

idealpos Update History

Idealpos 7.1 Build 5

Update Details:

** Enhancements

- * [IP-3045] - Newbook Interface - Tax Flag option
- * [IP-3058] - Speed Improvement for Finalizing Sales with large number of Stock Transactions
- * [IP-3059] - PAX Eftpos - TSYS Payments Support
- * [IP-3086] - Macros support for Delays between functions
- * [IP-3092] - Journal History Report - option to Show Tenders Only

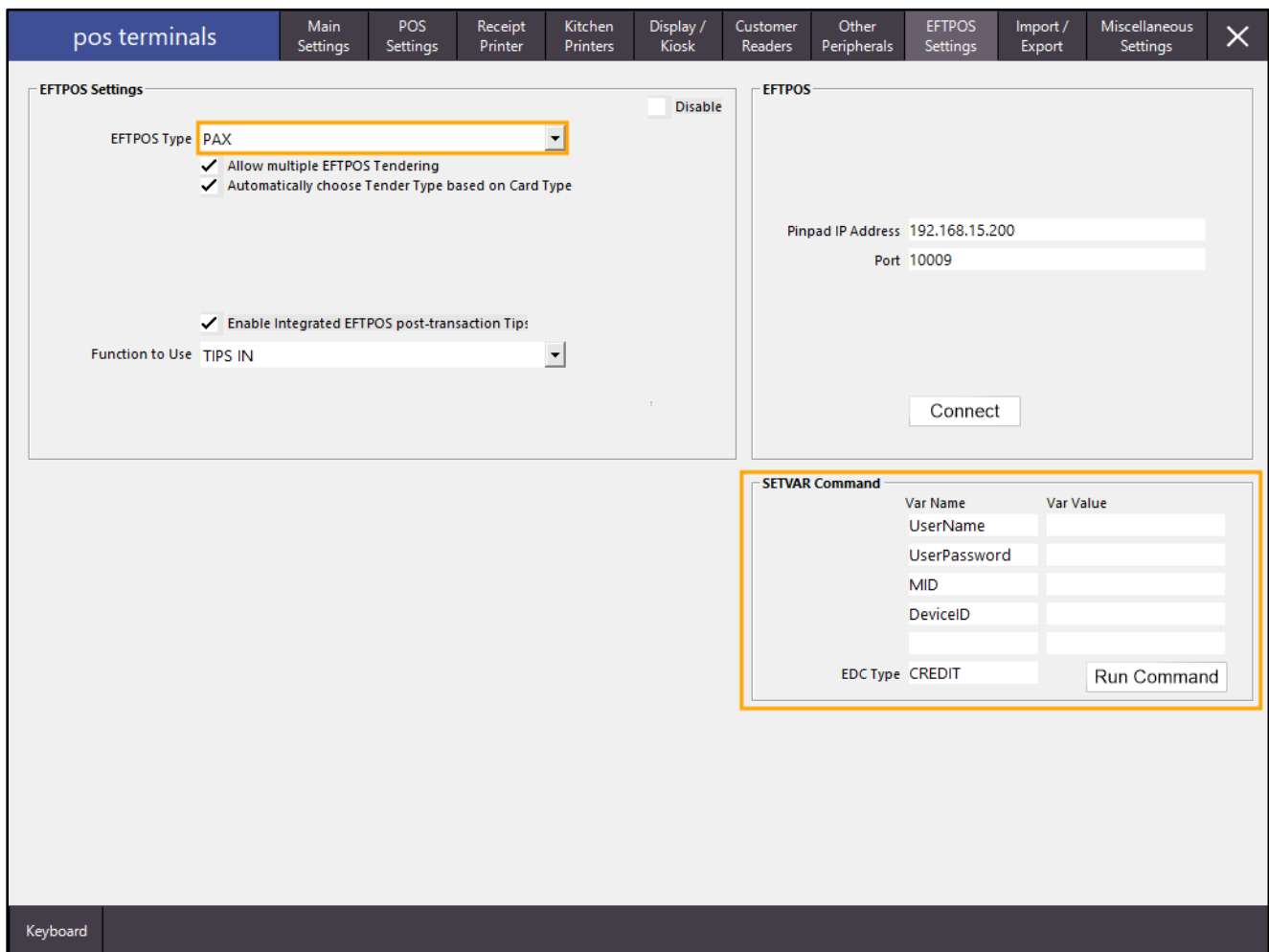
EFTPOS

PAX EFTPOS – TSYS Payments Support

This function adds the ability to configure the PAX EFTPOS payment integration with TSYS Payments (<https://www.tsys.com/>). This is supported through an additional SETVAR Command section within the Setup > POS Terminals > Modify > EFTPOS Settings screen.

To configure PAX EFTPOS for TSYS Payments, go to:
Setup > POS Terminals > Select the Terminal > Modify > EFTPOS Settings

Within the EFTPOS Settings tab, the EFTPOS Type must be set to PAX.
A SETVAR Command section will appear on the bottom-right corner of the window.
A pre-filled set of Var Names will be displayed (UserName, UserPassword, MID, DeviceID and EDC Type of CREDIT).
Enter the Var Value into the Var Value fields as supplied by TSYS.
If any Var Names have changed or additional names required, you can add them to any blank Var Name/Var Value fields.
Once the details supplied by TSYS have been entered, press the "Run Command" button to set the variables.



idealpos Update History

Macros

Macros support for Delays between functions

This function adds the ability to specify a delay between two characters that are entered in a macro through the use of a {D} character.

Due to the way macros work (a block or sequence of characters are inputted into Idealpos when triggering the macro), any characters or sequence of characters that a macro passes back to Idealpos may be entered too quickly, especially if a new window or dialog appears which takes a few moments to appear.

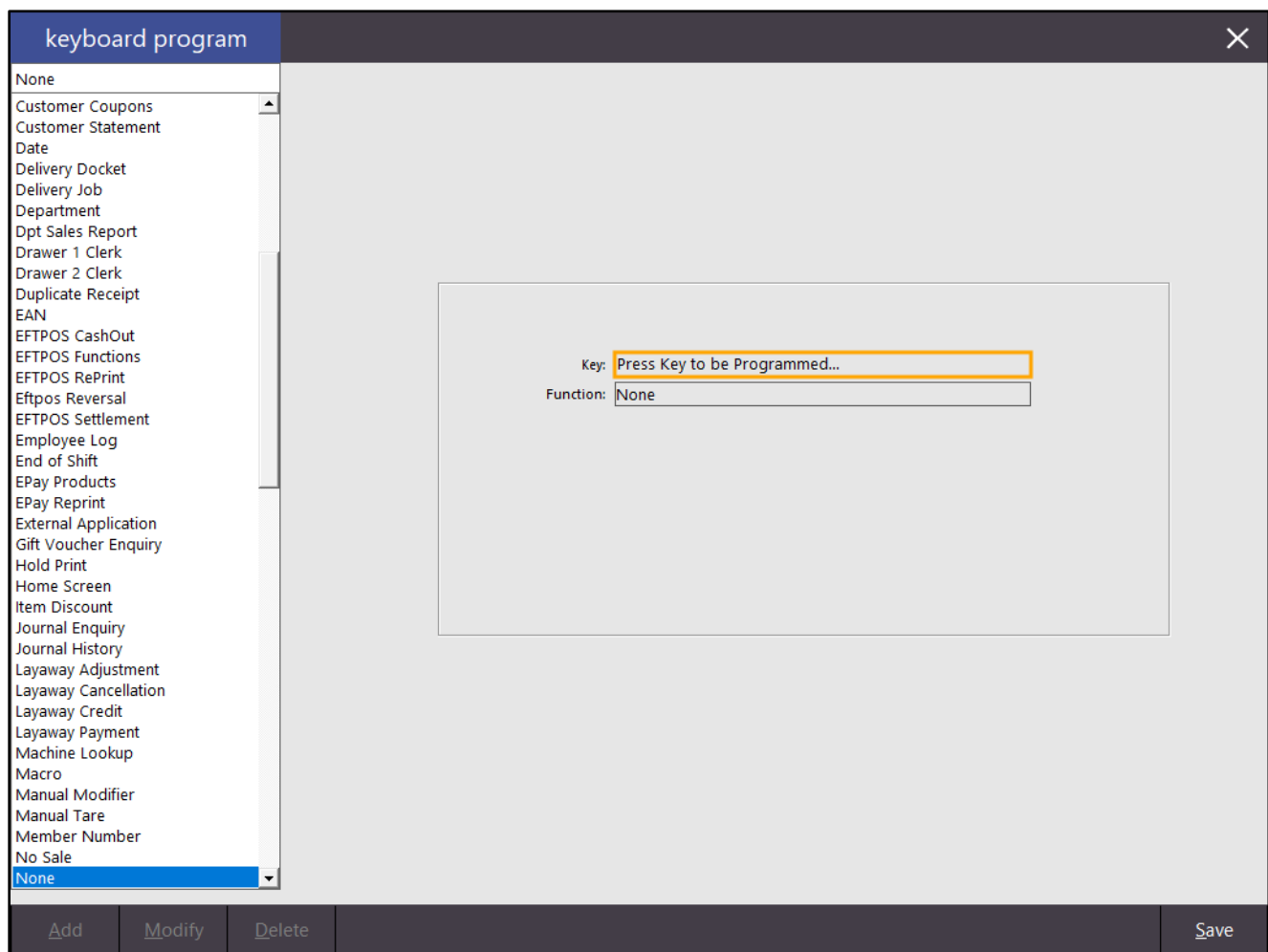
This can result in the macro not behaving the way you intended (e.g. characters from the macro not being entered into the correct window or characters that exist in the macro aren't passed to Idealpos correctly).

Therefore, an additional delay character can be entered between other characters in order to introduce a delay in the macro, allowing the macro to function as expected.

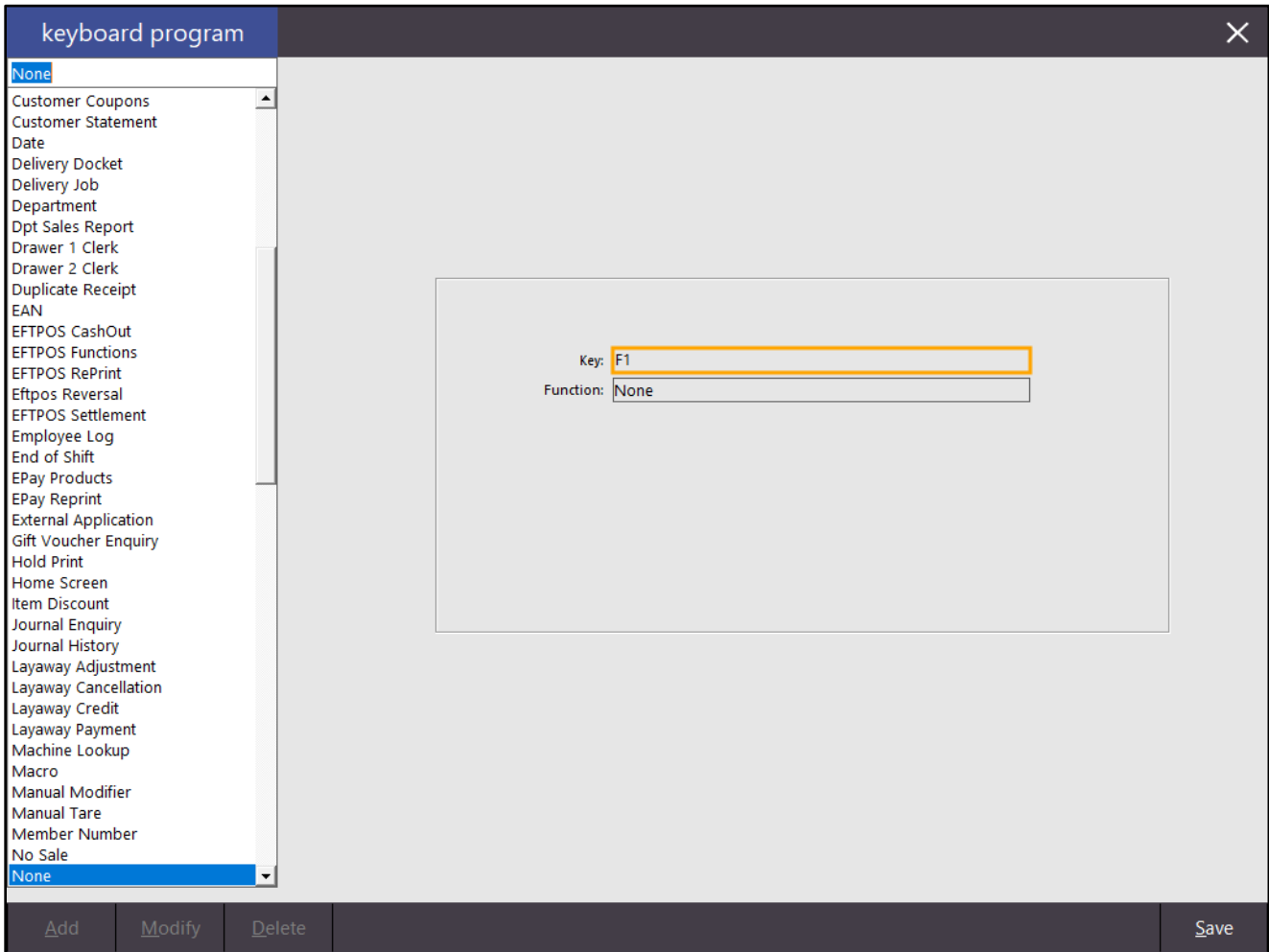
To use this function, go to:

Setup > Keyboard Program> Add

Then press the Key on the keyboard that you want to have programmed to the function.



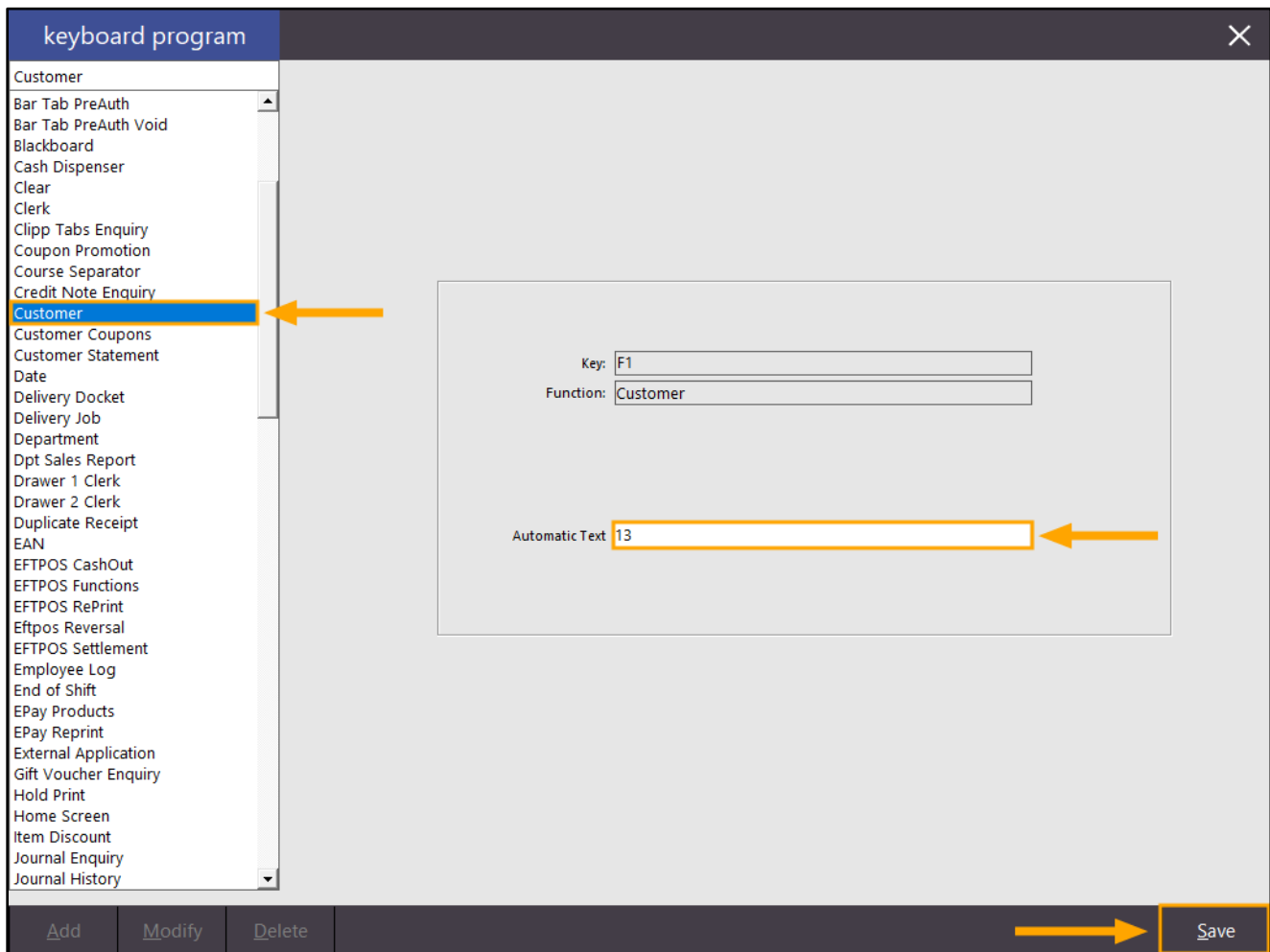
After pressing the desired key, the key will appear in the Key field.
In the below example, the F1 key was pressed and is therefore displayed in the Key field.



idealpos Update History

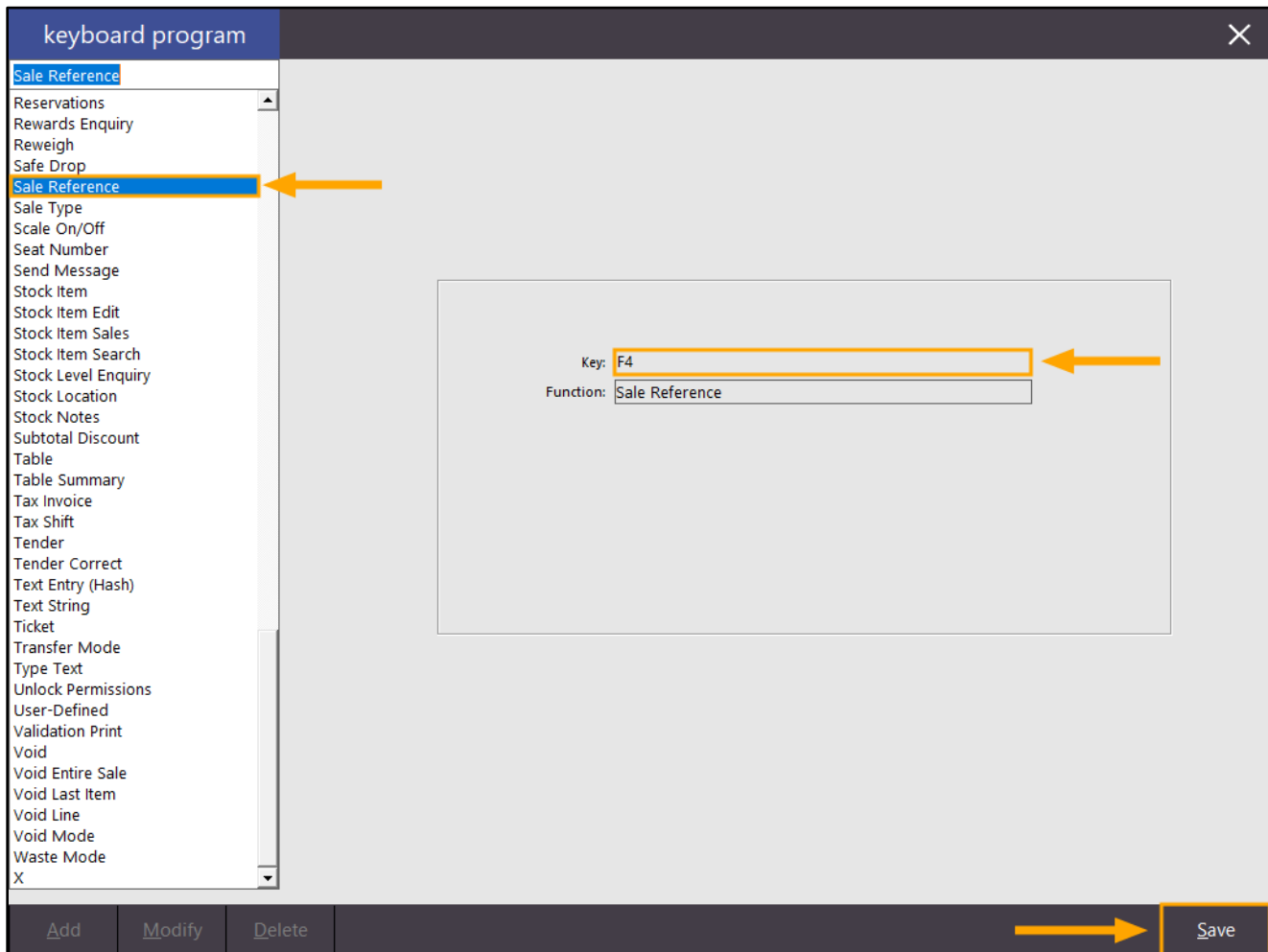
Finally, assign a function to the key from the list of functions on the left-hand side of the Keyboard Program window. In this example, we have selected the Customer function.

Enter a Customer code into the Automatic Text field in order to add that customer to the sale automatically. Once configured, press the "Save" button on the bottom-right corner of the screen.



Repeat the above process for another function.

The below function used is "Sale Reference" with a Key of F4 assigned to the function.



idealpos Update History

Now that the functions have been assigned to keys, the macro can be configured on a POS button. This can be done by going to: Setup > POS Screen > POS Screen Setup > Select Layout > Buttons

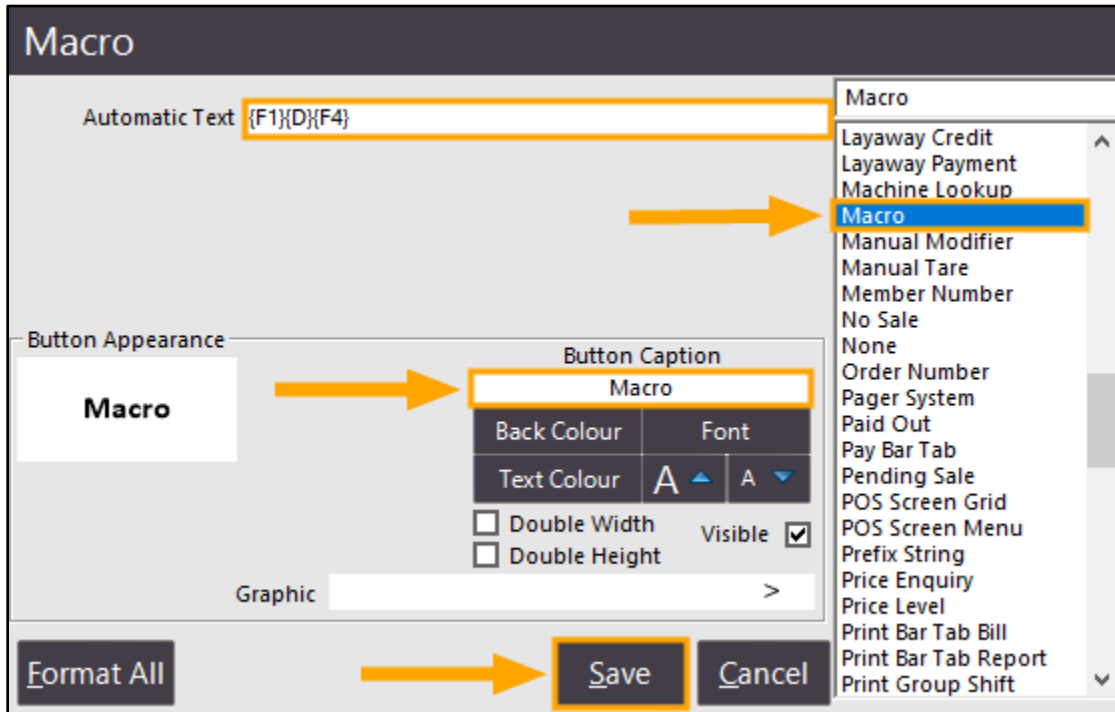
Select a blank button and configure the button using the "Macro" function.

In the Automatic Text field, enter the keys to the functions created earlier surrounded by curly braces {}.

I.e. Enter {F1}{D}{F4}

Add a {D} between the F1 and F4 keys to trigger a delay, allowing the macro to function correctly.

Enter the Button Caption that you want assigned to the button, then press the "Save" button to save.



Close the POS Screen Setup/POS Screen layout screens, then open the POS Screen via the POS button on the top-left corner of the back-office dashboard window.

Press the new button on the POS screen which was created to trigger the macro.

The customer number configured within the macro (in this example, customer 13) will be added to the sale, then the Sale Reference screen will appear.



The delay character {D} is not limited to the above functions/macro. It can be used in other cases that trigger multiple functions and a delay is required between each key/function that is triggered in a macro.

idealpos Update History

If the delay character (D) is removed from the macro and the POS screen button assigned to the macro is pressed, the Sale Reference window is not displayed:

Nov 07 09:35 Adult ID: Nov-07-2001
Jeremy PRICE 1

>>> X

Elizabeth Willis - 0 Points

	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		

0 Points \$0.00

BOYS SHORTS	BOYS SHIRTS	BOYS PANTS	GIRLS SHORTS	GIRLS SHIRTS	GIRLS SKIRTS	BOOKS	SCHOOL ITEMS	TOYS
ELECTRICAL		FISHING & OUTDOORS		MANCHESTER			Alex	Alexandria
							Bjorn	Elliot
MENS		LADIES		BULK LANDSCAPE SUPPLIES			Macro	
DRINKS	CAFE	TAP BEER	SPIRITS	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL	MANAGER
	RESTAURANT	BOTTLE BEER & RTD	WINE				SERVICES	ADMIN

Reports

Journal History Report – Option to Show Tenders Only

This function adds the ability to run the Journal History Report with a checkbox option to “Show Tenders Only”. Running the report with this option enabled will hide all journal details and will only show the total amounts that were paid, along with the type of tender used to make the payment.

To use this function, go to: Reports > Sales > Journal History
Select the required Date/Date Range, then enable the “Show Tenders Only” option.
Finally, press the “View” button on the bottom-right corner to run the report.

journal history report

Date Range

Today From 07 Nov 2019 00:00:00 To 07 Nov 2019 23:59:59

Group by

- Clerk
- POS System
- Location

Options

- Show Totals/Tendering
- Show Tenders Only

Selection Range

Clerk Code > to >

Clerk Name > to >

Location > to >

POS System >

Print View

idealpos Update History

A list of tenders will be displayed along with the amounts paid for each journal.

Idealpos Demo **NOT-FOR-RESALE** POS 1(1)		Journal History				Printed 07/11/2019 12:01:57	
		07 Nov 2019 00:00:00 to 07 Nov 2019 23:59:59				Page 1 of 1	
07/11/2019 11:53:38	1 001362	Jeremy	CASH	10.00			
07/11/2019 11:55:24	1 001363	Jeremy	CASH	38.00			

When running the report without the "Show Tenders Only" option enabled, the report will appear similar to the below:

Idealpos Demo **NOT-FOR-RESALE** POS 1(1)		Journal History				Printed 07/11/2019 12:03:40	
		07 Nov 2019 00:00:00 to 07 Nov 2019 23:59:59				Page 1 of 1	
07/11/2019 09:31:32	1 001359	Jeremy					
		VOID ENTIRE SALE		0.00			
07/11/2019 09:33:48	1 001360	Jeremy					
		VOID ENTIRE SALE		0.00			
07/11/2019 09:34:38	1 001361	Jeremy					
		VOID ENTIRE SALE		0.00			
07/11/2019 11:53:38	1 001362	Jeremy					
		202001 CAPPUCCINO		3.50			
		202002 FLAT WHITE		3.50			
		202004 SHORT BLACK		3.00			
07/11/2019 11:55:24	1 001363	Jeremy					
		106002 BEEF		13.00			
		1002014 WELL DONE		0.00			
		106006 PORK		13.00			
		22 -4.00 Daily Specials \$4 Off					
		106004 SEAFOOD		16.00			
		1002008 GRILLED		0.00			
		22 Daily Specials \$4 Off		-4.00			

Room Interface

Newbook Interface – Tax Flag option

This function adds the ability to control whether or not tax transactions that are sent to NewBook will be charged as Tax or Tax Free.

To configure/control this setting, go to:

Setup > Global Options > Interfaces > Room Interface

Toggle the Tax Flag option to control whether or not transactions sent to NewBook are Tax or Tax Free.

The screenshot shows the 'global options' window for 'site 1 (Site 1)'. The 'Interfaces' tab is selected. The 'Room Interface' section is expanded, showing the following configuration:

- Interface Type: Newbook
- Output from POS#: 1
- Network Path: C:\newbook
- Tender Type: NEWBOOK
- Post Paid Transactions
- Tax Flag** (highlighted with a yellow box and an orange arrow)

Other interface sections visible include:

- Clipp Interface:** Clipp Tender: No Clipp Tender; POS Master #: 1; Clipp Tips: TIPS IN
- Pay@Table Interface:** Tender: No Tender Type; POS Master #: 1; Tips: TIPS IN; If exists, Auto choose Tender Type based on Card Type
- Bev Con Interface:** Folder: [empty]; POS Master #: [empty]
- Pager Interface:** Interface Type: Unipage; IP Address: [empty]; Port: [empty]
- epay Interface:** Primary Server: [empty]; Secondary Server: [empty]; Username: [empty]; Password: [empty]; Retailer ID: [empty]; Store ID: [empty]
- Gunnebo Interface:** Folder: [empty]
- Reservation Interface:** Interface Type: No Reservation Interface; IP Address: [empty]; Port: 5602; Send Transaction Details; Link to User-Defined Status Buttons: Drinks Served: DRINKS AWAY; Entree Served: ENTREE AWAY; Main Served: MAINS AWAY; Dessert Served: DESSERT AWAY; Customer Type: RESERVATION
- Bookings Interface:** Interface Type: No Booking Interface; URL: [empty]; API Key: [empty]; Tender Type: ONLINE