idealpos Update History

Idealpos 7.1 Build 14 - Update History

Update Details:

Function Descriptors

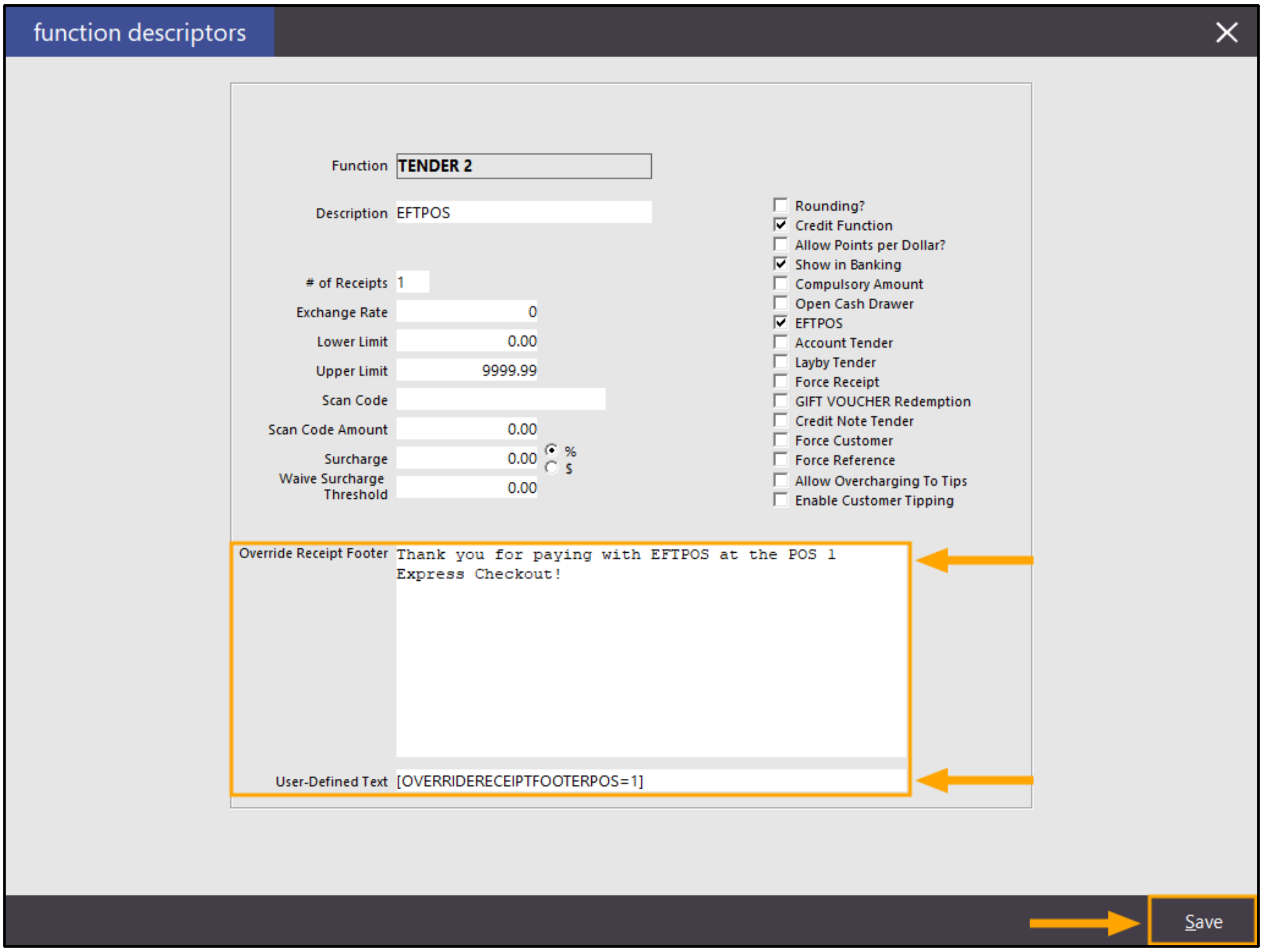
IP-3779 – Override Receipt Footer on Tender – by POS Number

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 [OVERRIDERECEIPTFOOTERPOS=#] 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.

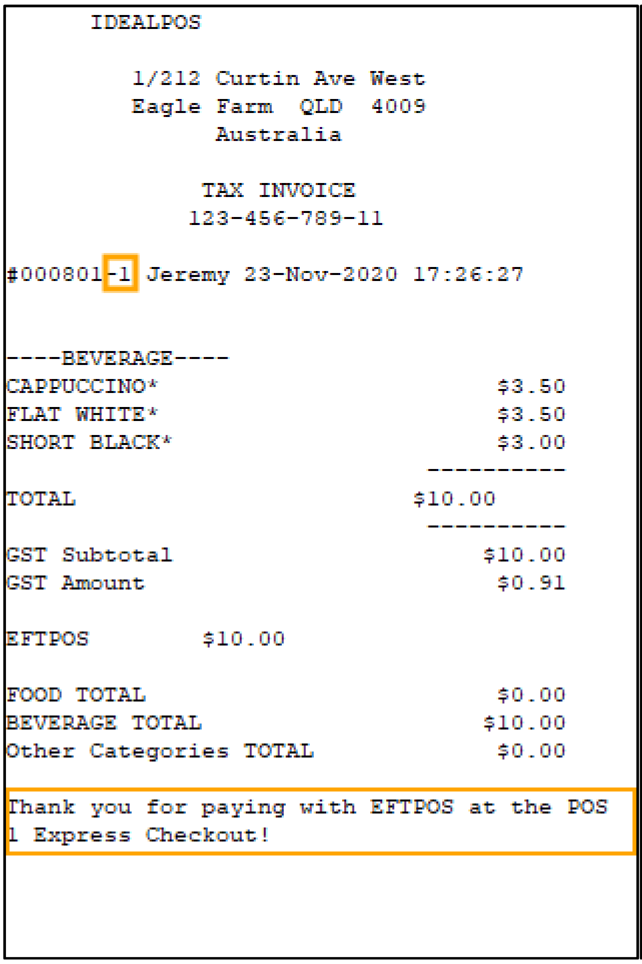
Examples:
[OVERRIDERECEIPTFOOTERPOS=1] – This will override the receipt footer on POS terminal 1 only.
[OVERRIDERECEIPTFOOTERPOS=1,2,3,4,5] – This will override the receipt footer on POS terminals 1, 2, 3, 4 and 5.
[OVERRIDERECEIPTFOOTERPOS=1-5] – This will override the receipt footer on all POS terminals between 1 to 5.
[OVERRIDERECEIPTFOOTERPOS=1-2,4,5] – This will override the receipt footer on POS terminals between 1 to 2 and POS terminals 4 and 5.

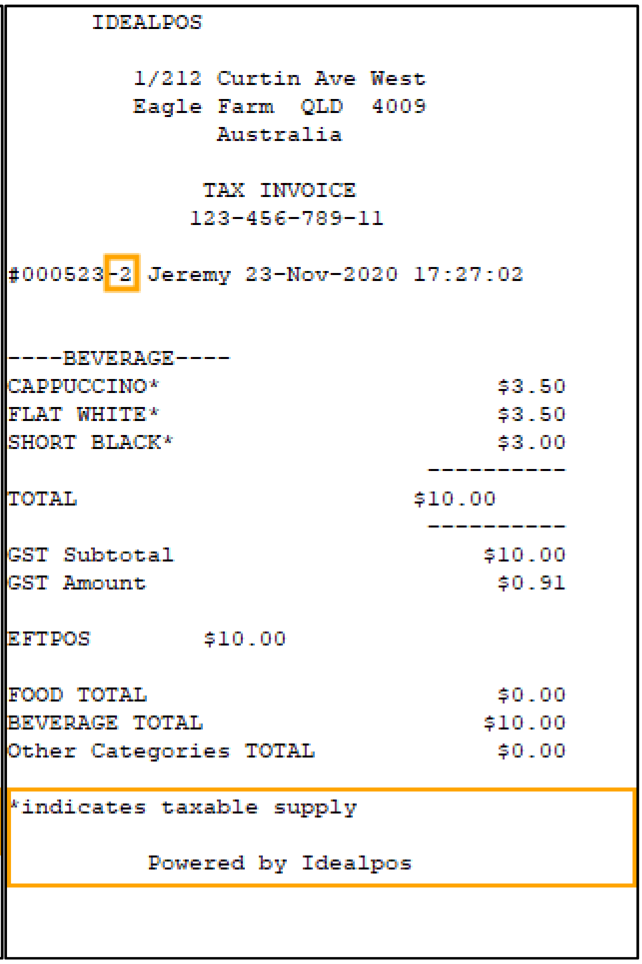
To configure and use this function, go to:
Back Office > Setup > Function Descriptors > Select Tender Type from the list of Function Descriptors > Modify.
In the Override Receipt Footer field, enter the text that you want to appear at the bottom of the Customer Receipt when the sale is tendered with 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 [OVERRIDERECEIPTFOOTERPOS=1] to have the setting apply only on POS 1.
Any POS terminals that aren't included in the OVERRIDERECEIPTFOOTERPOS will use the standard receipt footer.
Once configured, press the "Save" button on the bottom-right corner of the Function Descriptors window.



Return to top

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).


```
      IDEALPOS

         1/212 Curtin Ave West
         Eagle Farm  QLD  4009
               Australia

              TAX INVOICE
             123-456-789-11

#000801-1 Jeremy 23-Nov-2020 17:26:27


----BEVERAGE----
CAPPUCCINO*                          $3.50
FLAT WHITE*                          $3.50
SHORT BLACK*                         $3.00
                               ----------
TOTAL                           $10.00
                               ----------
GST Subtotal                        $10.00
GST Amount                           $0.91

EFTPOS        $10.00

FOOD TOTAL                           $0.00
BEVERAGE TOTAL                      $10.00
Other Categories TOTAL               $0.00

Thank you for paying with EFTPOS at the POS
1 Express Checkout!
```

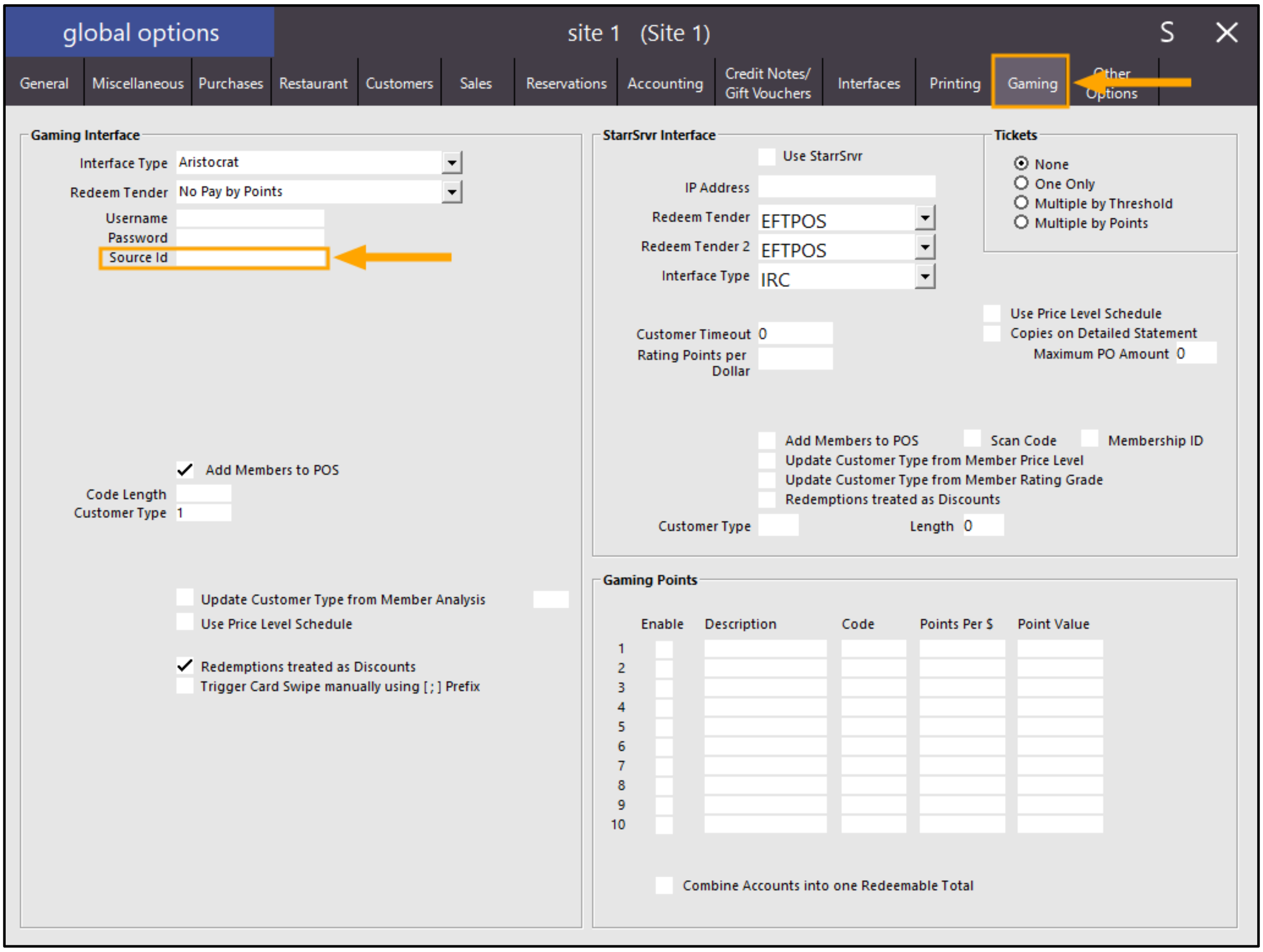

```
      IDEALPOS

         1/212 Curtin Ave West
         Eagle Farm  QLD  4009
               Australia

              TAX INVOICE
             123-456-789-11

#000523-2 Jeremy 23-Nov-2020 17:27:02


----BEVERAGE----
CAPPUCCINO*                          $3.50
FLAT WHITE*                          $3.50
SHORT BLACK*                         $3.00
                               ----------
TOTAL                           $10.00
                               ----------
GST Subtotal                        $10.00
GST Amount                           $0.91

EFTPOS        $10.00

FOOD TOTAL                           $0.00
BEVERAGE TOTAL                      $10.00
Other Categories TOTAL               $0.00

*indicates taxable supply

          Powered by Idealpos
```

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).



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.

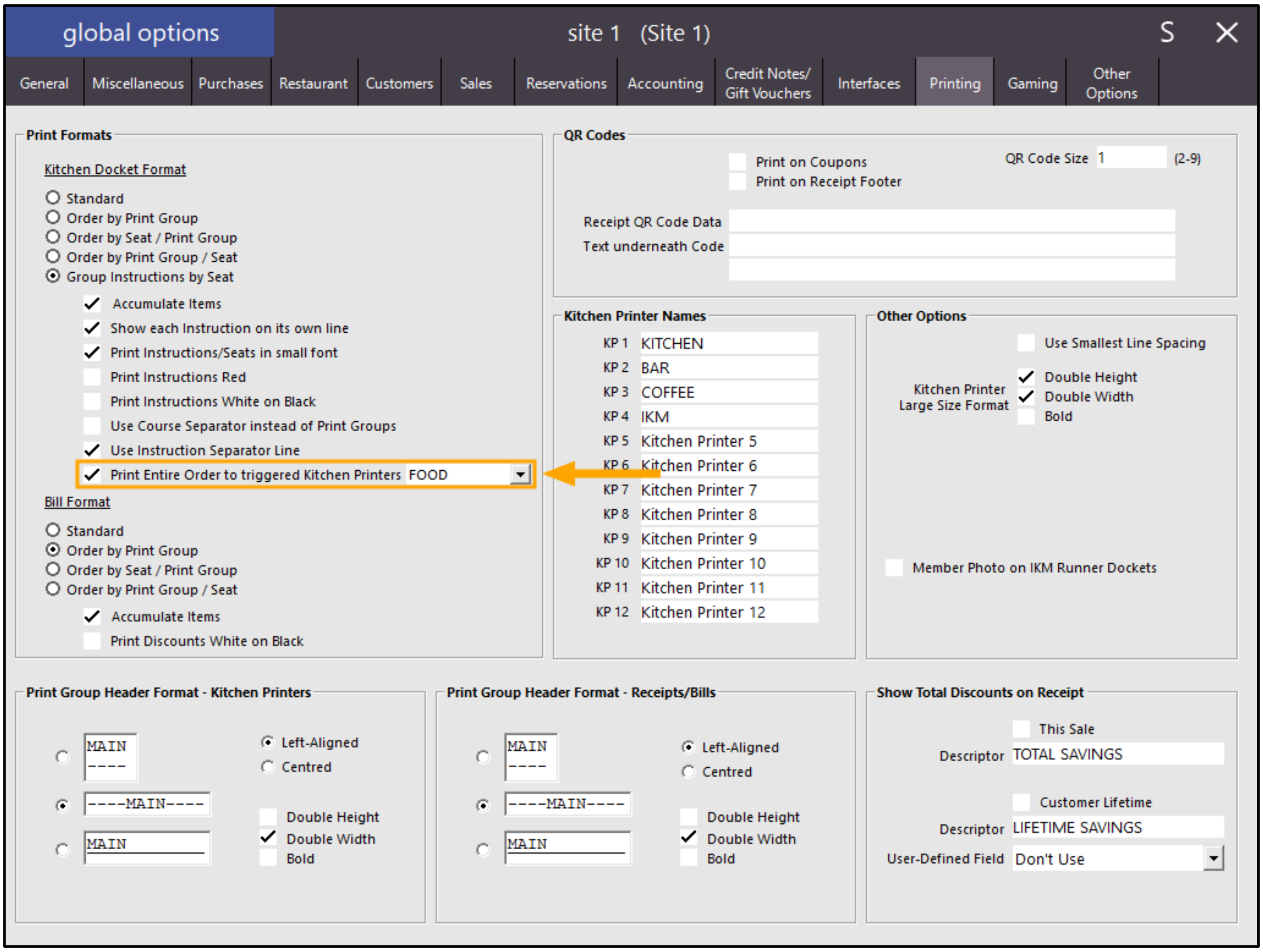
Example 3 – An order containing Steak and Veg, Pizza, Pasta and Beer is sent to the Kitchen.
Result – The Steak and Veg, Pizza, Pasta and Beer items will be printed to all Kitchen Printers (Mains Printer, Pizza Printer, Pasta Printer and Bar Printer).

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.

Return to top

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".



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]

Return to top

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:

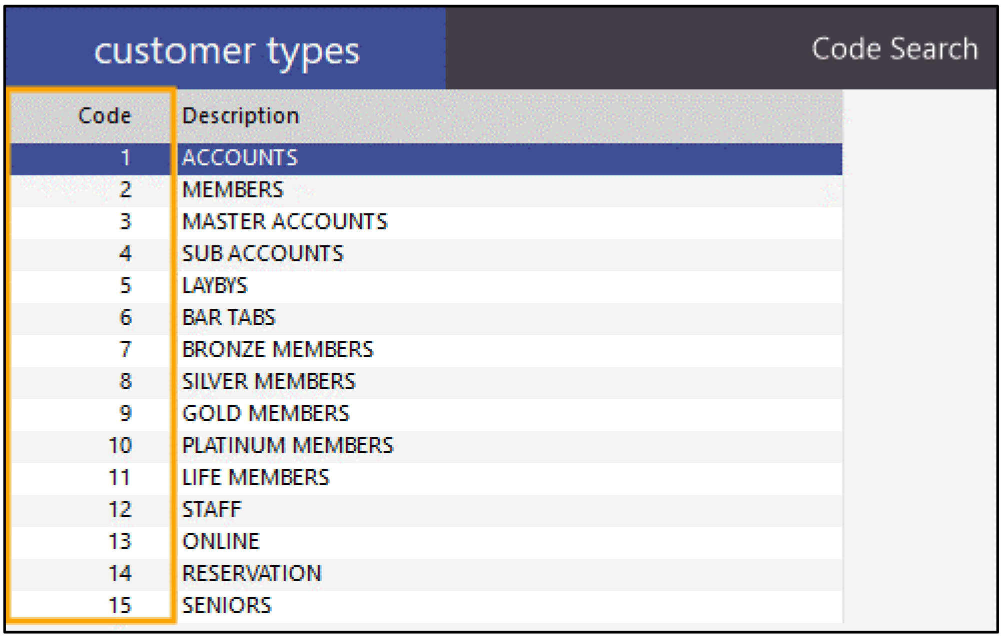
```
T A B L E   1    3   c o v e r s

 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.

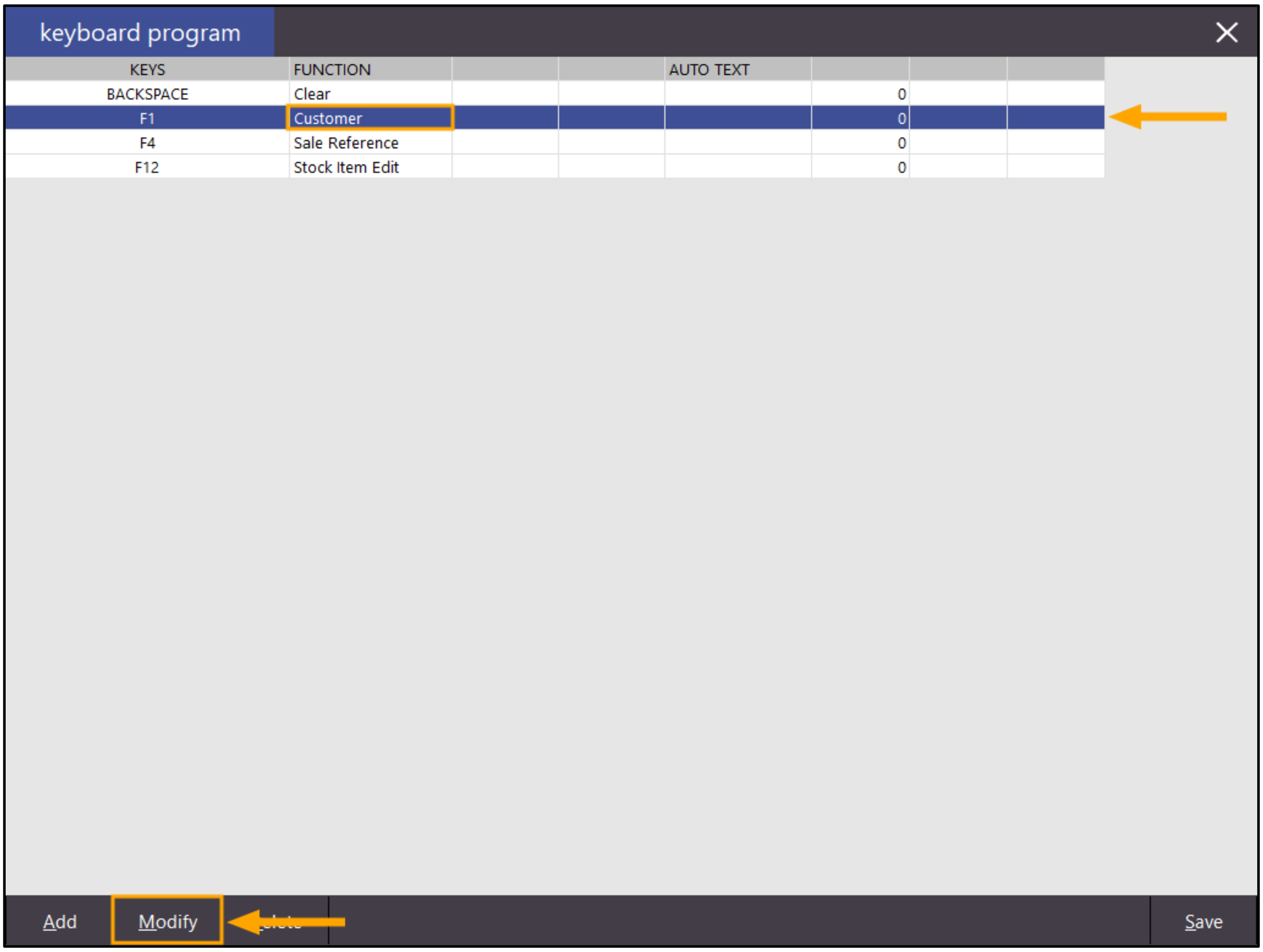
To configure and use this function, go to: Back Office > File > Customers > Customer Types
Identify which Customer Type that you want to display a list of Customers from, then note down the Customer Type Code that's displayed next to the Customer Type that you want to use.



Return to top

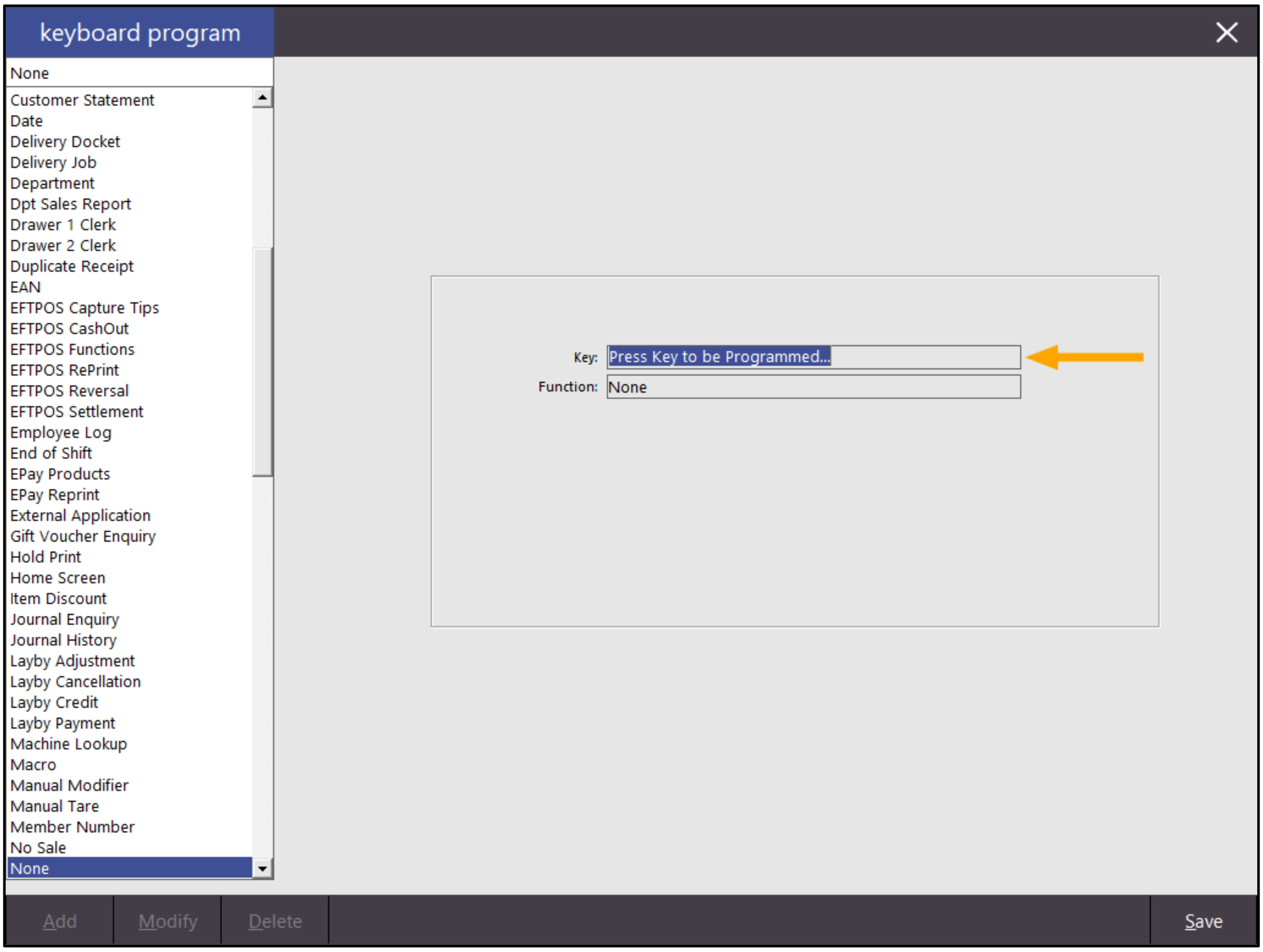
Close the Customer Types window, then go to: Back Office > Setup > Keyboard Program

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.

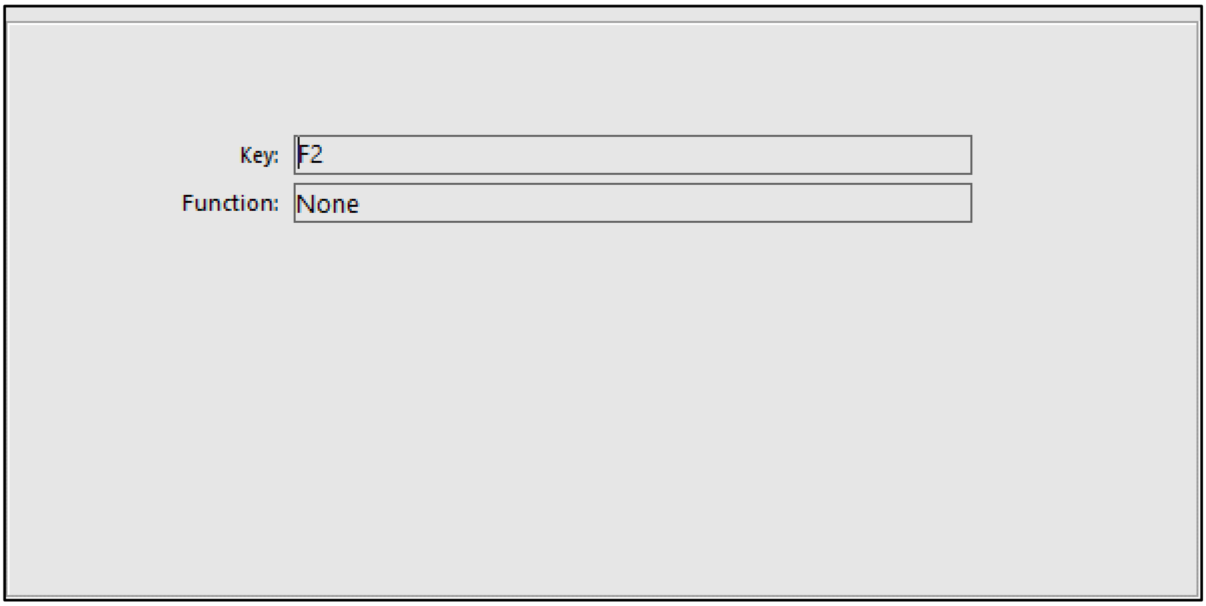


Return to top

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”.



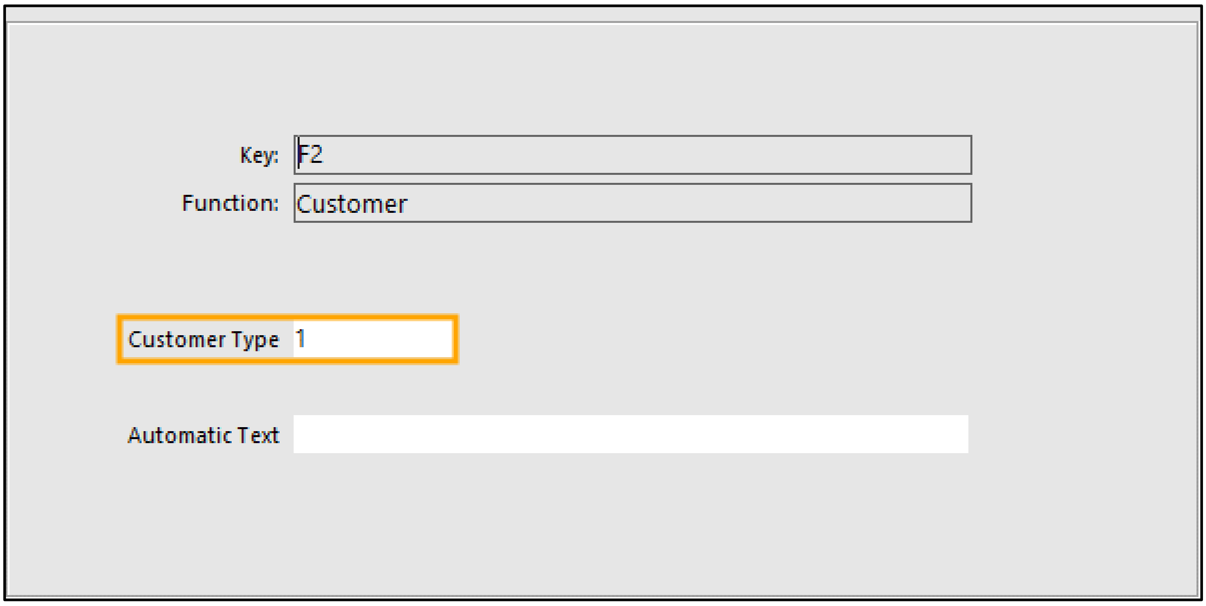
Press any key on the keyboard and Idealpos will detect the keypress and display the key in the key field. In this example, we have pressed the “F2” key on the keyboard.



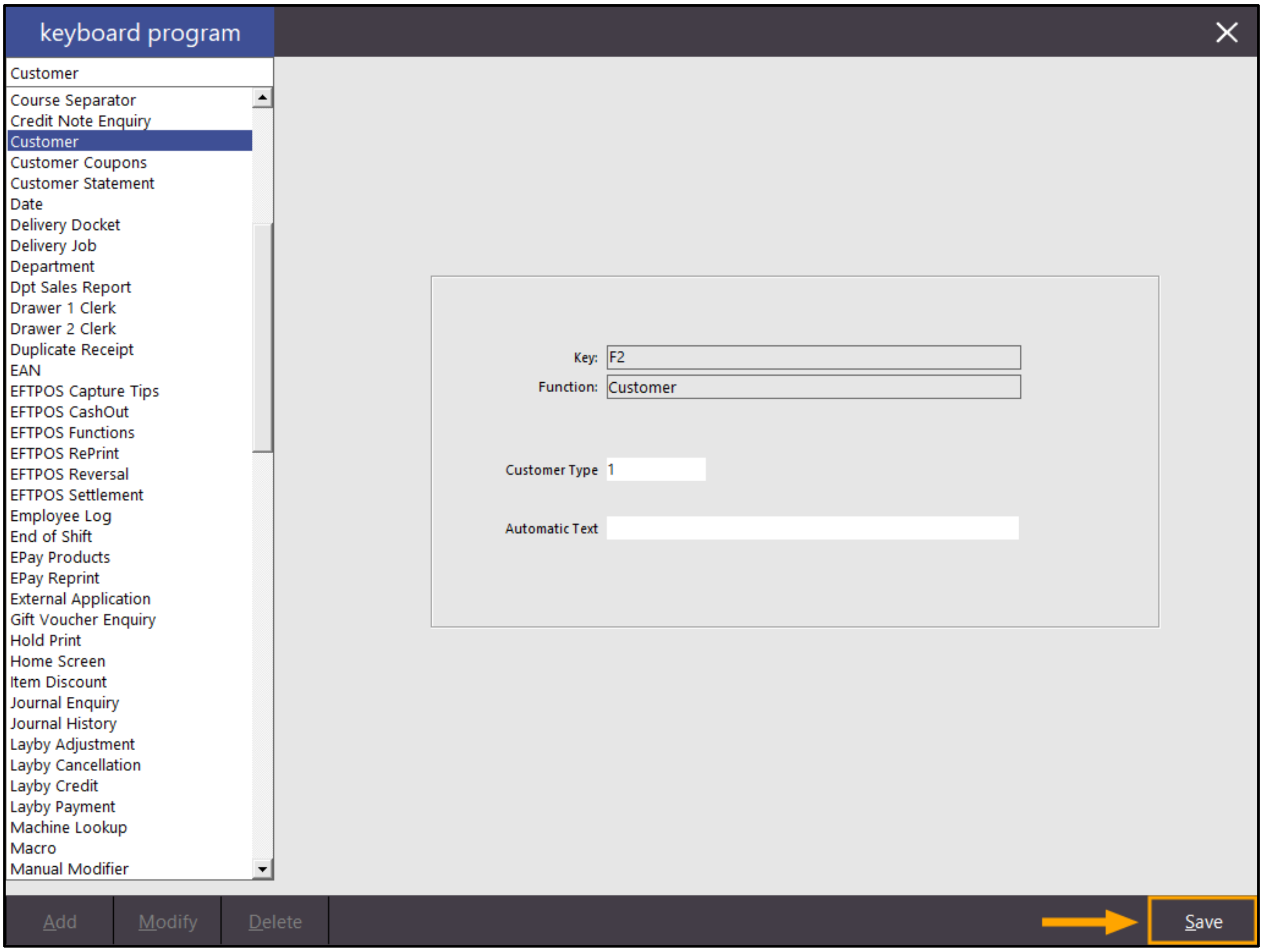
Note that if you press a key that has already been programmed, Idealpos will display a “This Key has already been Programmed” prompt.

Return to top

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.

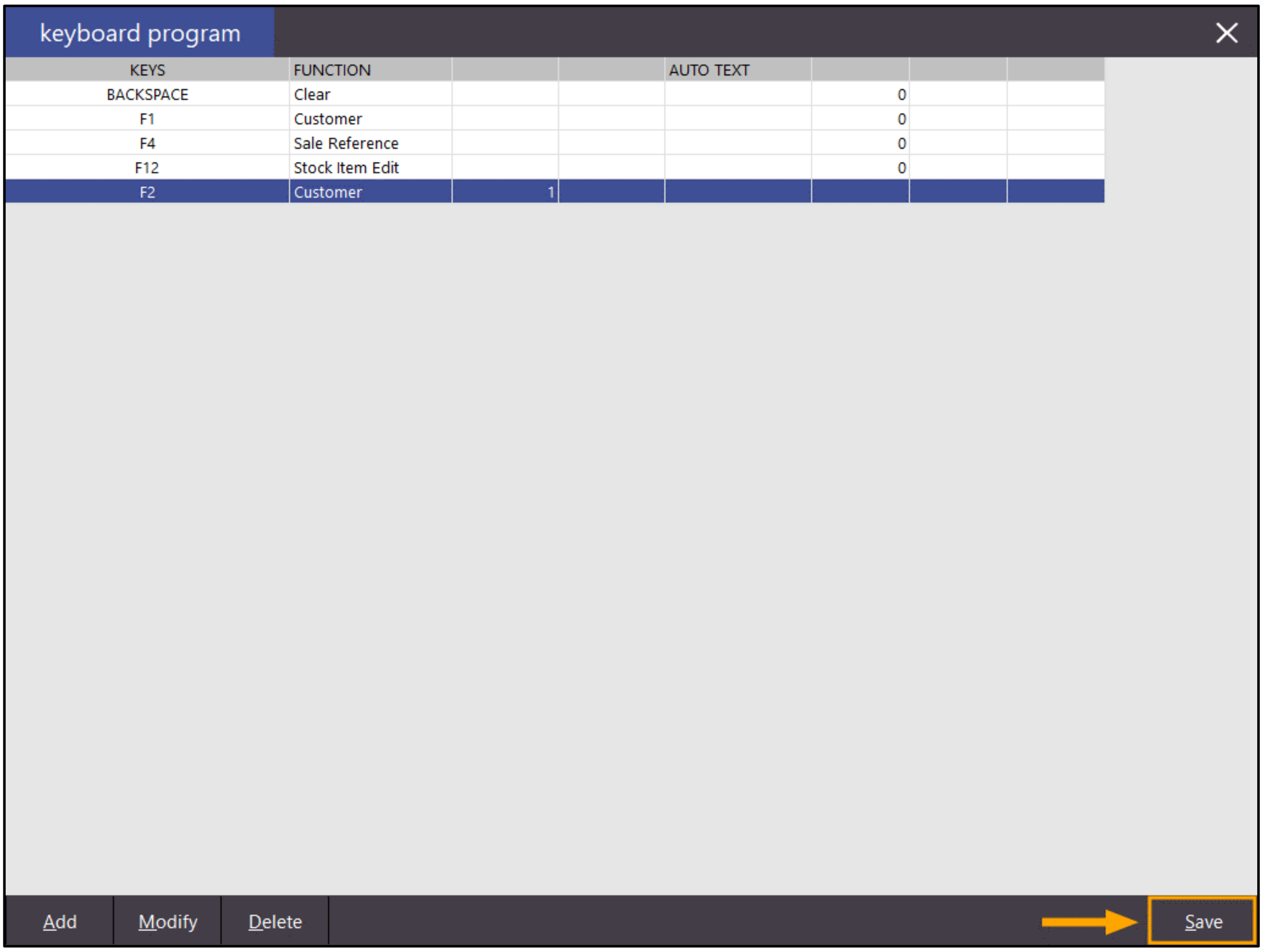


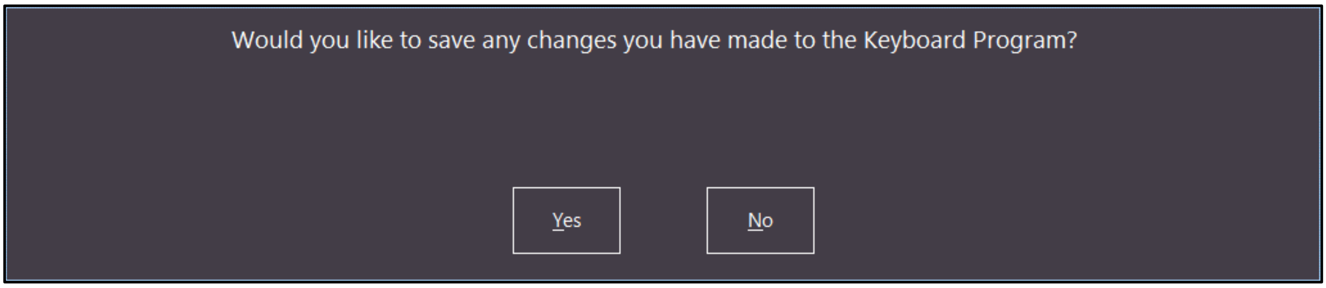
Press the "Save" button on the bottom-right corner of the window to save your change.



Return to top

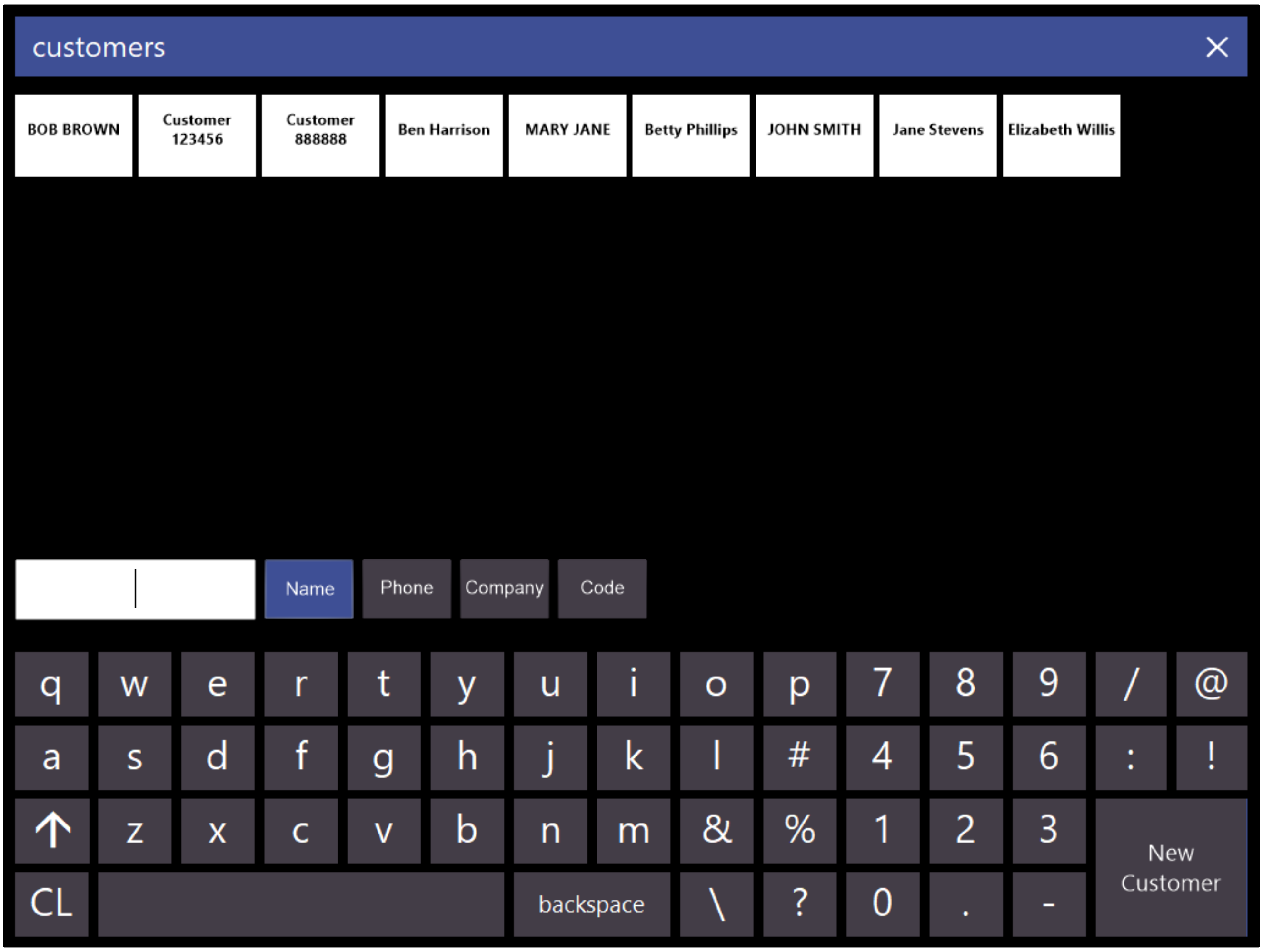
The newly programmed key will appear on the list of programmed keys.
Once again, press the “Save” button on the bottom-right corner of the screen, then confirm the change by pressing “Yes”.





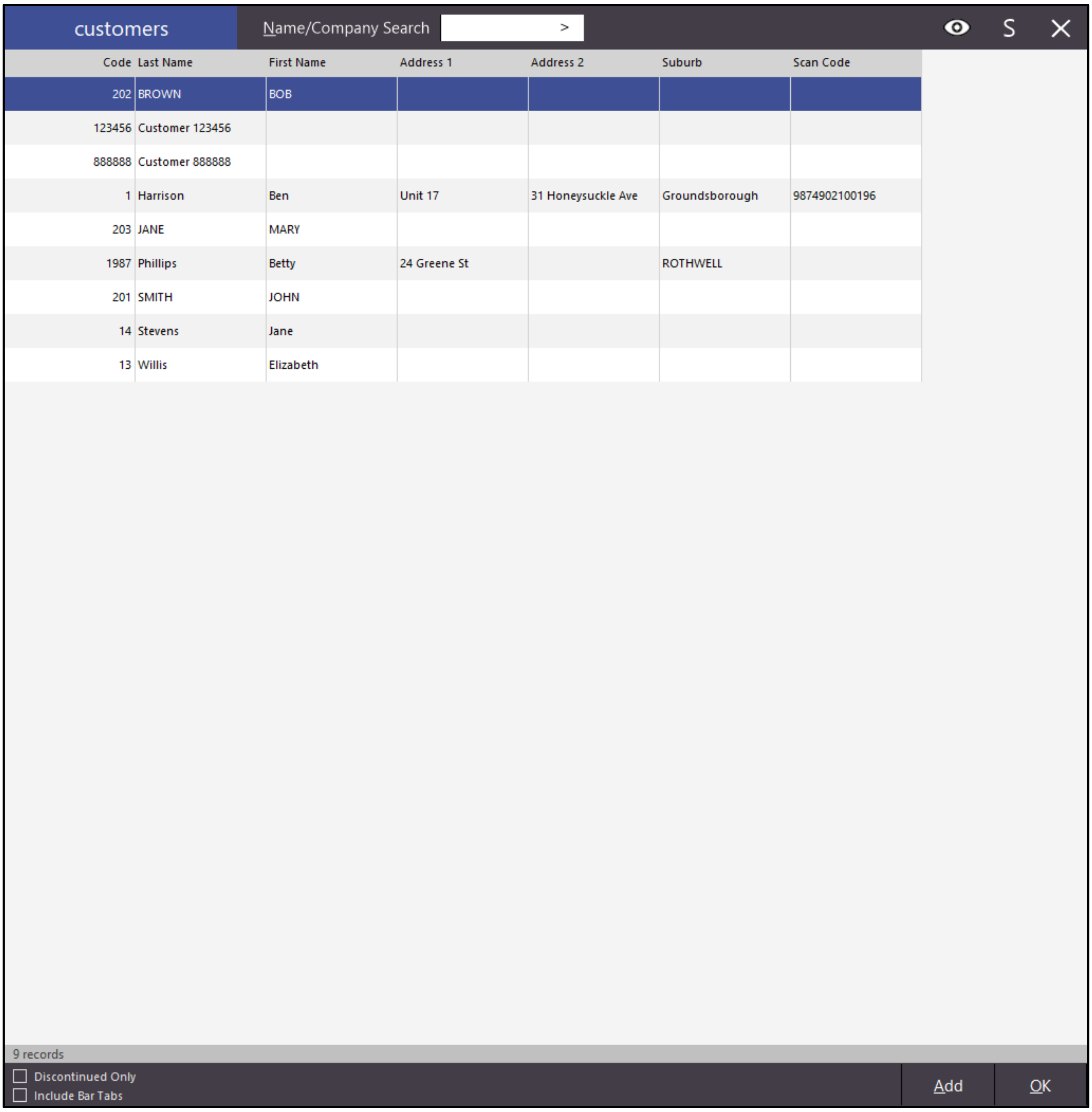
Return to top

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.



Return to top

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.

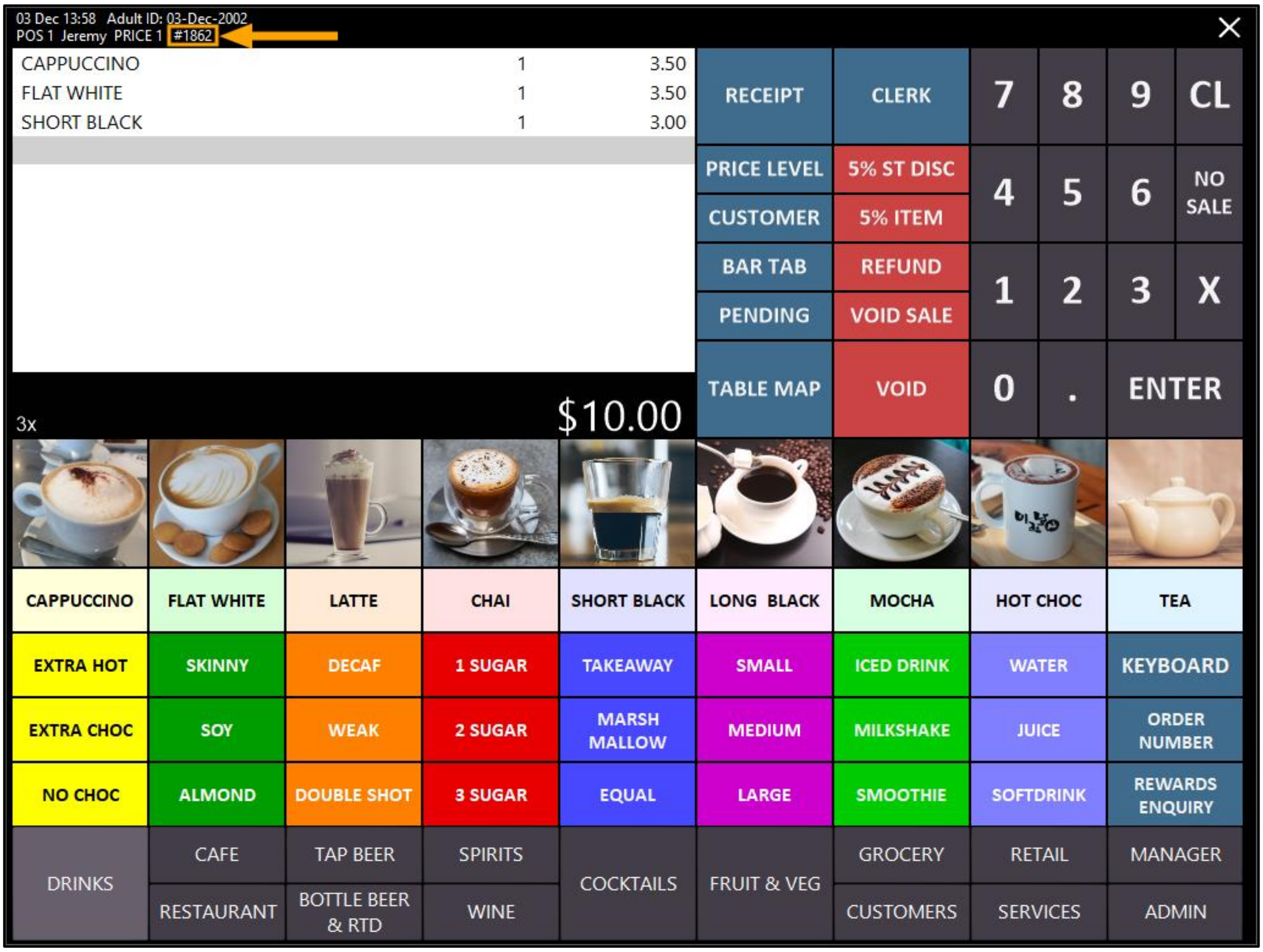


POS Screen

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

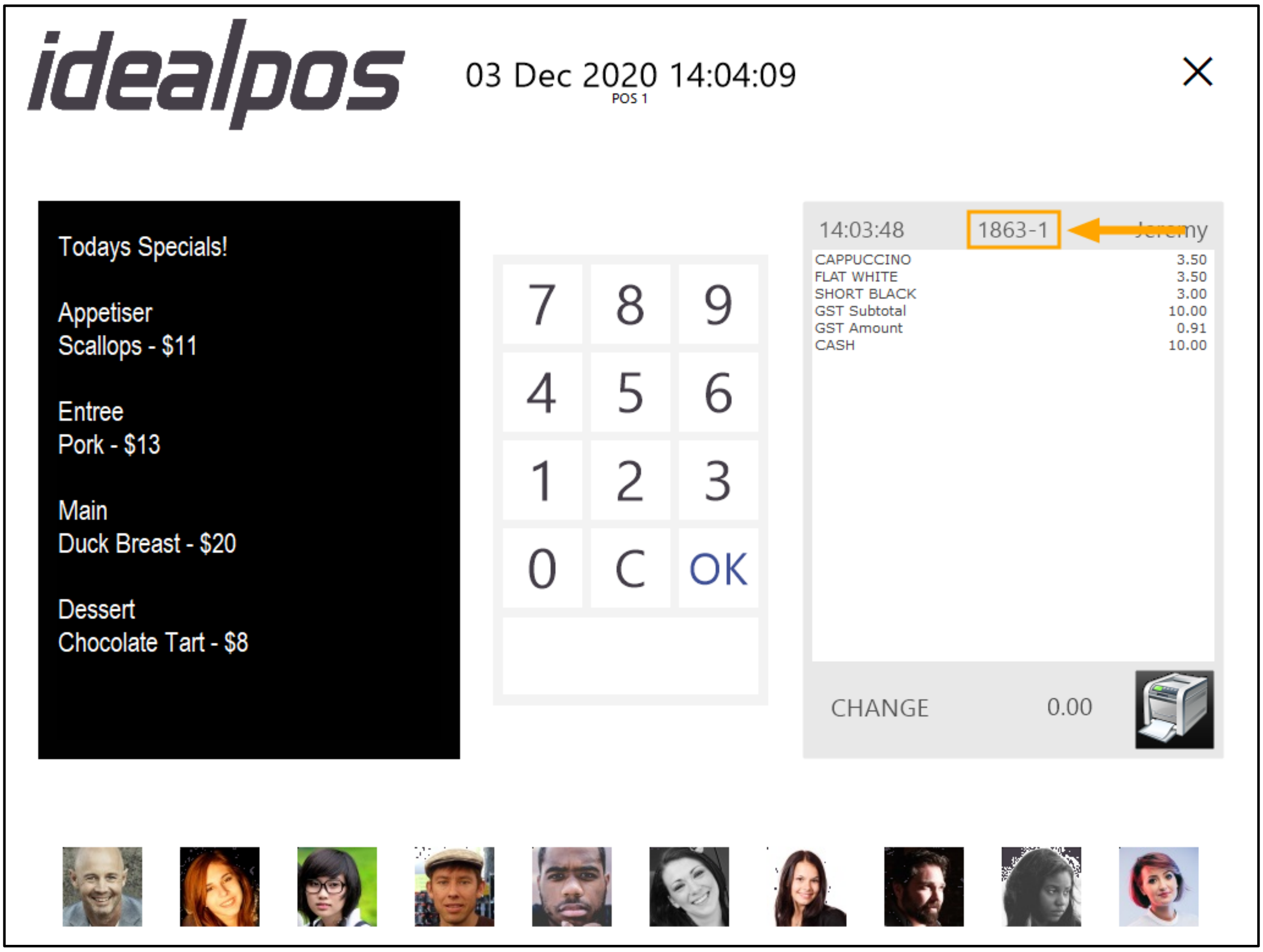
This function adds the Audit Number to the POS and Home Screens.
A unique Audit Number is assigned to each transaction or sale that is performed and by displaying the current Audit Number on both the POS Screen and Home Screen, it may come in useful for finding the transaction via the Journal History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



Return to top

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.



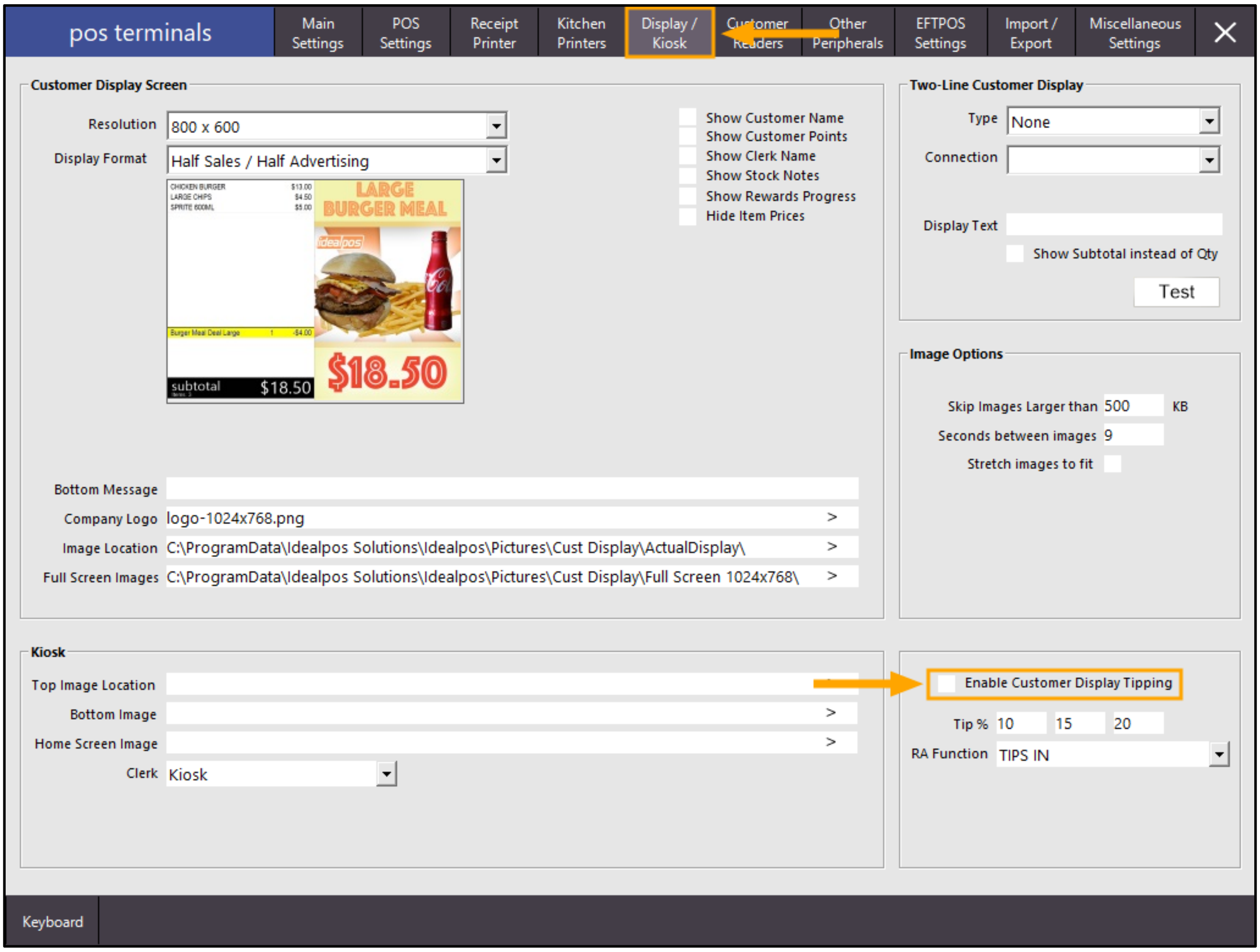
Note that the Home Screen will only appear immediately after a sale if the Yes/No Option “Return to Home Screen after Each Sale” is enabled or if the Home Screen is manually displayed by pressing a POS screen button assigned to the Home Screen function. The last transaction will be available on the Home 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.

Return to top

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

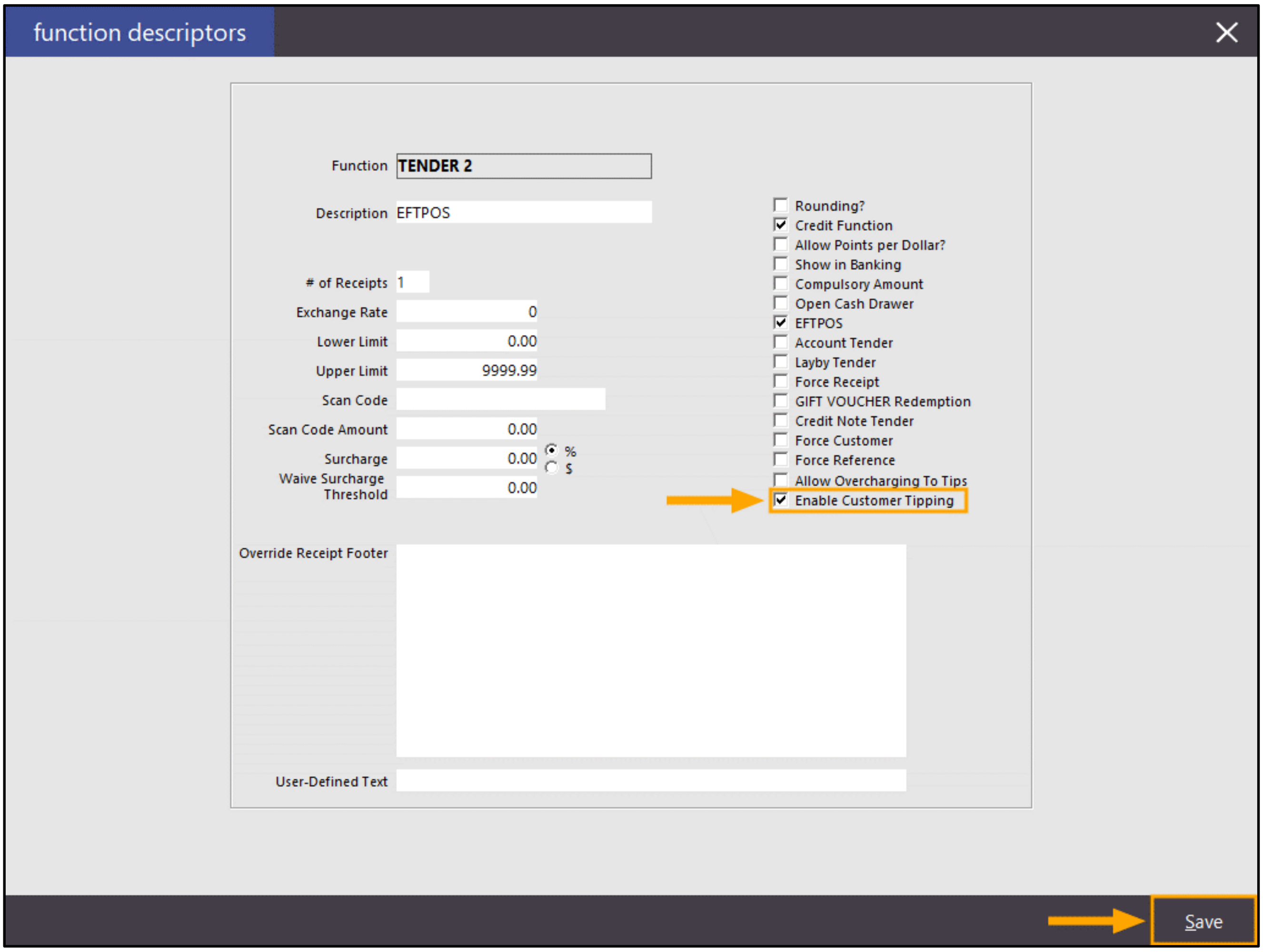
This function adds the ability to control which Tender Types will trigger the Customer Tipping screen to appear on the Customer Display and POS Screen. Previous to this change, enabling the Customer Display Tipping on a POS Terminal would cause the Customer Tip prompt to appear after the Clerk pressed 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.



Return to top

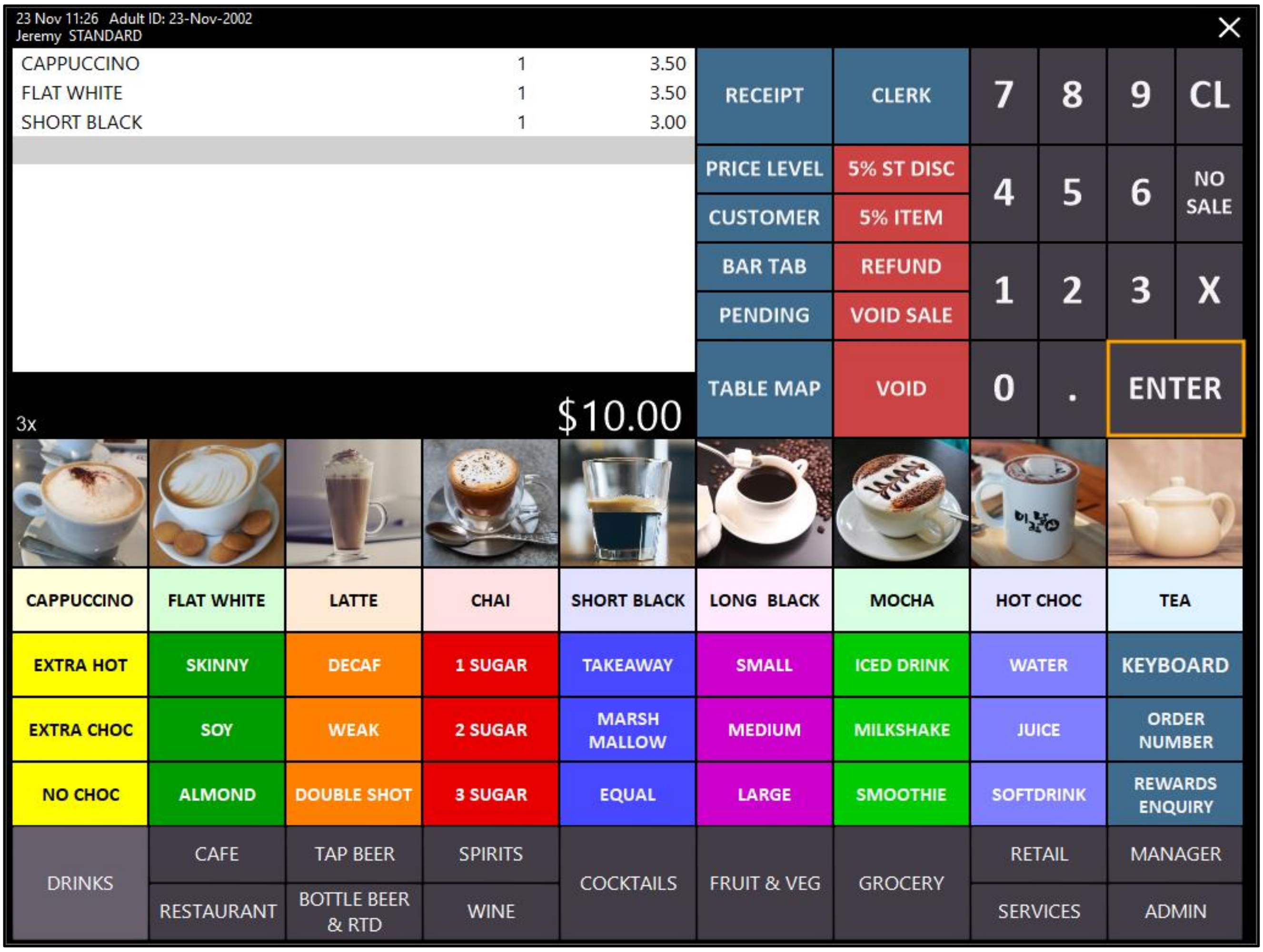
Once Customer Display Tipping has been disabled on the POS Terminal(s), close the POS Terminal configuration windows.
Then go to: Setup > Function Descriptors.
Select the Tender Type that you want to have the Customer Tipping prompt enabled, then press “Modify” on the bottom-right corner of the window. 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”.



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.

Return to top

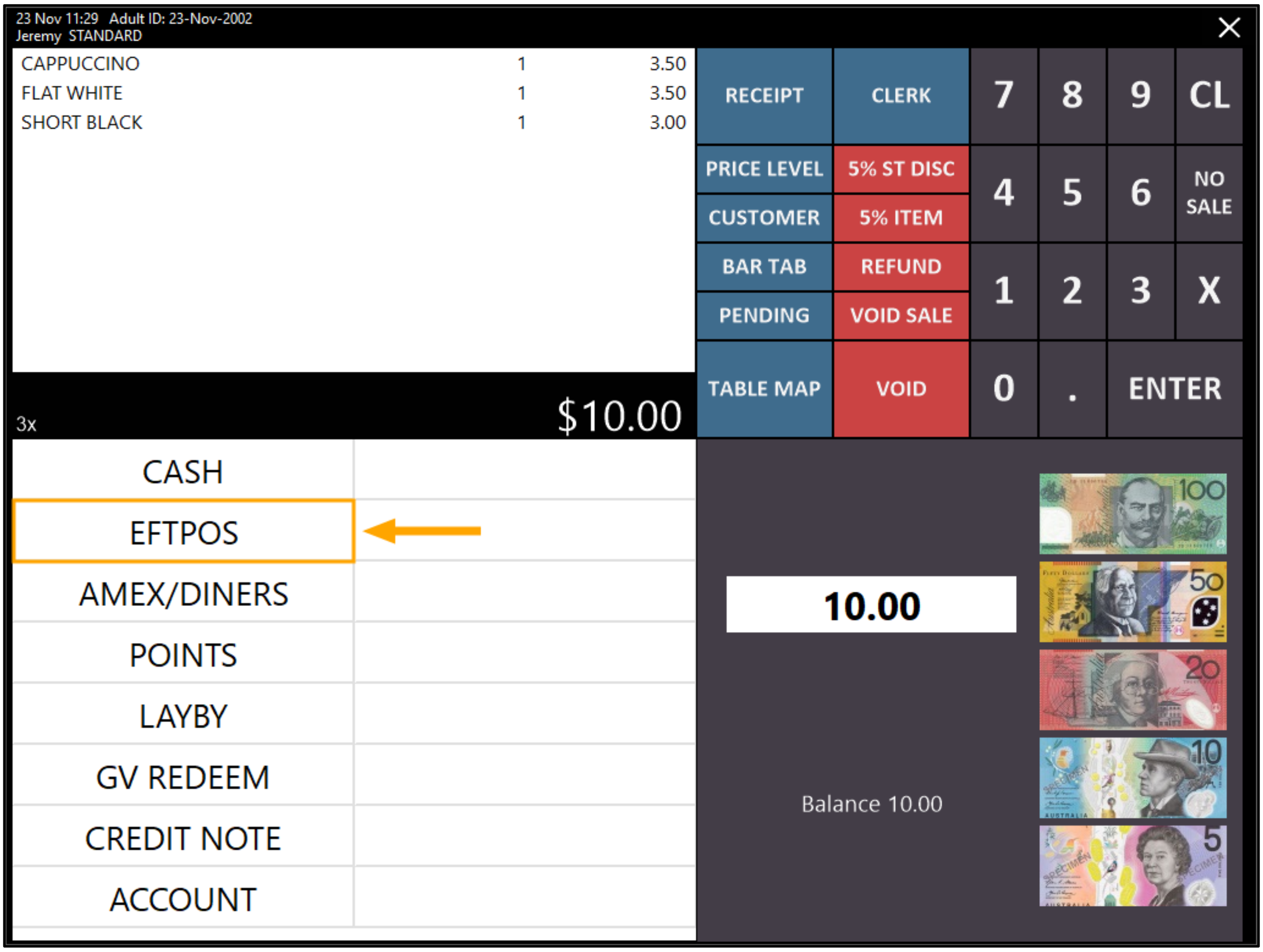
From the POS Screen, add the required items to the sale, then press the “ENTER” button to go to the Tender Screen:



Return to top

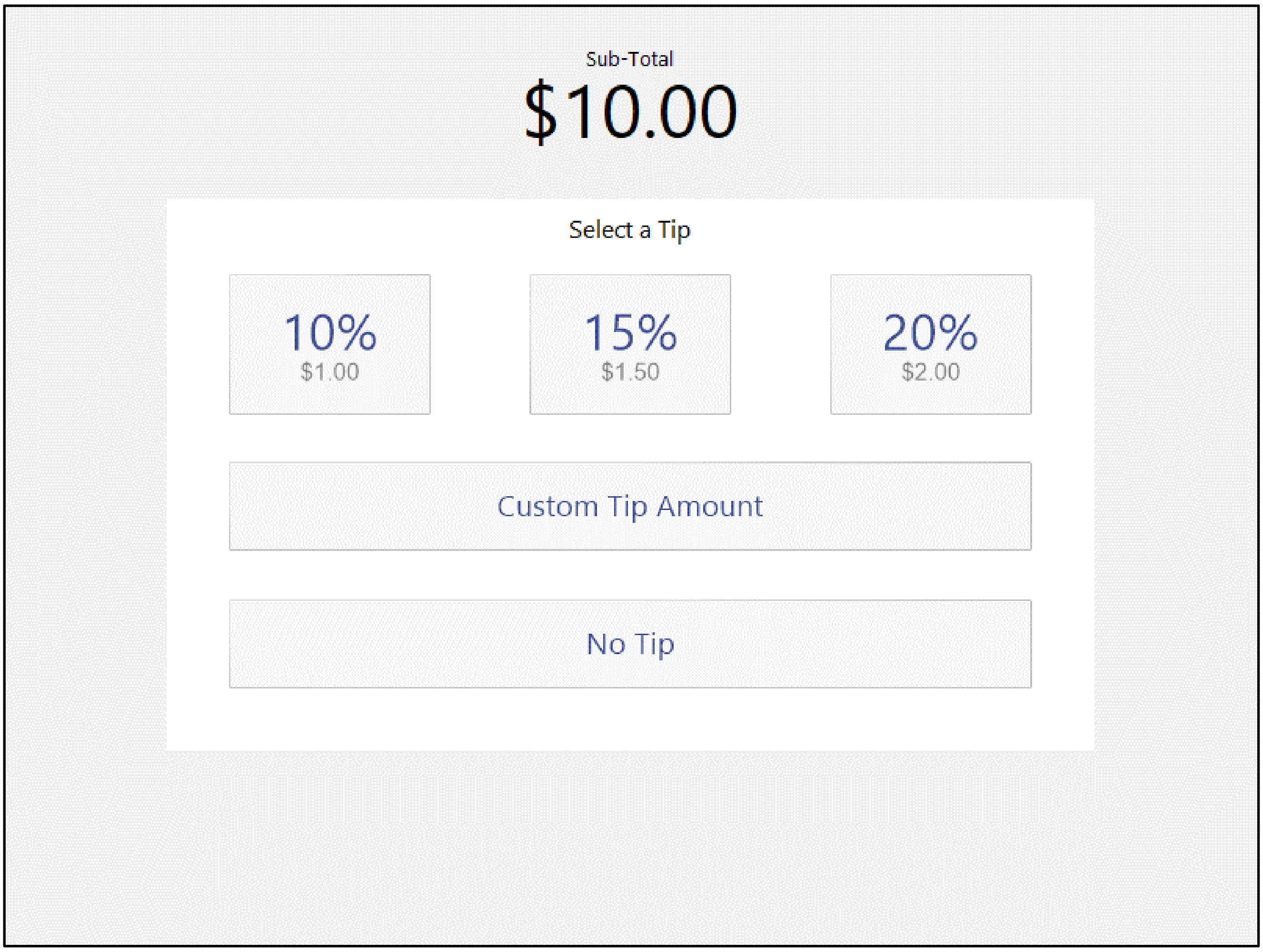
A list of Tender Types will be displayed. When selecting any Tender Type that does not have the “Enable Customer Tipping” option enabled, the Customer Tipping prompt will not be displayed.
Selecting any Tender Type which has the “Enable Customer Tipping” option enabled will trigger the Customer Tipping 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:



Return to top

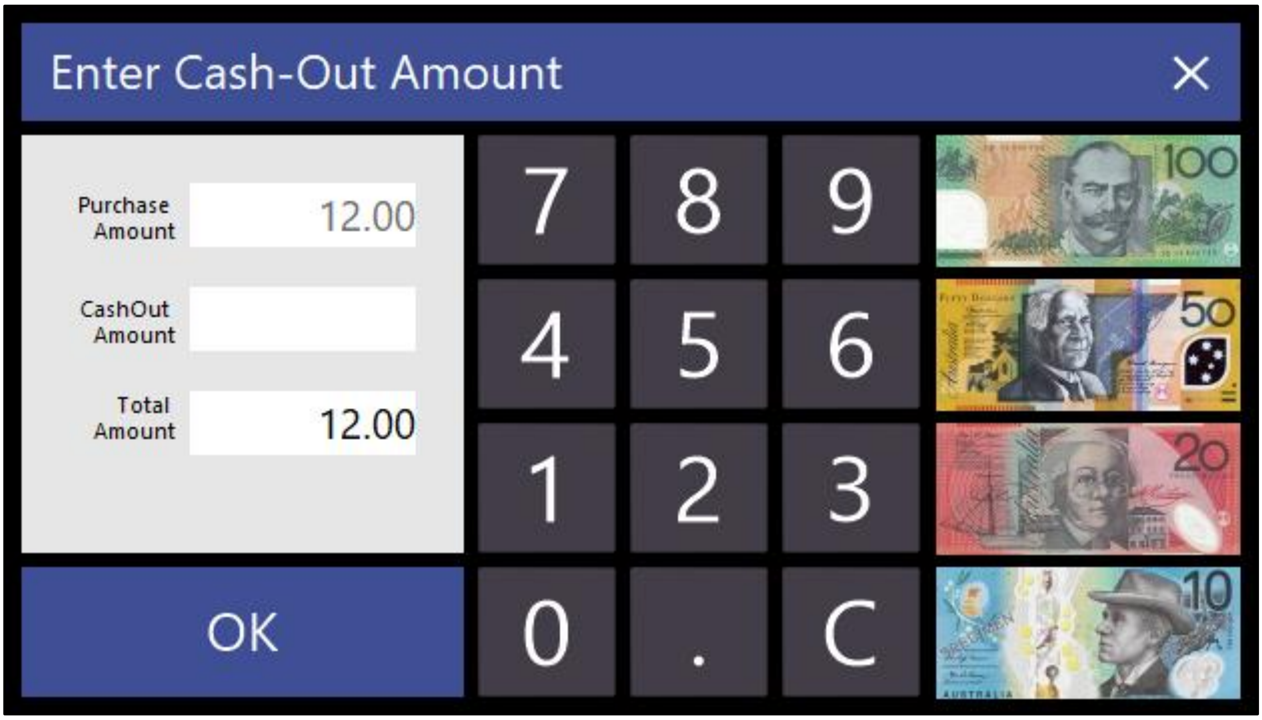
After EFTPOS is selected, the Customer Tipping prompt will be displayed on both the POS Screen and the Customer Display:



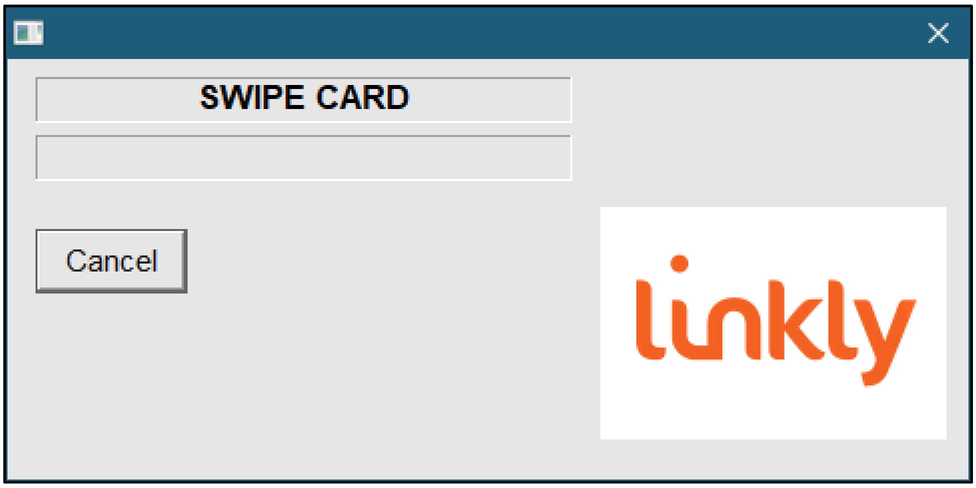
After an amount has been selected, it will be added to the total amount due and in this example, the total amount due will be sent to the EFTPOS pinpad:

Return to top

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:



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



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

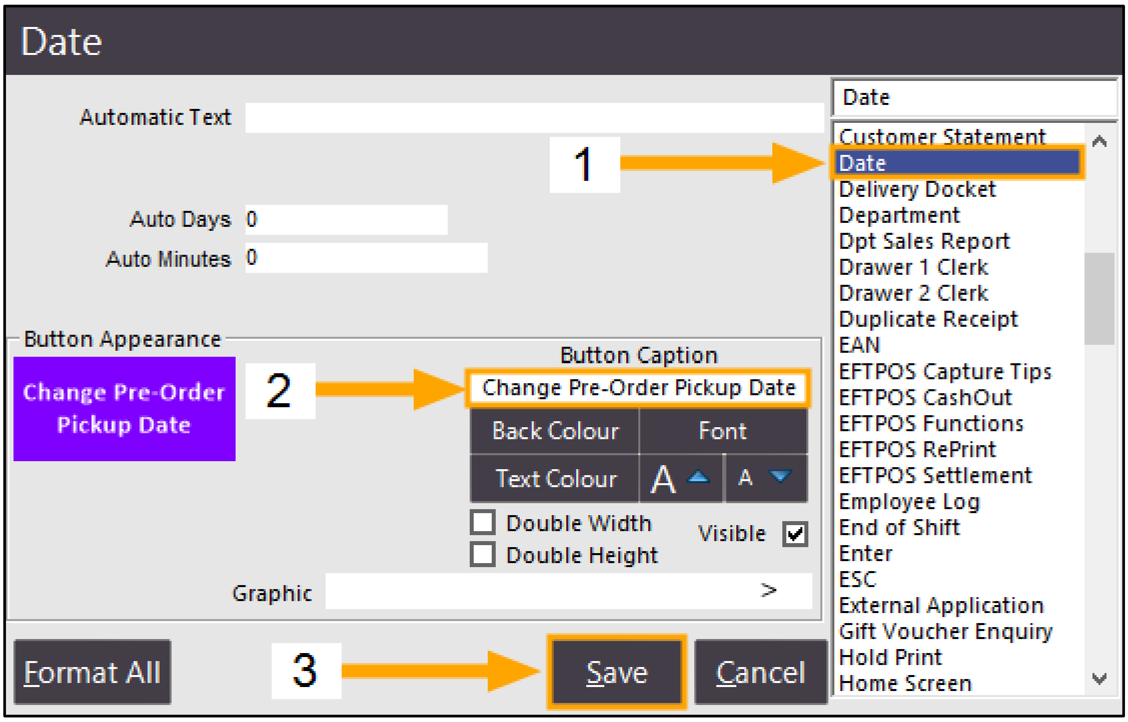
IP-3781 – Preorder Functionality – Ability to change pickup date

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



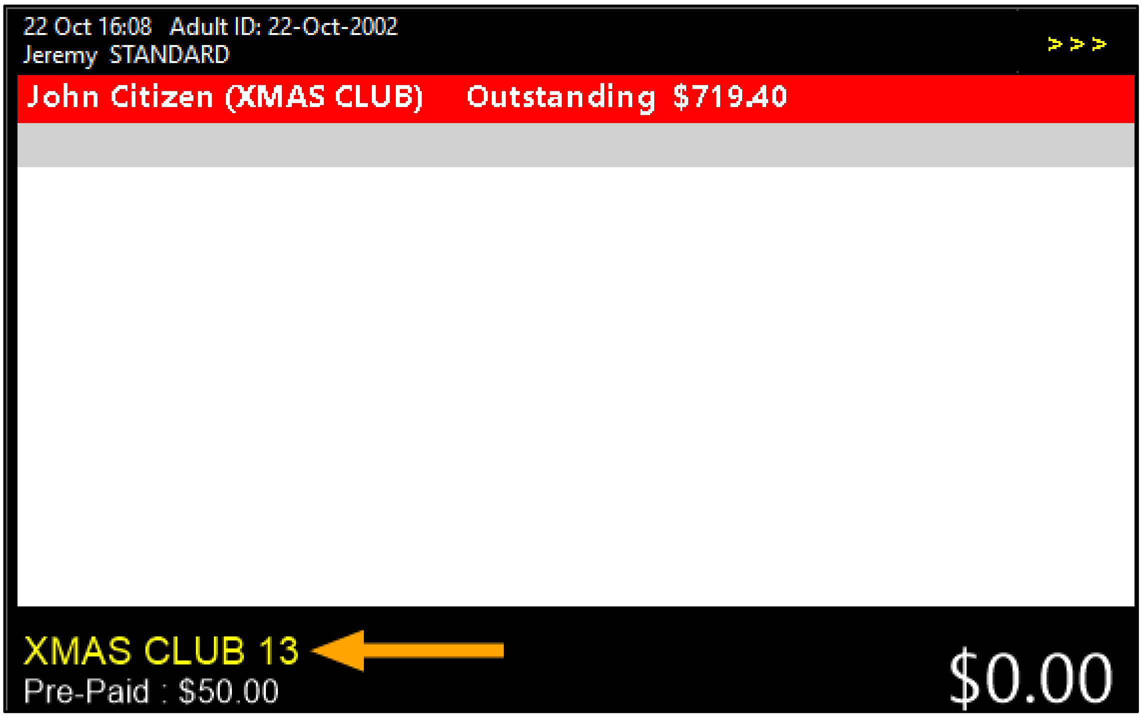
Return to top

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

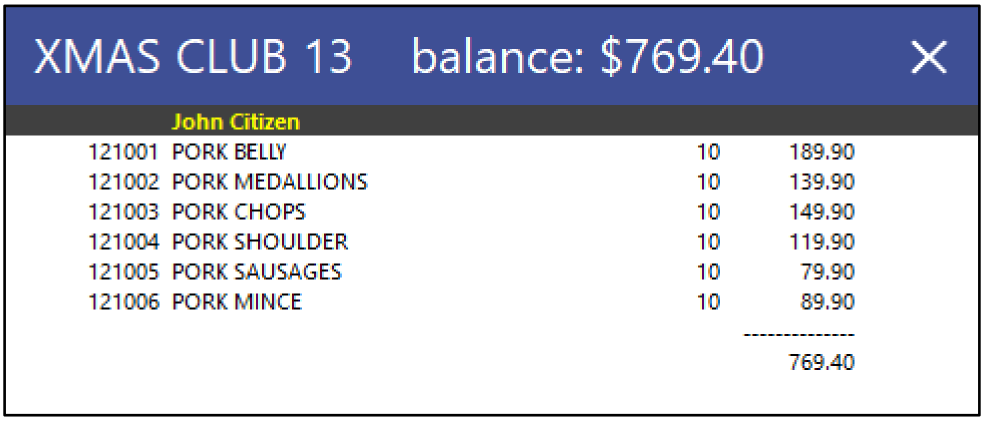
To modify a pickup date of an existing order, add the Bar Tab Customer to the sale which contains a saved pre-order.
This can be done by clicking on the pre-configured POS Screen button for the Customer Type (e.g. XMAS CLUB) that you created when originally setting up the Pre-Ordering Function, then select a Customer from the list which currently has a pre-order saved:

Return to top

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.

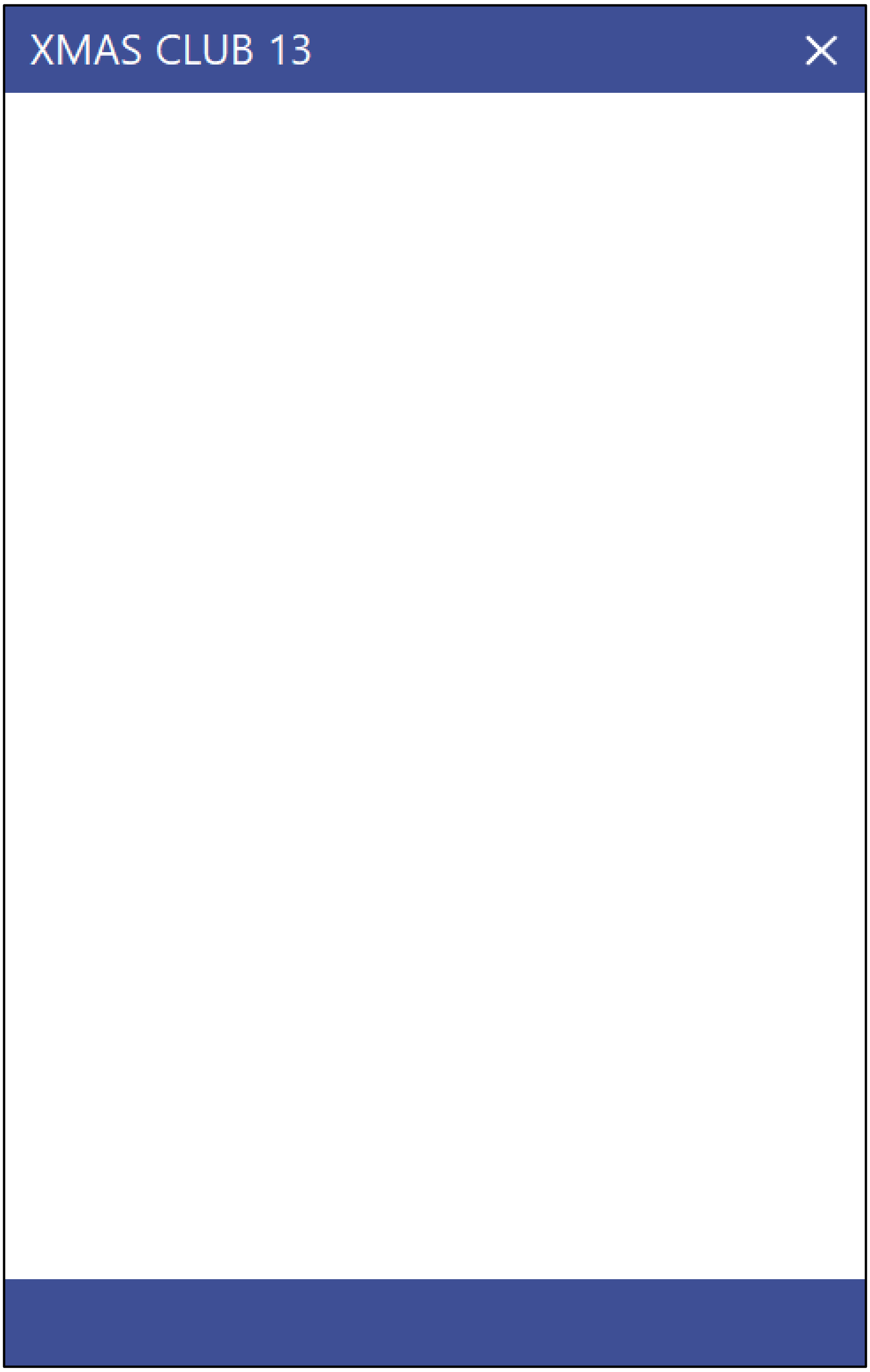


If items have been saved to the pre-order, they will be shown in the window similar to the below example:



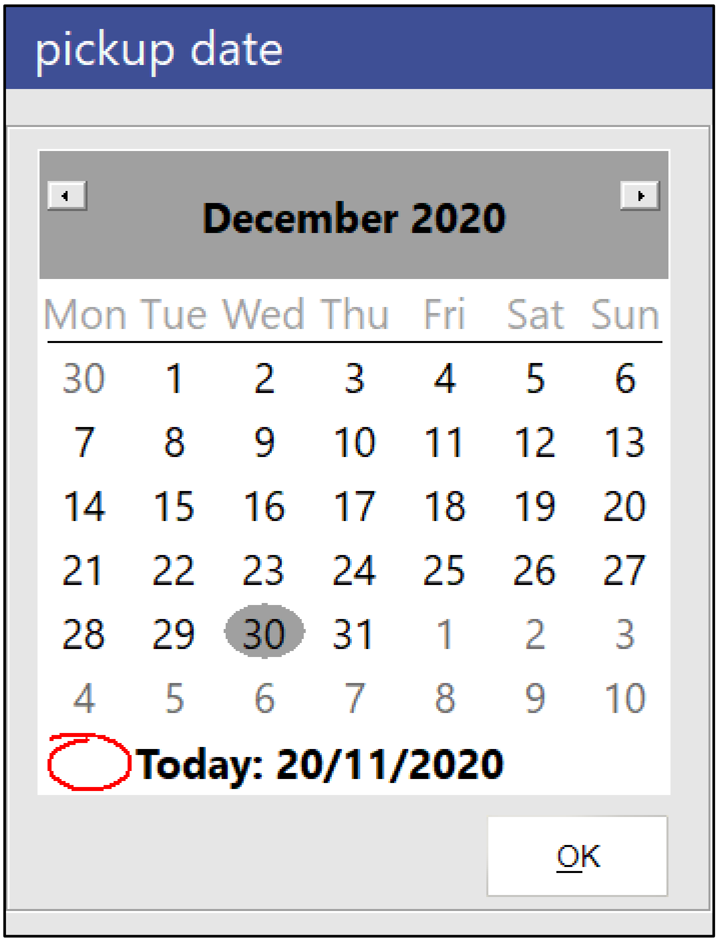
Return to top

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



Return to top

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".

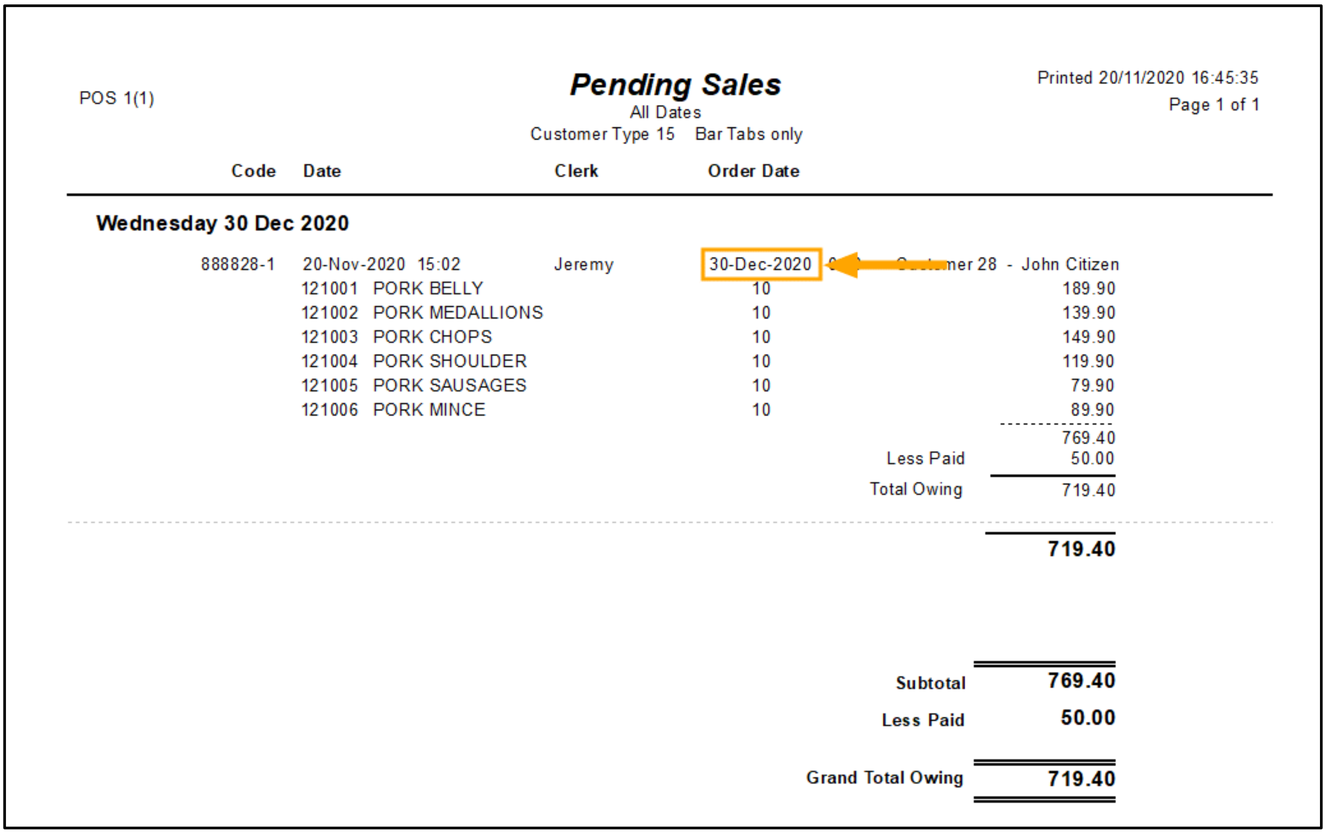


Return to top

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.



POS 1(1)

Pending Sales

All Dates

Customer Type 15 Bar Tabs only

Printed 20/11/2020 16:45:35

Page 1 of 1

Code	Date	Clerk	Order Date		
Wednesday 30 Dec 2020					
888828-1	20-Nov-2020 15:02	Jeremy	30-Dec-2020	mer 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.

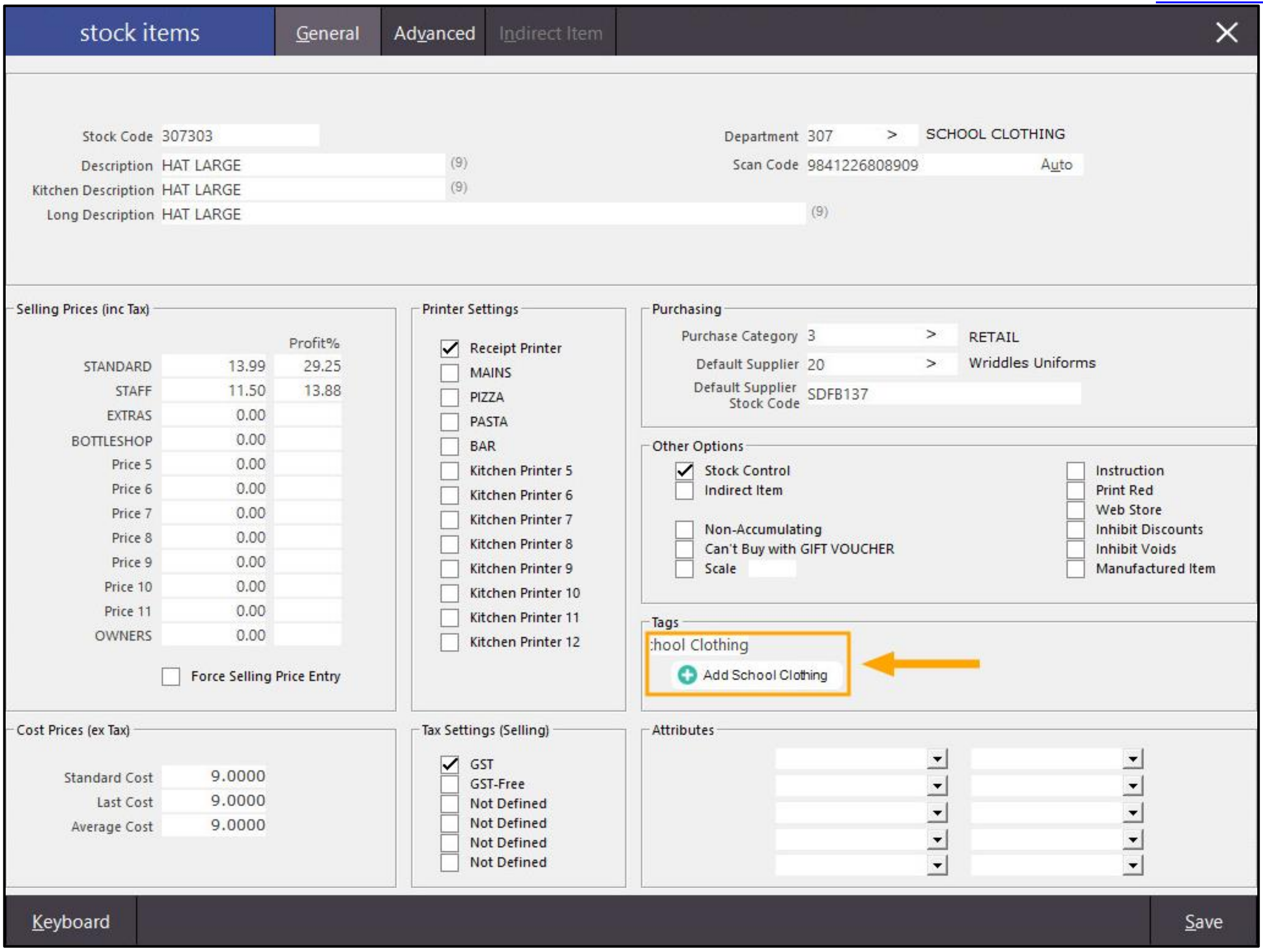
Note that the length of each tag is restricted to twenty characters.
In the near future, we'll be adding support for sending tags from Idealpos to Shopify (via Idealpos Online).
This will result in the tags that are entered against a Web Store Stock Item in Idealpos being sent to and created in Shopify.

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.

Return to top



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.

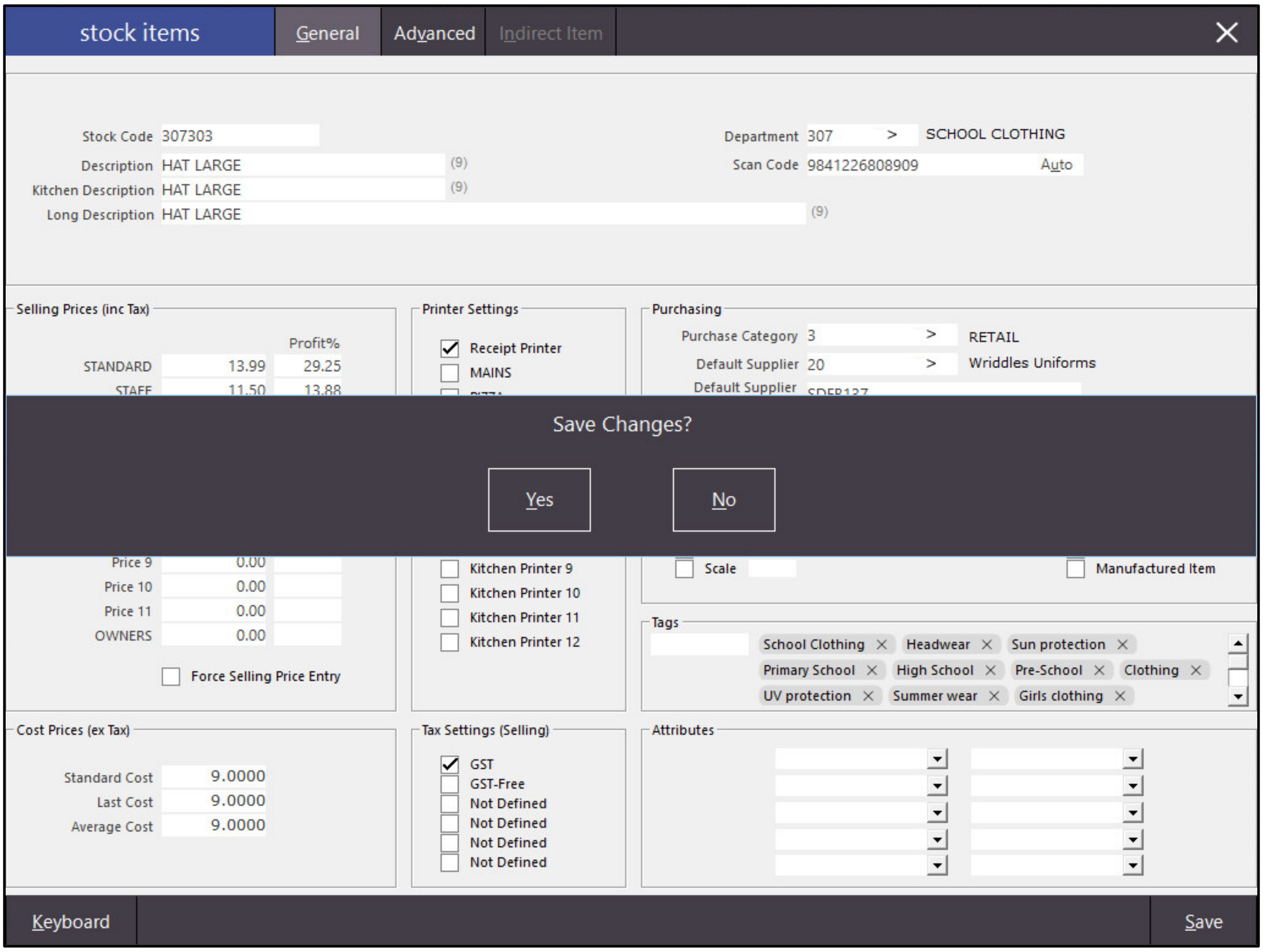
If more tags are entered than can be displayed in the Tags area, a scrollbar will appear on the right-hand side of the Tags area to enable scrolling through the list of tags.

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

Return to top

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.



Return to top

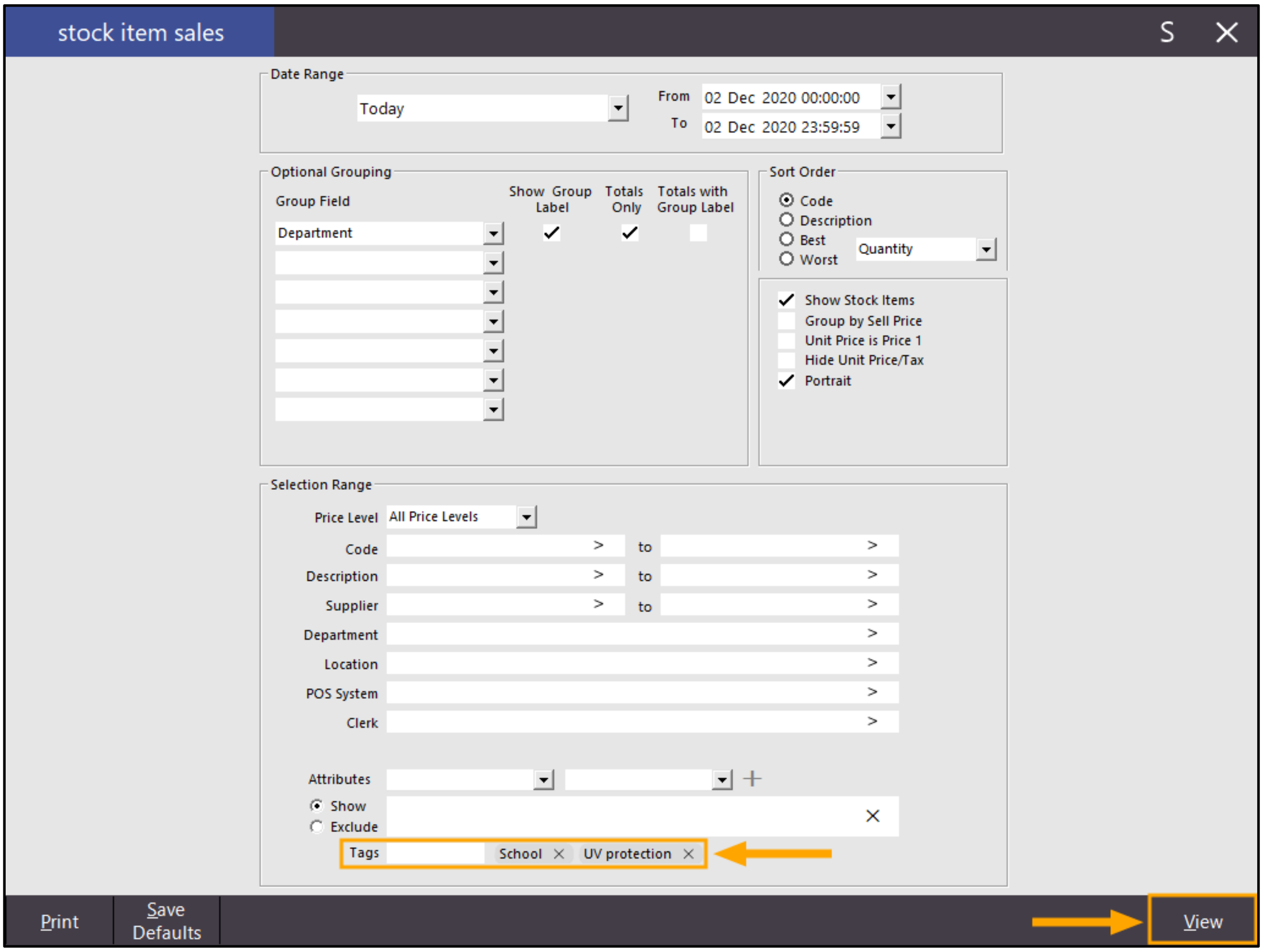
The Stock Item Sales Report has been updated to support tags functionality.
Specific tags can be entered into the selection range when running the report and the report will only display items that match the entered tags. Entering multiple tags into the report selection range will display items that 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"

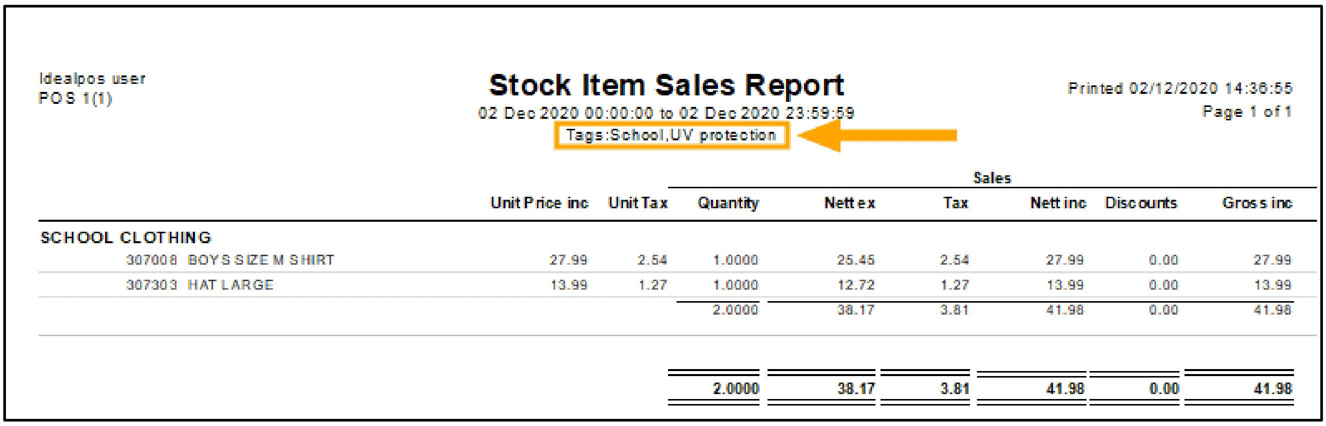
When running the Stock Item Sales Report with tags "School" and "UV protection", both Stock Items (Hat Large and Boys Size M Shirt) will appear in the report, provided that there are sales for both Stock Items within the sales period selected. This is because the tags function looks for any Stock Items 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).



Return to top

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.



Idealpos user
POS 1(1)

Stock Item Sales Report

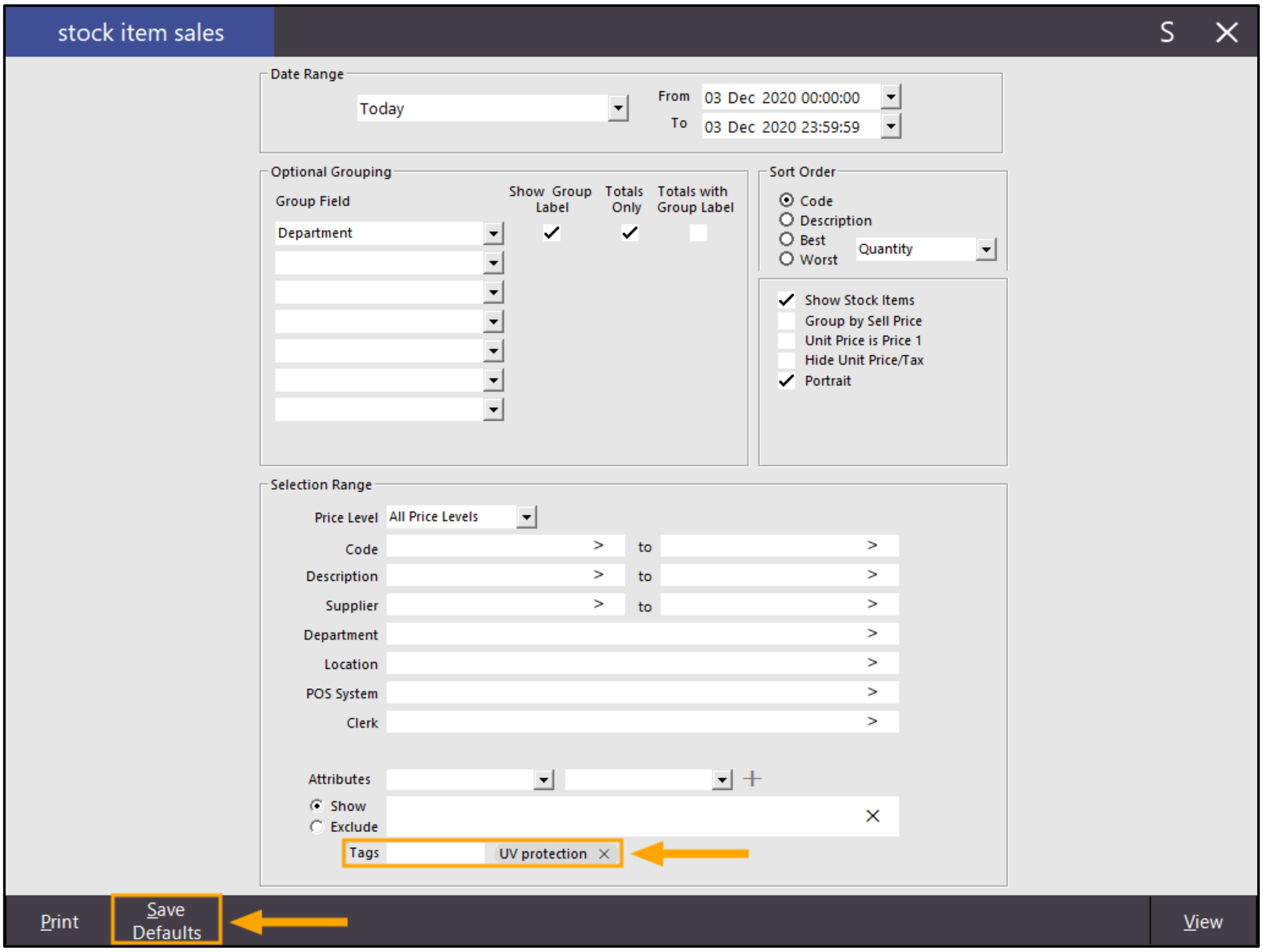
02 Dec 2020 00:00:00 to 02 Dec 2020 23:59:59

Tags:School,UV protection

Printed 02/12/2020 14:36:55
Page 1 of 1

	Unit Price inc	Unit Tax	Quantity	Nett ex	Tax (Sales)	Nett inc	Discounts	Gross 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.

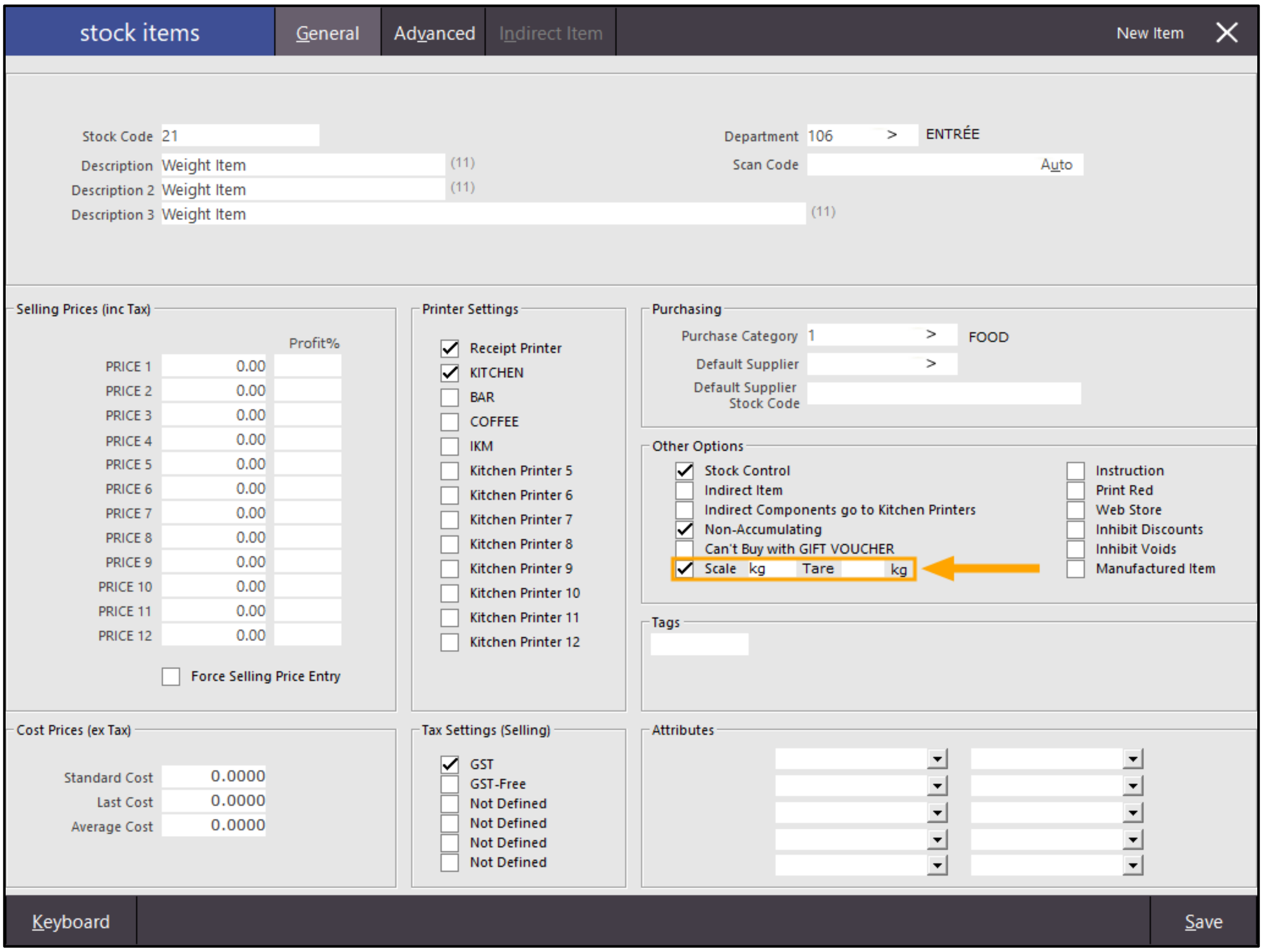


Return to top

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

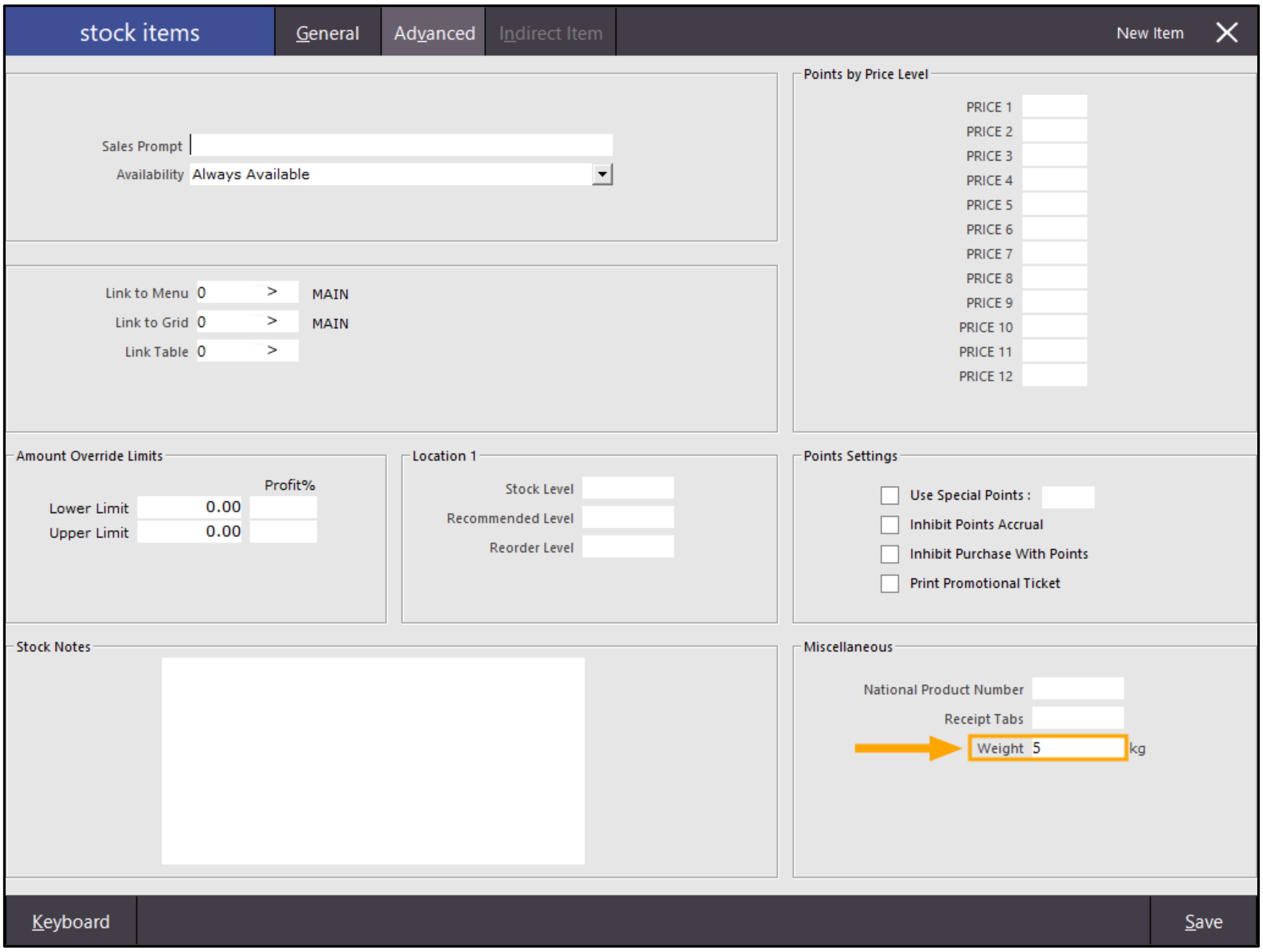
This function adds a Weight field into the Idealpos Stock Items – Advanced tab.
The Weight field will be sent to Shopify once support is added for this functionality.
Note: Support for sending Weight info to Shopify that has been entered into this field will be added in the near future.

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.



Return to top

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.



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

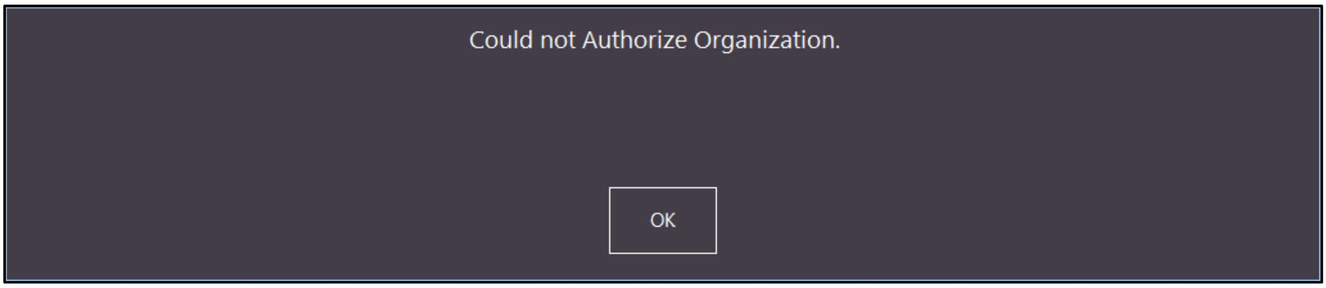
IP-3698 – Xero Interface – Support for Chromium Embedded Framework

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.