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.
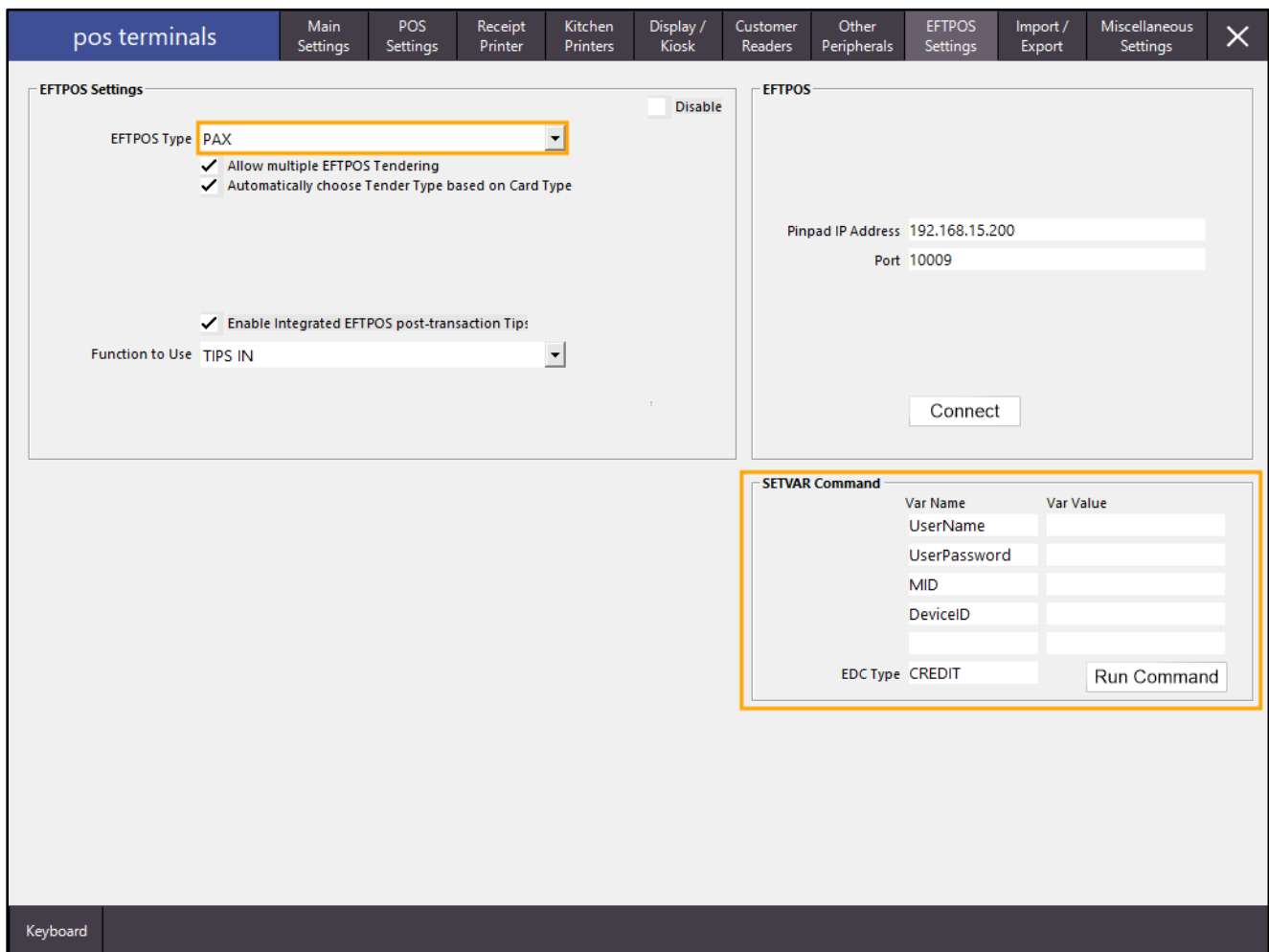
Macros

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.
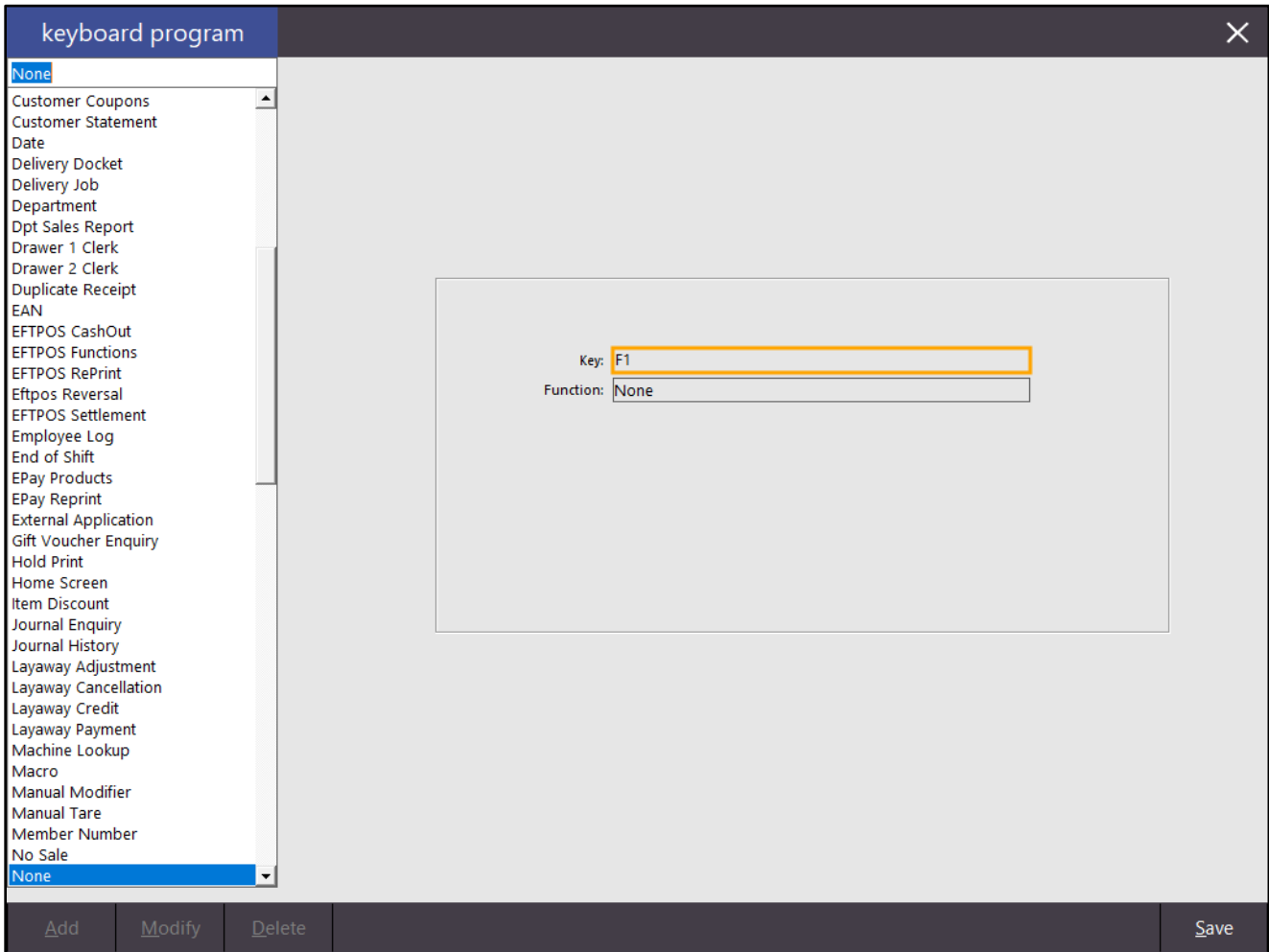
To use this function, go to:
Setup > Keyboard Program> Add
Then press the Key on the keyboard that you want to have programmed to the function.
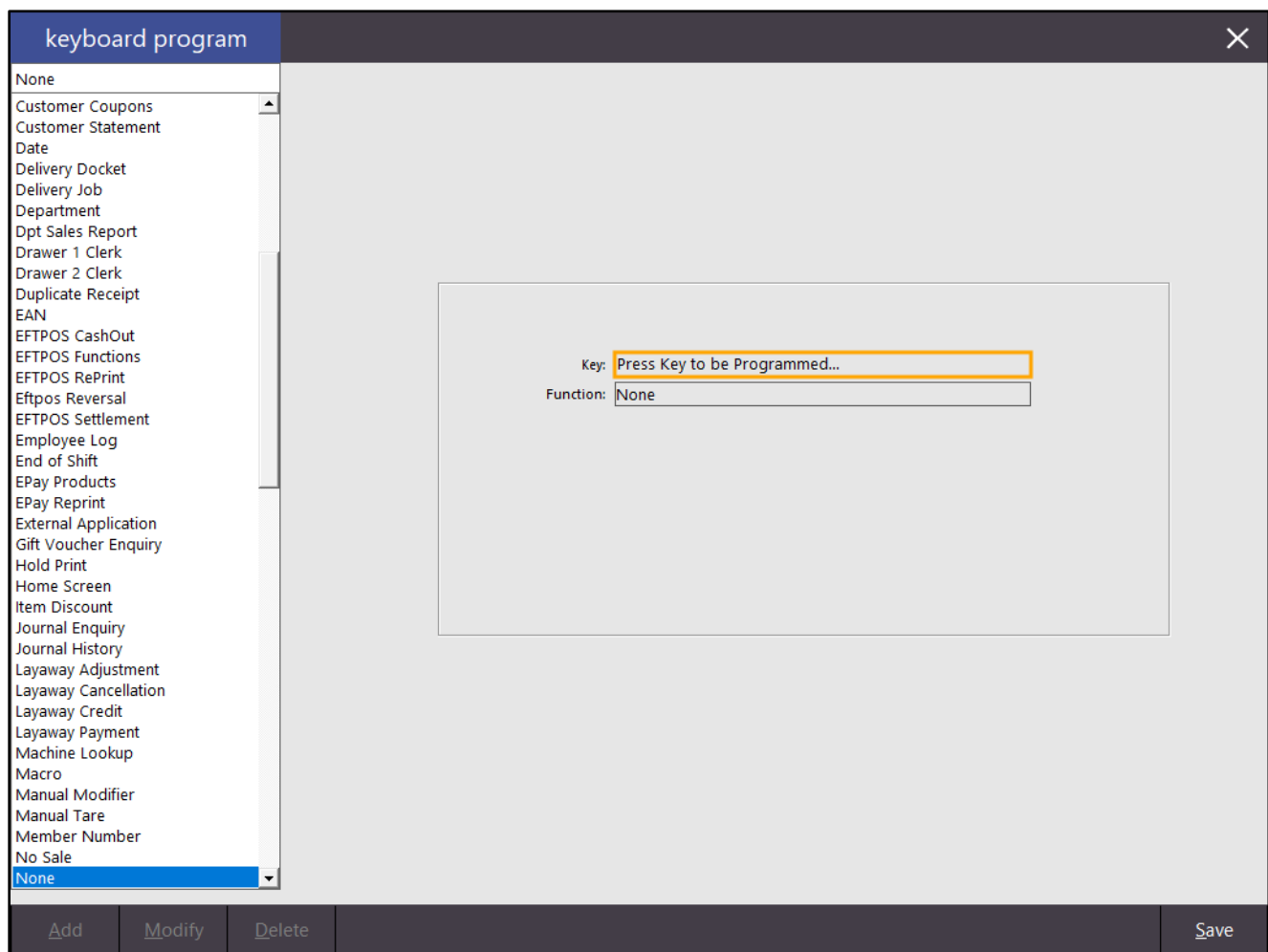
After pressing the desired key, the key will appear in the Key field.
In the below example, the F1 key was pressed and is therefore displayed in the Key field.

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.
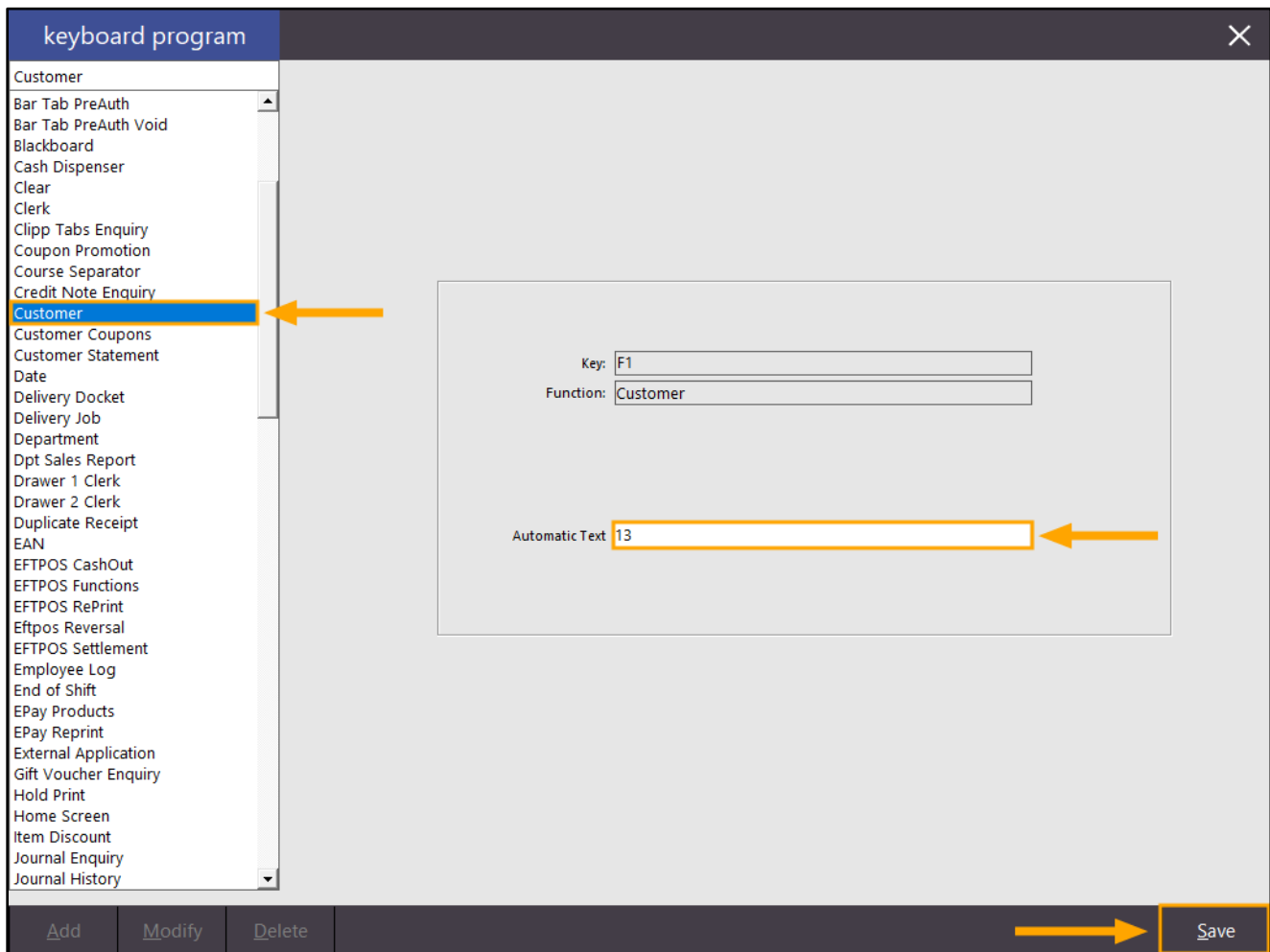
Repeat the above process for another function.
The below function used is "Sale Reference" with a Key of F4 assigned to the function.
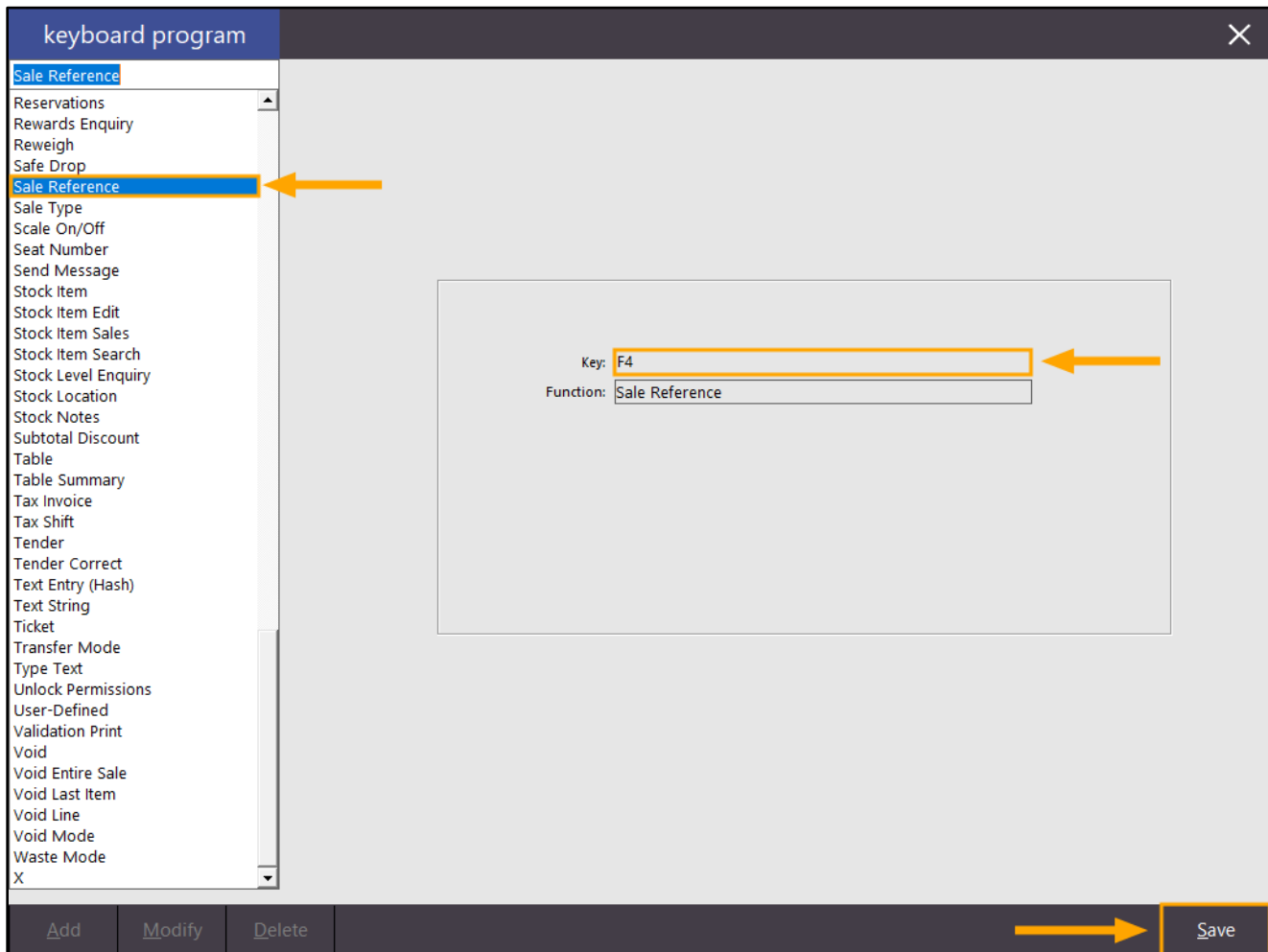
Now that the functions have been assigned to keys, the macro can be configured on a POS button.
This can be done by going to: Setup > POS Screen > POS Screen Setup > Select Layout > Buttons

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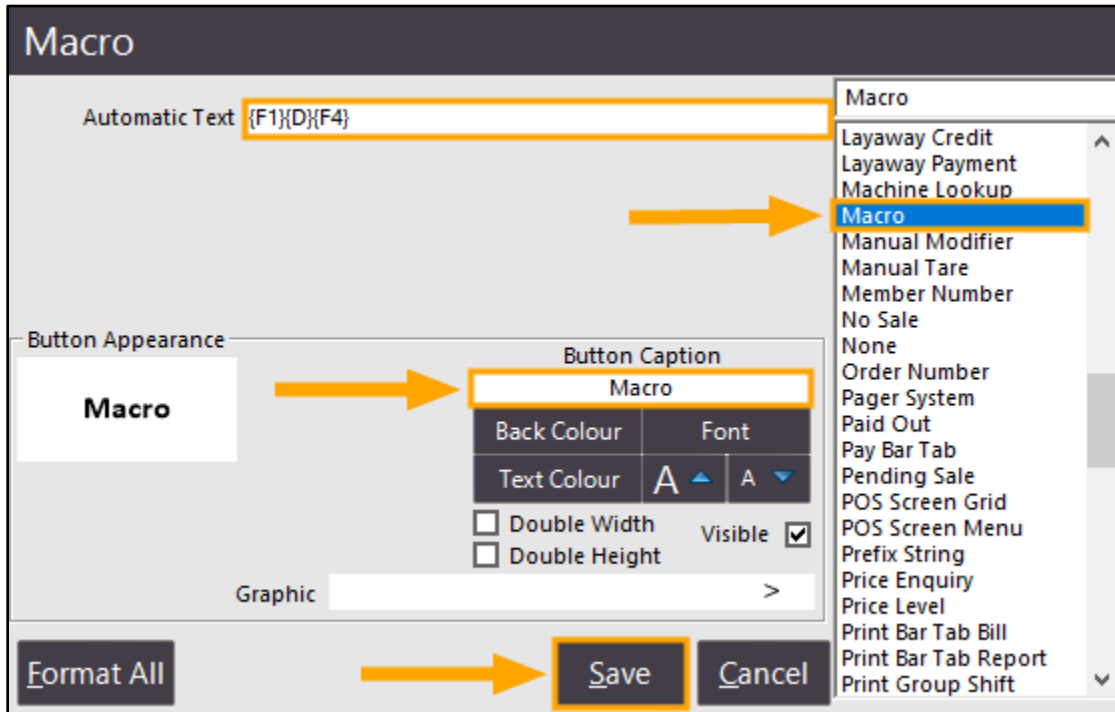
Close the POS Screen Setup/POS Screen layout screens, then open the POS Screen via the POS button on the top-left corner of the back-office dashboard window.

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.

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:

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.

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

```
Idealpos Demo **NOT-FOR-RESALE**                    Journal History                    Printed 07/11/2019 12:01:57
POS 1(1)
                                           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**                    Journal History                    Printed 07/11/2019 12:03:40
POS 1(1)
                                           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  09:34:36    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.