

Idealpos 7.1 Build 14 - Update History

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Function Descriptors

IP-3779 – Override Receipt Footer on Tender – by POS Number

This function adds the ability to control which POS Terminal(s) will override the standard receipt footer (configured in Setup > POS Terminals > Modify > Receipt Printer > Footer) using the text that has been entered into the Override Receipt Footer field in the Tender Type Function Descriptor (configured in Setup > Function Descriptors > Modify > Override Receipt Footer), when tendering a sale using the Tender Type containing the overridden receipt footer.

This function is configured by entering the required text into the Override Receipt Footer field, then entering [OVERRIDE RECEIPT FOOTER POS=#] into the User-Defined Text field, where # is substituted with the POS Terminal number. You have the option of entering a single POS Terminal number, multiple POS Terminal numbers as a comma separated list, a POS Terminal number range, or a combination of all three.

Examples:

[OVERRIDE RECEIPT FOOTER POS=1] – This will override the receipt footer on POS terminal 1 only.

[OVERRIDE RECEIPT FOOTER POS=1,2,3,4,5] – This will override the receipt footer on POS terminals 1, 2, 3, 4 and 5.

[OVERRIDE RECEIPT FOOTER POS=1-5] – This will override the receipt footer on all POS terminals between 1 to 5.

[OVERRIDE RECEIPT FOOTER POS=1-2,4,5] – This will override the receipt footer on POS terminals between 1 to 2 and POS terminals 4 and 5.

To configure and use this function, go to:

Back Office > Setup > Function Descriptors > Select Tender Type from the list of Function Descriptors > Modify.

In the Override Receipt Footer field, enter the text that you want to appear at the bottom of the Customer Receipt when the sale is tendered with this Tender Type.

In the User-Defined Text, enter the POS Terminals that you want to print the text from the Override Receipt Footer field. The POS terminals need to be entered using the format shown in the examples listed above.

For this example, we'll use [OVERRIDE RECEIPT FOOTER POS=1] to have the setting apply only on POS 1.

Any POS terminals that aren't included in the OVERRIDE RECEIPT FOOTER POS will use the standard receipt footer.

Once configured, press the "Save" button on the bottom-right corner of the Function Descriptors window.

The screenshot shows the 'function descriptors' window with the following configuration:

- Function: TENDER 2
- Description: EFTPOS
- # of Receipts: 1
- Exchange Rate: 0
- Lower Limit: 0.00
- Upper Limit: 9999.99
- Scan Code: [Empty]
- Scan Code Amount: 0.00
- Surcharge: 0.00 %
- Waive Surcharge Threshold: 0.00
- Options:
 - Rounding?
 - Credit Function
 - Allow Points per Dollar?
 - Show in Banking
 - Compulsory Amount
 - Open Cash Drawer
 - EFTPOS
 - Account Tender
 - Layby Tender
 - Force Receipt
 - GIFT VOUCHER Redemption
 - Credit Note Tender
 - Force Customer
 - Force Reference
 - Allow Overcharging To Tips
 - Enable Customer Tipping

The 'Override Receipt Footer' field contains the text: "Thank you for paying with EFTPOS at the POS 1 Express Checkout!".

The 'User-Defined Text' field contains the text: "[OVERRIDE RECEIPT FOOTER POS=1]".

The 'Save' button is highlighted in the bottom right corner.

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When a sale is tendered using EFTPOS at POS 1, the Receipt Footer from the Override Receipt Footer field in the Function Descriptor is printed at the bottom of the receipt (example shown on the left).

When a sale is tendered using EFTPOS at POS 2, the standard footer configured in Setup > POS Terminals > Modify > Receipt Printer > Footer will be printed at the bottom of the receipt (example shown on the right).

<p>IDEALPOS</p> <p>1/212 Curtin Ave West Eagle Farm QLD 4009 Australia</p> <p>TAX INVOICE 123-456-789-11</p> <p>#000801-1 Jeremy 23-Nov-2020 17:26:27</p> <p>----BEVERAGE----</p> <p>CAPPUCCINO* \$3.50 FLAT WHITE* \$3.50 SHORT BLACK* \$3.00</p> <p>----- TOTAL \$10.00 -----</p> <p>GST Subtotal \$10.00 GST Amount \$0.91</p> <p>EFTPOS \$10.00</p> <p>FOOD TOTAL \$0.00 BEVERAGE TOTAL \$10.00 Other Categories TOTAL \$0.00</p> <p>Thank you for paying with EFTPOS at the POS 1 Express Checkout!</p>	<p>IDEALPOS</p> <p>1/212 Curtin Ave West Eagle Farm QLD 4009 Australia</p> <p>TAX INVOICE 123-456-789-11</p> <p>#000523-2 Jeremy 23-Nov-2020 17:27:02</p> <p>----BEVERAGE----</p> <p>CAPPUCCINO* \$3.50 FLAT WHITE* \$3.50 SHORT BLACK* \$3.00</p> <p>----- TOTAL \$10.00 -----</p> <p>GST Subtotal \$10.00 GST Amount \$0.91</p> <p>EFTPOS \$10.00</p> <p>FOOD TOTAL \$0.00 BEVERAGE TOTAL \$10.00 Other Categories TOTAL \$0.00</p> <p>*indicates taxable supply</p> <p>Powered by Idealpos</p>
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Gaming Interfaces

IP-3796 – Aristocrat Gaming – Support for Source ID field

This function adds the ability to set a value for the Source ID which may be required when communicating with Aristocrat (when awarding or redeeming points and performing other actions).

Note that this function may or may not be required depending on your environment.

We recommend configuring this option if you encounter problems when attempting to award or redeem points with your Aristocrat system.

Therefore, it is recommended that you test the overall functionality of your Aristocrat system (including awarding points and redeeming points). If you find issues with your system, we recommend that you try setting the Source ID field with the required setting provided by Aristocrat. Should you find that your system is already working correctly, please do not modify your system as configuring this option may affect your system.

To set this option, go to: Setup > Global Options > Gaming > Interface Type: Aristocrat

In the Source ID field, enter the Source ID as supplied by Aristocrat.

In our experience with a gaming system, POSCON needed to be entered, however, this may vary in your gaming environment. Please refer to Aristocrat for further details.

After modifying this setting, you may need to restart Idealpos on your POS Terminals.

This can be done via IPSUtils > Close (go to: Start > Idealpos > IPSUtils).

The screenshot shows the 'Global Options' window for 'site 1 (Site 1)'. The 'Gaming' tab is active. The 'Gaming Interface' section contains the following fields:

- Interface Type: Aristocrat
- Redeem Tender: No Pay by Points
- Username: [Empty]
- Password: [Empty]
- Source Id: [Empty] (highlighted with a yellow box and an arrow)

The 'StarrSrvr Interface' section contains the following fields:

- Use StarrSrvr:
- IP Address: [Empty]
- Redeem Tender: EFTPOS
- Redeem Tender 2: EFTPOS
- Interface Type: IRC
- Customer Timeout: 0
- Rating Points per Dollar: [Empty]

The 'Gaming Points' section contains a table with the following columns: Enable, Description, Code, Points Per \$, Point Value.

Enable	Description	Code	Points Per \$	Point Value
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

Other options include 'Add Members to POS' (checked), 'Update Customer Type from Member Analysis', 'Use Price Level Schedule', 'Redemptions treated as Discounts' (checked), and 'Trigger Card Swipe manually using [;] Prefix'.

Global Options

IP-3751 – Entire Order to Triggered Kitchen Printers – Filter by Sales Category

This function adds the ability to have an entire order print to all Kitchen Printers based on Sales Category.

When enabling this functionality, you can choose to:

Have all items printing to all triggered Kitchen Printers (the functionality prior to build 14 was hard-coded as “All Items”)

Or, you can have items that are from a specific sales category printing to triggered Kitchen Printers (functionality available from build 14 and onwards).

Examples that show how this function behaves are listed as follows:

Listing of Kitchen Printers:

Printer 1 – Mains

Printer 2 – Pizza

Printer 3 – Pasta

Printer 4 – Bar

Stock Items and their Printer Configuration:

Steak and Veg [Food Sales Category] – Configured to print to Mains Printer

Hawaiian Pizza [Food Sales Category] – Configured to print to Pizza Printer

Pasta [Food Sales Category] – Configured to print to Pasta Printer

Beer [Beverage Sales Category] – Configured to print to Bar Printer

Enable “**Print Entire Order to triggered Kitchen Printers**” setting in Global Options for “**All Items**”.

Example 1 – An order containing Steak and Veg is sent to the Kitchen.

Result – The Steak and Veg item will only be printed to the Mains Printer.

Example 2 – An order containing Steak and Veg and Pizza is sent to the Kitchen.

Result – The Steak and Veg and Pizza items are printed to the Mains Printer and Pizza Printer.

Example 3 – An order containing Steak and Veg, Pizza, Pasta and Beer is sent to the Kitchen.

Result – The Steak and Veg, Pizza, Pasta and Beer items will be printed to all Kitchen Printers (Mains Printer, Pizza Printer, Pasta Printer and Bar Printer).

In example 3 above, items from the Food Sales Category are printed to the Bar Printer.

If you don’t want items from the Food Sales Category to print to the Bar Printer, the Sales Category dropdown box can be set to the “Food” Sales Category. The ability to select the sales category has been added to build 14 and onwards.

Enable “**Print Entire Order to triggered Kitchen Printers**” setting in Global Options and set the Sales Category as “**Food**”.

Example 4 – An order containing Steak and Veg, Pizza, Pasta and Beer is sent to the Kitchen.

Result – The Steak and Veg, Pizza and Pasta items will be printed to the Kitchen Printers (Mains Printer, Pizza Printer and Pasta Printer).

The Bar Printer will only print the Beer item due to the Sales Category option being set to “Food”, which only triggers items from the “Food” Sales Category to print to all triggered Kitchen Printers.

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To configure and use this function, go to:

Setup > Global Options > Printing > Enable the option "Print Entire Order to triggered Kitchen Printers".

Note that this option is only supported for the Kitchen Docket Format "Group Instructions by Seat".

The dropdown box can be set to the Sales Category you want this setting to apply to.

If you want all items to print to all triggered Kitchen Printers, select the "All Items" option.

Otherwise, select a specific Sales Category and only items from the selected Sales Category will be printed to triggered Kitchen Printers. The below example shows the option "Print Entire Order to triggered Kitchen Printers" enabled with the Sales Category set to "Food".

The screenshot shows the 'global options' window for 'site 1 (Site 1)' with the 'Printing' tab selected. The 'Print Formats' section is expanded to 'Kitchen Docket Format'. Under 'Group Instructions by Seat', the option 'Print Entire Order to triggered Kitchen Printers' is checked and set to 'FOOD'. Other options include 'Accumulate Items', 'Show each instruction on its own line', 'Print instructions/seats in small font', 'Print instructions red', 'Print instructions white on black', 'Use course separator instead of print groups', 'Use instruction separator line', and 'Print discounts white on black'. The 'Kitchen Printer Names' list shows 12 printers from KITCHEN to Kitchen Printer 12. The 'Other Options' section has 'Double Height', 'Double Width', and 'Bold' checked. The 'Print Group Header Format' sections for Kitchen Printers and Receipts/Bills are also visible.

Using example 4 shown further above, an order containing the following items is saved to a table:

Steak and Veg [Food Sales Category]

Pizza [Food Sales Category]

Pasta [Food Sales Category]

Beer [Beverage Sales Category]

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The resulting Kitchen Dockets are printed:

Bar Printer:

```
T A B L E 1 3 c o v e r s
1 1 : 3 6 a m 30-Nov-2020
J e r e m y
-----BEVERAGE-----
3 x B E E R
```

Pasta Printer:

```
T A B L E 1 3 c o v e r s
1 1 : 3 6 a m 30-Nov-2020
J e r e m y
-----FOOD-----
1 x S T E A K A N D V E G
1 x H A W A I I A N P I Z Z A
1 x P A S T A
```

Pizza Printer:

```
T A B L E 1 3 c o v e r s
1 1 : 3 6 a m 30-Nov-2020
J e r e m y
-----FOOD-----
1 x S T E A K A N D V E G
1 x H A W A I I A N P I Z Z A
1 x P A S T A
```

Mains Printer:

```
T A B L E 1 3 c o v e r s
1 1 : 3 6 a m 30-Nov-2020
J e r e m y
-----FOOD-----
1 x S T E A K A N D V E G
1 x H A W A I I A N P I Z Z A
1 x P A S T A
```

Keyboard Program

IP-3727 – Keyboard Program – Customer Type Selection on Customer Function

This function adds the ability to program a key to display a list of Customers from a specific Customer Type. Previous to this change, it was only possible to either program a key to add a specific customer to the sale or display a list of all Customers on the POS Screen. It is now possible to program a key to only display a list of Customers from a specific Customer Type.

To configure and use this function, go to: Back Office > File > Customers > Customer Types

Identify which Customer Type that you want to display a list of Customers from, then note down the Customer Type Code that's displayed next to the Customer Type that you want to use.

customer types		Code Search
Code	Description	
1	ACCOUNTS	
2	MEMBERS	
3	MASTER ACCOUNTS	
4	SUB ACCOUNTS	
5	LAYBYS	
6	BAR TABS	
7	BRONZE MEMBERS	
8	SILVER MEMBERS	
9	GOLD MEMBERS	
10	PLATINUM MEMBERS	
11	LIFE MEMBERS	
12	STAFF	
13	ONLINE	
14	RESERVATION	
15	SENIORS	

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Close the Customer Types window, then go to: Back Office > Setup > Keyboard Program

If you already have a specific key that has been programmed to add a Customer to the sale and you want to modify it so that it displays a list of Customers from a specific Customer Type, you can select it from the list then press the "Modify" button at the bottom of the Keyboard Program window.

The screenshot shows a window titled "keyboard program" with a close button (X) in the top right corner. The window contains a table with the following data:

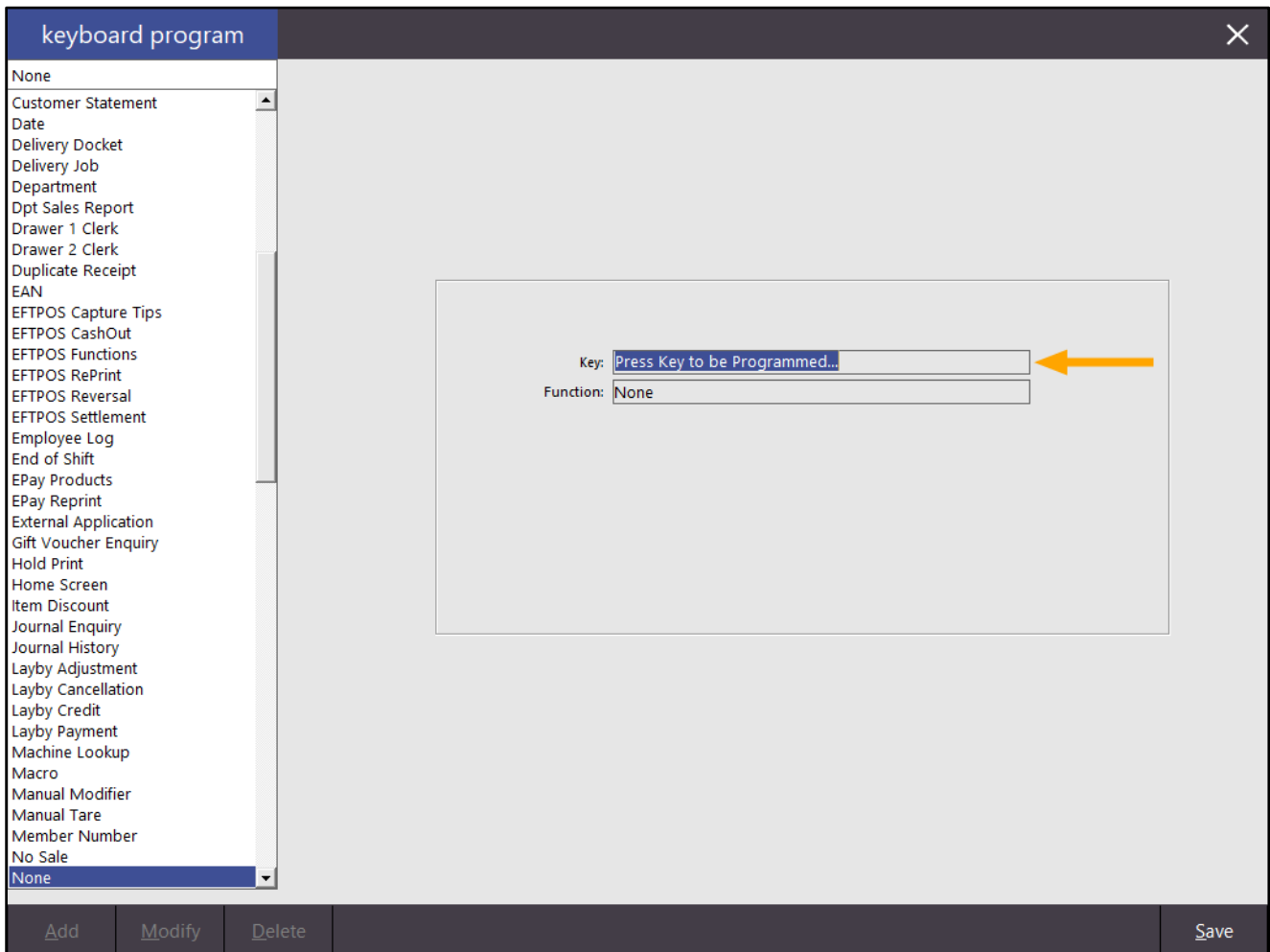
KEYS	FUNCTION	AUTO TEXT
BACKSPACE	Clear	0
F1	Customer	0
F4	Sale Reference	0
F12	Stock Item Edit	0

The "F1" row is highlighted in blue. A yellow arrow points to the "Customer" function in the "F1" row. At the bottom of the window, there are three buttons: "Add", "Modify", and "Save". The "Modify" button is highlighted with a yellow box, and a yellow arrow points to it from the left.

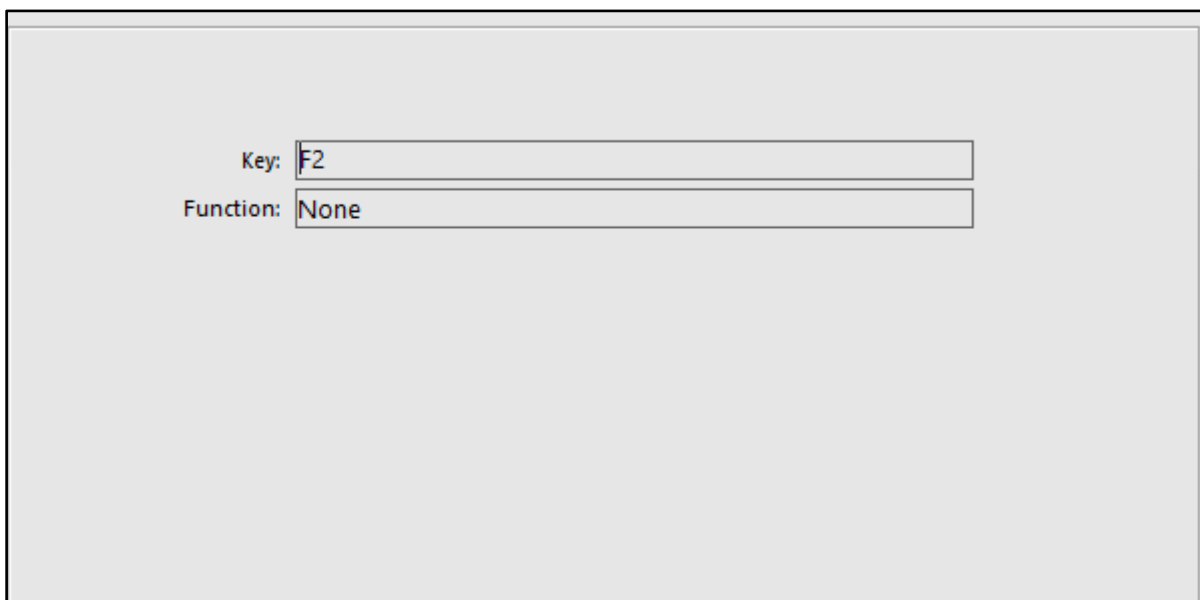
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If you are programming a new key, press the “Add” button on the bottom-right corner of the Keyboard Program window. The Key field will display “Press Key to be Programmed”.



Press any key on the keyboard and Idealpos will detect the keypress and display the key in the key field. In this example, we have pressed the “F2” key on the keyboard.



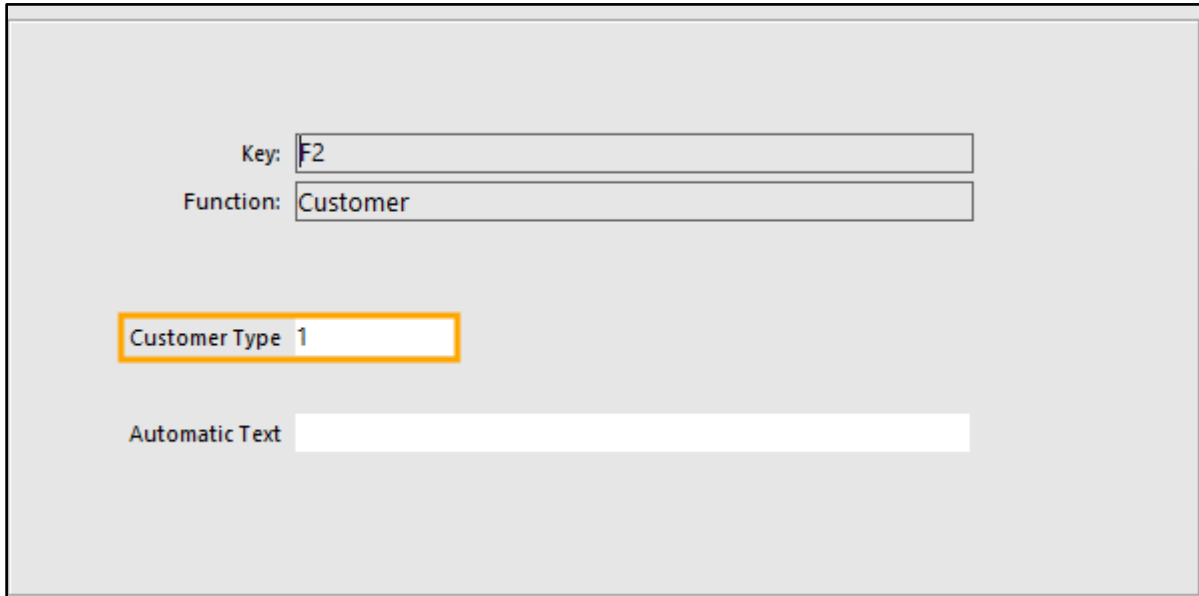
Note that if you press a key that has already been programmed, Idealpos will display a “This Key has already been Programmed” prompt.

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Select the "Customer" function from the list, then enter the Customer Type code into the Customer Type field (using the Customer Type Code that was noted down earlier).

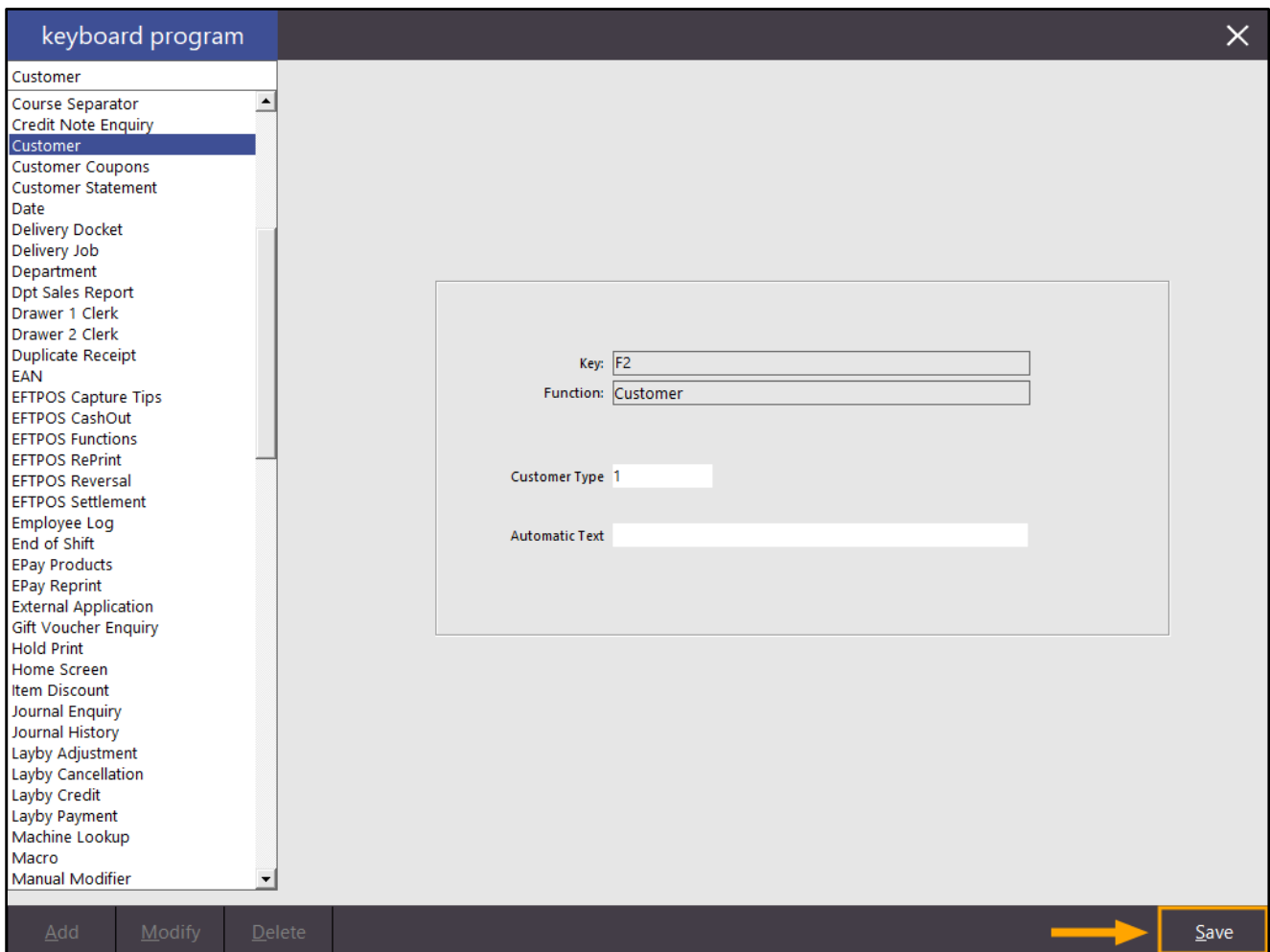
For this example, we'll use the Customer Type Code of 1 which refer to the Accounts Customer Type. Do not enter anything into the Automatic Text field.



The screenshot shows a window titled "keyboard program" with a close button (X) in the top right corner. The window contains four input fields:

- Key:** A text box containing "F2".
- Function:** A text box containing "Customer".
- Customer Type:** A text box containing "1", highlighted with a yellow border.
- Automatic Text:** An empty text box.

Press the "Save" button on the bottom-right corner of the window to save your change.



The screenshot shows the "keyboard program" window with a list of functions on the left side. The "Customer" function is selected. The main area contains the same input fields as the previous screenshot. At the bottom, there are buttons for "Add", "Modify", "Delete", and "Save". A yellow arrow points to the "Save" button.

keyboard program

- Customer
- Course Separator
- Credit Note Enquiry
- Customer
- Customer Coupons
- Customer Statement
- Date
- Delivery Docket
- Delivery Job
- Department
- Dpt Sales Report
- Drawer 1 Clerk
- Drawer 2 Clerk
- Duplicate Receipt
- EAN
- EFTPOS Capture Tips
- EFTPOS CashOut
- EFTPOS Functions
- EFTPOS RePrint
- EFTPOS Reversal
- EFTPOS Settlement
- Employee Log
- End of Shift
- EPay Products
- EPay Reprint
- External Application
- Gift Voucher Enquiry
- Hold Print
- Home Screen
- Item Discount
- Journal Enquiry
- Journal History
- Layby Adjustment
- Layby Cancellation
- Layby Credit
- Layby Payment
- Machine Lookup
- Macro
- Manual Modifier

Key: F2

Function: Customer

Customer Type 1

Automatic Text

Add Modify Delete Save

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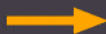
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The newly programmed key will appear on the list of programmed keys.

Once again, press the "Save" button on the bottom-right corner of the screen, then confirm the change by pressing "Yes".

keyboard program ✕

KEYS	FUNCTION		AUTO TEXT			
BACKSPACE	Clear			0		
F1	Customer			0		
F4	Sale Reference			0		
F12	Stock Item Edit			0		
F2	Customer	1				

Add Modify Delete  Save

Would you like to save any changes you have made to the Keyboard Program?

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You can now return to the POS screen by pressing the "POS" button on the top-left corner of the Back Office window.

Press the key on the keyboard which was programmed above (F2).

A list of Customers from the Customer Type will be displayed on the POS Screen.

If Fast Customer Searching is enabled in the Yes/No Options, a window similar to the below will be displayed; click on any Customer from the list to add them to the sale.

The screenshot shows a window titled "customers" with a close button (X) in the top right corner. The window contains a list of customer records with the following columns: Name, Phone, Company, and Code. The records are:

Name	Phone	Company	Code
BOB BROWN	Customer 123456	Customer 888888	Ben Harrison
MARY JANE	Betty Phillips	JOHN SMITH	Jane Stevens
Elizabeth Willis			

Below the list is a search bar and a keyboard interface for navigation. The keyboard has the following keys:

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	.	-			

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If Fast Customer Searching is disabled in the Yes/No Options, a window similar to the below will be displayed; either double click on the required customer to add them to the sale, or select the customer by single clicking on them, then press the "OK" button on the bottom-right corner of the window.

customers > 👁 S ✕

Code	Last Name	First Name	Address 1	Address 2	Suburb	Scan Code
202	BROWN	BOB				
123456	Customer 123456					
888888	Customer 888888					
1	Harrison	Ben	Unit 17	31 Honeysuckle Ave	Groundsborough	9874902100196
203	JANE	MARY				
1987	Phillips	Betty	24 Greene St		ROTHWELL	
201	SMITH	JOHN				
14	Stevens	Jane				
13	Willis	Elizabeth				

9 records

Discontinued Only Include Bar Tabs Add OK

POS Screen

IP-3722 – Audit Number shows on POS Screen and Home Screen

This function adds the Audit Number to the POS and Home Screens.

A unique Audit Number is assigned to each transaction or sale that is performed and by displaying the current Audit Number on both the POS Screen and Home Screen, it may come in useful for finding the transaction via the Journal History Enquiry, Activity Enquiry or Journal History report.

Note that the Audit Number has always been printed on the receipt and has also been available via the abovementioned reports.

To view the Audit Number on the POS Screen, from the Back Office, press the “POS” button on the top-left corner of the screen.

The Audit Number is displayed on the top-left corner of the POS Screen as shown in the below example:

03 Dec 13:58 Adult ID: 03-Dec-2002
 POS 1 Jeremy PRICE 1 #1862

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

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			CUSTOMERS	SERVICES	ADMIN

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After a sale is completed, the Audit Number will appear on the right-hand side of the Home Screen as shown in the below example.



Note that the Home Screen will only appear immediately after a sale if the Yes/No Option “Return to Home Screen after Each Sale” is enabled or if the Home Screen is manually displayed by pressing a POS screen button assigned to the Home Screen function. The last transaction will be available on the Home Screen for the amount of time that has been configured in the Last Transaction Timeout.

The Last Transaction Timeout can be configured via Setup > Global Options > Other Options > Home Screen > Last Transaction Timeout.

If required, you can configure Idealpos to show the last transaction indefinitely.

Note that in order to do this, you will need to set both the Last Transaction Timeout and Slideshow Start Time to 0 meaning that you’ll lose the ability to trigger the slideshow on the Home Screen.

IP-3743 – Customer Tipping screen – Enable by Tender Types

This function adds the ability to control which Tender Types will trigger the Customer Tipping screen to appear on the Customer Display and POS Screen. Previous to this change, enabling the Customer Display Tipping on a POS Terminal would cause the Customer Tip prompt to appear after the Clerk pressed the “ENTER” button and before the list of Tender Types were displayed on the POS Screen. With this change, you can configure specific Tender Types that will trigger the Customer Tipping screen.

Note that this function supports all Tender Types EXCEPT for Cash. If you require Customer Tipping on the Cash tender, you will need to enable Customer Display Tipping via Setup > POS Terminals > Modify > Display/Kiosk and therefore will be unable to specifically control which Tender Types will show the Customer Tipping screen.

Also note that Overtendering is not supported when the Customer Tipping screen is enabled on specific tender types. Attempting to Overtender on a tender type which has Customer Tipping enabled will produce a “Cannot Overtender with Customer Tipping” prompt.

To configure and use this function, go to:

Back Office > Setup > POS Terminals > Select POS Terminal > Modify > Display/Kiosk

In order for you to control which Tender Types will trigger the Customer Tipping Screen, the “Enable Customer Display Tipping” option must be DISABLED. The Customer Display Tipping screen will be enabled on the required Tender Types in the next step. Note that the even though the “Enable Customer Display Tipping” option needs to be unchecked as shown below, the Customer Display Tipping settings that are configured below (i.e. the Tip % amounts as well as the RA Function) will be used for the Customer Tipping prompt which you’ll enable for the required Tender Types.

The screenshot shows the 'pos terminals' configuration window for a 'Display / Kiosk' terminal. The 'Customer Display Screen' section includes a preview of a screen showing a 'LARGE BURGER MEAL' for \$18.50. The 'Two-Line Customer Display' section has 'Type' set to 'None'. The 'Image Options' section has 'Skip Images Larger than' set to 500 KB and 'Seconds between images' set to 9. The 'Kiosk' section has 'Enable Customer Display Tipping' checked, with a yellow arrow pointing to it. Other options include 'Tip %' (10, 15, 20) and 'RA Function' (TIPS IN).

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Once Customer Display Tipping has been disabled on the POS Terminal(s), close the POS Terminal configuration windows.

Then go to: Setup > Function Descriptors.

Select the Tender Type that you want to have the Customer Tipping prompt enabled, then press "Modify" on the bottom-right corner of the window. Note that this function is available on Tender 2 up to Tender 18. It is not available on the CASH tender (Tender 1).

Place a check into the "Enable Customer Tipping" option, then press "Save".

The screenshot shows a window titled "function descriptors" with a close button (X) in the top right corner. The window contains the following fields and options:

- Function: TENDER 2
- Description: EFTPOS
- # of Receipts: 1
- Exchange Rate: 0
- Lower Limit: 0.00
- Upper Limit: 9999.99
- Scan Code: [empty]
- Scan Code Amount: 0.00
- Surcharge: 0.00 (with % and \$ radio buttons)
- Waive Surcharge Threshold: 0.00
- Override Receipt Footer: [empty text area]
- User-Defined Text: [empty text area]
- Options list (checkboxes):
 - Rounding?
 - Credit Function
 - Allow Points per Dollar?
 - Show in Banking
 - Compulsory Amount
 - Open Cash Drawer
 - EFTPOS
 - Account Tender
 - Layby Tender
 - Force Receipt
 - GIFT VOUCHER Redemption
 - Credit Note Tender
 - Force Customer
 - Force Reference
 - Allow Overcharging To Tips
 - Enable Customer Tipping

Yellow arrows point to the "Enable Customer Tipping" checkbox and the "Save" button at the bottom right.

You may repeat the above process for each Tender Type that requires Customer Tipping functionality. Once complete, close the Function Descriptor windows, then return to the POS Screen.

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From the POS Screen, add the required items to the sale, then press the "ENTER" button to go to the Tender Screen:

23 Nov 11:26 Adult ID: 23-Nov-2002
Jeremy STANDARD

CAPPUCCINO	1	3.50							
FLAT WHITE	1	3.50							
SHORT BLACK	1	3.00							
			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		

3x \$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

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A list of Tender Types will be displayed. When selecting any Tender Type that does not have the "Enable Customer Tipping" option enabled, the Customer Tipping prompt will not be displayed.

Selecting any Tender Type which has the "Enable Customer Tipping" option enabled will trigger the Customer Tipping prompt to be displayed on both the POS Screen and the Customer Display.

Any amount selected or entered via the Customer Tipping Screen will be added to the final amount.

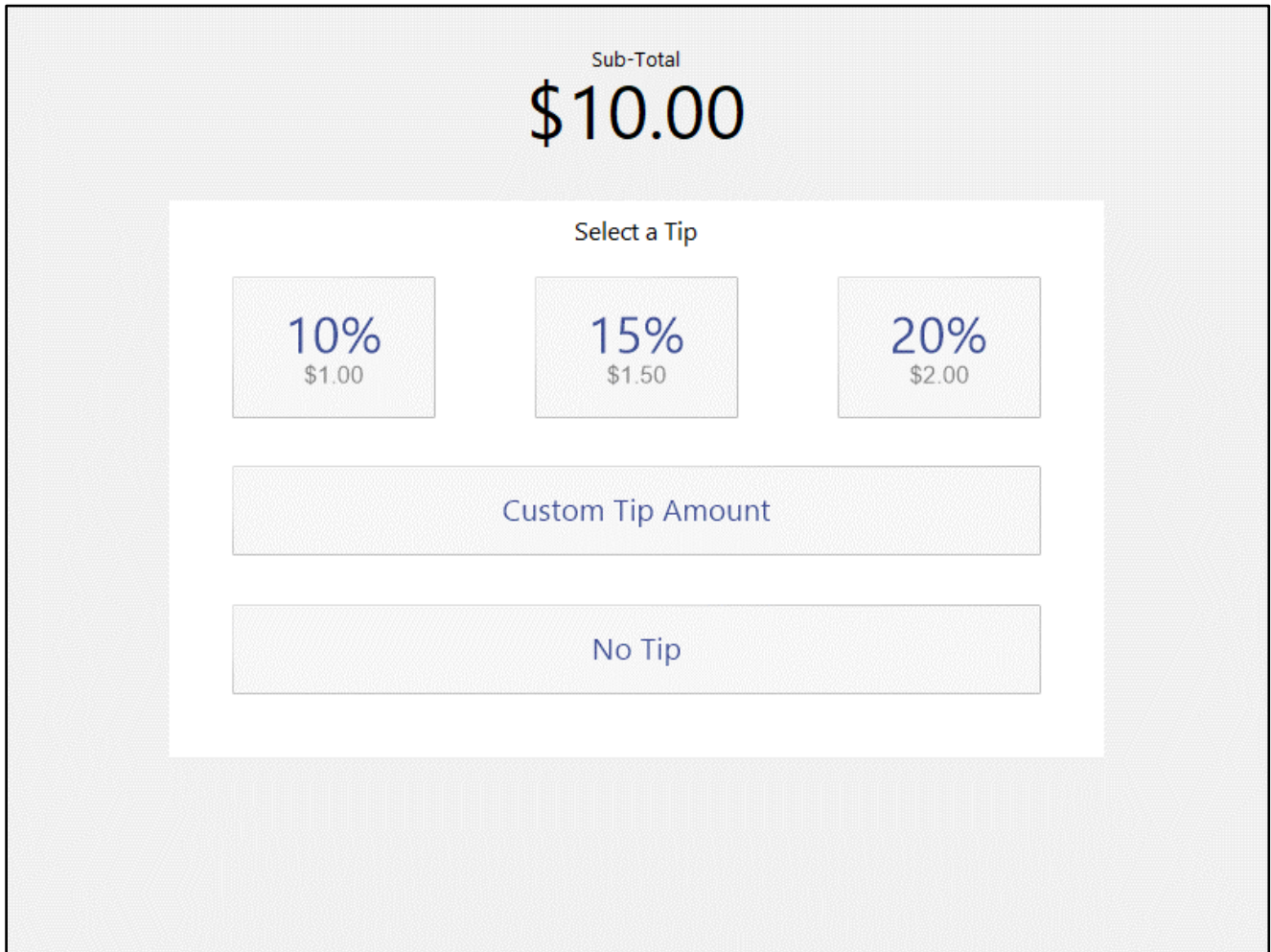
In the below example, the EFTPOS Tender Type has the Customer Tipping option enabled:

The screenshot shows the Idealpos POS interface. At the top left, it displays the date and time '23 Nov 11:29' and the user 'Adult ID: 23-Nov-2002' and 'Jeremy STANDARD'. The main receipt area lists three items: 'CAPPUCCINO' (1, 3.50), 'FLAT WHITE' (1, 3.50), and 'SHORT BLACK' (1, 3.00). Below the items, the total amount is shown as '\$10.00'. To the right of the receipt is a numeric 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', '.', 'ENTER'. Below the receipt is a list of tender types: 'CASH', 'EFTPOS', 'AMEX/DINERS', 'POINTS', 'LAYBY', 'GV REDEEM', 'CREDIT NOTE', and 'ACCOUNT'. The 'EFTPOS' option is highlighted with a yellow border and a yellow arrow pointing to it. To the right of the tender selection is a display showing the amount '10.00' and the text 'Balance 10.00'. Below the display are images of Australian banknotes: 100, 50, 20, 10, and 5.

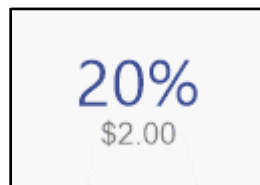
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After EFTPOS is selected, the Customer Tipping prompt will be displayed on both the POS Screen and the Customer Display:



After an amount has been selected, it will be added to the total amount due and in this example, the total amount due will be sent to the EFTPOS pinpad:



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You may also be prompted to enter a cashout amount if this has been enabled.

Note the new amount including the tip will also be displayed on the Enter Cash-Out Amount prompt:

Enter Cash-Out Amount				×	
Purchase Amount	12.00	7	8	9	100
CashOut Amount		4	5	6	50
Total Amount	12.00	1	2	3	20
OK	0	.	C	10	

If using integrated EFTPOS, Idealpos displays a prompt to swipe card:

SWIPE CARD		×
Cancel	linkly	

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The tip will be included in the total amount and will appear as TIPS IN on the customer's receipt:

IDEALPOS	
1/212 Curtin Ave West Eagle Farm QLD 4009 Australia	
TAX INVOICE 123-456-789-11	
#000790-1 Jeremy 23-Nov-2020 11:40:11	
----BEVERAGE----	
CAPPUCCINO*	\$3.50
FLAT WHITE*	\$3.50
SHORT BLACK*	\$3.00
TIPS IN	\$2.00

TOTAL	\$12.00

GST Subtotal	\$10.00
GST Amount	\$0.91
EFTPOS	\$12.00
FOOD TOTAL	\$0.00
BEVERAGE TOTAL	\$10.00
Other Categories TOTAL	\$0.00
*indicates taxable supply	
Powered by Idealpos	

Pre-Ordering Functionality

IP-3781 – Preorder Functionality – Ability to change pickup date

This function enables the ability to change the pickup date for a Pre-Order once it has already been saved. The Pre-Ordering functionality was introduced in the previous build of Idealpos (Idealpos 7.1 – Build 13) and allows Customers to pre-order their items with a deposit and specify a pickup date of when they're expecting to collect their order. Should a Customer decide to change their pickup date, this function can be used after the order has been saved.

In order to use this functionality, your system needs to be configured for Pre-Ordering functionality. For further details about configuring and using Pre-Ordering functionality, [click here](#).

To configure and use this function, go to:

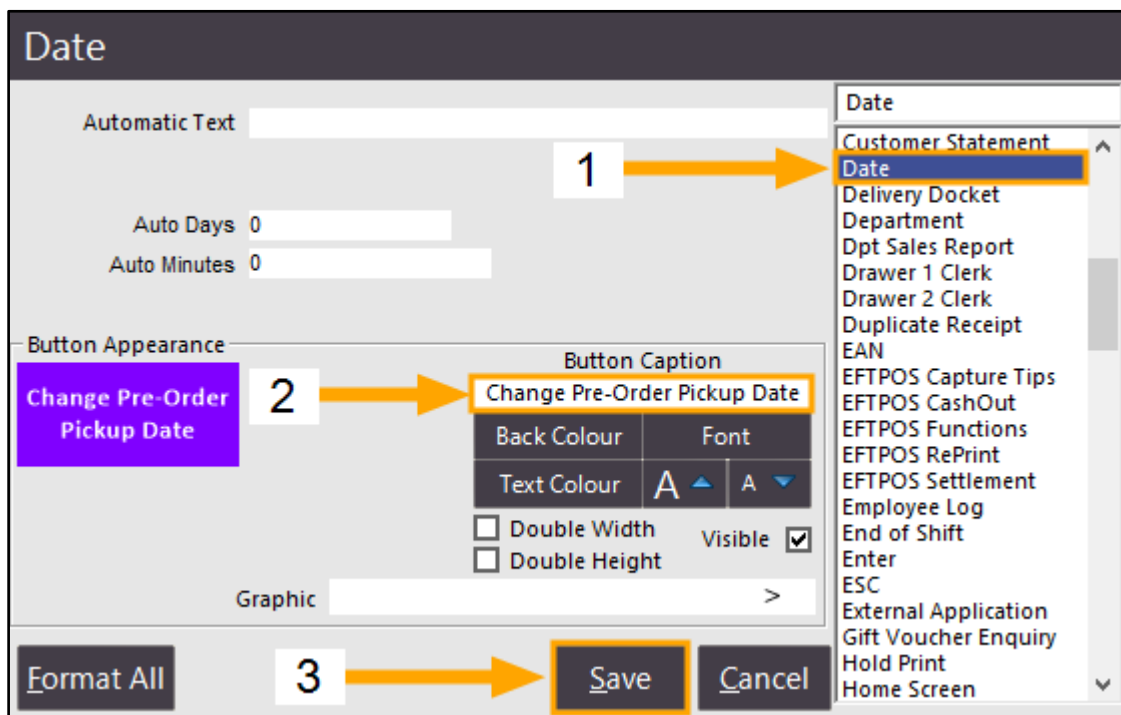
Back Office > Setup > POS Screen > POS Screen Setup > Select "Buttons" on the bottom-left corner of the window. Locate a POS Screen tab where you'd like to create the button for the "Change Pickup Date" button. Locate a blank button, click on it and configure it as follows:

POS Screen Function: Date

Auto Days/Auto Minutes: Leave as default

Button Caption: Change Pre-Order Pickup Date

Button Appearance: Customise Button appearance as desired/required



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Once the button has been created, close the POS Screen layout windows.
Then go to: POS Screen

To modify a pickup date of an existing order, add the Bar Tab Customer to the sale which contains a saved pre-order.

This can be done by clicking on the pre-configured POS Screen button for the Customer Type (e.g. XMAS CLUB) that you created when originally setting up the Pre-Ordering Function, then select a Customer from the list which currently has a pre-order saved:



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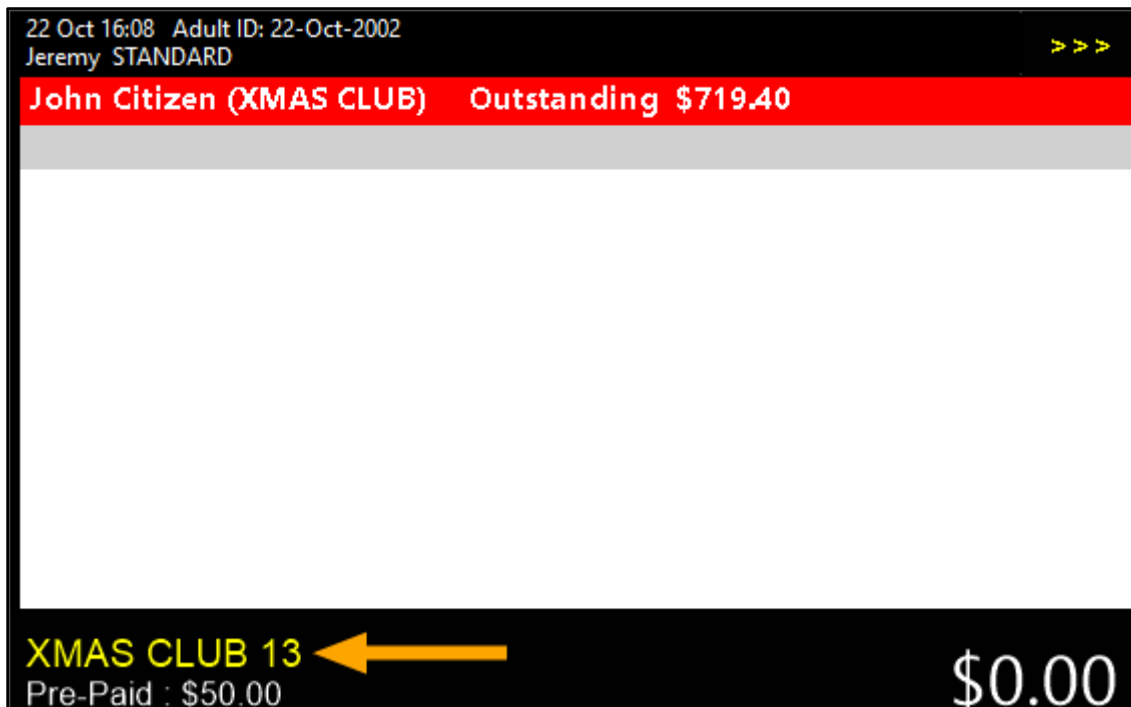
The Customer is added to the sale.

Before changing the pickup date, you may want to confirm whether or not the customer has a pre-order in the system.

The reason being that if the customer has a pickup date that falls on the current date, the pickup date window will highlight the current date. Also, if the customer does not have a pre-order in the system, the pickup date window will also highlight the current date.

Therefore, to avoid any possible confusion, it is a good idea to ensure that the customer does indeed have a pre-order saved in the system.

This can be confirmed by checking the customer details that are displayed within the POS Sale screen. Pre-Orders will typically display "Outstanding" text next to the Customer's name and any outstanding balance will appear here. If you want to confirm whether the customer has items saved in their pre-order, the Customer Type text (e.g. XMAS CLUB) can be pressed on the POS Screen.



If items have been saved to the pre-order, they will be shown in the window similar to the below example:

XMAS CLUB 13		balance: \$769.40		×
John Citizen				
121001	PORK BELLY	10	189.90	
121002	PORK MEDALLIONS	10	139.90	
121003	PORK CHOPS	10	149.90	
121004	PORK SHOULDER	10	119.90	
121005	PORK SAUSAGES	10	79.90	
121006	PORK MINCE	10	89.90	

			769.40	

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If the customer doesn't currently have items saved in a pre-order, a blank window will be shown similar to the below example:



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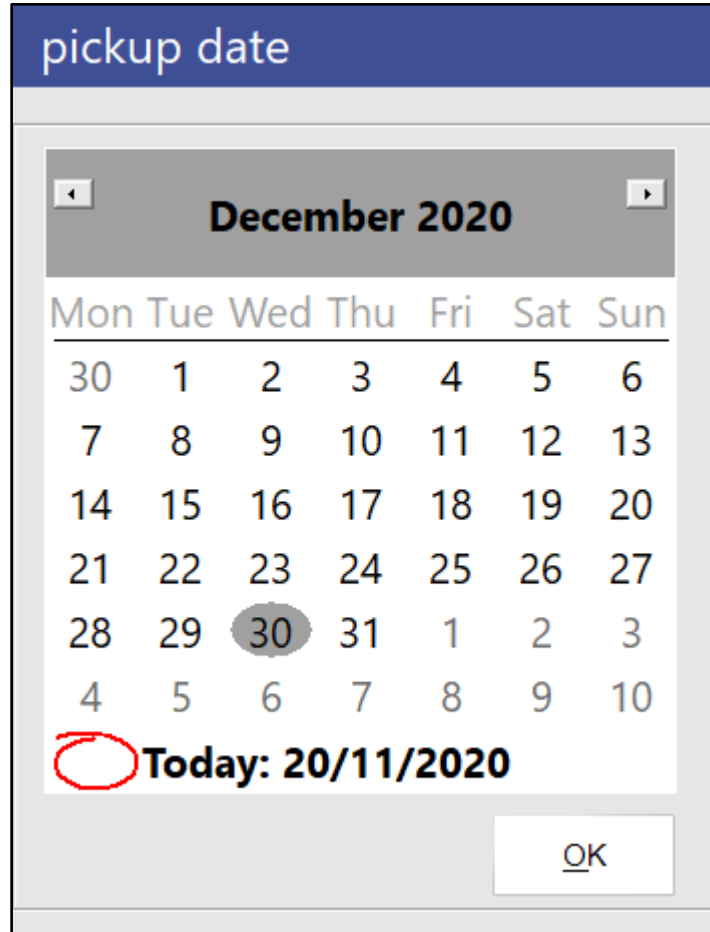
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Once you have confirmed that the customer has a pre-order saved, the “Change Pre-Order Pickup Date” button can then be pressed on the POS Screen.

The pickup date window will be displayed and the previously chosen pickup date will be highlighted (from when the pre-order was originally saved).

You can either leave the date as-is and press OK, then either Void the sale or press “ENTER” to clear the customer from the sale.

If you want to change the pickup date, select a new date from the pickup date window, then press “OK”.



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The new pickup date will appear on the top-right corner within the sale as shown in the below example:



To apply the change, press the "ENTER" button on the POS Screen.

When running the Pending Sales Report (from the Back Office, go to Reports > Sales > Pending Sales), the new pickup date will now appear for the order.

Code	Date	Clerk	Order Date	
Wednesday 30 Dec 2020				
888828-1	20-Nov-2020 15:02	Jeremy	30-Dec-2020	Customer 28 - John Citizen
121001	PORK BELLY		10	189.90
121002	PORK MEDALLIONS		10	139.90
121003	PORK CHOPS		10	149.90
121004	PORK SHOULDER		10	119.90
121005	PORK SAUSAGES		10	79.90
121006	PORK MINCE		10	89.90

				769.40
				Less Paid 50.00
				Total Owing 719.40

				719.40

				Subtotal 769.40
				Less Paid 50.00
				Grand Total Owing 719.40

Stock Items

IP-3773 – Support for Stock Item Tags

This function adds tag functionality to Stock Items.

Tags can be added to Stock Items and they can be used to record additional details about the item or type of item.

E.g. In a clothing store, you may have clothing articles which are for babies, children, adolescents and adults.

Clothing Stock Items can be marked using tags such as Clothing – Baby, Clothing – Children, etc.

You can create as many tags as needed for each item.

E.g. An item can be marked with tags such as:

- Clothing – Baby
- Pants
- Size – Small
- Etc.

Note that the length of each tag is restricted to twenty characters.

In the near future, we'll be adding support for sending tags from Idealpos to Shopify (via Idealpos Online).

This will result in the tags that are entered against a Web Store Stock Item in Idealpos being sent to and created in Shopify.

An option to enter tags has also been added to the Stock Item Sales Report which enables you to enter one or more tags. The Stock Item Sales Report will only report on items that match the entered tags.

There is no configuration required to enable the tags function.

To use this function, go to: File > Stock Control > Stock Items

Open a Stock Item by selecting it and pressing "Modify" on the bottom-right corner of the screen. Alternatively, you can double-click on an item to open it.

In the Tags section, click into the blank field and start entering a tag.

As you enter a tag, you will notice a small popup appear below the blank field showing "+ Add [tag]", where [tag] is the text is representative of the tag that you've entered into the field shown above.

To add the tag to the list, you can either press the "+" button on the small popup area. Alternatively, you can press ENTER or the comma (,) button on your keyboard.

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Stock Code 307303 Department 307 > SCHOOL CLOTHING
Description HAT LARGE (9) Scan Code 9841226808909 Auto
Kitchen Description HAT LARGE (9)
Long Description HAT LARGE (9)

Selling Prices (inc Tax)

		Profit%
STANDARD	13.99	29.25
STAFF	11.50	13.88
EXTRAS	0.00	
BOTTLESHOP	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	
OWNERS	0.00	

Force Selling Price Entry

Printer Settings

- Receipt Printer
- MAINS
- PIZZA
- PASTA
- BAR
- Kitchen Printer 5
- Kitchen Printer 6
- Kitchen Printer 7
- Kitchen Printer 8
- Kitchen Printer 9
- Kitchen Printer 10
- Kitchen Printer 11
- Kitchen Printer 12

Purchasing

Purchase Category 3 > RETAIL
Default Supplier 20 > Wriddles Uniforms
Default Supplier Stock Code SDFB137

Other Options

- Stock Control
- Indirect Item
- Non-Accumulating
- Can't Buy with GIFT VOUCHER
- Scale
- Instruction
- Print Red
- Web Store
- Inhibit Discounts
- Inhibit Voids
- Manufactured Item

Tags

School Clothing

Cost Prices (ex Tax)

Standard Cost 9.0000
Last Cost 9.0000
Average Cost 9.0000

Tax Settings (Selling)

- GST
- GST-Free
- Not Defined
- Not Defined
- Not Defined
- Not Defined

Attributes

Keyboard Save

The tag will be added to the right-hand side of the Tags field. You can repeat this process to add as many tags as required for the item.

Tags
School Clothing X

If more tags are entered than can be displayed in the Tags area, a scrollbar will appear on the right-hand side of the Tags area to enable scrolling through the list of tags.

Tags
Primary School X High School X Pre-School X Clothing X
UV protection X Summer wear X Girls clothing X
Boys clothing X

Tags can be removed by pressing the "X" button located to the right-hand side of the tag.

Tags
Primary School X High School X Pre-School X Clothing X
UV protection X Summer wear X Girls clothing X
Boys clothing X

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Once the required tags have been added to the Stock Item, press the "Save" button on the bottom right corner of the Stock Item window.

If you add tags to a Stock Item and close the window without saving by pressing the "X" button on the top-right corner, a "Save Changes?" prompt will be displayed as below. Press "Yes" to save your changes or press "No" to discard any newly entered tags.

stock items
General Advanced Indirect Item
✕

Stock Code: 307303

Description: HAT LARGE (9)

Kitchen Description: HAT LARGE (9)

Long Description: HAT LARGE (9)

Department: 307 > SCHOOL CLOTHING

Scan Code: 9841226808909 Auto

Selling Prices (inc Tax)

	Price	Profit%
STANDARD	13.99	29.25
STAFF	11.50	13.88

Printer Settings

Receipt Printer

MAINS

Purchasing

Purchase Category: 3 > RETAIL

Default Supplier: 20 > Wridbles Uniforms

Default Supplier: 608127

Save Changes?

Yes
No

Price 9 0.00

Price 10 0.00

Price 11 0.00

OWNERS 0.00

Force Selling Price Entry

Kitchen Printer 9

Kitchen Printer 10

Kitchen Printer 11

Kitchen Printer 12

Scale

Manufactured Item

Tags

School Clothing ✕ Headwear ✕ Sun protection ✕

Primary School ✕ High School ✕ Pre-School ✕ Clothing ✕

UV protection ✕ Summer wear ✕ Girls clothing ✕

Cost Prices (ex Tax)

Standard Cost: 9.0000

Last Cost: 9.0000

Average Cost: 9.0000

Tax Settings (Selling)

GST

GST-Free

Not Defined

Not Defined

Not Defined

Attributes

Keyboard
Save

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The Stock Item Sales Report has been updated to support tags functionality.

Specific tags can be entered into the selection range when running the report and the report will only display items that match the entered tags. Entering multiple tags into the report selection range will display items that match any of the entered tags.

E.g. Entering multiple tags into the selection range acts as an “or” function, meaning that entering multiple tags such as “UV protection” and “Headwear” will display any Stock Items that have “UV protection” OR “Headwear” tags (to broaden the selection range).

Entering multiple tags does not restrict the results to only show items that contain all the tags within the one item.

E.g. The two following Stock Items exist with the following tags:

Stock Item: Hat Large

Tags: “UV protection” and “School”

Stock Item: Boys Size M Shirt

Tags: “Shirts” and “School”

When running the Stock Item Sales Report with tags “School” and “UV protection”, both Stock Items (Hat Large and Boys Size M Shirt) will appear in the report, provided that there are sales for both Stock Items within the sales period selected. This is because the tags function looks for any Stock Items that contain any of the tags entered in the report selection range. It does not look for Stock Items that specifically have all of the entered tags in each item.

To use the reporting function, go to: Reports > Sales > Stock Item Sales

At the bottom of the Stock Item Sales report window, enter the tags for the Stock Items that you want to report on, then press the “View” button. After you have entered a tag, ensure that you press the comma button on your keyboard “,” to add it to the list of tags in the selection range.

The below example shows the tags “School” and “UV protection” added to the selection range.

To add School and UV protection to the list of tags, you would need to enter “School,UV protection,” into the Tags field (excluding the quotes).

The screenshot shows the 'stock item sales' report window. The 'Date Range' is set to 'Today' from '02 Dec 2020 00:00:00' to '02 Dec 2020 23:59:59'. The 'Optional Grouping' section has 'Department' selected as the group field, with 'Show Group Label' and 'Totals Only' checked. The 'Sort Order' is set to 'Code'. The 'Selection Range' section has 'Price Level' set to 'All Price Levels'. The 'Tags' field is highlighted with a yellow box and contains 'School' and 'UV protection' separated by a comma. A yellow arrow points to the 'View' button at the bottom right.

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The report will run and will display a list of Stock Items that have been assigned to the tags which were entered in the selection range. Any tags that were entered into the selection range will be displayed at the top of the Stock Item Sales Report as a comma separated list.

						Sales		
	Unit Price inc	Unit Tax	Quantity	Nett ex	Tax	Nett inc	Discounts	Gros s inc
SCHOOL CLOTHING								
307008 BOYS SIZE M SHIRT	27.99	2.54	1.0000	25.45	2.54	27.99	0.00	27.99
307303 HAT LARGE	13.99	1.27	1.0000	12.72	1.27	13.99	0.00	13.99
			2.0000	38.17	3.81	41.98	0.00	41.98
			2.0000	38.17	3.81	41.98	0.00	41.98

Tags can also be included as a default setting in the Stock Item Sales Report via the "Save Defaults" function. To include tags in the report defaults, enter the required tag(s), then press the "Save Defaults" button. Each time the report is opened via Reports > Sales > Stock Item Sales, the tags will be pre-entered.

stock item sales
S X

Date Range: Today | From: 03 Dec 2020 00:00:00 | To: 03 Dec 2020 23:59:59

Optional Grouping: Department (Show Group Label: checked, Totals Only: checked, Totals with Group Label: unchecked)

Sort Order: Code (selected), Description, Best, Worst (Quantity selected)

Show Stock Items: checked, Group by Sell Price: unchecked, Unit Price is Price 1: unchecked, Hide Unit Price/Tax: unchecked, Portrait: checked

Selection Range: Price Level: All Price Levels

Code: > to >

Description: > to >

Supplier: > to >

Department: >

Location: >

POS System: >

Clerk: >

Attributes: +

Show: selected, Exclude: unchecked

Tags: UV protection X

Print
Save Defaults
View

IP-3764 – Stock Items – Support for Weight field (Shopify)

This function adds a Weight field into the Idealpos Stock Items – Advanced tab.

The Weight field will be sent to Shopify once support is added for this functionality.

Note: Support for sending Weight info to Shopify that has been entered into this field will be added in the near future.

This functionality is available by going to: File > Stock Control > Stock Items > Select Item > Modify
 Enable the Scale checkbox and enter the unit of measurement for the weight (e.g., g, kg, oz, lb, etc.).
 If required, the tare can also be entered.

The screenshot shows the 'stock items' advanced tab with the following details:

- Stock Code:** 21
- Department:** 106 > ENTRÉE
- Description:** Weight Item (11)
- Description 2:** Weight Item (11)
- Description 3:** Weight Item (11)
- Scan Code:** Auto
- Purchasing:** Purchase Category 1 > FOOD, Default Supplier >
- Other Options:**
 - Stock Control
 - Indirect Item
 - Indirect Components go to Kitchen Printers
 - Non-Accumulating
 - Can't Buy with GIFT VOUCHER
 - Scale kg Tare kg (highlighted with an orange arrow)
 - Instruction
 - Print Red
 - Web Store
 - Inhibit Discounts
 - Inhibit Voids
 - Manufactured Item
- Printer Settings:**
 - Receipt Printer
 - KITCHEN
 - BAR
 - COFFEE
 - IKM
 - Kitchen Printer 5
 - Kitchen Printer 6
 - Kitchen Printer 7
 - Kitchen Printer 8
 - Kitchen Printer 9
 - Kitchen Printer 10
 - Kitchen Printer 11
 - Kitchen Printer 12
- Cost Prices (ex Tax):**
 - Standard Cost: 0.0000
 - Last Cost: 0.0000
 - Average Cost: 0.0000
- Tax Settings (Selling):**
 - GST
 - GST-Free
 - Not Defined
 - Not Defined
 - Not Defined
 - Not Defined
- Attributes:** Six dropdown menus.

At the bottom of the form, there are buttons for 'Keyboard' and 'Save'.

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Once you've entered the unit of measurement for the scale and entered the tare weight, press the "Advanced" tab, and enter the weight of the item.

The screenshot shows the 'stock items' interface with the 'Advanced' tab selected. The interface is divided into several sections:

- General:** Sales Prompt (text input), Availability (dropdown menu set to 'Always Available').
- Linking:** Link to Menu 0 > MAIN, Link to Grid 0 > MAIN, Link Table 0 >.
- Amount Override Limits:** Lower Limit 0.00, Upper Limit 0.00, Profit% (input).
- Location 1:** Stock Level (input), Recommended Level (input), Reorder Level (input).
- Points by Price Level:** A list of PRICE 1 through PRICE 12, each with an associated input field.
- Points Settings:** Use Special Points (checkbox), Inhibit Points Accrual (checkbox), Inhibit Purchase With Points (checkbox), Print Promotional Ticket (checkbox).
- Stock Notes:** A large empty text area.
- Miscellaneous:** National Product Number (input), Receipt Tabs (input), Weight 5 kg (input, highlighted with a yellow arrow).

At the bottom of the interface, there are 'Keyboard' and 'Save' buttons.

Note that as mentioned previously, this functionality is available in the Idealpos User Interface, however, sending this data to Shopify is not yet supported. Support for sending the actual weight of an item to Shopify (via Idealpos Online) will be added in the near future.

Xero Interface

IP-3698 – Xero Interface – Support for Chromium Embedded Framework

This function adds Chromium Embedded Framework support to the Xero Interface in Idealpos.

This change ensures that Idealpos can continue to connect to and work with the Xero Oauth 2.0 Accounting Interface beyond December 2020.

Previous to this change, we were utilising a component that leveraged the latest Microsoft web browser installed on the PC/terminal to establish a connection with Xero. However, the components that were being used are no longer being supported by Xero after December 2020 and therefore, when connecting Idealpos to Xero, the Xero login prompt would display the following message: “Xero support for your browser ends in December”.

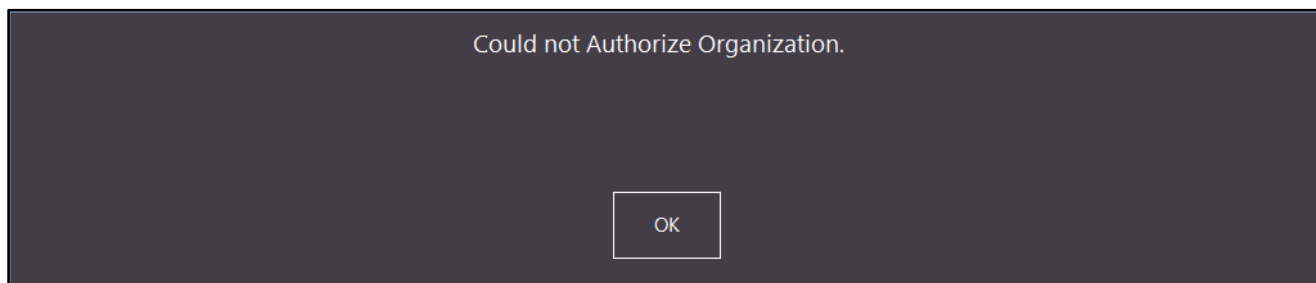
In order to ensure that our customers can continue to connect to Xero, we have added support for Chromium Embedded Framework.

If you are using Xero or plan to use Xero, you must install the Framework patch which includes support for Chromium Embedded Framework. The Framework patch must be installed prior to installing the latest build release, otherwise you may encounter error prompts after starting Idealpos.

Should you forget to install the Framework patch before installing the latest build release, please install the Framework patch, then re-run the latest Idealpos build installer.

Once the Framework Patch has been installed, the process for connecting Idealpos to Xero remains the same as per the steps that have been documented in the User Guide [here](#).

If the Framework Patch has not been installed and you attempt to connect Idealpos to Xero via the connect to Xero button, a prompt “Could not Authorize Organization” will be displayed as shown below.



To rectify this, complete the steps in the order shown below:

- Install the Framework Patch.
- Install the latest Idealpos build.
- Connect Idealpos to Xero using the button on-screen. A popup window should appear where you can login using your Xero credentials.