

Build 52

Update Details:

** Enhancements

- * [IP-400] - Jackpot Winner shows on Customer Display
- * [IP-401] - Raffle Winner shown on the Customer Display
- * [IP-503] - Support for Tyro Pinpad Surcharging
- * [IP-954] - Support for Alpha Table Codes [*Support for Handheld app coming soon]
- * [IP-1034] - Ability to Email Pending Sales
- * [IP-1059] - Unlock Permissions button for Table Details
- * [IP-1462] - Option to Inhibit Manual Subtotal Discounts by Customer Type
- * [IP-1563] - Customer Mag Card Printing: Suppress Member Number when using Format 1
- * [IP-1576] - Auto Import Supplier Invoices - can find Supplier by Code
- * [IP-1600] - Saudi Arabia region - Tax System same as Canadian region setting
- * [IP-1610] - Reports Date Selection drop-down list includes Last 2,3 and 6 months
- * [IP-1638] - Ability to add Log Out function to Shortcut Bar
- * [IP-1639] - Log Out function - Hides Backoffice Screen
- * [IP-1643] - Safe Drop function - option to open the Cash Drawer
- * [IP-1686] - Financial Summary Report - Gross Sales field added
- * [IP-1687] - Financial Summary Report - support for Dynamic Grouping in Shortcut Reports
- * [IP-1702] - Yes/No Option - Inhibit Delete Items after Bill Print
- * [IP-1705] - Assembly Payments EFTPOS Integration
- * [IP-1713] - Yes/No Option - Print Order Number Dockets
- * [IP-1719] - RMS/Hirum Room Interface - option to set Customer Type for new Customers
- * [IP-1723] - Yes/No Option to Inhibit Stock Transactions on locations that have a different Stock Location
- * [IP-1724] - Auto Import Promotions
- * [IP-1735] - Zebra Label Printer - change font size on instruction items
- * [IP-1749] - Manufactured Items option on Re-Order Reports
- * [IP-1753] - Yes/No Option - Print Large Order Number on receipts
- * [IP-1755] - Support for Multiple HC 100 Wristband Printers per Site
- * [IP-1760] - Yes/No Option - Inhibit Order Number on Table Kitchen Prints
- * [IP-1762] - Long Description Support on A4 Invoices when using Stock Notes for Long Descriptions option
- * [IP-1766] - Xero API - Upgraded Transport Layer Security to 1.2
- * [IP-1771] - Konami Gaming - Get Member by House Number query
- * [IP-1777] - Tax Amount on Bills shows in Windows Currency Format
- * [IP-1778] - Tender Labels on Receipt can show in Unexpanded Format
- * [IP-1779] - Export Financial Data - support for Group by POS
- * [IP-1784] - Stock Items Grid - show Grid Link Field
- * [IP-1788] - Ability to specify a default Customer Photo Location
- * [IP-1797] - Redirected Kitchen Printer Jobs show where they were Redirected from
- * [IP-1809] - Pending Sale Deletions - items recorded in Journal and Activity Log
- * [IP-1810] - Clerk/User Permissions for Tender Types
- * [IP-1812] - Promotions - Can set specific Priorities / Move to Top and Bottom
- * [IP-1826] - Support for longer Alternate Codes
- * [IP-1839] - Embedded Marketing Website into Dashboard to advertise Idealpos Online
- * [IP-1843] - Gift Vouchers will hide Expiry Date when Expiry Days 99999

Customers – Customer Types

Inhibit Manual Subtotal Discounts by Customer Type

This function allows you to stop Subtotal Discounts from being applied to specific Customer Types. This is useful if you want to stop particular types of customers from receiving subtotal discounts when a sale is being finalised on a POS terminal.

To inhibit manual subtotal discounts from applying to a Customer Type, Go to File > Customers > Customer Types > Select Customer Type > Modify > Inhibit Manual Subtotal Discounts

customer types ✕

Code

Description

Use Points System

Point Multiplication Factor

Auto % Discount

Auto Discount POS Range

Price Level

Gaming Rating Grade

Auto Populate Tender Spend Limit Credit (1)

Auto Populate Tender Spend Limit Credit (2)

Macro

New Customers Default to Bar Tab

Print at Kitchen

Prompt in POS

Inhibit Manual Subtotal Discounts

Fast Customers

Idealpos Customer

Export Data

Export Financial Data – Support for Group by POS

This function adds the ability to Group by POS when exporting Financial Data.

Go to Utilities > Export Data > Financial Data > Group by POS

export financial data

This option will export financial data in a comma delimited text format.

Include Header Output File Format: Standard

Group by Location
 Group by POS
 Group by Day
 Group by Transaction

Date Range

Today From: 06/04/2018 00:00:00 To: 06/04/2018 23:59:59

Selection Range

Location > to >

Export Field	Header Label
Gross Sales	Gross Sales
Sales Qty	Sales Qty
Nett Sales	Nett Sales
Subtotal Discounts 1	Subtotal Discounts 1
Subtotal Discounts 1 Qty	Subtotal Discounts 1 Qty
Subtotal Discounts 2	Subtotal Discounts 2
Subtotal Discounts 2 Qty	Subtotal Discounts 2 Qty
Subtotal Discounts 3	Subtotal Discounts 3
Subtotal Discounts 3 Qty	Subtotal Discounts 3 Qty
Subtotal Discounts 4	Subtotal Discounts 4
Subtotal Discounts 4 Qty	Subtotal Discounts 4 Qty
Subtotal Surcharges	Subtotal Surcharges
Subtotal Surcharges Qty	Subtotal Surcharges Qty
Promotions	Promotions
Promotions Qty	Promotions Qty
Item Discounts 1	Item Discounts 1
Item Discounts 1 Qty	Item Discounts 1 Qty
Item Discounts 2	Item Discounts 2
Item Discounts 2 Qty	Item Discounts 2 Qty
Item Discounts 3	Item Discounts 3
Item Discounts 3 Qty	Item Discounts 3 Qty
Item Discounts 4	Item Discounts 4
Item Discounts 4 Qty	Item Discounts 4 Qty
Item Surcharges	Item Surcharges
Item Surcharges Qty	Item Surcharges Qty
Points Redemptions	Points Redemptions
Points Redemptions Qty	Points Redemptions Qty
Rounding	Rounding
Received on Account 1	Received on Account 1
Received on Account 2	Received on Account 2
Received on Account 3	Received on Account 3
Received on Account 4	Received on Account 4
Paid Out 1	Paid Out 1
Paid Out 2	Paid Out 2
Paid Out 3	Paid Out 3
Paid Out 4	Paid Out 4
Units Qty	Units Qty

Select All UnSelect All

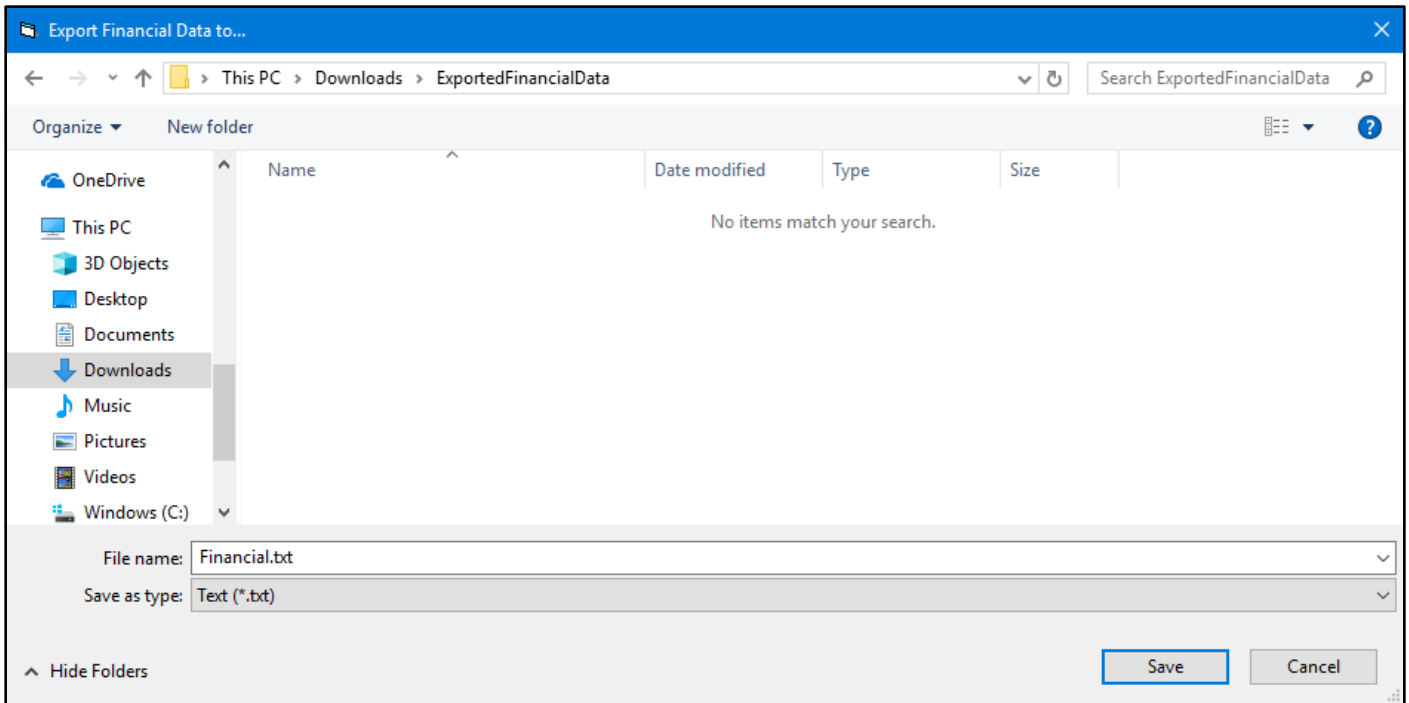
Save as Default OK

Leave the Output File Format as Standard to export the data in a single line/row or change it to Single Column to export data in a single column.

All the Export Fields can be left as selected or you can deselect any fields that are not required.

Press the OK button.

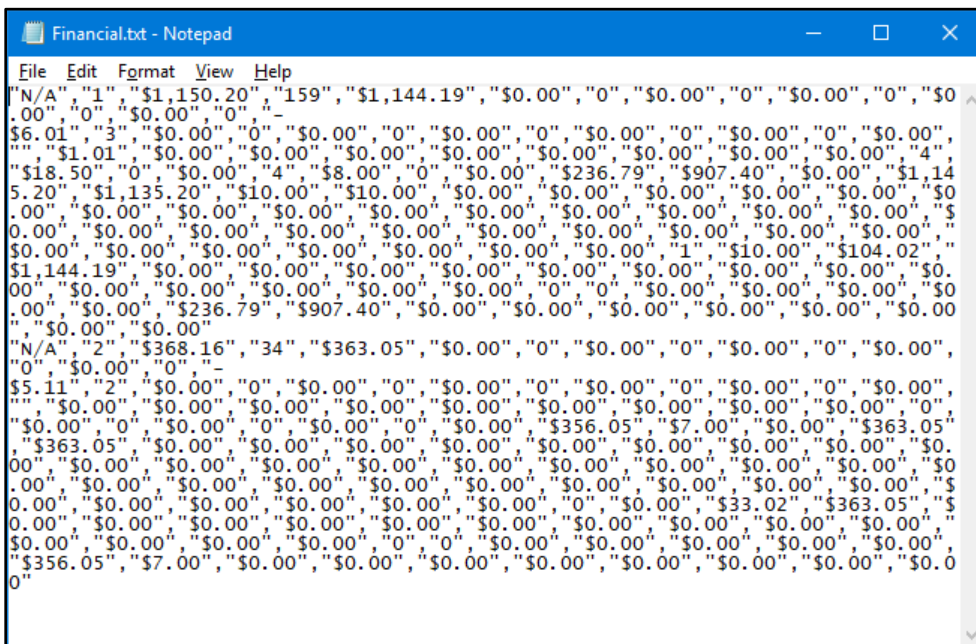
A prompt will appear allowing you to choose a location and filename for the exported data.



Press the 'Save' button to save the data.

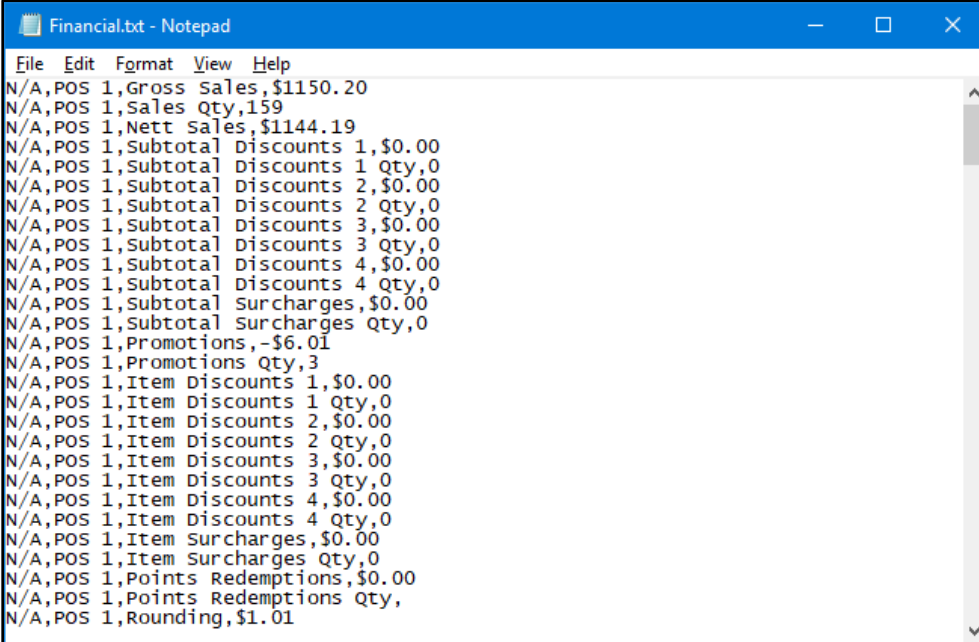
The file is created and the data exported.

The below is an example of an Output File Format of 'Standard'



idealpos7 Update History

The below is an example of an Output File Format of 'Single Column'



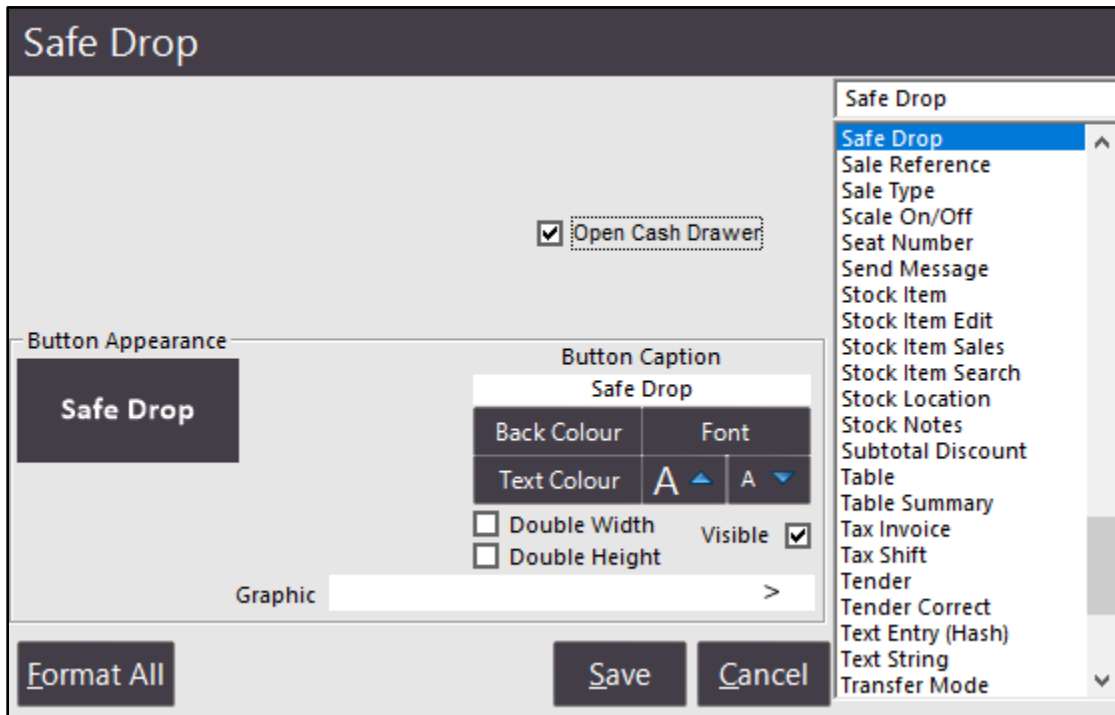
```
File Edit Format View Help
N/A,POS 1,Gross Sales,$1150.20
N/A,POS 1,Sales Qty,159
N/A,POS 1,Nett Sales,$1144.19
N/A,POS 1,Subtotal Discounts 1,$0.00
N/A,POS 1,Subtotal Discounts 1 Qty,0
N/A,POS 1,Subtotal Discounts 2,$0.00
N/A,POS 1,Subtotal Discounts 2 Qty,0
N/A,POS 1,Subtotal Discounts 3,$0.00
N/A,POS 1,Subtotal Discounts 3 Qty,0
N/A,POS 1,Subtotal Discounts 4,$0.00
N/A,POS 1,Subtotal Discounts 4 Qty,0
N/A,POS 1,Subtotal Surcharges,$0.00
N/A,POS 1,Subtotal Surcharges Qty,0
N/A,POS 1,Promotions,-$6.01
N/A,POS 1,Promotions Qty,3
N/A,POS 1,Item Discounts 1,$0.00
N/A,POS 1,Item Discounts 1 Qty,0
N/A,POS 1,Item Discounts 2,$0.00
N/A,POS 1,Item Discounts 2 Qty,0
N/A,POS 1,Item Discounts 3,$0.00
N/A,POS 1,Item Discounts 3 Qty,0
N/A,POS 1,Item Discounts 4,$0.00
N/A,POS 1,Item Discounts 4 Qty,0
N/A,POS 1,Item Surcharges,$0.00
N/A,POS 1,Item Surcharges Qty,0
N/A,POS 1,Points Redemptions,$0.00
N/A,POS 1,Points Redemptions Qty,
N/A,POS 1,Rounding,$1.01
```

Functions

Safe Drop function – Option to open the Cash Drawer

This function adds the ability to open the Cash Drawer when using the Safe Drop function at the POS terminal.

Go to Setup > POS Screen > POS Screen Setup > Buttons > Select Blank Button > Function > Safe Drop > Open Cash Drawer



When the Safe Drop button is pressed on the POS Screen, the Cash Drawer will open.

idealpos7 Update History

Gift Vouchers

Gift Vouchers will hide Expiry Date when Expiry Days 99999

This function allows Gift Vouchers to print without an Expiry Date when the Expiry Days have been set to 99999.

Go to Setup > Global Options > Credit Notes/Gift Vouchers

Gift Voucher Type	Expiry Days	Receipt Printer Logo	PDF Logo
1 Gift Voucher	90	Gift Voucher Receipt.png	Gift Voucher PDF.jpg
2 Birthday Voucher	90	Gift Voucher Receipt.png	Gift Voucher BD PDF.jpg
3 Certificate	90	Gift Certificate Receipt.png	Gift Certificate PDF.jpg
4 Birthday Certificate	90	Gift Certificate Receipt.png	Gift Certificate BD PDF.jpg
5 Gift Voucher Type 5	90		
6 Gift Voucher Type 6	90		
7 Gift Voucher Type 7	90		
8 Gift Voucher Type 8	90		
9 Gift Voucher Type 9	90		
10 Gift Voucher Type 10	90		
11 Gift Voucher Type 11	90		
12 Gift Voucher Type 12	90		
13 Gift Voucher Type 13	90		
14 Gift Voucher Type 14	90		
15 Gift Voucher Type 15	90		
16 Gift Voucher Type 16	90		
17 Gift Voucher Type 17	90		
18 Gift Voucher Type 18	90		
19 Gift Voucher Type 19	90		
20 Gift Voucher Type 20	90		

Message: Terms and Conditions
- Vouchers redeemable up to and including the expiry date.
- Vouchers can be redeemed at ANY one of our awesome stores.
- Vouchers cannot be redeemed for cash or

Company Logo: Idealpos_Gift_Voucher_Banner.jpg
Website: www.idealpos.com.au

- Print Vouchers on Receipt Printer
- Only Print Voucher if No Email Address
- Automatically create Gift Voucher codes
- Gift Vouchers can be redeemed at any Site
- Gift Vouchers use Customer Code
- Can Search Gift Vouchers by Name
- Voucher details shown on Receipts

Use Programmable Barcodes

Amount	Position	Length

Customer Type: ACCOUNTS
Expiry Days: 90

Reason	Item Returned	6
2	Item Damaged	7
3	Product Recall	8
4		9
5		10

Print Credit Notes on Receipt Printer
 Automatically create Credit Note codes
 Credit Notes can be redeemed at any Site

In the Expiry Days column, enter a value of 99999 to set that type of Gift Voucher to never expire. By doing this, the Gift Voucher will print without an expiry date.

Gift Voucher Type	Expiry Days
1 Gift Voucher	99999

At the POS Screen, sell the Gift Voucher by pressing the 'Gift Voucher' button.



Then enter the Gift Voucher value and the Customer Name for who the Gift Voucher is for. If the Customer does not exist, leave the Customer Name field as blank and press the OK button.

GIFT VOUCHER Sale ✕

Scan or Enter Voucher Code

Amount

Customer Name

Email Address

GIFT VOUCHER Type

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 & .com 1 2 3 **OK**
CL backspace \ ? 0 . -

The Gift Voucher will be added to the sale.

16 Apr 09:38 POS 1 Adult ID: 16/04/00 Bjorn STANDARD		
GV PURCHASE	1	20.00
Discounts (+/-)		0.00
		\$20.00

idealpos7 Update History

Press the 'Enter' button to go to the Tender screen, then choose a Tender to Finalise the sale.


16 Apr 09:40 POS 1 Adult ID: 16/04/00
 Bjorn STANDARD

GV PURCHASE 1 20.00	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="background-color: #2c5e8c; color: white;">RECEIPT</td> <td style="background-color: #2c5e8c; color: white;">CLERK</td> <td style="background-color: #333; color: white;">7</td> <td style="background-color: #333; color: white;">8</td> <td style="background-color: #333; color: white;">9</td> <td style="background-color: #333; color: white;">CL</td> </tr> <tr> <td style="background-color: #2c5e8c; color: white;">PRICE LEVEL</td> <td style="background-color: #c00; color: white;">5% ST DISC</td> <td rowspan="2" style="background-color: #333; color: white;">4</td> <td rowspan="2" style="background-color: #333; color: white;">5</td> <td rowspan="2" style="background-color: #333; color: white;">6</td> <td rowspan="2" style="background-color: #333; color: white;">NO SALE</td> </tr> <tr> <td style="background-color: #2c5e8c; color: white;">CUSTOMER</td> <td style="background-color: #c00; color: white;">5% ITEM</td> </tr> <tr> <td style="background-color: #2c5e8c; color: white;">BAR TAB</td> <td style="background-color: #c00; color: white;">REFUND</td> <td rowspan="2" style="background-color: #333; color: white;">1</td> <td rowspan="2" style="background-color: #333; color: white;">2</td> <td rowspan="2" style="background-color: #333; color: white;">3</td> <td rowspan="2" style="background-color: #333; color: white;">X</td> </tr> <tr> <td style="background-color: #2c5e8c; color: white;">PENDING</td> <td style="background-color: #c00; color: white;">VOID SALE</td> </tr> <tr> <td style="background-color: #2c5e8c; color: white;">TABLE MAP</td> <td style="background-color: #c00; color: white;">VOID</td> <td style="background-color: #333; color: white;">0</td> <td style="background-color: #333; color: white;">.</td> <td colspan="2" style="background-color: #333; color: white;">ENTER</td> </tr> </table>	RECEIPT	CLERK	7	8	9	CL	PRICE LEVEL	5% ST DISC	4	5	6	NO SALE	CUSTOMER	5% ITEM	BAR TAB	REFUND	1	2	3	X	PENDING	VOID SALE	TABLE MAP	VOID	0	.	ENTER	
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																									
Discounts (+/-) 0.00 \$20.00																													

CASH	
EFTPOS	
AMEX / DINERS	
LAYBY	
CHEQUE	
CREDIT NOTE	
ONLINE	

20.00

Balance 20.00



The Receipt will print, followed by the Gift Voucher.
The Expiry Date will not print on the Gift Voucher as per the example below.



IDEALPOS
1/212 Curtin Ave West
Eagle Farm QLD 4009
Australia

TAX INVOICE
123-456-789-11


#000541 Bjorn 16/04/18 09:41:31

GV PURCHASE	\$20.00
TOTAL	\$20.00
CASH	\$20.00

GIFT VOUCHER Code: 9801898044357
Remaining Value: \$20.00

TOTAL \$0.00

*indicates taxable supply
Powered by Idealpos




Gift Voucher

Amount = 20.00
Redeemed = 0.00

Balance = 20.00

Date Bought : 16/04/2018
Gift Voucher
9801898044357



Terms and Conditions
- Vouchers redeemable up to and including the expiry date,
- Vouchers can be redeemed at ANY one of our awesome stores.
- Vouchers cannot be redeemed for cash or other services.

idealpos7 Update History

Global Options

Gaming Interface – Konami Gaming – Get Member by House Number

Idealpos previously looked up active members by sending a GMID number to the Konami Gaming System.

However, the GMID number was not known or easily remembered by staff at the venue.

The venue identifies machines by the House Number.

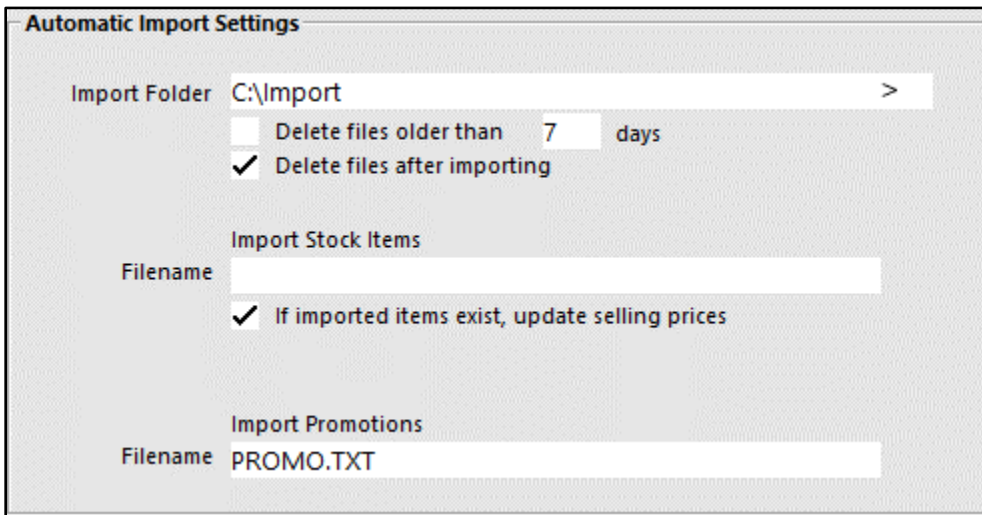
Therefore, Idealpos has been updated so that the House Number is sent to the Konami Gaming System instead of the GMID number.

Import Data

Auto Import Promotions

This function allows Promotions to be imported into Idealpos automatically.

Go to Setup > POS Terminals > Select POS Terminal > Modify > Import/Export > Automatic Import Settings



The screenshot shows a dialog box titled "Automatic Import Settings". It contains the following fields and options:

- Import Folder:** A text field containing "C:\Import" with a right-pointing arrow button.
- Delete files older than** **days**
- Delete files after importing**
- Import Stock Items**
- Filename:** A text field (empty).
- If imported items exist, update selling prices**
- Import Promotions**
- Filename:** A text field containing "PROMO.TXT".

Specify the Import Folder location of where you will be placing the Import files.

Then specify the name of the promotion file that you will be importing under Import Promotions – Filename.

The format of the promotion file needs to be as per the format that's documented on the 'Import Promotions' section of the User Guide.

For completeness, the promotion format has been included below:

ZONE – Currently unused but included for future plans. Header must be included but data can be left blank.

DESCRIPTION – Promotion Description.

TRIP_QUANTITY – The number of items required to purchase to trip the promotion.

PROMO_PRICE – Price of the promotion.

START_DATE – Start date of the promotion.

END_DATE – End date of the promotion.

ITEM_CODE – Stock items to be included in the promotion.

CUSTOMER_TYPE or CUSTOMERTYPE - Customer Type Code

CUSTOMERTYPERANGE or CUSTOMER_TYPE_RANGE - The range of Customer Type Codes expressed as 1-4, 16.

Anything fields that contain a comma must be contained within quotes, so "1-4, 16".

POS or POS_NUMBER or TERMINAL - POS Terminal Code

POS_RANGE - POS Terminal Code range expressed as 1-4, 16. Anything fields that contain a comma must be contained within quotes, so "1-4, 16".

LOCATION - The Location Code

LOCATION_RANGE - The Location Code range expressed as 1-4, 16. Anything fields that contain a comma must be contained within quotes, so "1-4, 16".

SITE - The Site Code

SITE_RANGE - The Site Code range expressed as 1-4, 16. Anything fields that contain a comma must be contained within quotes, so "1-4, 16".

PRICE_LEVEL - The Price Level Code.

As the POS Range, Location Range, Site Range, Price Level all share the same field, whichever field comes first will take precedence if you have a record that has data in both fields.

idealpos7 Update History

Here is an example of a promotion file:

	A	B	C	D	E	F	G
1	ZONE	DESCRIPTION	TRIP_QUANTITY	PROMO_PRICE	START_DATE	END_DATE	ITEM_CODE
2	1	Z1-S20-WINE-3FOR20	3	20	01-Apr-18	31-Aug-18	1
3	1	Z1-S20-WINE-3FOR20	3	20	01-Apr-18	31-Aug-18	2
4	1	Z1-S20-WINE-3FOR20	3	20	01-Apr-18	31-Aug-18	3
5	1	Z1-S20-WINE-3FOR20	3	20	01-Apr-18	31-Aug-18	4
6	1	Z1-S20-WINE-3FOR20	2	20	01-Apr-18	31-Aug-18	5
7	1	Z1-S20-WINE-3FOR20	2	20	01-Apr-18	31-Aug-18	6
8	1	Z1-S20-WINE-3FOR20	2	20	01-Apr-18	31-Aug-18	7
9	1	Z1-S20-WINE-3FOR20	2	20	01-Apr-18	31-Aug-18	8

```

ZONE,DESCRIPTION,TRIP_QUANTITY,PROMO_PRICE,START_DATE,END_DATE,ITEM_CODE
1,Z1-S20-WINE-3FOR20,3,20,01-Apr-18,31-Aug-18,1
1,Z1-S20-WINE-3FOR20,3,20,01-Apr-18,31-Aug-18,2
1,Z1-S20-WINE-3FOR20,3,20,01-Apr-18,31-Aug-18,3
1,Z1-S20-WINE-3FOR20,3,20,01-Apr-18,31-Aug-18,4
1,Z1-S20-WINE-3FOR20,2,20,01-Apr-18,31-Aug-18,5
1,Z1-S20-WINE-3FOR20,2,20,01-Apr-18,31-Aug-18,6
1,Z1-S20-WINE-3FOR20,2,20,01-Apr-18,31-Aug-18,7
1,Z1-S20-WINE-3FOR20,2,20,01-Apr-18,31-Aug-18,8
    
```

Once the Promotion file has been created and saved with a name of PROMO.TXT, copy it into Import Folder location (in the above example, the location and name of the promo file is C:\Import\PROMO.TXT).

When copied to the configured location, the Promotion File will then be imported automatically and will appear in Promotions.

Go to File > Sales > Promotions > Promotions

Code	Description	Group	Discount	Date Range	Time Range	Days	Selection Range	Cust Type Range	Priority
26	Z1-S20-WINE-3FOR20	PROMO	\$20.00 Each	01 Apr 18 - 31 Aug 18	All Day	Every Day			26

View the promotion by double clicking on it or selecting it and press the 'Modify' button to see the details of the promotion which was imported as per the promotion file.

promotions Promotion Avanced ✕

Description: Z1-S20-WINE-3FOR20

Group: PROMO

POS: >

Customer Type: >

Multiple Trips
 Apply Over Trip Level

From: 01/04/2018 00:00
to: 31/08/2018 23:59

Continuous
 During Specific Times

Discount Type: Unit Price Each 20.00

Trip Conditions Set 1 Buy 3 of items below

Trip by Quantity
 Trip by Amount

- 1 Test Stock Item
- 8 Test Stock Item Eight
- 5 Test Stock Item Five
- 4 Test Stock Item Four
- 7 Test Stock Item Seven
- 6 Test Stock Item Six
- 3 Test Stock Item Three
- 2 Test Stock Item Two

Trip Conditions Set 2 And Buy 0 of items below

Trip by Quantity
 Trip by Amount

Trip Conditions Set 3 And Buy 0 of items below

Trip by Quantity
 Trip by Amount

Delete Promotion Link Enquiry Add Department Add Stock Item

idealpos7 Update History

Auto Import Supplier Invoices – Can find Supplier by Code

Previously, Idealpos would look up a Supplier by Supplier name. Idealpos has now been updated to look up the Supplier by Supplier Code if the Supplier name cannot be found.

Go to Setup > POS Terminals > Modify > Import/Export > Supplier Invoices > Retrieve Supplier from Filename

Enter the location of the Supplier name or Supplier code using the information in the filename.

E.g. To retrieve the Supplier Name from a filename of "Warehouse – ALM.csv", you would set the "Retrieve Supplier from Filename - Right of" setting as "-" and the "Retrieve Supplier from Filename - Left of" setting as "."

Idealpos will retrieve the Supplier name of "ALM" from a filename of "Warehouse – ALM.csv" using the above "Right of" and "Left of" settings.

If the filename contains the Supplier Code instead of the Supplier Name, Idealpos will retrieve and search for the Supplier Code instead.

E.g. For a filename of "Warehouse – 1.csv", Idealpos will retrieve a Supplier Code of 1 using the "Left of" and "Right of" settings that have been described above.

The screenshot displays the Idealpos7 software settings interface, organized into four main sections:

- Automatic Export Settings:** Includes fields for Export Folder, a checkbox for "Delete files older than 7 days", Export Stock Items (set to "All Items"), Department Range, Filter by Attribute Type, Export Daily at (with "Or every" and "minutes" options), Filename, checkboxes for "Append Date/Time to filename", "Append Site Name to filename", "Append Venue ID to filename", "Include Discontinued Items", and "Use Saved Automatic Export Format", Export Sales Format (set to "No Daily Export"), Sales From (set to "All POS Terminals"), and Daily Export Time.
- Automatic Import Settings:** Includes Import Folder (set to "C:\Import"), a checkbox for "Delete files older than 7 days", Import Stock Items, and a Filename field. It also has checkboxes for "If imported items exist, update selling prices" and "Delete file after importing".
- IBA Interface:** Includes fields for Daily Import/Export Time, Username, Password, a checkbox for "Import Promotions", State Code, Store Code, Zone, POS Range, and Promotion Group. There is also an "Exclude Batch" checkbox.
- Supplier Invoices:** Includes a checked checkbox for "Automatically Import Supplier Invoices", fields for "Retrieve Location from Filename" (Right of and Left of), "Retrieve Supplier from Filename" (Right of and Left of), checkboxes for "Automatically Add/Modify Stock Items during Import" (with sub-options for "Update Description", "Update Department", and "Update Sell Price"), and "Automatically Process Invoices after Import Complete". It also has an "Import Items Only Folder" field.

Invoices

Long Description Support on A4 Invoices when using Stock Notes for Long Descriptions option

This function adds support for Long Descriptions to be displayed in their entirety on A4 Invoices when the Stock Notes for Long Descriptions option has been enabled.

Go to Setup > Yes/No Options > Miscellaneous > Enable: Use Stock Notes Field for Long Descriptions

	ALL	1
MISCELLANEOUS		
Use Stock Notes Field for Long Descriptions	<input checked="" type="checkbox"/>	

When enabling the above setting, the Stock Notes field will be used to handle Stock Item Descriptions and you will lose access to the Stock Notes features.

After enabling the above Yes/No option, a long Stock Item Description can be entered against the Stock Item.

Go to File > Stock Control > Stock Items > Select: Stock Item > Modify > Update Description Field: Enter a long description into the Description field > Save

stock items
General Advanced Indirect Item
Created 04 Dec 2017 16:21:40 ✕

Stock Code Department >

Description (73) Scan Code

Description 2 (10)

Selling Prices (inc Tax)

		Profit%
STANDARD	1.23	100.00
STAFF	0.00	
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

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

Purchasing

Purchase Category >

Default Supplier

Default Supplier Stock Code

Other Options

Stock Control Instruction

Indirect Item Print Red

Non-Accumulating Web Store

Scale Inhibit Discounts

Can't Buy with GIFT VOUCHER Inhibit Voids

Manufactured Item

Cost Prices (ex Tax)

Standard Cost

Last Cost

Average Cost

Tax Settings (Selling)

GST

GST-Free

Not Defined

Not Defined

Not Defined

Not Defined

Attributes

Keyboard
Save

Open the POS screen and sell the Stock Item containing a long description in a Sale.

After the sale has been finalised, close the POS screen and go to:

Enquiry > Journal History > Select the Journal from the list > Press the Tax Invoice button

idealpos7 Update History

journal history enquiry
S X

Today

From 13/03/2018 00:00:00

To 13/03/2018 23:59:59

Top 1000 records

Customer >

Clerk >

Price Level v

Location v

Site v

Tender Type v

Function v

Stock Item >

Department >

Sale Total to

Table

Audit

Filter Table/Bar Tabs

Select

Audit	POS	Date	Customer
486	1	Tue 13/03/2018 14:13:07	Jeremy
485	1	Tue 13/03/2018 11:57:44	
484	1	Tue 13/03/2018 11:56:49	
483	1	Tue 13/03/2018 11:54:37	
482	1	Tue 13/03/2018 11:49:24	
481	1	Tue 13/03/2018 11:49:01	
480	1	Tue 13/03/2018 11:44:52	
479	1	Tue 13/03/2018 11:44:16	
478	1	Tue 13/03/2018 10:15:58	
477	1	Tue 13/03/2018 09:19:44	

Date 13/03/2018 14:13:07 Audit 486,1






1 This is an example of a Stock

ROUNDING	1.23
GST Subtotal	0.02
GST Amount	1.23
CASH	0.11
Change	1.25
	0.00

10 records

View All
Docket Print
Tax Invoice
Email
Total
Stock Item Sales
Favourite
Add Text
Keyboard

After pressing the 'Tax Invoice' button, the Tax Invoice will print and will include the full Stock Item Description

Idealpos user ABN 34091801204 ACN 091801204 1/212 Curtin Ave West Eagle Farm Queensland 4009 Phone 07 3630 2216 Fax 07 3630 2217 Email email@domain.com				
		TAX INVOICE Page 1 of 1		
To:	CASH SALE	Customer		
		Phone		
		Date	13/03/2018 14:13:07	
		Served by	Jeremy	
		Invoice #	486	
Stock Code	Description	Unit Cost	Quantity	Amount
1	This is an example of a Stock Item with a long description for A4 Invoice*	1.23	1.0000	1.23
	ROUNDING	0.02	1.0000	0.02
				Includes GST of \$0.11
				Total \$1.25
* taxable item				
How to pay				
 by credit card To pay via MasterCard or VISA by PHONE: 07 3630 2016 by FAX: 07 3630 2017		 by internet Logon to your financial institution to make this payment from your bank account. BSB: xxx-xxxx Account #: xxxxxxxx Use surname or invoice number as reference. Email remittance to: info@idealpos.com.au		
 by mail Detach this section and mail your cheque to Idealpos Solutions PO Box 3128 Newstead QLD 4006		 in person To make a payment via credit card, cheque, cash or EFTPOS. Present this invoice at Idealpos Solutions.		

idealpos7 Update History

Log Out

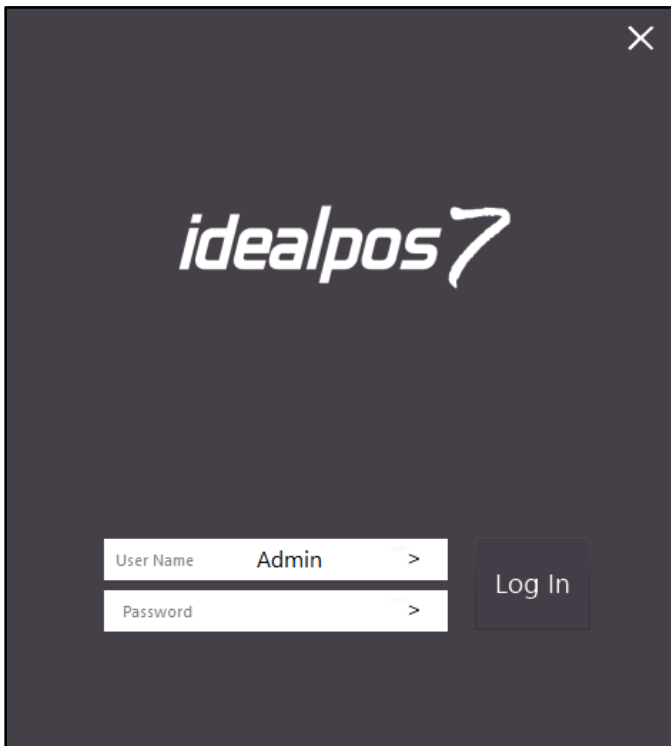
Hide Backoffice screen

This function hides the Backoffice screen after logging out of Idealpos.

This prevents unauthorised staff from seeing the figures that were displayed on the Dashboard by the last logged in user.

This function is hard-coded and there are no configuration changes required.

Go to File > Log Out



The Backoffice screen is now hidden and only the Idealpos 7 logon screen is displayed on the screen.

Pending Sales

Ability to Email Pending Sales

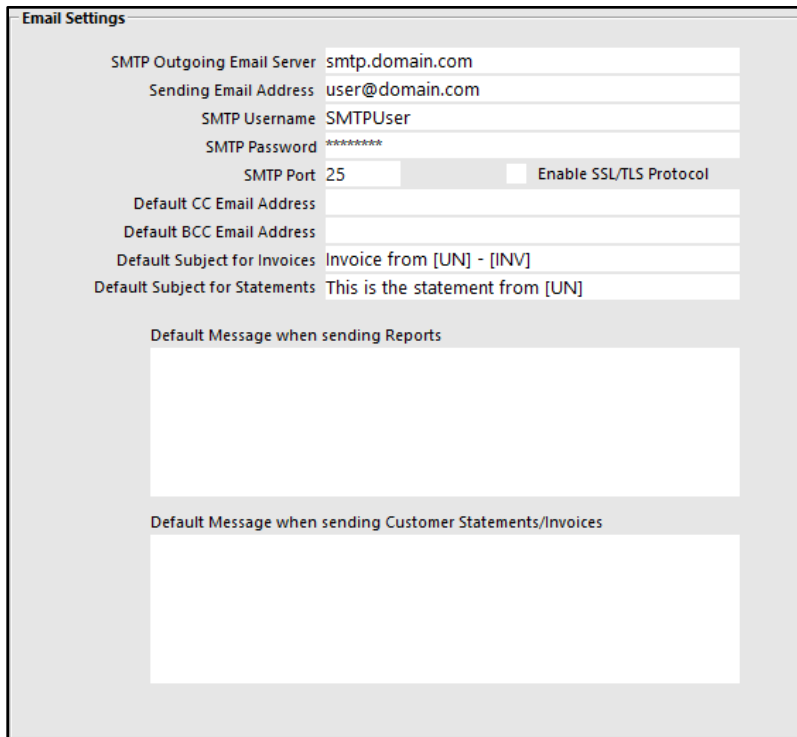
The ability to send a customer a Pending Sale as an email is now available in Idealpos.

Pending Sales are used to save a sale for use at a later stage.

For complete details about configuring Pending Sales in Idealpos, please search for Pending Sales in our Support User Guide available on the Idealpos website.

In order to use the Email Pending Sales feature, you will need to ensure that the Outgoing Email Server is configured in Idealpos.

Go to Setup > Global Options > Other Options > Email Settings



The screenshot shows the 'Email Settings' configuration window. It contains the following fields and options:

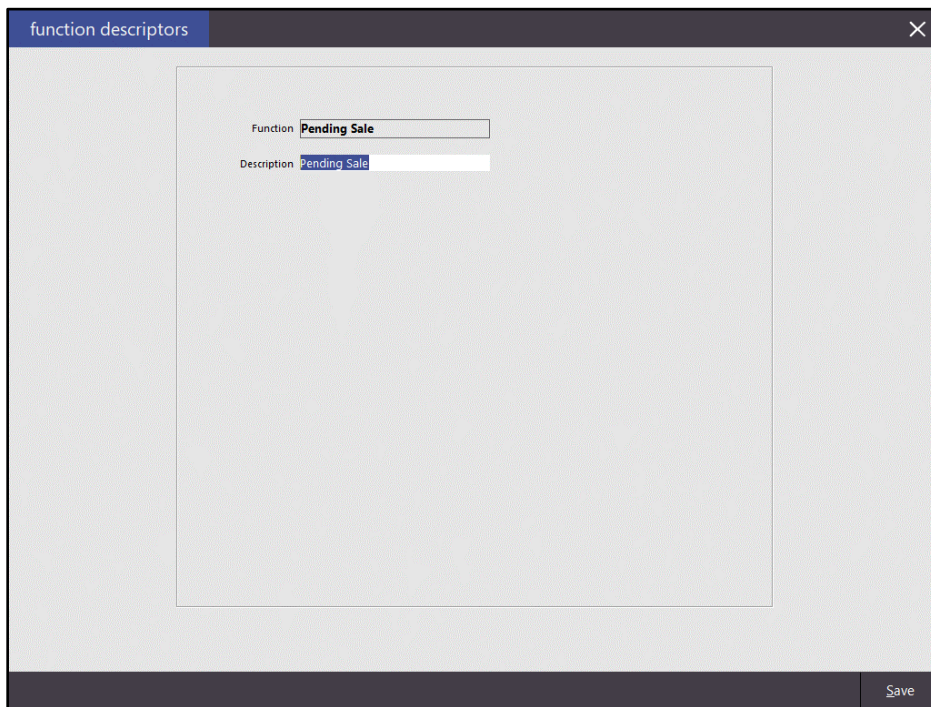
- SMTP Outgoing Email Server: smtp.domain.com
- Sending Email Address: user@domain.com
- SMTP Username: SMTPUser
- SMTP Password: *****
- SMTP Port: 25
- Enable SSL/TLS Protocol:
- Default CC Email Address: [Empty field]
- Default BCC Email Address: [Empty field]
- Default Subject for Invoices: Invoice from [UN] - [INV]
- Default Subject for Statements: This is the statement from [UN]
- Default Message when sending Reports: [Empty text area]
- Default Message when sending Customer Statements/Invoices: [Empty text area]

Enter the details that are used by your email server. You may need to request these settings from your Internet Service Provider or from the Email Service that you use to send/receive your emails.

idealpos7 Update History

By default, the Pending Sale Descriptor is set as 'Table'. The Descriptor appears on the top right corner of any Pending Sales that you email to your customers. Therefore, you may want to change this to Pending Sale or to another Description that you prefer.

Go to Setup > Function Descriptors > Pending Sale > Modify



The screenshot shows a window titled 'function descriptors' with a close button in the top right corner. Inside the window, there are two input fields: 'Function' and 'Description'. Both fields contain the text 'Pending Sale'. At the bottom right of the window, there is a 'Save' button.

Enter your preferred Description for Pending Sales into the Description field, then press the 'Save' button.

Open the Idealpos POS screen, then add the Customer to the sale if they exist in your database, then add the Stock Items you want in your Pending Sale by selecting them from the POS Screen, or alternatively scan the Stock Item barcodes if they are barcoded and you have a barcode scanner.

Then press the Pending Sale button.



If you added a Customer to the transaction, their details will be pre-filled in the below screen, otherwise you may enter their details. POS only requires the Code, the other fields are optional.

Save Pending Sale

Code: 908

Name: John Smith

Address: 123 Smith St

Suburb: EAGLE FARM

State: QLD Post Code: 4009

02/03/2018 15:41 +5 +10 +15

None
 Takeaway
 Delivery
 Pickup
 Cater

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 Save
 CL backspace \ ? 0 . -

Press the Save button to Save the Pending Sale

To email the Pending Sale, press the Pending Sale button on your POS Screen to view a list of Pending Sales then select the Pending Sale that you want to Email.

Pending Sale

Search For: Code Clerk Name Status: Pickup

Code	Date	Clerk	Name	Address	Postcode	Status	Order Date	
908	02/03/18	Jeremy	John Smith	123 Smith St EAGLE FARM QLD	4009	Pickup	02/03/18 15:41	

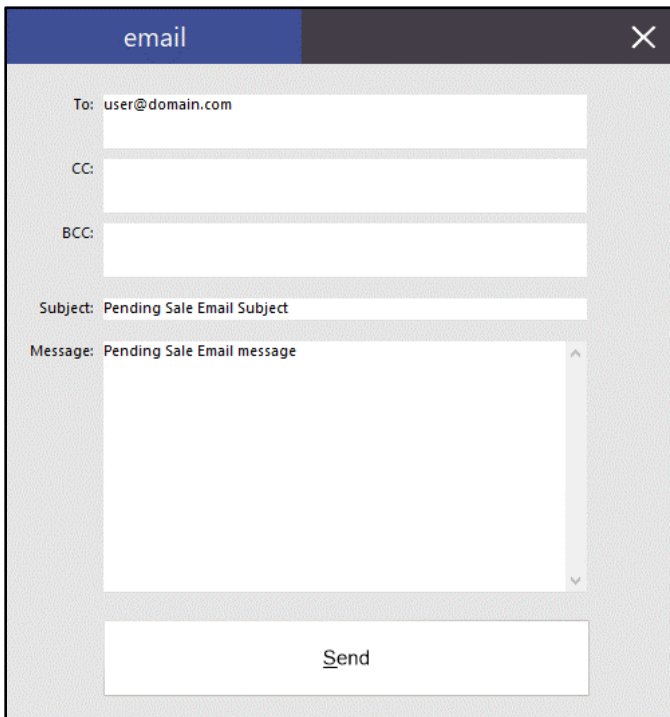
CHICKEN BURGER	13.00
LARGE CHIPS	4.50
CARROT CAKE SLICE	7.50
	25.00

Windows Print Transfer to Table Email Modify Delete Print OK

Press the Email button to Email the Pending Sale.

idealpos7 Update History

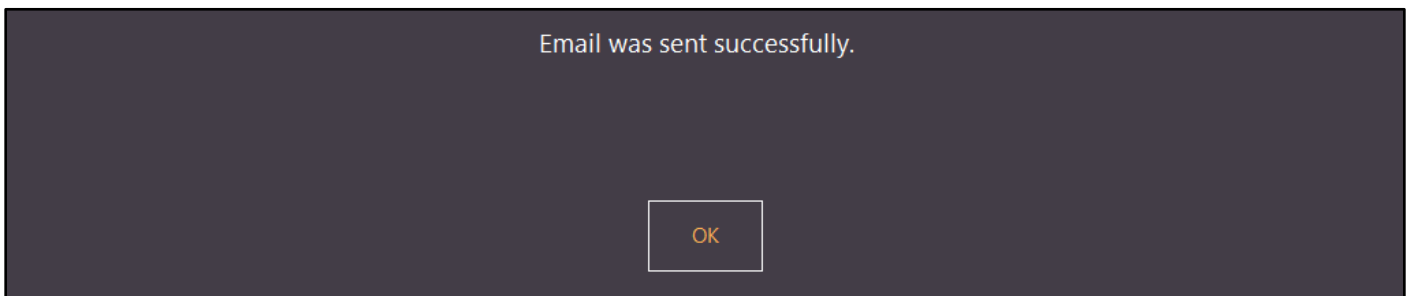
Fill in the details for the email.



The screenshot shows a standard email composition window. The title bar is blue with the text 'email' and a close button (X) on the right. The main area contains several input fields: 'To: user@domain.com', 'CC:', 'BCC:', 'Subject: Pending Sale Email Subject', and 'Message: Pending Sale Email message'. A large text area for the message body is visible below the subject line. At the bottom of the window is a 'Send' button.

Press the Send button to email the Pending Sale.

The following window will appear to show that the Pending Sale was emailed successfully.



The Pending Sale email will contain the above message and will also have a PDF attachment containing the details of the Pending Sale.

Idealpos user ABN 34091801204 A.C.N. 091801204 1/212 Curtin Ave West Eagle Farm Queensland 4009 Phone 07 3630 2216 Fax 07 3630 2217 Email email@domain.com		Pending Sale	
		Printed 02/03/2018 16:07:18 Page 1 of 1	
To:	John Smith 123 Smith St EAGLE FARM QLD 4009	Customer	Phone
		Date	02/03/2018 15:47:42
		Pending Sale	908, 1
		Served by	Jeremy
Stock Code	Description	Quantity	
112004	CHICKEN BURGER	1.0000	
116006	LARGE CHIPS	1.0000	
115002	CARROT CAKE SLICE	1.0000	
	Pending Sale Message field one		
Pending Sale Message field two			
* indicates taxable supply			

idealpos7 Update History

Pending Sale Deletions - Items recorded in Journal and Activity Log

This function adds the ability to see the Stock Items that were added to a Pending Sale after a Pending Sale has been deleted. After a Pending Sale is deleted, the Pending Sale and the Stock Items it contained will be recorded in the Journal and Activity Log.

Go to POS Screen and add required Stock Items to the transaction.

If the sale is being created for a Customer, ensure that you add the Customer to the sale.

Then press the 'Pending' button

16 Apr 10:07 POS 1 Adult ID: 16/04/00 Bjorn STANDARD										
PASTA	1	11.00	RECEIPT	CLERK	7	8	9	CL		
DUCK	1	14.00	PRICE LEVEL	5% ST DISC	4	5	6	NO SALE		
			CUSTOMER	5% ITEM	1	2	3	X		
			BAR TAB	REFUND						
			PENDING	VOID SALE						
			TABLE MAP	VOID	0	.	ENTER			
Discounts (+/-) 0.00										
2x \$25.00										
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		

The 'Save Pending Sale' screen will appear.

If you selected a Customer during the sale, the Customer's details will appear. Otherwise, enter the details of the Customer which the Pending Sale is being created for (Name, Address, Suburb, State and Post Code), select the Type of Pending Sale (None, Takeaway, Delivery, Pickup, Cater) then press the 'Save' button.

Save Pending Sale ✕

Code

Name

Address

Suburb

State Post Code

:

None
 Takeaway
 Delivery
 Pickup
 Cater

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	Save	
CL						backspace	\	?	0	.	-			

The Pending Sale has now been saved.










idealpos7 Update History

Now press the 'Pending' button to open the Pending Sales screen

16 Apr 10:22 POS 1 Adult ID: 16/04/00
Bjorn STANDARD
✕

→

Discounts (+/-) 0.00
\$0.00

																																												
BEEF					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				

From the Pending Sale screen, select the Pending Sale that you want to Delete, then press the 'Delete' button

The screenshot shows a 'Pending Sale' window with a search bar and a status dropdown set to 'ALL'. Below is a table with columns: Code, Date, Clerk, Name, Address, Postcode, Status, Order Date, and a list of items with prices. The first row is selected. The bottom navigation bar contains buttons for 'Windows Print', 'Transfer to Table', 'Email', 'Modify', 'Delete' (highlighted with a yellow box), 'Print', and 'OK'. A yellow arrow points to the 'Delete' button.

Code	Date	Clerk	Name	Address	Postcode	Status	Order Date	Item	Price
100	16/04/18	Bjorn	John Smith	123 Smith Rd EAGLE FARM QLD	4009	Pickup	16/04/18 10:08	PASTA	11.00
								DUCK	14.00
									25.00
910	05/03/18	Jeremy	John Citizen	Windy St BRISBANE QLD	4000	Delivery	05/03/18 12:11		

Confirm the deletion by pressing the 'Yes' button

A dark grey dialog box with the text 'Are you sure you wish to Delete?' centered at the top. At the bottom, there are two buttons: 'Yes' and 'No'.

idealpos7 Update History

Close the Pending Sale screen, then close the POS screen, then go to Enquiry > Journal History
 The Deleted Pending Sale will appear as an entry for the day that the Pending Sale was deleted on

journal history enquiry S ×

Today ▼

From

To

Top 1000 records

Customer ▼

Clerk ▼

Price Level ▼

Location ▼

Site ▼

Tender Type ▼

Function ▼

Stock Item ▼

Department ▼

Sale Total to

Table

Audit

Filter Table/Bar Tabs

Select

Audit	POS	Date	Customer
543	1	Mon 16/04/2018 10:27:17	
542	1	Mon 16/04/2018 10:14:05	
541	1	Mon 16/04/2018 09:41:31	
540	1	Mon 16/04/2018 09:35:35	
539	1	Mon 16/04/2018 09:26:37	13
538	1	Mon 16/04/2018 09:22:29	13

Date 16/04/2018 10:27:17 Audit 543,1 Bjorn

Delete Pending Sale 100

106007 PASTA	11.00
106001 DUCK	14.00

The Deleted Pending Sale will also appear in the Activity Log.
 Go to Enquiry > Activity Log

activity enquiry S ×

Date	Time	POS	Clerk/User	Action Description
16 Apr 18	04:00:50	1	Admin	Logged In : Admin
16 Apr 18	09:22:29	1	Bjorn	Transaction 000538-1 = 20.00
16 Apr 18	09:22:30	1	Bjorn	Sale 000538,1 sent to Kitchen
16 Apr 18	09:23:04	1	Admin	Save All Network Printers
16 Apr 18	09:26:37	1	Bjorn	Transaction 000539-1 = 20.00
16 Apr 18	09:26:37	1	Bjorn	Sale 000539,1 sent to Kitchen
16 Apr 18	09:27:16	1	Admin	Modified Buttons on Layout 1
16 Apr 18	09:32:52	1	Admin	Global Options modified
16 Apr 18	09:35:35	1	Bjorn	Void Entire Sale - Amount 20.00
16 Apr 18	09:35:35	1	Bjorn	Transaction 000540-1 = 0.00
16 Apr 18	09:35:35	1	Bjorn	Sale 000540,1 sent to Kitchen
16 Apr 18	09:41:31	1	Bjorn	Transaction 000541-1 = 20.00
16 Apr 18	09:41:31	1	Bjorn	Sale 000541,1 sent to Kitchen
16 Apr 18	10:14:05	1	Bjorn	POS Sale to Table/Bar Tab 000542,1
16 Apr 18	10:14:05	1	Bjorn	Pending Sale 100 sent to Kitchen
16 Apr 18	10:27:17	1	Bjorn	Pending Sale Delete : 100-1

16/04/2018 10:27:17 Audit 543,1 Bjorn

Delete Pending Sale 100

106007 PASTA	11.00
106001 DUCK	14.00

View All

Promotions

Can set specific Priorities / Move to Top and Bottom

This function adds the ability to set a Priority for a Promotion by selecting a Promotion from the list then entering a numeric value for the Priority.

It also adds the ability to move a Promotion to the top or bottom of the list.

Go to File > Sales > Promotions > Promotions > Change Priority

Code	Description	Group	Discount	Date Range	Time Range	Days	Selection Range	Cust Type Range	Priority
24	Stock Item Link Table Offer	Promotions	Bonus Item	Expired	All Day	Every Day	1		1
25	Stock Item Link Table Offer 2	Promotions	Bonus Item	Expired	All Day	Every Day	1		2
23	Test Promotion	Customer Reward Promo	\$2.00 off	Expired	All Day	Every Day	1		3
2	Meat Raffle Ticket 10	Promotions	\$5.00 off Total	01 Oct 16 - 01 Jan 20	All Day	Every Day			4
1	Meat Raffle Ticket 5	Promotions	\$2.00 off Total	01 Oct 16 - 01 Jan 20	All Day	Every Day			5
3	Burger Meal Deal Small	Promotions	\$16.50 Price	01 Oct 16 - 01 Jan 20	All Day	Every Day			6
4	Burger Meal Deal Large	Promotions	\$18.50 Price	01 Oct 16 - 01 Jan 20	All Day	Every Day			7
5	Salad Deal \$1.50 Off	Promotions	\$1.50 off	01 Oct 16 - 01 Jan 20	All Day	Every Day			8
6	10% off RTD Singles	Promotions	10% off	01 Oct 16 - 01 Jan 20	All Day	Every Day	4		9
7	Corona Bucket Stubby Cooler	Promotions	Bonus Item	01 Oct 16 - 01 Jan 20	All Day	Every Day			10
22	Daily Specials \$4 Off	Promotions	\$4.00 off	01 Jan 17 - 01 Jan 20	All Day	Every Day			11
8	Main Meal Buy 1 Get 1 Free	Promotions	100% off cheapest	01 Oct 16 - 01 Jan 20	All Day	Every Day			12
9	Sides Only \$3	Promotions	\$3.00 Each	01 Oct 16 - 01 Jan 20	All Day	Every Day			13
10	20% Off Most Exp. Dessert	Promotions	20% off expensive	01 Oct 16 - 01 Jan 20	17:00 - 23:59	Every Day			14
11	2 School Outfits Bonus Cap	Promotions	Bonus Item	01 Oct 16 - 01 Jan 20	All Day	Every Day			15
12	Cocktail Happy Hour \$3 Off	Promotions	\$3.00 off Each	01 Oct 16 - 01 Jan 20	17:30 - 19:00	Every Day			16
13	Wine & Cheese 50% Off	Promotions	50% off cheapest	01 Oct 16 - 01 Jan 20	All Day	Every Day			17
14	5KG Bulk Buy 10% Discount	Promotions	10% off	01 Oct 16 - 01 Jan 20	All Day	Every Day			18
15	Milk & Bread for \$3	Promotions	\$3.00 Price	01 Oct 16 - 01 Jan 20	All Day	Every Day			19
16	Buy 2 Milk for \$3	Promotions	\$3.00 Price	01 Oct 16 - 01 Jan 20	All Day	Every Day			20
17	20% Off Bananas After 1pm	Promotions	20% off	01 Oct 16 - 01 Jan 20	13:00 - 14:59	Every Day			21
18	35% Off Bananas After 3pm	Promotions	35% off	01 Oct 16 - 01 Jan 20	15:00 - 23:59	Every Day			22
19	Snack Pack Small	Promotions	\$2.00 off Total	01 Oct 16 - 01 Jan 20	All Day	Every Day			23
20	Snack Pack Large	Promotions	\$3.00 off Total	01 Oct 16 - 01 Jan 20	All Day	Every Day			24
21	2 Flat Whites 25% Off	Promotions	25% off	01 Jan 17 - 01 Jan 20	All Day	Every Day			25
26	Z1-S20-WINE-3FOR20	PROMO	\$20.00 Each	01 Apr 18 - 31 Aug 18	All Day	Every Day			26

26 records

Change Priority Import Copy Delete Add Modify

idealpos7 Update History

The Promotions will change to a light-yellow background and additional buttons will be revealed at the bottom of the Promotions window. The new buttons have been annotated below

Code	Description	Group	Discount	Date Range	Time Range	Days	Selection Range	Cust Type Range	Priority
24	Stock Item Link Table Offer	Promotions	Bonus Item	Expired	All Day	Every Day	1		1
25	Stock Item Link Table Offer 2	Promotions	Bonus Item	Expired	All Day	Every Day	1		2
23	Test Promotion	Customer Reward Promo	\$2.00 off	Expired	All Day	Every Day	1		3
2	Meat Raffle Ticket 10	Promotions	\$5.00 off Total	01 Oct 16 - 01 Jan 20	All Day	Every Day			4
1	Meat Raffle Ticket 5	Promotions	\$2.00 off Total	01 Oct 16 - 01 Jan 20	All Day	Every Day			5
3	Burger Meal Deal Small	Promotions	\$16.50 Price	01 Oct 16 - 01 Jan 20	All Day	Every Day			6
4	Burger Meal Deal Large	Promotions	\$18.50 Price	01 Oct 16 - 01 Jan 20	All Day	Every Day			7
5	Salad Deal \$1.50 Off	Promotions	\$1.50 off	01 Oct 16 - 01 Jan 20	All Day	Every Day			8
6	10% off RTD Singles	Promotions	10% off	01 Oct 16 - 01 Jan 20	All Day	Every Day	4		9
7	Corona Bucket Stubby Cooler	Promotions	Bonus Item	01 Oct 16 - 01 Jan 20	All Day	Every Day			10
22	Daily Specials \$4 Off	Promotions	\$4.00 off	01 Jan 17 - 01 Jan 20	All Day	Every Day			11
8	Main Meal Buy 1 Get 1 Free	Promotions	100% off cheapest	01 Oct 16 - 01 Jan 20	All Day	Every Day			12
9	Sides Only \$3	Promotions	\$3.00 Each	01 Oct 16 - 01 Jan 20	All Day	Every Day			13
10	20% Off Most Exp. Dessert	Promotions	20% off expensive	01 Oct 16 - 01 Jan 20	17:00 - 23:59	Every Day			14
11	2 School Outfits Bonus Cap	Promotions	Bonus Item	01 Oct 16 - 01 Jan 20	All Day	Every Day			15
12	Cocktail Happy Hour \$3 Off	Promotions	\$3.00 off Each	01 Oct 16 - 01 Jan 20	17:30 - 19:00	Every Day			16
13	Wine & Cheese 50% Off	Promotions	50% off cheapest	01 Oct 16 - 01 Jan 20	All Day	Every Day			17
14	5KG Bulk Buy 10% Discount	Promotions	10% off	01 Oct 16 - 01 Jan 20	All Day	Every Day			18
15	Milk & Bread for \$3	Promotions	\$3.00 Price	01 Oct 16 - 01 Jan 20	All Day	Every Day			19
16	Buy 2 Milk for \$3	Promotions	\$3.00 Price	01 Oct 16 - 01 Jan 20	All Day	Every Day			20
17	20% Off Bananas After 1pm	Promotions	20% off	01 Oct 16 - 01 Jan 20	13:00 - 14:59	Every Day			21
18	35% Off Bananas After 3pm	Promotions	35% off	01 Oct 16 - 01 Jan 20	15:00 - 23:59	Every Day			22
19	Snack Pack Small	Promotions	\$2.00 off Total	01 Oct 16 - 01 Jan 20	All Day	Every Day			23
20	Snack Pack Large	Promotions	\$3.00 off Total	01 Oct 16 - 01 Jan 20	All Day	Every Day			24
21	2 Flat Whites 25% Off	Promotions	25% off	01 Jan 17 - 01 Jan 20	All Day	Every Day			25
26	Z1-S20-WINE-3FOR20	PROMO	\$20.00 Each	01 Apr 18 - 31 Aug 18	All Day	Every Day			26

26 records

Lock Priority ↑ ↓ **↑ ↓ Set Priority** Import Copy Delete Add Modify

The following arrow button pointing upwards sends the selected promotion to the top of the list

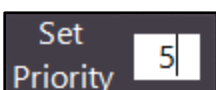


The following arrow button pointing downwards sends the selected promotion to the bottom of the list



The following button allows you to specify a priority for the selected promotion.

Select the promotion, enter a numeric value for the promotion into the white field, then press the Set Priority button. The selected promotion's priority will be updated and the promotion will move accordingly.



Once changes to the priorities have been made, press the 'Lock Priority' button

Receipts

Tax Amount on Bills shows in Windows Currency Format

Idealpos has been updated to show the Tax Amount using the Currency Format that has been configured in Windows. There is no configuration required to enable this function; it is enabled automatically when upgrading to this build of Idealpos.



IDEALPOS
1/212 Curtin Ave West
Eagle Farm QLD 4009
Australia

TAX INVOICE
123-456-789-11

Table 97
Jeremy 06/04/18 10:45
Covers : 4

-----ENTREE-----	
PASTA	\$11.00
-----BEVERAGE-----	
CAPPUCCINO	\$3.50
Includes Tax:	
GST Amount	\$1.32
SUB TOTAL	\$14.50
TIPS Amount	-----
GRAND TOTAL	-----

*indicates taxable supply
Powered by Idealpos

idealpos7 Update History

Reports

Financial Summary Report – Gross Sales field added

This function allows you to report on the Gross Sales of your selected period when running the Financial Summary Report.

Go to Reports > Financial > Financial Summary

financial summary report ✕

Date Range

Year to Date From 01/01/2018 00:00:00 To 07/03/2018 23:59:59

Report Options

Selected Fields (max 12)

Gross Sales Up
Nett Sales (incl.tax) >
Nett Sales (excl.tax) >>
Cost of Sales <
Margin <<
GST
GST-Free
Number of Transactions
Number of Sales
Covers
Total FOOD
Total BEVERAGE
Other Categories
Tender 1 in Drawer [CASH]
Tender 2 in Drawer [EFTPOS]
Tender 3 in Drawer [ACCOUNT]
Tender 4 in Drawer [AMEX / DINERS]
Tender 5 in Drawer [LAVBY]
Tender 6 in Drawer [CHEQUE]
Tender 7 in Drawer [GV REDEEM]
Tender 8 in Drawer [CREDIT NOTE]
Tender 9 in Drawer [ONLINE]
Tender 10 in Drawer [POINTS]
Tender 11 in Drawer [TENDER 11]
Tender 12 in Drawer [TENDER 12]
Tender 13 in Drawer [TENDER 13]
Tender 14 in Drawer [TENDER 14]
Tender 15 in Drawer [TENDER 15]

Group DateTime

Date Filter Session

Sub Groups (max 2)

Location
 POS
 Clerk

Condensed format
 One page per group

Selection Range

Clerk Code > to >
Location > to >
POS System >

Print Save Defaults View

From the Report Options, select Gross Sales and press the '>' arrow to include it in the 'Selected Fields', then press the 'View' button to run the report using your selections. The resulting report will include the Gross Sales Report option as selected on the previous screen.

Idealpos user (pos1)		Financial Summary Report		Printed 07/03/2018 13:36:43	
		01 Jan 2018 00:00:00 to 07 Mar 2018 23:59:59		Page 1 of 1	
		Group by: Session			
Gross Sales					
(05:00 - 10:00) Brekky					
1: Location 1	1: POS 1	26.00			
	Subtotal:	26.00			
Total		26.00			
(10:00 - 15:00) Lunch					
1: Location 1	1: POS 1	143.00			
	Subtotal:	143.00			
Total		143.00			
(15:00 - 23:00) Dinner					
1: Location 1	1: POS 1	0.00			
	Subtotal:	0.00			
Total		0.00			
<div style="border-top: 3px double black; width: 100px; margin: 0 auto;"> 169.00 </div>					

idealpos7 Update History

Financial Summary Report – Support for Dynamic Grouping in Shortcut Reports

This function adds support for creating Shortcut Reports with Dynamic Grouping. This then allows those Shortcut Reports to use Dynamic Grouping selections that were made when the Reports were initially created.

Go to Reports > Financial > Financial Summary

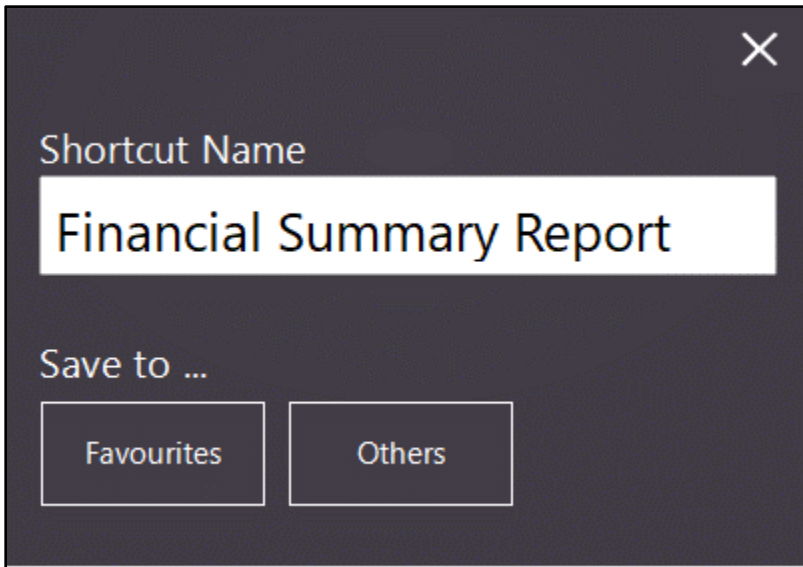
Select the criteria that you want included in your Shortcut Report. The Dynamic Grouping selections that are now supported in the Shortcut Report are illustrated below.

The screenshot shows the 'financial summary report' configuration window. The 'Date Range' section is set to 'Year to Date' with a 'From' date of 01/01/2018 00:00:00 and a 'To' date of 07/03/2018 23:59:59. The 'Report Options' section shows a list of fields on the left and 'Selected Fields (max 12)' on the right. The 'Selected Fields' list includes Gross Sales, Net Sales (incl.tax), Net Sales (excl.tax), Cost of Sales, Margin, GST, GST-Free, Number of Transactions, Number of Sales, Covers, Total FOOD, and Total BEVERAGE. The 'Group' is set to 'DateTime' and the 'Date Filter' is set to 'Session'. The 'Sub Groups (max 2)' section has checkboxes for 'Location', 'POS', and 'Clerk', with 'Clerk' checked and highlighted by an orange box and an arrow. The 'Condensed format' and 'One page per group' checkboxes are unchecked. The 'Selection Range' section has input fields for 'Clerk Code', 'Location', and 'POS System'. At the bottom are buttons for 'Print', 'Save Defaults', and 'View'.

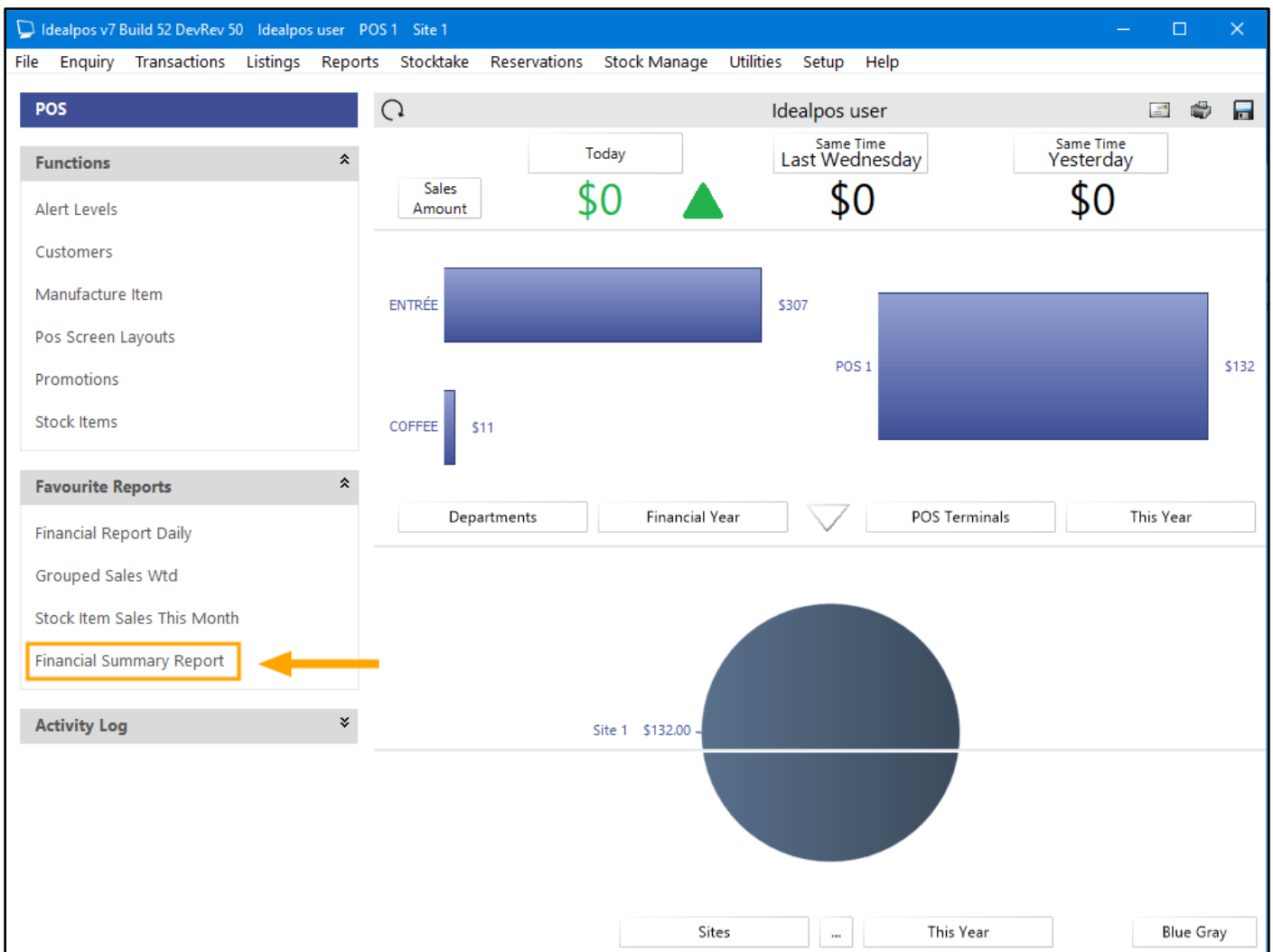
Press the 'View' button to run the report.

When the report is displayed on the screen, press the Shortcut button (S) on the top right corner of the window to create a shortcut for the report.

Enter a Shortcut Name for the report and select the location where you want the shortcut for the report to be saved.



The report can now be run anytime by selecting it from the Favourite Reports section which is located on the left-hand side of the Dashboard on the main Idealpos window.



idealpos7 Update History

The Shortcut Report can also be scheduled to run.

Note that before setting up Schedules, ensure that your Email Settings have been configured in Idealpos

Go to Setup > Schedules > Add

Complete each of the fields with the options that you want to use to run the scheduled Shortcut Report.

Drag and drop the newly created Shortcut Report from the Shortcut Reports Available section into the scheduled reports section.

schedules

Description: Financial Summary Report

Type: Email Reports

Output: PDF

Run next at: 07 Mar 2018 15:00

Repeat Every: 1 Days

From: 00:00 to 23:59

Mon Tue Wed Thu
 Fri Sat Sun

Email Options

To: email@domainname.com

CC:

BCC:

Message: Please refer to the attachment which contains your Financial Summary Report

Shortcut Reports Available

Financial Report Daily
Grouped Sales WTD
Stock Item Sales this Month
Financial Summary Report

scheduled reports - drag and drop from above

Delete

Once you have finished setting up your report, press the X button on the top right corner of the window.

Press 'Yes' to Save Changes.

Save Changes?

Yes

No

The Report will run as scheduled and will include the Dynamic Grouping options that were selected when the Shortcut Report was created.

Idealpos user (pos1)		Financial Summary Report										Printed 07/03/2018 13:51:25	
		01 Jan 2018 00:00:00 to 07 Mar 2018 23:59:59										Page 1 of 1	
		Group by: Session											
		Gross Sales	Nett Sales (incl.tax)	Nett Sales (excl.tax)	Cost of Sales	Margin	GST	GST-Free	Number of Transactio	Number of Sales	Covers	Total FOOD	Total BEVERAGE
(05:00 - 10:00) Brekky													
1: Location 1	1: Jeremy	13.00	13.00	11.82	6.25	5.57	1.18	\$0.00	1.00	1.00	4.00	13.00	0.00
	3: Hiroku	13.00	13.00	11.82	6.25	5.57	1.18	\$0.00	1.00	1.00	0.00	13.00	0.00
	Subtotal:	26.00	26.00	23.64	12.50	11.14	2.36	\$0.00	2.00	2.00	4.00	26.00	0.00
Total		26.00	26.00	23.64	12.50	11.14	2.36	\$0.00	2.00	2.00	4.00	26.00	0.00
(10:00 - 15:00) Lunch													
1: Location 1	1: Jeremy	143.00	106.00	96.35	68.75	27.60	9.65	\$0.00	17.00	11.00	0.00	106.00	0.00
	2: Melissa	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	7.00	0.00	0.00	0.00	0.00
	Subtotal:	143.00	106.00	96.35	68.75	27.60	9.65	\$0.00	24.00	11.00	0.00	106.00	0.00
Total		143.00	106.00	96.35	68.75	27.60	9.65	\$0.00	24.00	11.00	0.00	106.00	0.00
(15:00 - 23:00) Dinner													
1: Location 1	1: Jeremy	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	1.00	0.00	0.00	0.00	0.00
	Subtotal:	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	1.00	0.00	0.00	0.00	0.00
Total		0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	1.00	0.00	0.00	0.00	0.00
		169.00	132.00	119.99	81.25	38.74	12.01	\$0.00	27.00	13.00	4.00	132.00	.00

idealpos7 Update History

Re-Order Report – Add option for Manufactured Items

This function adds the ability to report on Manufactured Items that need to be re-ordered.

Since Manufactured Items are Stock Items that are Manufactured in-house, any Manufactured Items that appear on the Re-Order Report simply mean that these items need to be manufactured.

When running the Re-Order Report with the 'Manufactured Items' option ticked, the system will look for Stock Items which have the 'Manufactured Item' checkbox enabled and need to be re-ordered. The quantities recorded against the Stock Level, Recommended Level and Reorder Level are all used to determine whether a Stock Item needs to be ordered.

When the current Stock Level of a Manufactured Stock Item is less than the Reorder Level AND the Recommended Level is higher than the current Stock Level, the Item will be displayed on the Re-Order Report. The Reorder Quantity that is displayed on the Re-Order report against the Stock Item will be the quantity that is needed to increase the Quantity of the Stock Item back to the Recommended Level.

Go to Reports > Stock Control > Re-Order > Select: Manufactured Items

The screenshot shows a window titled 'reorder report' with a close button (X) in the top right corner. The window contains several configuration sections:

- Sort Order:** Radio buttons for 'Code' (selected) and 'Description'.
- Group by:** Checkboxes for 'Department', 'Supplier', and 'Location'.
- Options:** Checkboxes for 'Use Supplier Stock Codes', 'ReOrder Forms', 'Show All Items', and 'Manufactured Items' (checked).
- Selection Range:** A table of input fields for 'Code', 'Description', 'Department', 'Supplier', and 'Location', each with a '>' button and a 'to' field.

At the bottom of the window, there are 'Print' and 'View' buttons.

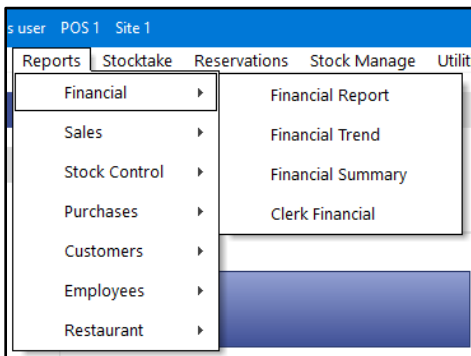
Any Manufactured Items that need to be re-ordered will be displayed on the Report

Idealpos user (pos1)		Re-Order Report				Printed 13/03/2018 11:19:10	
		Manufactured Items				Page 1 of 1	
StockCode	Description	Stk Level	Recomm. Level	Reorder Level	Reorder Qty	Cost	
126019	MUD CAKE	7.7000	10	8	3	\$13.77	
						<u>13.77</u>	

Reports Date Selection drop-down list includes last 2, 3 and 6 months

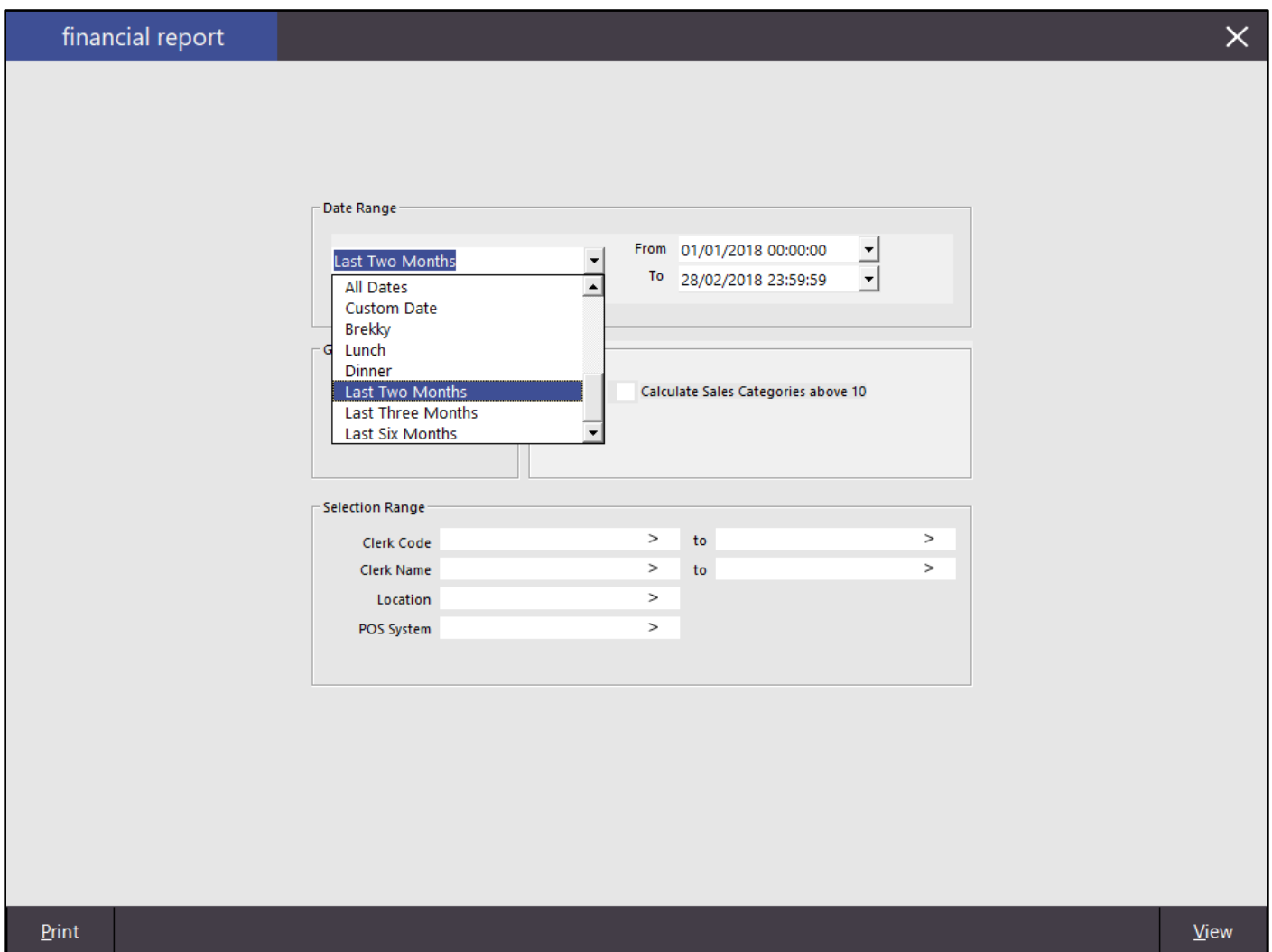
Extra period selections have been added to all Idealpos Reports in the Reports menu.

Go to Reports > Select a Report Type (Financial, Sales, Stock Control, Purchases, Customers, Employees or Restaurant)
> select the Report you want to run



Click on the Date Range dropdown box. You will see three new options at the bottom of the Date Range list (Last Two Months, Last Three Months and Last Six Months).

Selecting any of these three options will pre-fill the From/To fields according to your selection

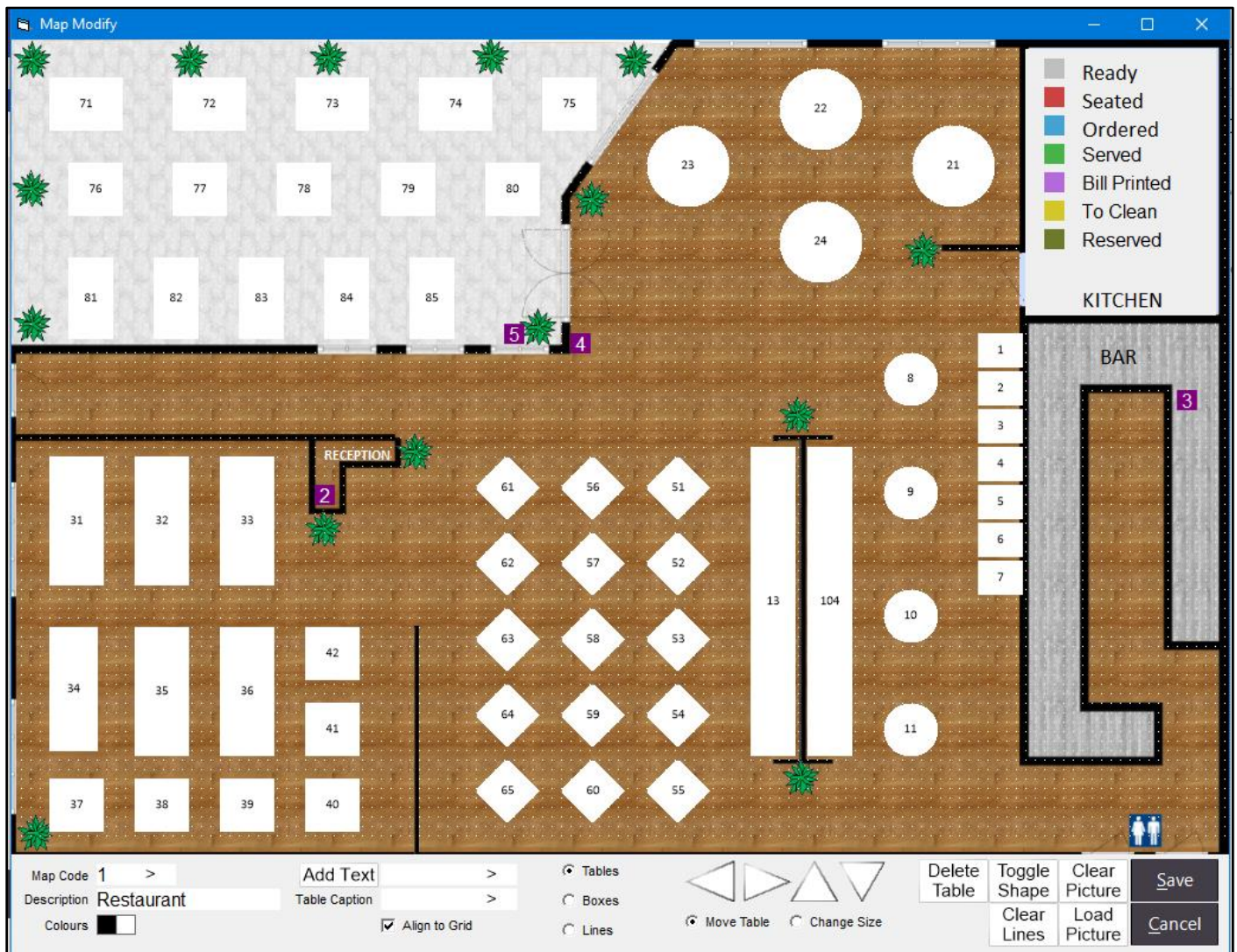


Restaurant & Table Map

Support for Alpha Table Codes

This function enables the ability to setup tables with alphanumeric codes (e.g. 100A, Couch1, etc.).

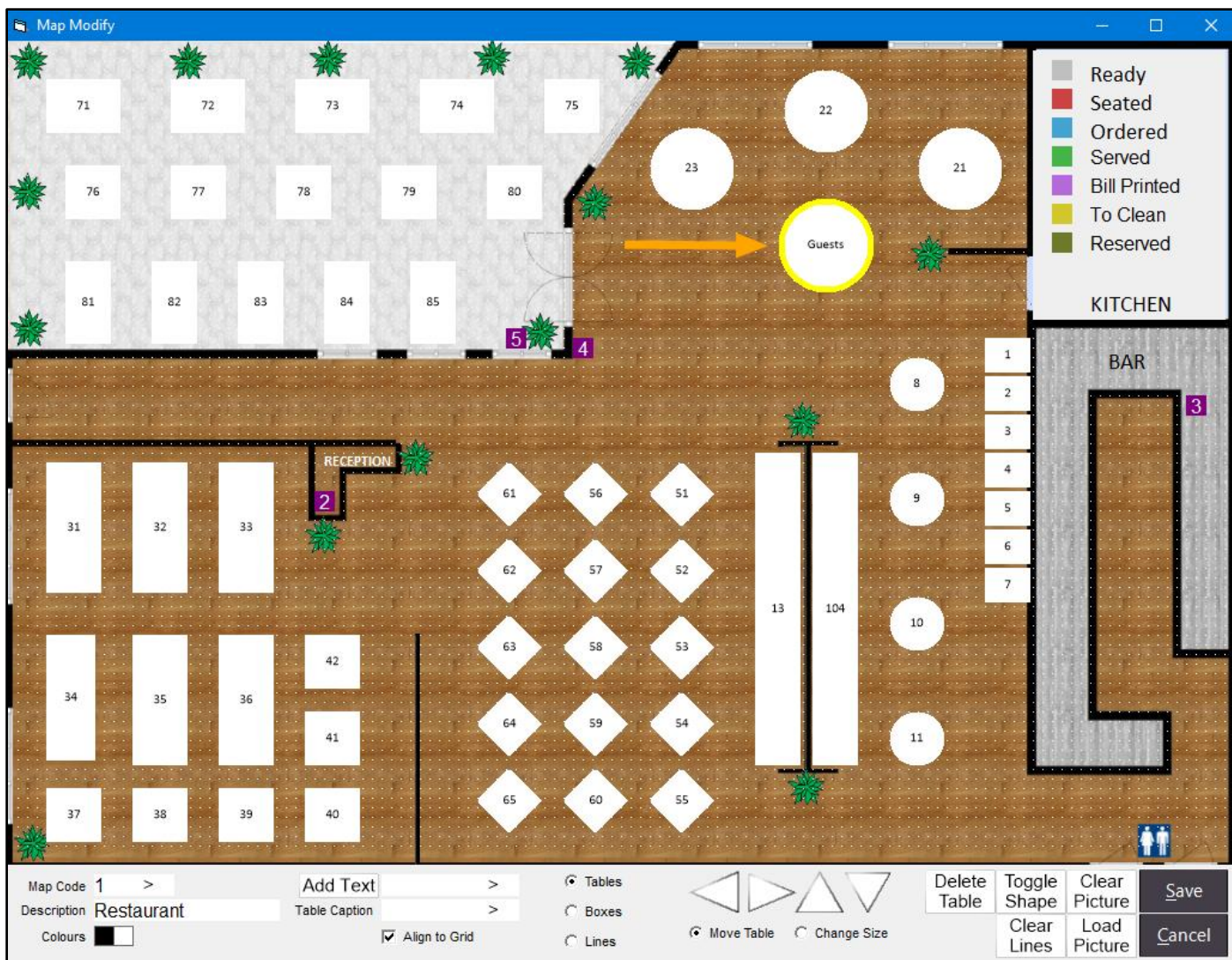
Go to Setup > Restaurant > Table Maps > Select: Table Map > Modify



Enter a caption for the table into the 'Table Caption' field located at the bottom of the Map Modify screen.



Then select a table on the map by clicking on it. The caption will be applied to the selected table.



Once you have finished making changes to the Table Map, press the 'Save' button.

The table will now show the caption on the Table Map.

When Kitchen Receipts are printed, the caption will be printed in place of the Table Number that would have previously been printed for the table.

Please note that support for Alpha Table Codes on the Ideal Handheld app will be released shortly. In the meantime, Tables will appear on the Handheld app with the Table Number that was set for the table at the time the table was created.

idealpos7 Update History

Unlock Permissions button for Table Details

This function adds an 'Unlock Permissions' button to the Table Details screen.

The 'Unlock Permissions' button allows a manager or supervisor to temporarily unlock all functions on the Table Details screen using a pre-configured 'Table Details Unlock Permissions Password'.

This function is used when a Clerk has restrictions imposed on them (e.g. their ability to Pay, Transfer, Bill, Delete or Finish under the Table Map option is disabled in the Clerk security settings).

When a Clerk with restricted access needs to perform one of the above functions, they will call a supervisor over who will press the 'Unlock Permissions' button then enter the password. After the password has been entered all functions are temporarily unlocked for the current Table Details screen which allows them to perform the task (Pay, Transfer, Bill, Delete or Finish) that is required (while they are under supervision of the supervisor or manager).

Once the required operation has been completed and the Table Details screen is closed, all security functions will return to normal. The next time the Clerk presses the 'Details' button for a table, the standard restrictions that have been imposed on that Clerk will apply.

Go to Setup > Global Options > Restaurant > Miscellaneous > Table Details Unlock Permissions Password

The screenshot shows the 'global options' window for 'site 1 (Site 1)'. The 'Miscellaneous' tab is selected. In the 'Miscellaneous' section, the 'Table Details Unlock Permissions Password' field is highlighted with a yellow box and an arrow pointing to it. The password is 'unlock'. Other fields in the 'Miscellaneous' section include 'Not Ordered Alert Time' (2 min), 'Bill not Paid Time' (2 min), 'Food Ordered Alert Time' (20 min), and 'Clerk Reset Time' (0 sec).

User-Defined Table Status Buttons

Button Caption	Table Caption	Instruction Item to KP
ENTREE AWAY	Entree	1003014 >
MAINS AWAY	Mains	1003015 >
DESSERT AWAY	Desserts	1003016 >
DRINKS AWAY	Drinks	1003017 >
		>
		>

Table Status

Ready	Caption
Ready	Ready
Seated	Seated
Unprinted	Unprinted
Sent to Kitchen	Printed
Served	Served
Bill Presented	Bill Print
To Clean	Clean
Reserved	Reserved

Sessions

Session	Name	Start	End
1	Brekky	5:00	10:00
2	Lunch	10:00	15:00
3	Dinner	15:00	23:00
4		:00	:00
5		:00	:00

For the above setting to be effective, you need to have a Clerk which has security restrictions applied to them on the Table Map. You also need to have 'Compulsory Clerk' and Require 'Clerk Entry on Table Map' enabled in the Yes/No options.

To enable 'Compulsory Clerk' and 'Clerk Entry on Table Map',
Go to Setup > Yes/No Options > Clerks > Enter Keyword Search: Compulsory Clerk

	ALL	1
CLERKS		
Compulsory Clerk	<input checked="" type="checkbox"/>	

Go to Setup > Yes/No Options > Clerks > Enter Keyword Search: Clerk Entry

	ALL	1
CLERKS		
Require Clerk Entry on Table Map	<input checked="" type="checkbox"/>	

idealpos7 Update History

Then Go to Setup > Clerks > Select: Clerk > Permissions

clerks		Code Search			S X		
Code	Name	Phone	Mobile	Email	User Link	Employee	Login Code
1	Jeremy				Admin	No	1
2	Melissa				MANAGER	No	2
3	Hiroku				STAFF	No	3
4	Bjorn				STAFF	No	4
5	Terry				STAFF	No	5
6	Alexandria				STAFF	No	6
7	Helen				STAFF	No	7
8	Elliot				STAFF	No	8
9	Jessie				STAFF	No	9
10	Sophia				STAFF	No	10
11	Raj				STAFF	No	11
12	Monique				STAFF	No	12
13	Greg				STAFF	No	13
14	Shon				STAFF	No	14
15	Neisha				STAFF	No	15
16	Tenille				STAFF	No	16
17	Pete				STAFF	No	17
18	Alex				STAFF	No	18
19	Erica				STAFF	No	19
20	Jaye				STAFF	No	20
9999	Online				Admin	No	Online

21 records

Permissions Discontinued Clerks Only [Delete](#) [Add](#) [Modify](#)

Then under Clerk Permissions > Table Map, enable/disable the options that the Clerk should have access to, then press the 'Save' button to apply the changes

The screenshot shows a software interface for managing clerk permissions. The top bar includes the label 'clerks' on the left and 'Jeremy' on the right, with a close button (X) in the top right corner. The main content area displays a tree view of permissions under 'Clerk Permissions'. The 'Table Map' sub-section is highlighted with a blue box and an orange arrow pointing to it from the left. This section contains the following items:

- PAY
- TRANSFER
- BILL
- DELETE
- FINISH
- Modify Table Map
- Reprint Tables
- Can Override Locks

Below the 'Table Map' section, there are two more checked items:

- Cust Types
- Tender Types

On the right side of the interface, there is a search bar with the text 'Search' and an empty input field. At the bottom of the interface, there is a dark grey bar with three buttons: 'Collapse All', 'Print', and 'Save'.

idealpos7 Update History

Open the Idealpos POS Screen and login using the clerk that has had the permissions applied to them
Press the 'Table Map' button, select a table that contains an Order on it then press the 'Details' button

Legend:


- Ready
- Seated
- Ordered
- Served
- Bill Printed
- To Clean
- Reserved

POS Screen:

POS	ENTREE AWAY	MAINS AWAY	DESSERT AWAY	DRINKS AWAY		Pay All	Transfer	Reservations	Summary	>>>	✕
	Details	Served	Bill	Finished				Jeremy			

Then press the 'Unlock Permissions' button

TABLE 24		1795 hrs 5 min		\$25.00				✕	
15 Covers - Avg \$1.67		Amount	Outstanding	Printed	Pay	Seat	Clerk		
PASTA		11.00	11.00	*			Jeremy		
DUCK		14.00	14.00	*			Jeremy		
		-----	-----						
		25.00	25.00						



Unlock Permissions

Hide Paid Items

Transfer

Reprint Kitchen

Name

Covers

Delete

Full	1/3	1/5	1/7	1/Covers	Amount				
1/2	1/4	1/6	1/8	Quantity	Fraction		Print Bill	Select All	Pay 0.00

idealpos7 Update History

A Password prompt will appear – Enter the Password as previously configured then press the 'Enter' button

TABLE 24		1795 hrs 5 min		\$25.00																	
15 Covers - Avg \$1.67		Amount	Outstanding	Printed	Pay	Seat	Clerk														
PASTA		11.00	11.00	*			Jeremy														
DUCK		14.00	14.00	*			Jeremy														
		-----	-----																		
		25.00	25.00																		

Unlock Permissions

Hide Paid Items

Transfer

Reprint Kitchen

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	Enter	
CL							\	?	0	.	-			

The following prompt will appear. All functions will now be temporarily unlocked – the clerk may now perform any of the Table Map actions that are normally not available to them.

Permissions Unlocked

Once the required actions have been performed under the supervision of the supervisor/manager, close the Table Details screen. After closing the Table Details screen, the Permissions for that Clerk will be locked.

Setup – Clerks/Users

Clerk/User Permissions for Tender Types

This function allows you to control which Users/Clerks have access to specific Tender Types.
E.g. You can stop a specific Clerk or User from finalising a transaction using the EFTPOS Tender

To configure Tender Types for a particular Clerk, go to:
Setup > Clerks > Select Clerk > Permissions

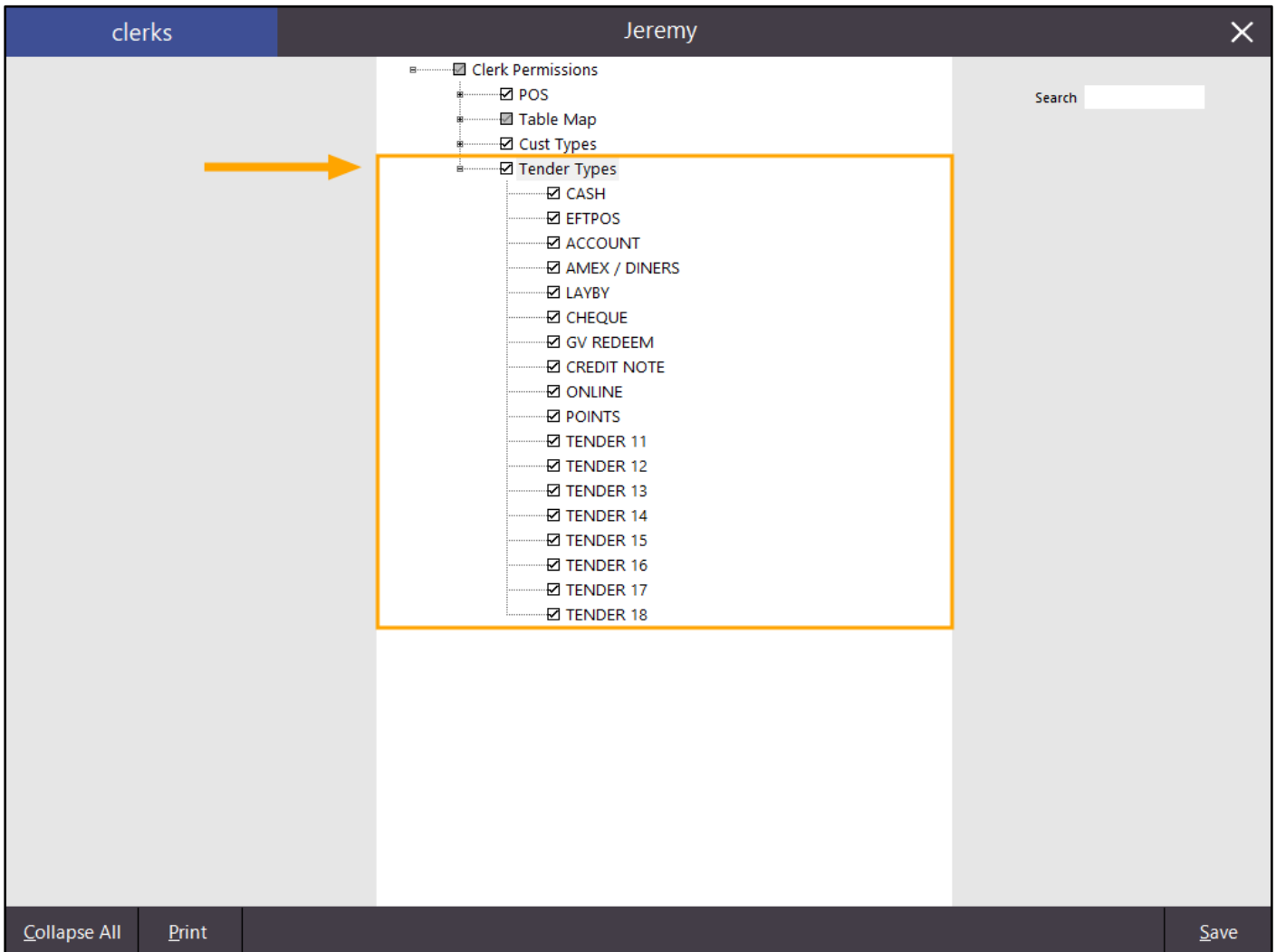
clerks		Code Search <input type="text"/>			S X		
Code	Name	Phone	Mobile	Email	User Link	Employee	Login Code
1	Jeremy				Admin	No	1
2	Melissa				MANAGER	No	2
3	Hiroku				STAFF	No	3
4	Bjorn				STAFF	No	4
5	Terry				STAFF	No	5
6	Alexandria				STAFF	No	6
7	Helen				STAFF	No	7
8	Elliot				STAFF	No	8
9	Jessie				STAFF	No	9
10	Sophia				STAFF	No	10
11	Raj				STAFF	No	11
12	Monique				STAFF	No	12
13	Greg				STAFF	No	13
14	Shon				STAFF	No	14
15	Neisha				STAFF	No	15
16	Tenille				STAFF	No	16
17	Pete				STAFF	No	17
18	Alex				STAFF	No	18
19	Erica				STAFF	No	19
20	Jaye				STAFF	No	20
9999	Online				Admin	No	Online

21 records

Permissions Discontinued Clerks Only Delete Add Modify

idealpos7 Update History

Under the 'Tender Types', select/unselect the Tender Types that you want the Clerk to have access to, then press the 'Save' button to save the changes



Any Tender Types that have been enabled for the Clerk will continue to work as normal.

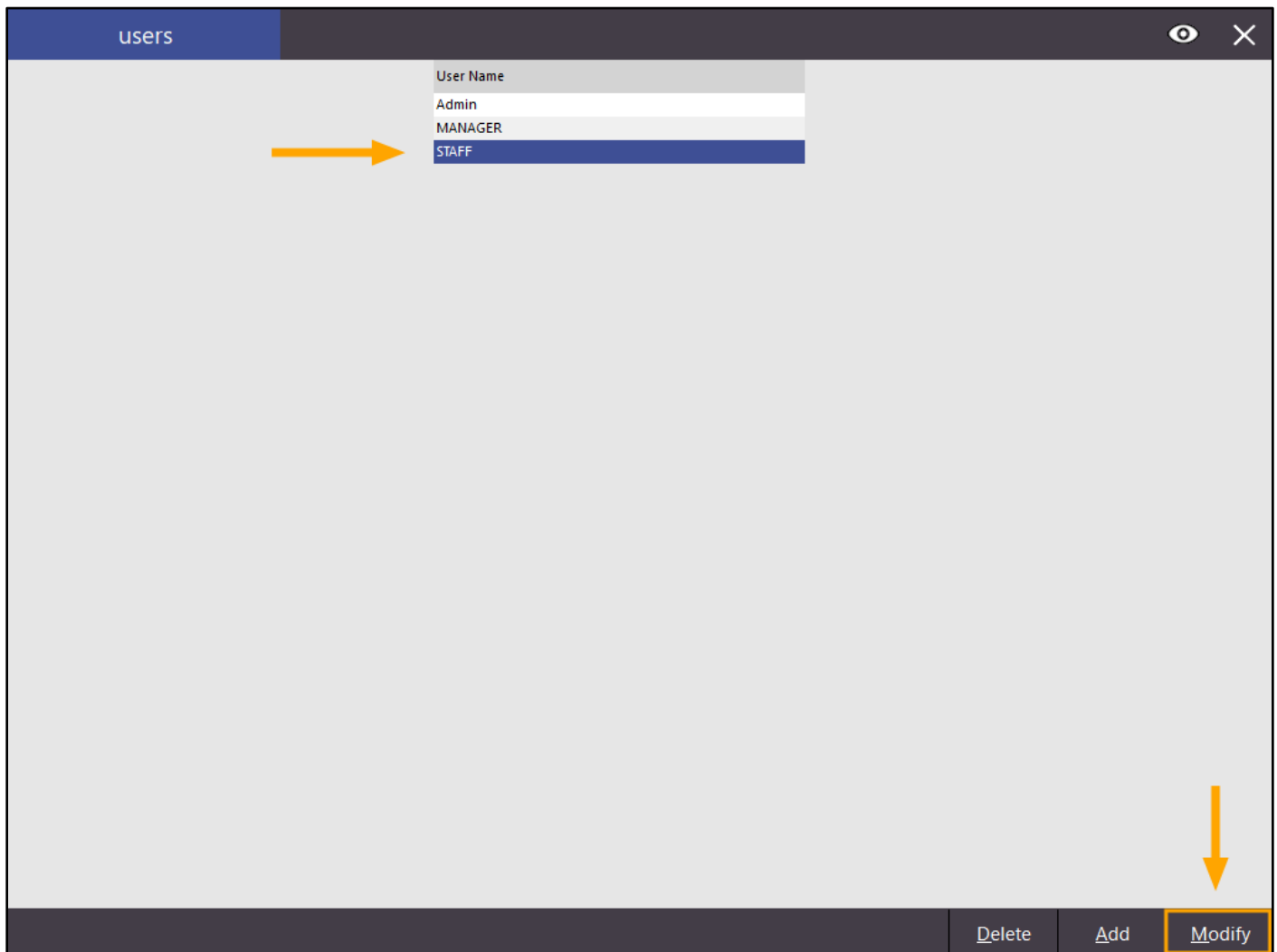
When the Clerk attempts to use a Tender Type that they don't have permission to use, the POS will display the following prompt.

You do not have permission for this function.

OK

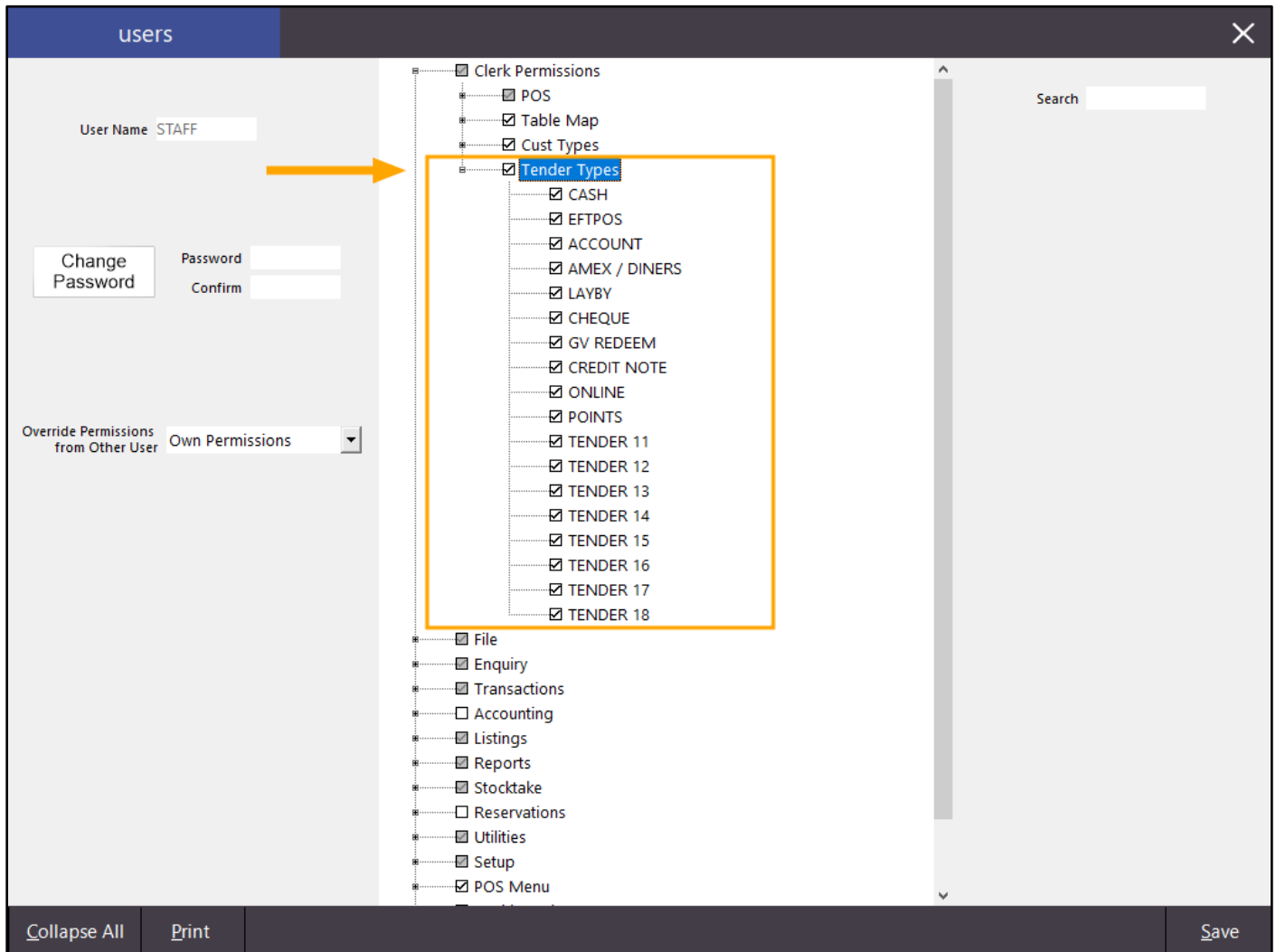
In addition to having the ability to set Tender Type access for Clerks, the same can be configured for a User. When a Tender Type is disabled for a specific User, any Clerk that is linked to that User will also be denied access to that Tender Type, even if access to the Tender Type has been enabled under the Clerk level access (Setup > Clerks > Permissions).

Go to Setup > Users > Select User Name > Modify

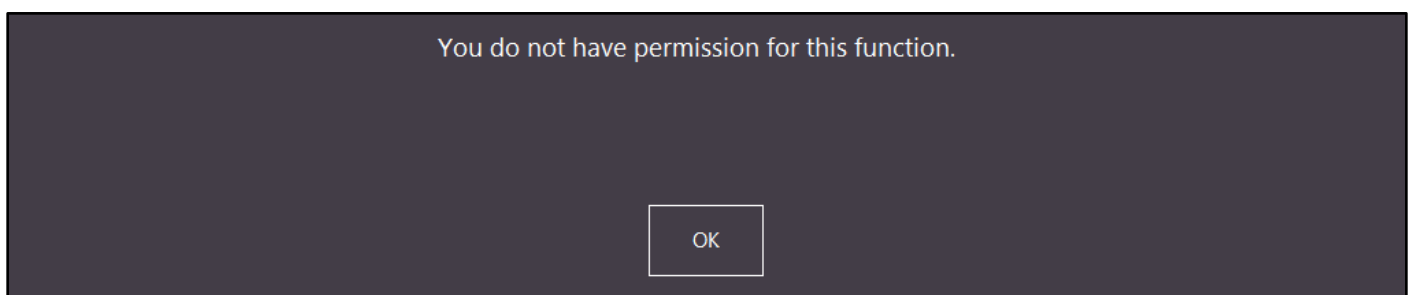


idealpos7 Update History

Under Clerk Permissions > Tender Types, tick/untick the Tender Types that you want the User to have access to, then press the 'Save' button save changes



When a Clerk that is linked to the User attempts to use a Tender Type that has been disabled, they will see the following prompt.



Setup – Global Options

Ability to specify a default Customer Photo Location

This function allows you to specify the default location for Customer Photos.

When a Customer doesn't have a photo programmed against their customer record in the system, the system will look into the Photo Folder and look for a Photo that matches the customer number.

If a match is found, the photo will be displayed when the Customer is selected during a POS transaction.

Note that when a Photo Folder is configured and a match exists for the Customer, the photo for the Customer will not be displayed when viewing the Customer record in File > Customers > Customers.

It will only display the photo when the Customer has been selected during a POS transaction.

Go to Setup > Global Options > Customers > Photo Folder

Enter a location into the Photo Folder field that contains Customer Photos.

The filename of the Customer Photo needs to match the Code that has been assigned to the Customer and photos should be in JPG format.

The screenshot shows the 'global options' window for 'site 1 (Site 1)'. The 'Customers' tab is active. The 'Photo Folder' field is highlighted with a yellow box and contains the path 'C:\UserPhotos\'. An orange arrow points to this field from the 'Laybys' section below it. Other sections include 'A4 Tax Invoice', 'Customer Date Function', 'Miscellaneous', 'Laybys', and 'User-Defined'.

global options site 1 (Site 1) S X

General Miscellaneous Purchases Restaurant Customers Sales Reservations Accounting Credit Notes/ Gift Vouchers Interfaces Interfaces 2 Printing Other Options Gaming

A4 Tax Invoice

Override Header

Show Amounts Ex Tax Hide Header Hide Paid/Balance

Customer Comments Force Stock Codes

Show Tendering Delivery Address

Show Points Remove Scale Text

Customer Date Function

2nd Date Label Birth Date 2

Apply the following actions on Birth Date 2nd Date

Continue to apply days after date is reached

Show Message

Change Price Level to

Subtotal Discount %

Sell item > Apply actions Once Only

Layby Statement Hide Header

Account Invoice/Activity Statement Hide Header

Tender Spend Limits

Tender Limit 1 POINTS

User-Defined Field Daily Spend Reset Daily

Tender Limit 2 No Spend Limit

User-Defined Field No Spend Limit Reset Manual

Photo Folder

C:\UserPhotos\ >

Miscellaneous

Points Tender AMEX / DINERS

Default Type ACCOUNTS

Default Credit Limit 1000.00

Automatic Customer Import Daily Time

Customer Import Frequency Never

Favourite Transaction Favourite

Laybys

Terms & Conditions:

Lay-by is available on purchases of \$35 or more.

Service Fee - A \$2.00 non refundable service fee will be charged for each new lay-by.

Deposit - A 10% deposit is required for each new lay-by.

Payments - Minimum fortnightly payments of \$5.00 are required.

Period 90 Minimum Deposit % 10

Laybys become Sales when started on Final Payment

User-Defined

Text Fields

- Favourite Drink?
- Favourite
- User-Defined Text 3
- User-Defined Text 4
- User-Defined Text 5
- User-Defined Text 6
- User-Defined Text 7
- User-Defined Text 8
- User-Defined Text 8
- User-Defined Text 9
- Daily Spend

Yes/No Fields

- Pays Weekly?
- User-Defined Yes/No
- User-Defined Yes/No
- User-Defined Yes/No
- User-Defined Yes/No

idealpos7 Update History

Go to File > Customers > Customers > Select a Customer > Modify



customers Name/Company Search > 👁 S ✕

Code	Last Name	First Name	Address 1	Address 2	Suburb	Scan Code
5001	Bar Tab 5001					
5002	Bar Tab 5002					
5003	Bar Tab 5003					
5004	Bar Tab 5004					
5005	Bar Tab 5005					
5006	Bar Tab 5006					
5007	Bar Tab 5007					
5008	Bar Tab 5008					
5009	Bar Tab 5009					
5010	Bar Tab 5010					
5011	Bar Tab 5011					
5012	Bar Tab 5012					
5013	Bar Tab 5013					
5014	Bar Tab 5014					
5015	Bar Tab 5015					
5016	Bar Tab 5016					
5017	Bar Tab 5017					
5018	Bar Tab 5018					
5019	Bar Tab 5019					
5020	Bar Tab 5020					
12	Bar Tab Customer					
STAFF004	Bjorn					
13	Blow	Joe				
104	Brinkle	Rebecca				
111	Bronze					
102	Brown	Talia				
2	Charlton	Sarah	42 Wallaby Way		Hampden	9850859357357
123456	Customer 123456					
888888	Customer 888888					
113	Gold					
6	Graham	Alan				9806633749962
1	Harrison	Ben	Unit 17	31 Honeysuckle Ave	Groundsborough	9874902100196
STAFF003	Hiroku					
STAFF001	Jeremy (Owner)					
11	Layby Customer					
115	Life					
9	Master Account					
STAFF002	Melissa					
101	Murray	Steve				
114	Platinum					
8	Points Customer					
112	Silver					
103	Singh	Jamal				
105	Smulders	Ashleigh				
10	Sub Account					
3	Townsend	Mick	Ableman Lodge	232 Punter Lane	Hackford	9869881290839
14	User	Idealpos	123 Idealpos User St		EAGLE FARM	
4	Winters	Charlotte	18 Sicklman Terrace		Bunters Point	9829235556813

50 records


Discontinued Only
 Include Bar Tabs

Discontinue Add **Modify**



Refer to the Code field on the Modify Customer screen – The code that is displayed is the Customer's Code.
The JPG file needs to match the Code that is displayed

modify customer General Advanced ✕

Code  Customer Type Scan Code Other Codes

Last Name Given Names Title

Address Details **Sales / Accounting**

Address Auto % Discount Account
Suburb Price Level Credit Limit
State Postcode Bar Tab

Delivery Address **Miscellaneous**

Delivery Address same as Above Company Birth Date
Address ABN Birth Date 2
Suburb Occupation Password
State Next of Kin Gender
Postcode Contact No Marital Status

Mail Out
 Discontinue

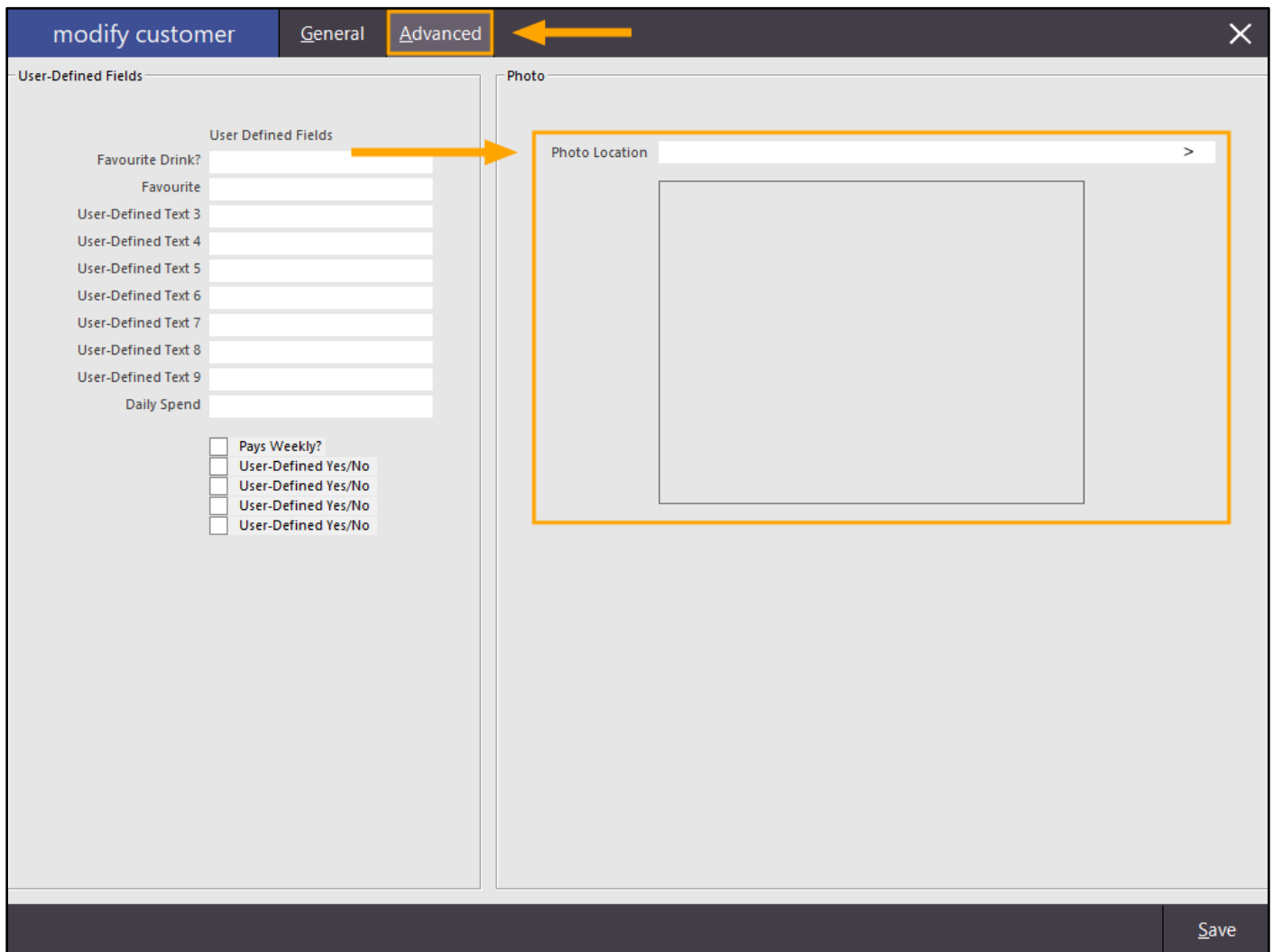
Contact Details

Phone Comments
Mobile Sales Prompt
Fax
Email

Save

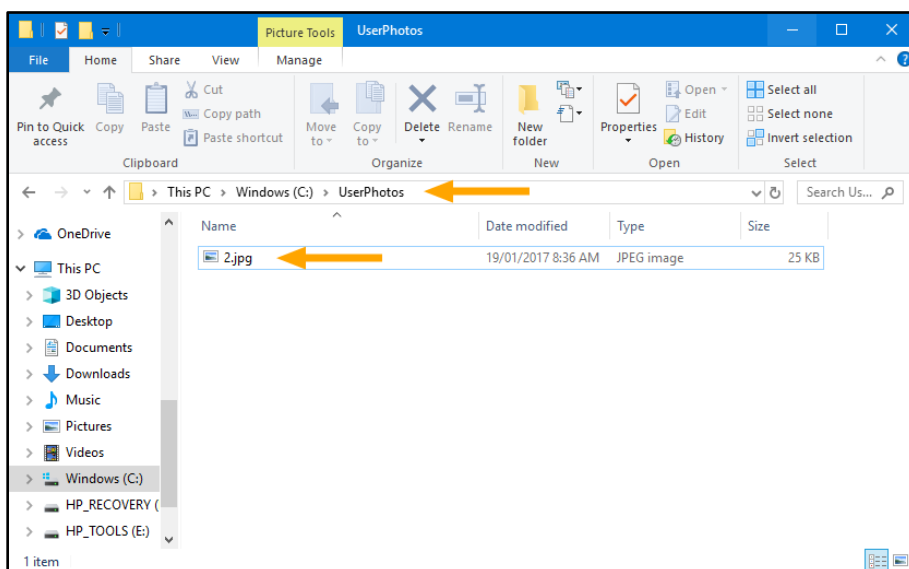
idealpos7 Update History

To check if they have a Photo assigned to them, click on the Advanced tab in the Modify Customer screen. The Photo Location field needs to be empty



In addition to the Code and as mentioned previously, the Customer's Photo that exists in the Photo Folder will only be used if the Customer doesn't already have a Photo assigned to them.

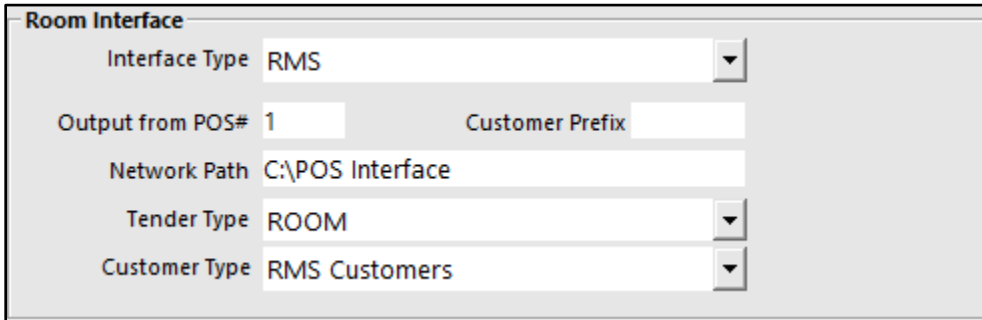
Copy the photo to the Photo Folder that's configured in Global Options as per the above steps



RMS/Hirum Room Interface – Option to set Customer Type for new Customers

This function allows you to specify a Customer Type for new RMS Customers. When customers are read from the RMS data file, they will be assigned to the Customer Type that has been selected.

Go to Setup > Global Options > Interfaces > Customer Type



The screenshot shows the 'Room Interface' configuration window. It contains several fields and dropdown menus:

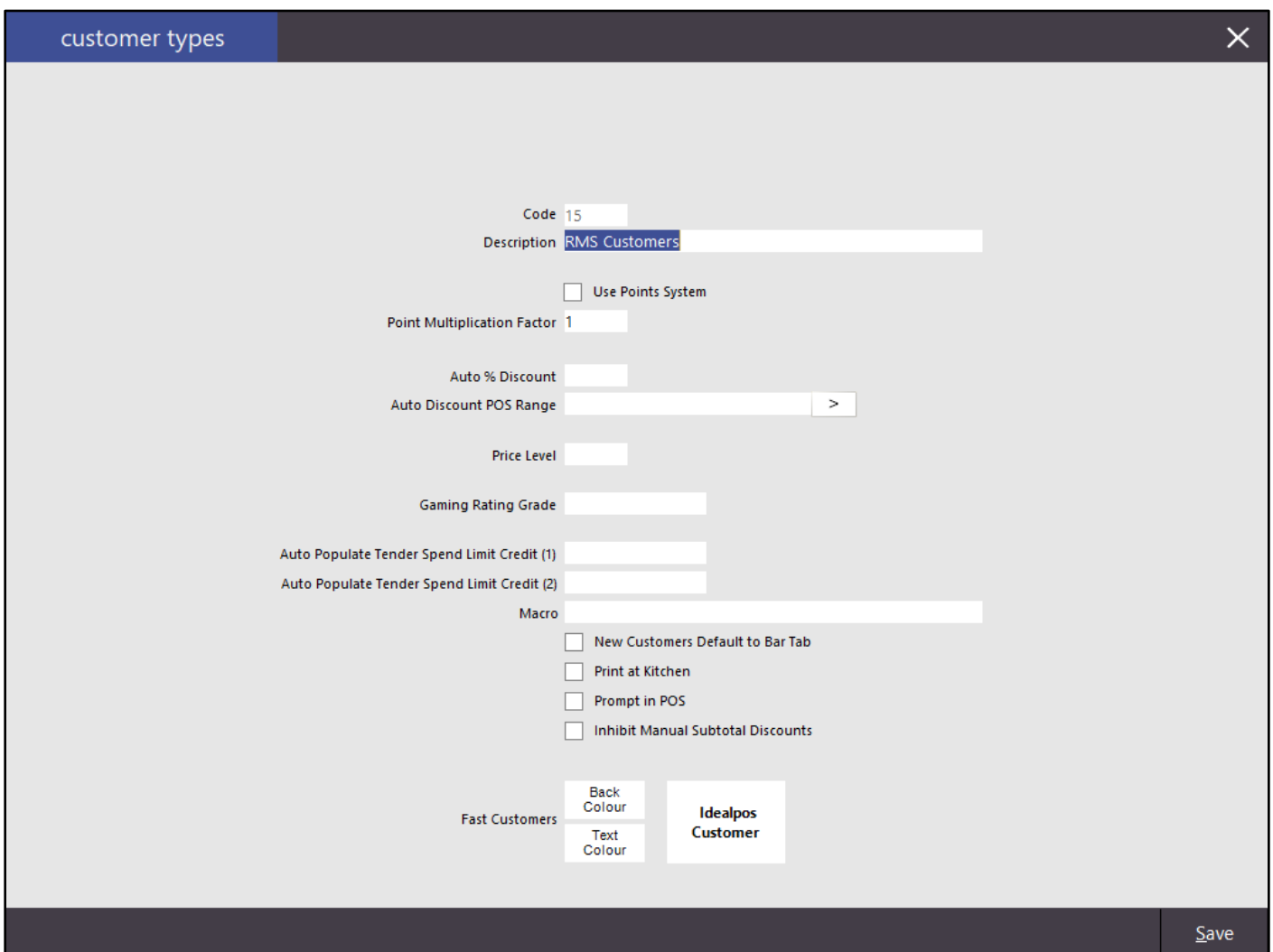
- Interface Type: RMS
- Output from POS#: 1
- Customer Prefix: (empty)
- Network Path: C:\POS Interface
- Tender Type: ROOM
- Customer Type: RMS Customers

Select the Customer Type that you want new RMS Customers assigned to.

If you don't already have an existing Customer Type that is suitable for RMS Customers, you may create a new Customer Type.

This can be done by going to File > Customers > Customer Types > Add

Configure the new Customer Type as required then press the 'Save' button to save changes.



The screenshot shows the 'customer types' configuration window. It contains the following fields and options:

- Code: 15
- Description: RMS Customers
- Use Points System
- Point Multiplication Factor: 1
- Auto % Discount: (empty)
- Auto Discount POS Range: (empty) >
- Price Level: (empty)
- Gaming Rating Grade: (empty)
- Auto Populate Tender Spend Limit Credit (1): (empty)
- Auto Populate Tender Spend Limit Credit (2): (empty)
- Macro: (empty)
- New Customers Default to Bar Tab
- Print at Kitchen
- Prompt in POS
- Inhibit Manual Subtotal Discounts
- Fast Customers: Back Colour, Text Colour
- Buttons: Idealpos, Customer
- Save button

Note that after adding a new Customer Type, you may need to restart Idealpos in order for the Customer Type to show as an available Customer Type from the Customer Type dropdown box in the above Room Interface settings.

idealpos7 Update History

Setup – Network Printers

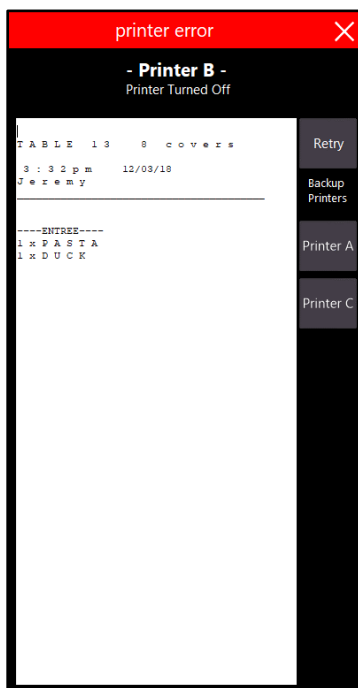
Redirected Kitchen Printer Jobs show where they were Redirected from

This function will print details at the top of the receipt that shows the name of the printers that the Kitchen Print Job was redirected from.

This function is hard-coded and there are no settings that need to be modified in order for the Kitchen Print Job to show where it was redirected from.

There are two ways a Print Job can be redirected from one printer to another, with both ways being triggered when the target printer is not available due to being turned off or not available.

Option one – When you attempt to print to a printer that's offline and redirect printer is not configured, the POS terminal will display a Printer Error box from where you can select the printer that you want to send the Print Job to.



After selecting the desired printer, the Kitchen Receipt will print and will show the Kitchen Print Job will show the printer from where it was redirected from.

Option two – When you attempt to print to a printer that's offline and redirect printer is configured, the POS terminal will attempt to print to the redirected printer. If it is successful, the Kitchen Receipt will print to the redirected printer and will print the receipt showing the printer name from which it was redirected from.

In the event that the redirected printer is also not available, the POS terminal will display a Printer Error box from where you can select the printer that you want to send the Print Job to. The Kitchen Receipt will print showing the printer name from which it was redirected from.

To setup automatic printer redirecting, go to Setup > Network Printers > Modify > Redirect Printer

network printers network printer in Site 1

Printer Name Printer B

Type Epson TM-T88

Connection Ethernet

IP Address 192.192.192.192

Port 9100

Use in Backup Printer List

Redirect Printer Printer A

Keyboard Save

idealpos7 Update History

When the Printer goes offline, any print job sent to it will be automatically redirected to the Redirect Printer that's selected in the 'Redirect Printer' dropdown box. The Print Job that was redirected will show the Printer where it was redirected from at the top of the Kitchen receipt.

```
*****
REDIRECTED FROM
Printer B
*****
TABLE 11  4 covers
2:43pm    12/03/18
Alex
-----ENTREE-----
1x PASTA
1x LAMB
1x GARLIC BREAD
1x PORK
1x VEGE DISH
```

Note that if there are multiple levels of Receipt Redirection, each level will be printed at the top of the receipt.

E.g. There are three printers in the system; Printer A, Printer B and Printer C.

The system is configured to print to the Kitchen Printer which is Printer C.

Printer C is configured to redirect to Printer B. Printer B is configured to redirect to Printer A.

Printer B and Printer C are both offline.

The Print Job tries to print to Printer C which fails.

It then redirects to Printer B which also fails then redirects to Printer A.

Printer A prints the Kitchen Receipt successfully and the Kitchen Receipt will show each printer that it was redirected from.

This aids in tracing each printer that the receipt was redirected from.

```
*****
REDIRECTED FROM
Printer B
*****
*****
REDIRECTED FROM
Printer C
*****
TABLE 10  4 covers
4:01pm    12/03/18
Alex
-----ENTREE-----
1x DUCK
```

Support for Multiple HC 100 Wristband Printers per Site

This function adds support for Multiple HC 100 Wristband Printers per site.

You will need to ensure that all Wristband printers have been configured in Idealpos - Network Printers.

Once all wristband printers have been configured in Network Printers, the printer that will be used for the printing of the wristband is configured within the Stock Notes of the Stock Item.

Go to Setup > Network Printers > Add

network printers

name POS Terminal Printer Type Connection Settings Redirect Printer

Add
Modify
Delete
Test

Site
Site 1

printers by pos drag-and-drop from above

POS	Description	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
1	POS 1													

Clear All Clear Copy KP Timeout

idealpos7 Update History

Enter a Printer Name, under Type, select 'Zebra HC100', then specify the IP address and Port (if it is not the default port of 9100). Then press 'Save' to save the printer. Repeat this step for each printer, ensuring that each HC100 printer has a unique Printer Name.

The screenshot shows a software interface for configuring network printers. The window title is "network printer in Site 1" and it has a "network printers" tab. The main content area contains a form with the following fields:

- Printer Name: Printer
- Type: Zebra HC100 (selected in a dropdown menu)
- Connection: Ethernet (selected in a dropdown menu)
- IP Address: (empty text input field)
- Port: 9100

At the bottom of the window, there are two buttons: "Keyboard" on the left and "Save" on the right.

After the HC100 printers have been configured, open a wristband Stock Item.

Go to File > Stock Control > Stock Items > Select: Stock Item > Modify > Advanced

stock items General **Advanced** Indirect Item Created 04 Dec 2017 16:21:40

Sales Prompt | _____

Link to Menu 0 > MAIN
Link to Grid 0 > MAIN
Link Table 0 >

Amount Override Limits Location 1

	Profit%
Lower Limit	0.00
Upper Limit	0.00

Stock Level -4 >>>
Recommended Level 0
Reorder Level 0

Points by Price Level

STANDARD	0
STAFF	0
EXTRAS	0
BOTTLESHOP	0
Price 5	0
Price 6	0
Price 7	0
Price 8	0
Price 9	0
Price 10	0
Price 11	0
OWNERS	0

Points Settings

- Use Special Points : 0
- Inhibit Points Accrual
- Inhibit Purchase With Points
- Print Promotional Ticket

Stock Notes

Miscellaneous

National Product Number 0
Receipt Tabs 0

Keyboard Save

The formula for what you want printed on the wristband needs to be entered along with the PRINTERNAME tag and the printer within the Stock Notes field. Please refer to the User Guide for more information about setting up tags. For the purpose of this guide, an example formula including the printer name has been included below:
[WRISTBAND=TIME PRINTERNAME=Rides]

The above example should appear in the Stock Notes field as follows...

Stock Notes

[WRISTBAND=TIME PRINTERNAME=Rides]

Repeat the above for each Stock Item that is used for printing a wristband ensuring that the printer has been correctly specified.

When printing the wristband, the wristband will print to the wristband printer that has been specified in the Stock Notes for the Stock Item.

Setup – POS Terminals

EFTPOS Settings – Assembly Payments EFTPOS Integration

This function enables the ability to integrate Idealpos with Assembly Payments.

Before setting up Assembly Payments, you need to be licenced to use Assembly Payments. You also need to be setup with Assembly Payments as your EFTPOS service provider. Speak to Idealpos Sales for more information if you are interested in using Assembly Payments as your EFTPOS provider.

We recommend setting up the Assembly Payments Pinpad using a Wi-Fi connection. Therefore, it is a requirement that you have Wi-Fi connectivity at your site in order to use Assembly Payments.

To enable Assembly Payments Integration, go to:

Setup > POS Terminals > Select: POS Terminal > Modify > EFTPOS Settings > EFTPOS Type: Assembly Payments

The screenshot displays the 'EFTPOS Settings' window. At the top, a navigation bar includes 'pos terminals', 'Main Settings', 'POS Settings', 'Receipt Printer', 'Kitchen Printers', 'Customer Display', 'Customer Readers', 'Other Peripherals', 'EFTPOS Settings', 'Import / Export', and 'Miscellaneous Settings'. The 'EFTPOS Settings' panel contains a 'Disable' checkbox (unchecked), an 'EFTPOS Type' dropdown menu (set to 'Assembly Payments'), two unchecked checkboxes for 'Allow multiple EFTPOS Tendering' and 'Automatically choose Tender Type based on Card Type', a 'Tips Function' dropdown menu (set to 'TIPS IN'), and an unchecked checkbox for 'Don't automatically print EFTPOS Receipt when Receipts turned off'. In the bottom right corner, a 'Pairing: POS 3' section shows an 'IP Address' field with '192.168.1.146', a 'Status' field with 'UNPAIRED', and a 'Pair' button. A 'Keyboard' button is located in the bottom left corner.

Ensure that the Disable box is unticked. If Disable is ticked, untick the box to enable EFTPOS.

Enter the IP address of the Pinpad into the IP Address field on the bottom right corner of the EFTPOS Settings window, then press the Pair button. Follow the remaining instructions on-screen and on the pinpad.

For more detailed information on setting up Assembly Payments, please refer to the EFTPOS – Assembly Payments section in the User Guide which is available on our website.

Region - Saudi Arabia – Tax System same as Canadian region setting

The Tax System in Saudi Arabia has changed to include VAT taxes.

Therefore, Idealpos has been updated so that when the Saudi Arabia region is selected, the Tax System that's used will be the same as the Tax System used by the Canadian setting.

We highly recommend that any customers in Saudi Arabia should take a backup and print out all reports up to the current date before they upgrade to this new build.

You can check what Region the POS has been set to by going to Setup > POS Terminals > Modify > Region

pos terminals	Main Settings	POS Settings	Receipt Printer	Kitchen Printers	Customer Display	Customer Readers	Other Peripherals	EFTPOS Settings	Import / Export	Miscellaneous Settings	X
<p>Main Settings</p> <p>Code <input type="text" value="1"/></p> <p>Description <input type="text" value="POS 1"/></p> <p>Location <input type="text" value="Location 1"/></p> <p>POS Screen Layout <input type="text" value="1"/> > POS SCREEN LAYOUT 1</p>											
<p>User Details</p> <p>Region <input type="text" value="Australia"/></p> <p>Address <input type="text"/></p> <p>Postal Address <input type="text"/></p> <p>Email <input type="text"/></p> <p>Phone <input type="text"/> Fax <input type="text"/></p> <p>ABN <input type="text"/> ACN <input type="text"/></p>											
Keyboard											

*idealpos*7 Update History

Support for Tyro Pinpad Surcharging

Idealpos now supports Tyro Pinpad surcharging based on the card presented.

There are two modes for this. Both are controlled from settings in Tyro.

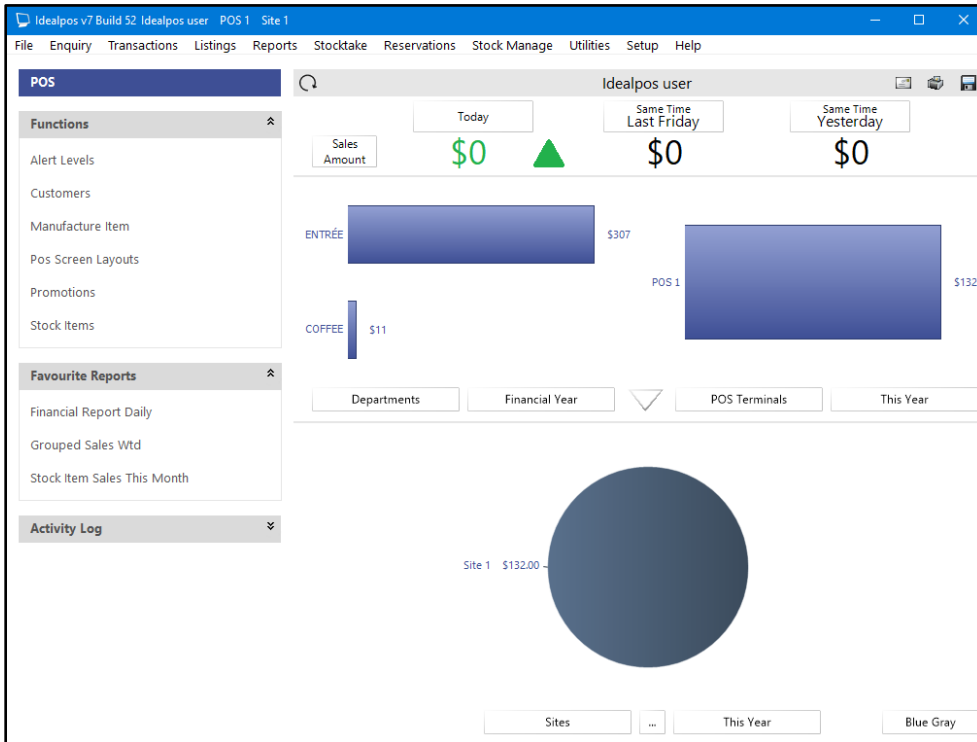
- The default mode (set from Tyro) is to have the surcharges deducted from the settlement amounts. Tyro then sends the settlement amounts without the surcharges, so that Idealpos will balance with the Tyro settlement
- You can also configure Tyro to have the settlement amounts sent to Idealpos as part of the settlement. If using this mode, you must set the Surcharges to a Stock Item in Global Options > Sales > Undistributed Links. Idealpos then adds the surcharges to the item specified.

Shortcuts

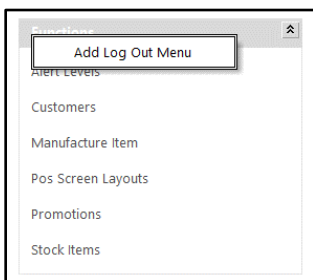
Ability to add Log Out function to Shortcut Bar

This function allows you to add the Log Out function to the Shortcut Bar located on the left-hand side of the Dashboard on the main Idealpos window. The shortcut can then be used to Log Out of Idealpos

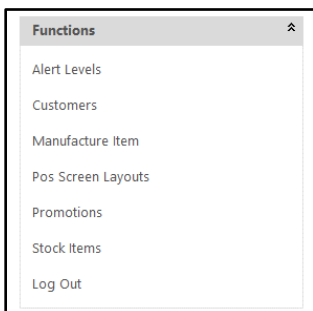
Go to the main Idealpos window



On the left-hand side of the Dashboard, right click on the Functions heading and select 'Add Log Out Menu'



The Log Out Shortcut will then appear in the Functions menu which can be used to Log Out of Idealpos



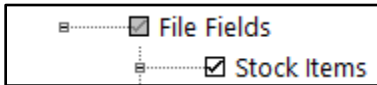
idealpos7 Update History

Stock Control

Stock Items Grid – Show Grid Link Field

This function enables the Grid Link Field to be displayed in the Stock Items Grid.

Go to Setup > Users > Modify > File Fields > Stock Items > GridLink



Enable the GridLink option, then press the Save button to save the change.

After the GridLink option has been enabled for the User, close the Users screen, return to the main Idealpos dashboard, then open the Stock Items screen.

Go to File > Stock Control > Stock Items

The GridLink option will be displayed at the far right-hand side of the Stock Items grid

			Edit Mode	Multi Select
Stock Notes	Manufactured	Grid Link		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
	No	118		
	No	0		
	No	0		
	No	0		

Stock Items can also be sorted by the Grid Link column. Click on the Grid Link header and the Stock Items will sort by the Grid Link column. Pressing on the Grid Link header multiple times toggles the order that the column is being sorted by (i.e. Ascending or Descending).

The Grid Link option that is displayed in the Stock Items grid corresponds to the Link to Grid setting that is configured within the Stock Item. Open the Stock Item then click on the Advanced tab.

The screenshot displays the 'Advanced' tab of a 'stock items' configuration window. The window title is 'stock items' and it shows 'Last Modified 24 Jan 2017'. The 'Advanced' tab is selected, indicated by an orange arrow. The 'Link to Grid' field is set to '118' and 'CORONA CHOICE', also indicated by an orange arrow. Other fields include 'Link to Menu' (0, MAIN), 'Link to Table' (0), 'Manual Modifier' (checkbox), 'Amount Override Limits' (Lower Limit: 0.00, Upper Limit: 0.00, Profit%), 'Location 1' (Stock Level: 264, Recommended Level: 36, Reorder Level: 12), 'Points by Price Level' (STANDARD: 2, STAFF: 0, EXTRAS: 0, BOTTLESHOP: 0, Price 5-11: 0, OWNERS: 0), 'Points Settings' (Use Special Points: 0, Inhibit Points Accrual, Inhibit Purchase With Points, Print Promotional Ticket), 'Stock Notes' (empty text area), and 'Miscellaneous' (National Product Number: 0, Receipt Tabs: 0). The bottom of the window has 'Keyboard' and 'Save' buttons.

Points by Price Level	Value
STANDARD	2
STAFF	0
EXTRAS	0
BOTTLESHOP	0
Price 5	0
Price 6	0
Price 7	0
Price 8	0
Price 9	0
Price 10	0
Price 11	0
OWNERS	0

idealpos 7 Update History

Support for longer Alternate Codes

Idealpos has been updated to support longer Stock Item Alternate Codes. The maximum allowed Alternate Code length has increased to 30. There is no configuration required for this to take effect.

Go to File > Stock Control > Stock Items > Select Stock Item > Alternate Codes

Code	Description	Description 2	Department	Ptu Code	Scan Code	Standard Cost	Average Cost	Last Cost	Stock Control	Indirect	STANDARD	STAFF	EXTRAS	BOTTLESHOP	Price 3
1	Test Stock Item	Test Stock Item	GROCERIES	0	010000000000	0.00	0.00	0.00	Yes	No	1.23	0.00	0.00	0.00	0.00
2	Test Stock Item Two	Test Stock Item Two	GROCERIES	0		0.00	0.00	0.00	Yes	No	1.23	0.00	0.00	0.00	0.00
3	OPEN STOCK ITEM	OPEN STOCK ITEM	GROCERIES	0		0.00	0.00	0.00	No	No	1.23	0.00	0.00	0.00	0.00
4	Test Stock Item Four	Test Stock Item Four	GROCERIES	0		0.00	0.00	0.00	Yes	No	1.23	0.00	0.00	0.00	0.00
5	Test Stock Item Five	Test Stock Item Five	GROCERIES	0		0.00	0.00	0.00	Yes	No	1.23	0.00	0.00	0.00	0.00
6	Test Stock Item Six	Test Stock Item Six	GROCERIES	0		0.00	0.00	0.00	Yes	No	1.23	0.00	0.00	0.00	0.00
7	Test Stock Item Seven	Test Stock Item Seven	GROCERIES	0		0.00	0.00	0.00	Yes	No	1.23	0.00	0.00	0.00	0.00
8	Test Stock Item Eight	Test Stock Item Eight	GROCERIES	0		0.00	0.00	0.00	Yes	No	1.23	0.00	0.00	0.00	0.00
101001	EGGS ON TOAST	EGGS ON TOAST	BREAKFAST	0		2.50	2.50	2.50	No	No	9.00	3.50	0.00	0.00	0.00
101002	BACON & EGGS	BACON & EGGS	BREAKFAST	0		3.00	3.00	3.00	No	No	10.00	4.00	0.00	0.00	0.00
101003	EGGS BENEDICT	EGGS BENEDICT	BREAKFAST	0		4.50	4.50	4.50	No	No	12.00	6.00	0.00	0.00	0.00
101004	AVOCADO ON TOAST	AVOCADO ON TOAST	BREAKFAST	0		5.00	5.00	5.00	No	No	11.00	6.50	0.00	0.00	0.00
101005	BAKED BEANS & TOAST	BAKED BEANS & TOAST	BREAKFAST	0		2.00	2.00	2.00	No	No	8.50	3.00	0.00	0.00	0.00
101006	PANCAKES	PANCAKES	BREAKFAST	0		2.00	2.00	2.00	No	No	9.00	3.00	0.00	0.00	0.00
101007	CANADIAN PANCAKES	CANADIAN PANCAKES	BREAKFAST	0		3.50	3.50	3.50	No	No	12.00	4.50	0.00	0.00	0.00
101008	WAFFLES	WAFFLES	BREAKFAST	0		2.50	2.50	2.50	No	No	9.00	3.50	0.00	0.00	0.00
101009	WAFFLES CHOCOLATE	WAFFLES CHOCOLATE	BREAKFAST	0		3.00	3.00	3.00	No	No	10.00	4.00	0.00	0.00	0.00
101010	JAM & TOAST	JAM & TOAST	BREAKFAST	0		1.20	1.20	1.20	No	No	5.00	2.00	0.00	0.00	0.00
101011	BIG BREAKFAST	BIG BREAKFAST	BREAKFAST	0		5.00	5.00	5.00	No	No	15.00	7.00	0.00	0.00	0.00
101012	BAKED BEANS & TOAST COPY	BAKED BEANS & TOAST	BREAKFAST	0		2.00	2.00	2.00	No	No	8.50	3.00	0.00	0.00	0.00
102001	EXTRA BACON	EXTRA BACON	BREAKFAST MODS	0		0.65	0.65	0.65	No	No	2.00	1.00	0.00	0.00	0.00
102002	EXTRA EGG	EXTRA EGG	BREAKFAST MODS	0		0.23	0.23	0.23	No	No	1.00	0.50	0.00	0.00	0.00
102003	EXTRA TOAST	EXTRA TOAST	BREAKFAST MODS	0		0.10	0.10	0.10	No	No	0.50	0.50	0.00	0.00	0.00
102004	EXTRA AVOCADO	EXTRA AVOCADO	BREAKFAST MODS	0		0.50	0.50	0.50	No	No	1.00	1.00	0.00	0.00	0.00
102005	EXTRA CHEESE	EXTRA CHEESE	BREAKFAST MODS	0		0.20	0.20	0.20	No	No	1.00	0.50	0.00	0.00	0.00
102006	EXTRA SALMON	EXTRA SALMON	BREAKFAST MODS	0		1.00	1.00	1.00	No	No	3.00	1.50	0.00	0.00	0.00
102007	EXTRA JAM	EXTRA JAM	BREAKFAST MODS	0		0.10	0.10	0.10	No	No	0.50	0.50	0.00	0.00	0.00
102008	EXTRA BUN	EXTRA BUN	BREAKFAST MODS	0		0.50	0.50	0.50	No	No	1.00	1.00	0.00	0.00	0.00
102009	EXTRA CREAM	EXTRA CREAM	BREAKFAST MODS	0		0.10	0.10	0.10	No	No	0.50	0.50	0.00	0.00	0.00
102010	EXTRA SAUCE	EXTRA SAUCE	BREAKFAST MODS	0		0.10	0.10	0.10	No	No	0.50	0.50	0.00	0.00	0.00
102011	EXTRA HAMBROUIN	EXTRA HAMBROUIN	BREAKFAST MODS	0		0.65	0.65	0.65	No	No	1.00	0.50	0.00	0.00	0.00
102012	WHITE	WHITE	BREAKFAST MODS	0		0.00	0.00	0.00	No	No	0.00	0.00	0.00	0.00	0.00
102013	MULTI-GRAIN	MULTI-GRAIN	BREAKFAST MODS	0		0.00	0.00	0.00	No	No	0.00	0.00	0.00	0.00	0.00
102014	WHOLE-GRAIN	WHOLE-GRAIN	BREAKFAST MODS	0		0.00	0.00	0.00	No	No	0.00	0.00	0.00	0.00	0.00
102015	GLUTEN FREE	GLUTEN FREE	BREAKFAST MODS	0		0.25	0.25	0.25	No	No	1.00	0.50	0.00	0.00	0.00
102016	TURKISH	TURKISH	BREAKFAST MODS	0		0.20	0.20	0.20	No	No	0.50	0.50	0.00	0.00	0.00
102017	BAGEL	BAGEL	BREAKFAST MODS	0		0.20	0.20	0.20	No	No	0.50	0.50	0.00	0.00	0.00
103001	CHARLIE BREAD	CHARLIE BREAD	LUNCH	0		1.50	1.50	1.50	No	No	7.00	2.00	0.00	0.00	0.00
103002	COB LOAF	COB LOAF	LUNCH	0		1.00	1.00	1.00	No	No	8.00	2.50	0.00	0.00	0.00
103003	SOUP OF THE DAY	SOUP OF THE DAY	LUNCH	0		2.20	2.20	2.20	No	No	10.00	3.00	0.00	0.00	0.00
103004	POW OF THE DAY	POW OF THE DAY	LUNCH	0		2.40	2.40	2.40	No	No	11.00	4.50	0.00	0.00	0.00
103005	STEAK SPECIAL	STEAK SPECIAL	LUNCH	0		6.50	6.50	6.50	No	No	13.00	8.50	0.00	0.00	0.00
103006	CHICKEN SPECIAL	CHICKEN SPECIAL	LUNCH	0		4.80	4.80	4.80	No	No	12.00	6.50	0.00	0.00	0.00
103007	LASAGNE	LASAGNE	LUNCH	0		3.20	3.20	3.20	No	No	9.00	4.50	0.00	0.00	0.00
104001	EXTRA CROUTONS	EXTRA CROUTONS	LUNCH MODS	0		0.05	0.05	0.05	No	No	1.00	0.50	0.00	0.00	0.00
104002	CHIPS AND SALAD	CHIPS AND SALAD	LUNCH MODS	0		0.00	0.00	0.00	No	No	0.00	0.00	0.00	0.00	0.00
104003	MILK CHAI LATTE	MILK CHAI LATTE	LUNCH MODS	0		0.00	0.00	0.00	No	No	0.00	0.00	0.00	0.00	0.00

Press the 'Add' button

alternate codes

Stock Code 1

Description Test Stock Item

Alternate Codes

61414100036

Delete Add Modify

Enter the Alternate Code for the Stock Item.

An alphanumeric Alternate Code of up to 30 characters may now be entered.

Once the code has been entered, press the 'Save' button.

Stock Code	1
Test Stock Item	
Alternate Code	ABC12345678901234567890123

The Alternate Code has now been saved for the Stock Item.

From the Stock Items screen, select the Stock Item then press the 'Alternate Codes' button.

The saved Alternate Code will be displayed

Stock Code	1
Description	Test Stock Item
Alternate Codes	
	614141000036
	ABC12345678901234567890123

idealpos7 Update History

Yes/No Options

Inhibit Delete Items after Bill Print

This option will disable the ability to delete items from a table once a bill has been printed for that table.

Go to Setup > Yes/No Options > Restaurant > Inhibit Delete Items after Bill Print

	ALL	1
RESTAURANT		
Inhibit Delete Items after Bill Print	<input checked="" type="checkbox"/>	

Open the POS Screen and add items to the sale

21 Mar 14:10 POS 1 Adult ID: 21/03/00
Jeremy STANDARD

<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;">PASTA</td> <td style="width: 10%; text-align: center;">1</td> <td style="width: 10%; text-align: right;">11.00</td> </tr> <tr> <td>DUCK</td> <td style="text-align: center;">1</td> <td style="text-align: right;">14.00</td> </tr> <tr> <td>SEAFOOD</td> <td style="text-align: center;">1</td> <td style="text-align: right;">16.00</td> </tr> <tr> <td style="padding-left: 20px;">GRILLED</td> <td></td> <td></td> </tr> </table>	PASTA	1	11.00	DUCK	1	14.00	SEAFOOD	1	16.00	GRILLED			<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">RECEIPT</td> <td style="width: 15%;">CLERK</td> <td style="width: 10%; text-align: center;">7</td> <td style="width: 10%; text-align: center;">8</td> <td style="width: 10%; text-align: center;">9</td> <td style="width: 10%; text-align: center;">CL</td> </tr> <tr> <td>PRICE LEVEL</td> <td style="background-color: #f08080;">5% ST DISC</td> <td style="text-align: center;">4</td> <td style="text-align: center;">5</td> <td style="text-align: center;">6</td> <td style="text-align: center;">NO SALE</td> </tr> <tr> <td>CUSTOMER</td> <td style="background-color: #f08080;">5% ITEM</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>BAR TAB</td> <td style="background-color: #f08080;">REFUND</td> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">3</td> <td style="text-align: center;">X</td> </tr> <tr> <td>PENDING</td> <td style="background-color: #f08080;">VOID SALE</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>TABLE MAP</td> <td style="background-color: #f08080;">VOID</td> <td style="text-align: center;">0</td> <td style="text-align: center;">.</td> <td colspan="2" style="text-align: center;">ENTER</td> </tr> </table>	RECEIPT	CLERK	7	8	9	CL	PRICE LEVEL	5% ST DISC	4	5	6	NO SALE	CUSTOMER	5% ITEM					BAR TAB	REFUND	1	2	3	X	PENDING	VOID SALE					TABLE MAP	VOID	0	.	ENTER	
PASTA	1	11.00																																															
DUCK	1	14.00																																															
SEAFOOD	1	16.00																																															
GRILLED																																																	
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																																													
Discounts (+/-) 0.00 \$41.00																																																	

GARLIC BREAD	PASTA	BEEFS	SALMON	LAMB SHANKS <small>8</small>	BUTTERED BEANS	DANISH	BLUE CHEESE	KEYBOARD
SCALLOPS	DUCK	LAMB	EYE FILLET	KANGAROO <small>9</small>	CHATS POTATOES	PAVLOVA	CHEDDAR	
KOPTAS	SEAFOOD	VEGE DISH	PORTERHOUSE	MUSHROOM RISOTTO	TOMATO SALAD	ICE CREAM	GHOUDA	SEAT
COB LOAF	CAESAR SALAD	PORK	DUCK BREAST	BEEF STROGANOFF	CHEESE CAULIFLOWER	SORBETS	CAMEMBERT	ENTREE AS MAIN
SPECIALS						CHOC TART	CHEESE PLATTER 2	WITH
							CHEESE PLATTER 3	WITHOUT
DRINKS	CAFE	TAP BEER	SPIRITS	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL	MANAGER
	RESTAURANT	BOTTLE BEER & RTD	WINE				SERVICES	ADMIN

Save the items to a table by pressing the 'TABLE MAP' button, select a table from the Table Map then enter the number of Covers and press OK.

Then open the Table Map, select the table and press the Details button.

Items can be deleted from the table before the bill has been printed by selecting the item and pressing the 'Delete' button.

TABLE 45		4 min		\$41.00				✕	
4 Covers - Avg \$10.25		Amount	Outstanding	Printed	Pay	Seat	Clerk		
PASTA		11.00	11.00	*	11.00		Jeremy		
DRINK		14.00	14.00	*			Jeremy		
SEAFOOD		16.00	16.00	*			Jeremy		
GRILLED	0	-	-	*			Jeremy		
		-----	-----	-----					
		41.00	41.00		11.00				

Full 1/3 1/5 1/7 1/Covers Amount

1/2 1/4 1/6 1/8 Quantity Fraction

Print Bill Select All Pay 11.00

Hide Paid Items

Transfer

Reprint Kitchen

Name

Covers

Delete

→

idealpos7 Update History

Print a bill for the table by pressing the 'Print Bill' button from the Details screen.

TABLE 45		10 min	\$41.00					×
4 Covers - Avg \$10.25		Amount	Outstanding	Printed	Pay	Seat	Clerk	
PASTA		11.00	11.00	*			Jeremy	
DUCK		14.00	14.00	*			Jeremy	
SEAFOOD		16.00	16.00	*			Jeremy	
GRILLED	0	-	-	*			Jeremy	
		-----	-----					
		41.00	41.00					
								Hide Paid Items
								Transfer
								Reprint Kitchen
								Name
								Covers
								Delete
Full	1/3	1/5	1/7	1/Covers	Amount	Print Bill		Pay 0.00
1/2	1/4	1/6	1/8	Quantity	Fraction	Select All		

After a Bill has been printed, the 'Bill Printed' status will be displayed at the top right corner of the Table Details screen.

TABLE 45		10 min		\$41.00		Bill Printed		✕	
4 Covers - Avg \$10.25		Amount	Outstanding	Printed	Pay	Seat	Clerk		
PASTA		11.00	11.00	*			Jeremy		
DUCK		14.00	14.00	*			Jeremy		
SEAFOOD		16.00	16.00	*			Jeremy		
GRILLED	0	-	-	*			Jeremy		
		-----	-----						
		41.00	41.00						
								Hide Paid Items	
								Transfer	
								Reprint Kitchen	
								Name	
								Covers	
								Delete	
Full	1/3	1/5	1/7	1/Covers	Amount			Print Bill	Select All
1/2	1/4	1/6	1/8	Quantity	Fraction			Pay	0.00

idealpos7 Update History

Once the bill has been printed, select an item from the Details screen, then press the 'Delete' button.

TABLE 45		17 min	\$41.00		Bill Printed		×
4 Covers - Avg \$10.25		Amount	Outstanding	Printed	Pay	Seat	Clerk
PASTA		11.00	11.00	*	11.00		Jeremy
DESK		14.00	14.00	*			Jeremy
SEAFOOD		16.00	16.00	*			Jeremy
GRILLED	0	-	-	*			Jeremy
		-----	-----	-----			
		41.00	41.00		11.00		

Hide Paid Items

Transfer

Reprint Kitchen

Name

Covers

Delete

Full	1/3	1/5	1/7	1/Covers	Amount	Print Bill	Select All	Pay 11.00
1/2	1/4	1/6	1/8	Quantity	Fraction			

The following prompt will be displayed.

Cannot Delete Items after a Bill has been Printed!

OK

The item that you attempted to delete will remain in the order.

Inhibit Order Number on Table Kitchen Prints

This function prevents the Order Number from printing on Table Kitchen Prints.

Go to Setup > Yes/No Options > Receipt/Kitchen > Inhibit Order Number on Table Kitchen Prints

	ALL	1
RECEIPT / KITCHEN		
Inhibit Order Number on Table Kitchen Prints	<input checked="" type="checkbox"/>	

When you enter an Order Number into a sale that also contains Stock Items which print to a Kitchen Printer and save the sale to a table, the Order Number will not be printed on the Kitchen Printout.

If the Inhibit Option is not enabled, the Order Number will print to the Kitchen Print in the above scenario.

Note that this option only affects Table Kitchen Prints. If you add Kitchen Print Stock Items to a sale and then tender the sale (without saving the sale to a table), the Kitchen Print will still contain the Order Number.

Inhibit Order Number on Table Kitchen Prints unchecked (Order Number is printed on Kitchen Print)

* ORDER 123 *
TABLE 65 4 covers
11:29am 08/03/18
Jeremy
-----ENTREE-----
1x PASTA

Inhibit Order Number on Table Kitchen Prints checked (Order Number is not printed on Kitchen Print)

TABLE 65 4 covers
11:30am 08/03/18
Jeremy
-----ENTREE-----
1x PASTA

idealpos7 Update History

Inhibit Transactions for Locations with different Stock Location

This function will stop Transactions (Transfers, Purchases, Stocktakes) from occurring at a Location which has a Location other than its own Location set as the Stock Location.

This function is useful for scenarios where a site has two locations such as a Mini Mart and a Café.

All Stock is located in the Café and the site does not want Transactions performed against the Mini Mart.

This function will allow you to stop Transactions (Transfers, Purchases, Stocktakes) from being performed at the Mini Mart location.

Before making changes regarding Stock Locations, we recommend that you create a backup of your Idealpos system. To backup your Idealpos system, go to File > Backup Database > OK

Go to Setup > Yes/No Options > Stock Control > Inhibit Transactions for Locations with different Stock Location

	ALL	1
STOCK CONTROL		
Inhibit Transactions for Locations with different Stock Location	✓	

If required, setup/update your Locations so they reflect the Stock Location.

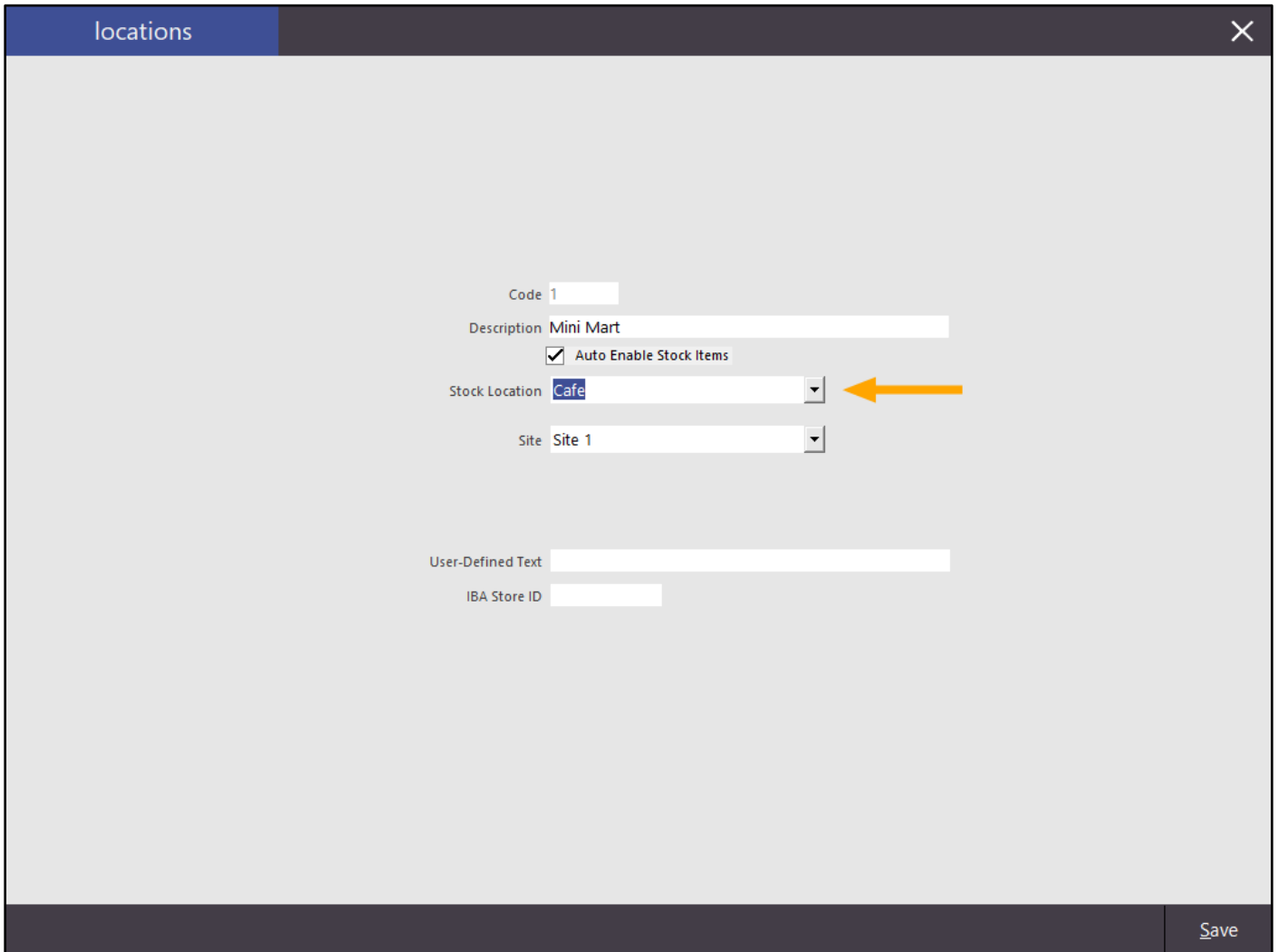
Go to File > Stock Control > Locations > Select: Location > Modify

Code	Description	Auto-Enable Stock	Site
1	Mini Mart	Yes	Site 1
2	Cafe	Yes	Site 1
3	Location 3	Yes	Site 1
4	Location 4	Yes	Site 1
5	Location 5	Yes	Site 1
6	A Location 1	No	Site 1
20	A Location 2	Yes	Site 2
25	A Location 3	No	Site 1

8 records

Delete Add **Modify**

Select the Stock Location from the Stock Location dropdown list which reflects the location of where the Stock is located for the current location then press Save to save the change.



The screenshot shows a web form titled "locations" with a close button (X) in the top right corner. The form contains the following fields:

- Code: 1
- Description: Mini Mart
- Auto Enable Stock Items
- Stock Location: Cafe (dropdown menu, highlighted with a yellow arrow)
- Site: Site 1 (dropdown menu)
- User-Defined Text: (empty text field)
- IBA Store ID: (empty text field)

A "Save" button is located in the bottom right corner of the form.

Using the above as an example, transactions (Transfers, Purchases or Stocktakes) will be inhibited. This means that the Mini Mart Location will not be shown as an available Location when performing Transfers, Purchases or Stocktakes.

idealpos7 Update History

The Mini Mart Location is now hidden on the Transfers, Purchases and Stocktake screens

stock transfers

Transfer Source

Source Location Cafe

Stock Code Cafe

Quantity Location 3

Current Stock Level

purchase order

Purchase Type Purchase Order Location Cafe

Supplier > Purchase Order No 11 Invoice No Details Stock >>>

Stock Code	Supplier Code	Description	Total	Last Cost
*				

start stocktake

Stocktake Procedure

Step 1 : Choose Location(s) and Click 'Start Stocktake'

Step 2 : Print Stocktake Forms

Step 3 : Physically count stock recording quantities on stocktake forms

Step 4 : Enter the stocktake into Idealpos

Step 5 : Print Stocktake Variance Report

Step 6 : Print Stocktake Valuation Report

Step 7 : Update Stock Levels

Location	Stocktake Started?	Click to Start Stocktake
2 Cafe	No	
3 Location 3	No	
4 Location 4	No	
5 Location 5	No	
6 A Location 1	No	
20 A Location 2	No	
25 A Location 3	No	

Jackpot/Raffles are shown on Customer Display

This function displays the Jackpot or Raffle winner on the Customer Display when a Jackpot or Raffle is drawn. This function is enabled by default. In order to see Jackpot/Raffle winners on the Customer Display, you must also have a physical Customer Display installed and enabled.

Go to Setup > Yes/No Options > Miscellaneous > Jackpot/Raffles are shown on Customer Display

	ALL	1
MISCELLANEOUS		
Jackpot/Raffles are shown on Customer Display	✓	

To ensure that Idealpos is enabled to use your installed Customer Display, go to:
Setup > POS Terminals > Modify > Customer Display > Resolution > Select the resolution of your Customer Display, Display Format > Select your desired display format for the Customer Display

Then go to the POS Screen and draw a Jackpot or Raffle by pressing the Jackpot or Raffle button on your POS screen. The Jackpot or Raffle winner will be displayed on both the POS Screen and the Customer Display.



For complete details about using Jackpots and Raffles in Idealpos, please search for either Jackpot or Raffles in our Support User Guide available on the Idealpos website.

idealpos7 Update History

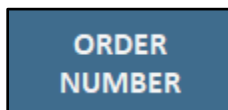
Print Large Order Number

This function configures the receipt to print Order Numbers in large font type if an Order Number is entered during a sale.

Go to Setup > Yes/No Options > Receipt/Kitchen > Print Large Order Number

	ALL	1
RECEIPT / KITCHEN		
Print Large Order Number	✓	

During a sale on the POS Screen, press the Order Number button, or enter a number and then press the Order Number button.



If you just selected the Order Number button or have the option to Force Order Entry, the sales screen will prompt you to enter a number. Enter the Order Number and press the 'Enter' button.



Add items to the sale then tender the sale.

After you tender the sale, the receipt will print out and will contain the Order Number printed in large font type.



IDEALPOS

1/212 Curtin Ave West
Eagle Farm QLD 4009
Australia

TAX INVOICE
123-456-789-11

#000428 Jeremy 08/03/18 10:25:48

ORDER 123

-----FOOD-----
BEEF BURGER* \$11.50
LARGE CHIPS* \$4.50

TOTAL \$16.00
GST Subtotal \$16.00
GST Amount \$1.45
CASH \$16.00

FOOD TOTAL \$16.00
BEVERAGE TOTAL \$0.00
Other Categories TOTAL \$0.00

*indicates taxable supply

Powered by Idealpos

idealpos7 Update History

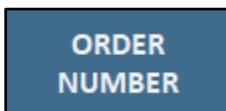
Print Order Number Dockets

This function forces Idealpos to print an Order Number docket to the receipt printer when a sale is done that contains an Order Number. This function is useful for Quick Service businesses that assign Order Numbers for each order, then hand a copy of the Order Number docket to their customer. Then when the customer's order is ready for collection, the business will call out the order number.

Go to Setup > Yes/No Options > Receipt/Kitchen > Print Order Number Dockets

	ALL	1
RECEIPT / KITCHEN		
Print Order Number Dockets	✓	

From the Idealpos POS screen, press the Order Number button, or enter a number and then press the Order Number button.



If you just selected the Order Number button or have the option to Force Order Entry, the sales screen will prompt you to enter a number. Enter the Order Number and press the 'Enter' button.



Add items to the sale then tender the sale.

The sale receipt will print followed by the Order Number docket. Any Kitchen Receipts will also print at the Kitchen Printers if Kitchen Printers have been configured.

If Receipt Printing is turned off, the Order Number docket will still print followed by any Kitchen Receipts if Kitchen Printers have been configured.



IDEALPOS

1/212 Curtin Ave West
Eagle Farm QLD 4009
Australia

TAX INVOICE
123-456-789-11

#000424 Jeremy 07/03/18 16:02:47

*** ORDER 123 ***

----FOOD----

BEEF BURGER* \$11.50
LARGE CHIPS* \$4.50

TOTAL \$16.00

GST Subtotal \$16.00
GST Amount \$1.45

CASH \$16.00

FOOD TOTAL \$16.00
BEVERAGE TOTAL \$0.00
Other Categories TOTAL \$0.00

*indicates taxable supply

Powered by Idealpos

ORDER 123

07 Mar 2018 16:02:47