	ADMIN

If the Yes/No Option "Fast Service on Unoccupied Tables Only" is disabled, the Table Map screen will remain open after selecting an Unoccupied Table.

