# idealpos7 Update History

# Build 52

## Update Details:

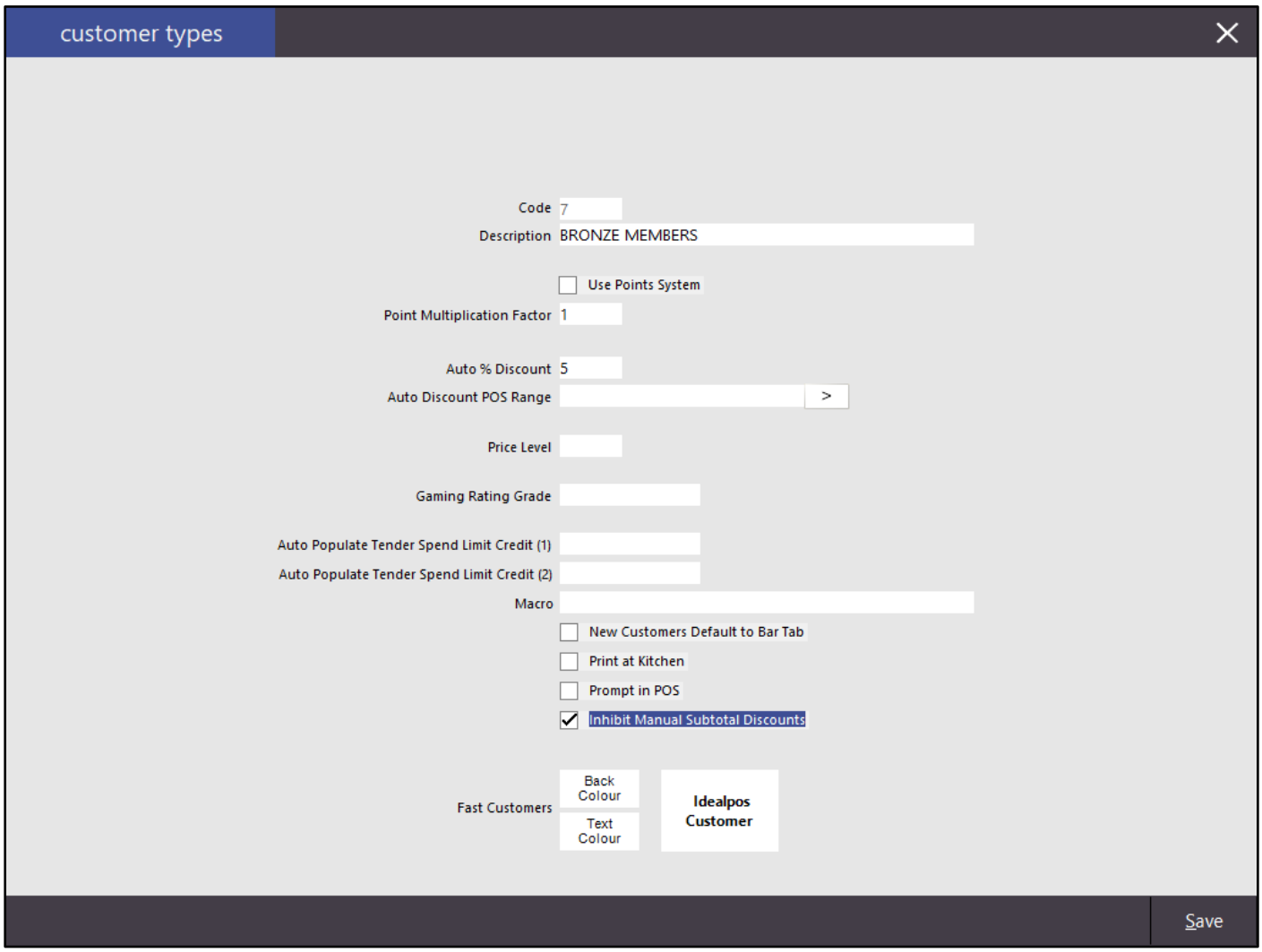
** Enhancements
* [IP-400] - Jackpot Winner shows on Customer Display
* [IP-401] - Raffle Winner shown on the Customer Display
* [IP-503] - Support for Tyro Pinpad Surcharging
* [IP-954] - Support for Alpha Table Codes [*Support for Handheld app coming soon]
* [IP-1034] - Ability to Email Pending Sales
* [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

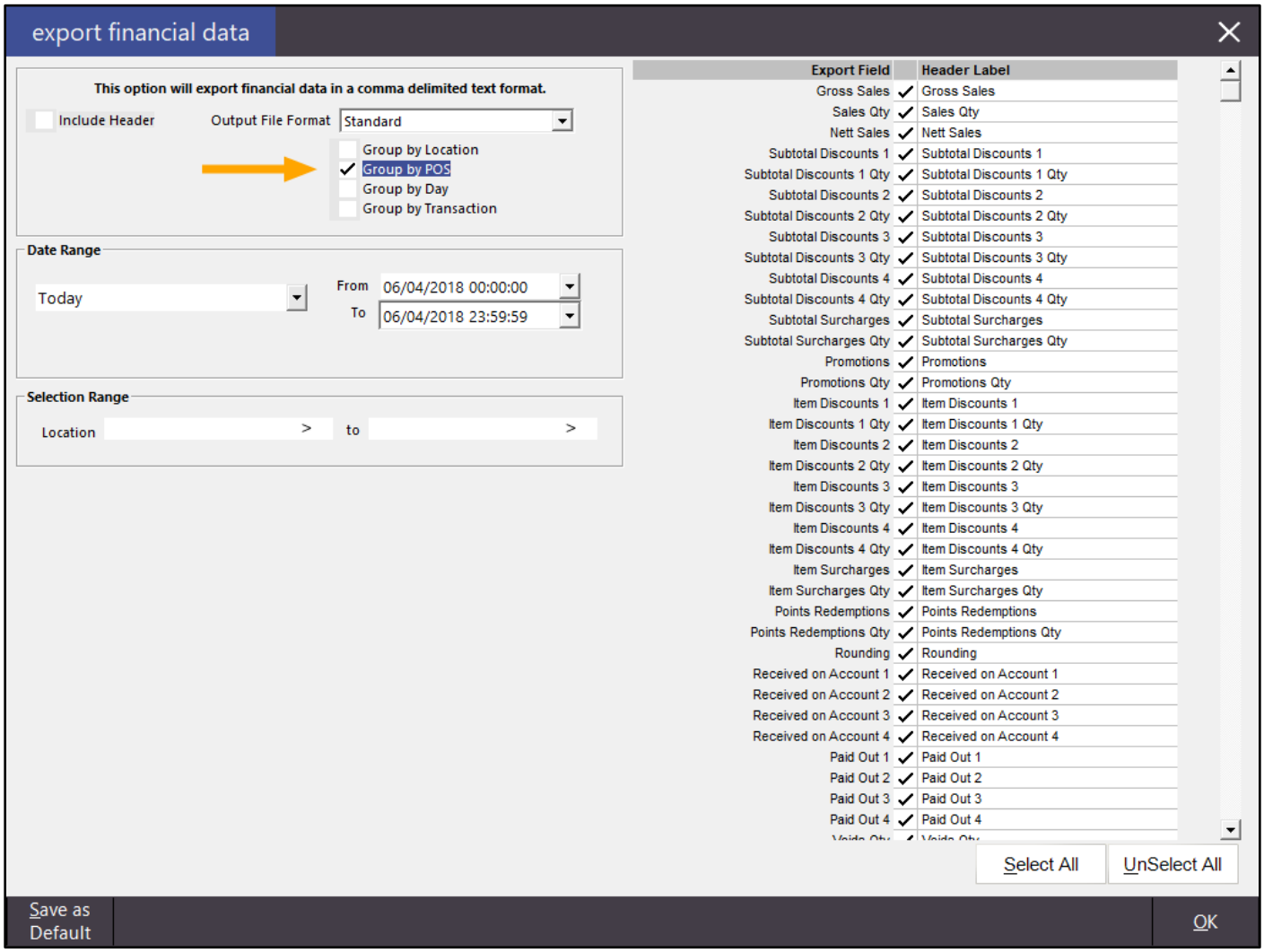


# Export Data

## 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

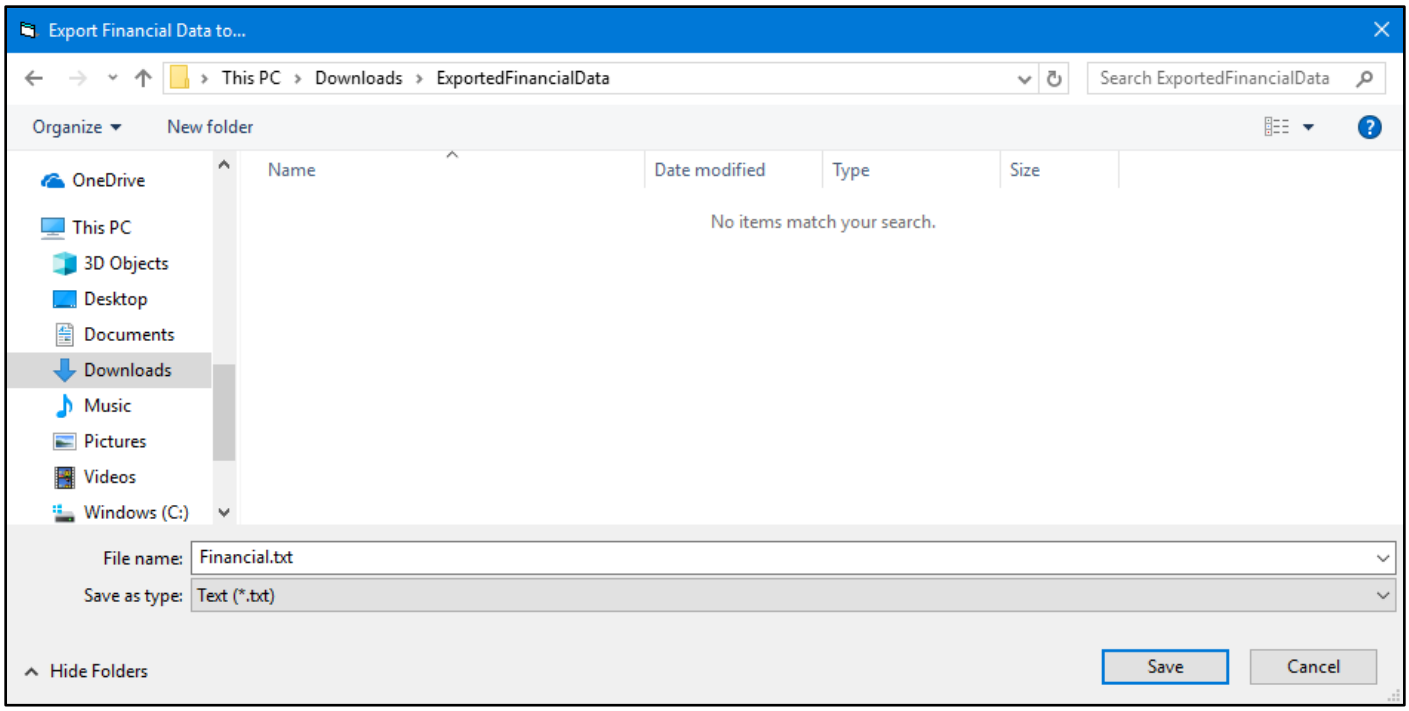



Leave the Output File Format as Standard to export the data in a single line/row or change it to Single Column to export data in a single column.

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

Press the OK button.

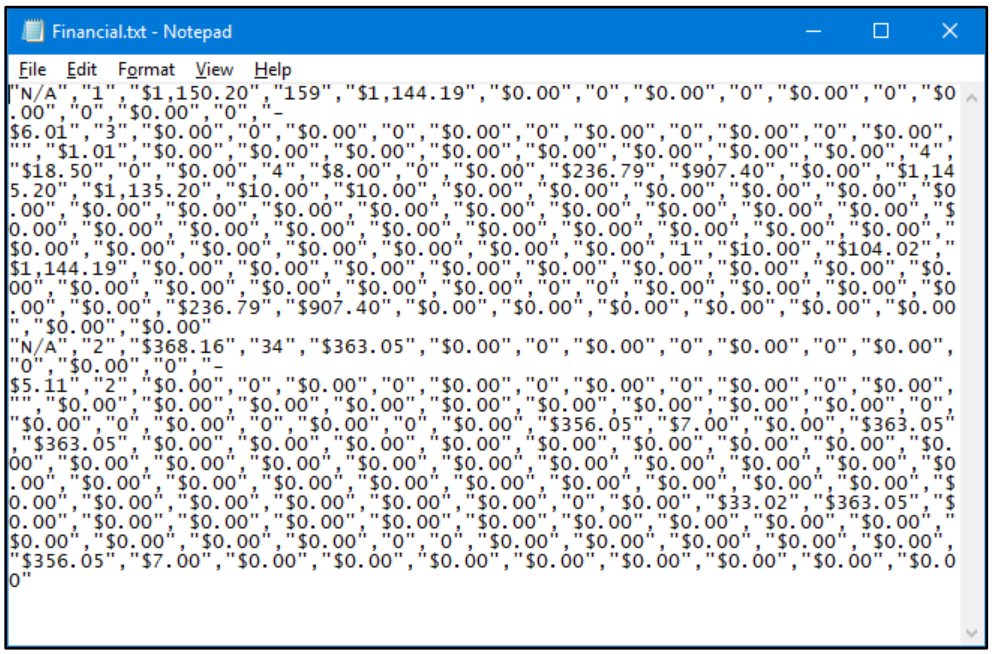
A prompt will appear allowing you to choose a location and filename for the exported data.




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'





```
"N/A","1","$1,150.20","159","$1,144.19","$0.00","0","$0.00","0","$0.00","0","$0
.00","0","$0.00","0","-
$6.01","3","$0.00","0","$0.00","0","$0.00","0","$0.00","0","$0.00","0","$0.00",
"","$1.01","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","4",
"$18.50","0","$0.00","4","$8.00","0","$0.00","$236.79","$907.40","$0.00","$1,14
5.20","$1,135.20","$10.00","$10.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0
.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$
0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","
$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","1","$10.00","$104.02","
$1,144.19","$0.00","$0.00","$0.00","$0.00","$0.00","0","0","$0.00","$0.00","$0.00","$0.
00","$0.00","$0.00","$0.00","$0.00","$0.00","0","0","$0.00","$0.00","$0.00","$0
.00","$0.00","$236.79","$907.40","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00
","$0.00","$0.00"
"N/A","2","$368.16","34","$363.05","$0.00","0","$0.00","0","$0.00","0","$0.00",
"0","$0.00","0","-
$5.11","2","$0.00","0","$0.00","0","$0.00","0","$0.00","0","$0.00","0","$0.00",
"","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","0",
"$0.00","0","$0.00","0","$0.00","0","$0.00","$356.05","$7.00","$0.00","$363.05"
,"$363.05","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.
00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0
.00","$0.00","$0.00","$0.00","$0.00","$0.00","0","$0.00","$33.02","$363.05","$
0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","
$0.00","$0.00","$0.00","$0.00","0","0","$0.00","$0.00","$0.00","$0.00","$0.00",
"$356.05","$7.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.00","$0.0
0"
```

# idealpos7 Update History

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

Financial.txt - Notepad

File Edit Format View Help

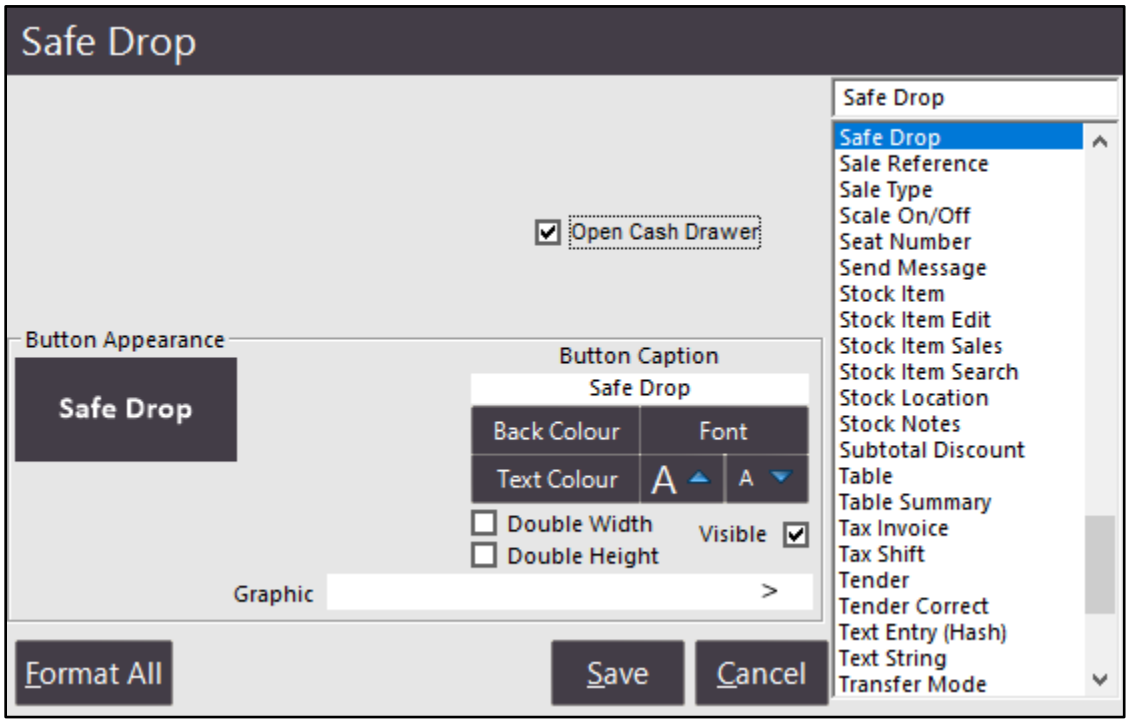
```
N/A,POS 1,Gross Sales,$1150.20
N/A,POS 1,Sales Qty,159
N/A,POS 1,Nett Sales,$1144.19
N/A,POS 1,Subtotal Discounts 1,$0.00
N/A,POS 1,Subtotal Discounts 1 Qty,0
N/A,POS 1,Subtotal Discounts 2,$0.00
N/A,POS 1,Subtotal Discounts 2 Qty,0
N/A,POS 1,Subtotal Discounts 3,$0.00
N/A,POS 1,Subtotal Discounts 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.

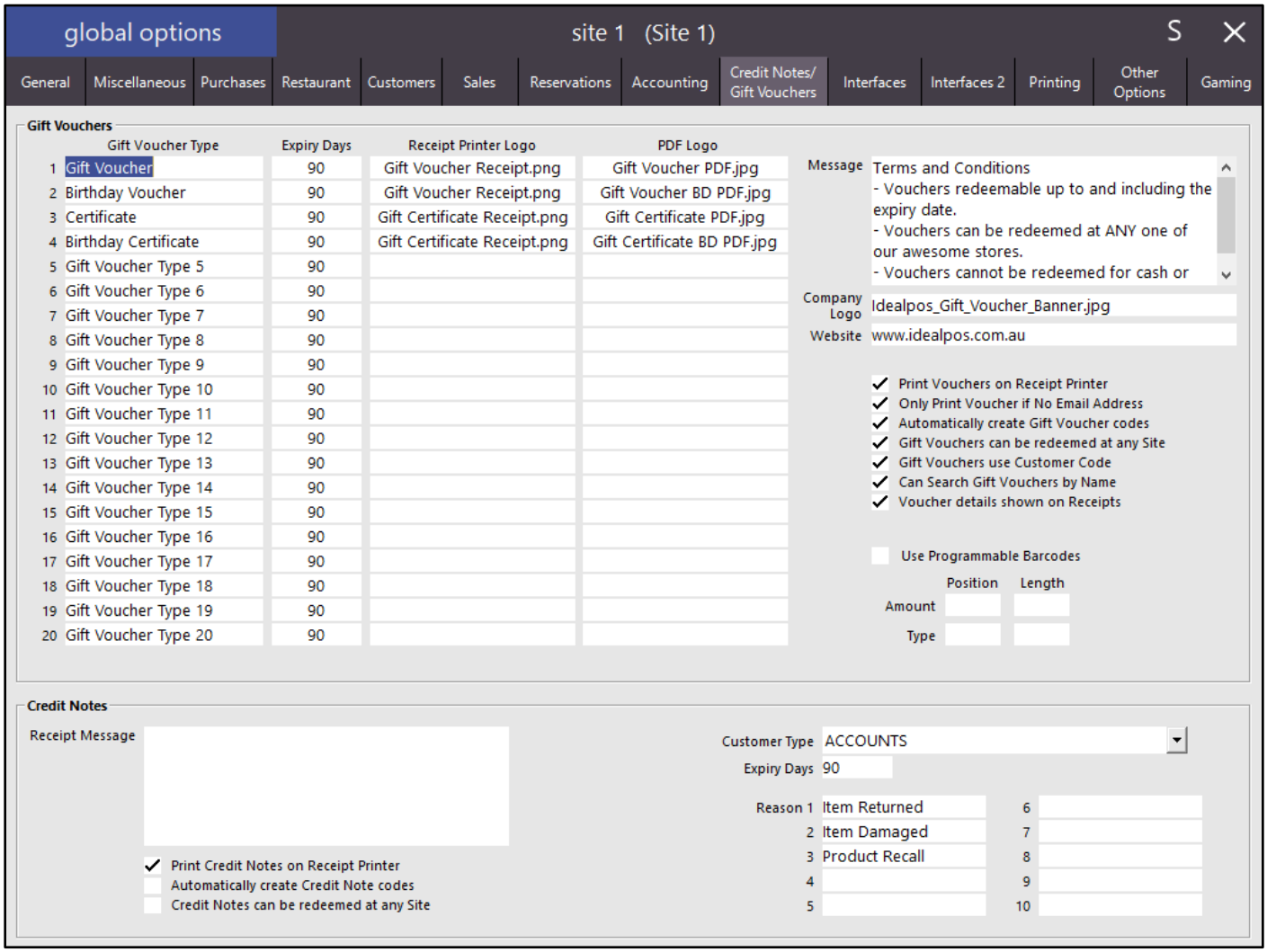
# idealpos7 Update History

## Gift Vouchers

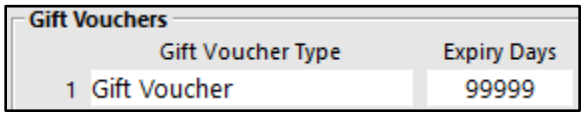
### Gift Vouchers will hide Expiry Date when Expiry Days 99999

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



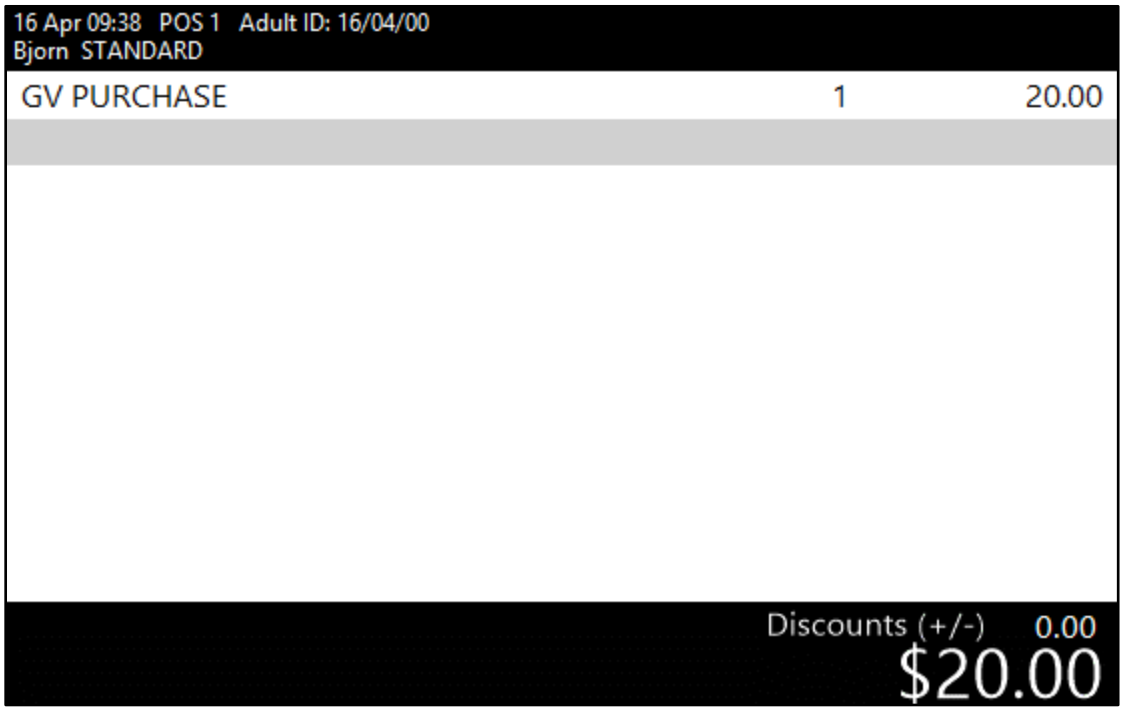

In the Expiry Days column, enter a value of 99999 to set that type of Gift Voucher to never expire.
By doing this, the Gift Voucher will print without an expiry date.




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

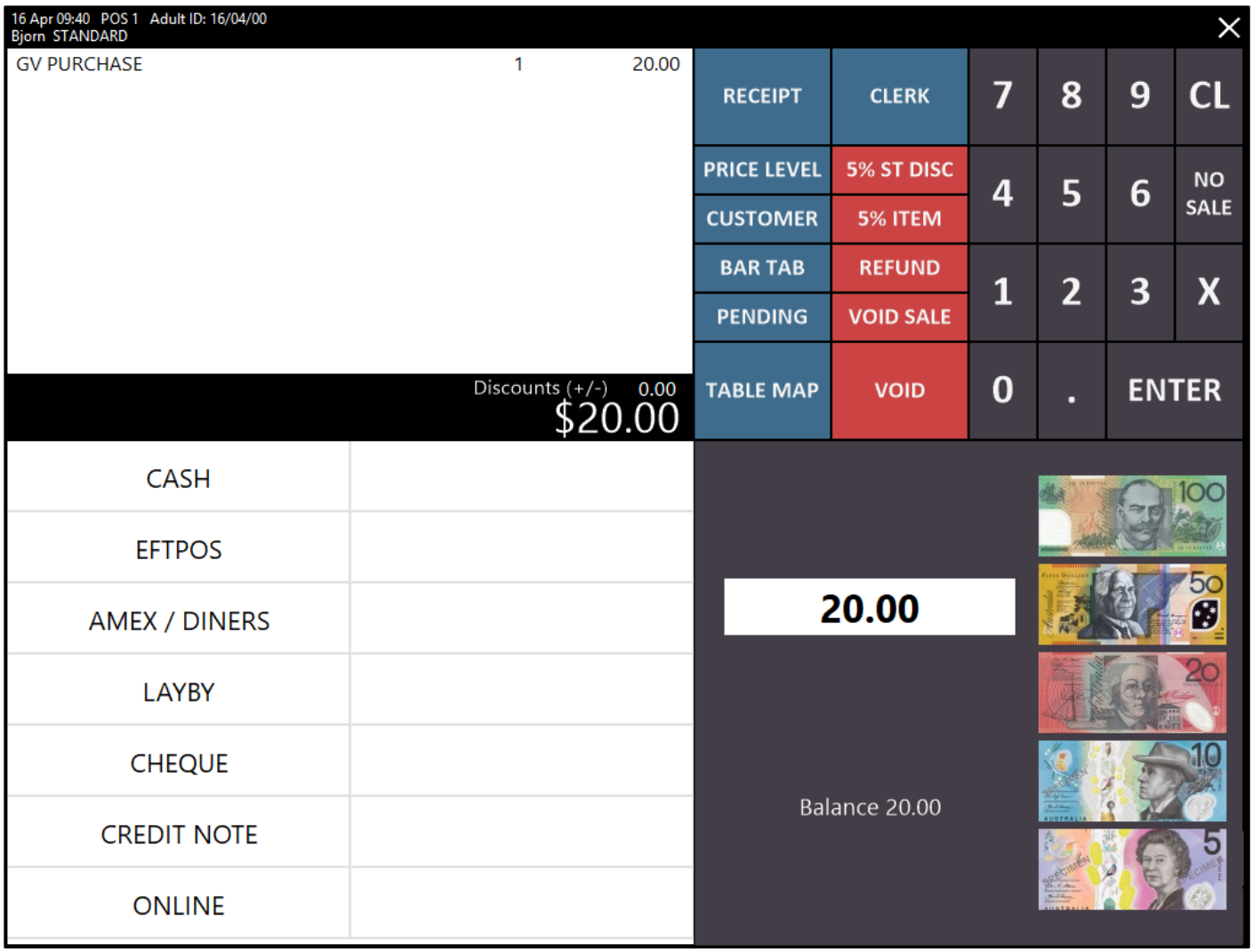
Then enter the Gift Voucher value and the Customer Name for who the Gift Voucher is for. If the Customer does not exist, leave the Customer Name field as blank and press the OK button.

The Gift Voucher will be added to the sale.



# idealpos7 Update History

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



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

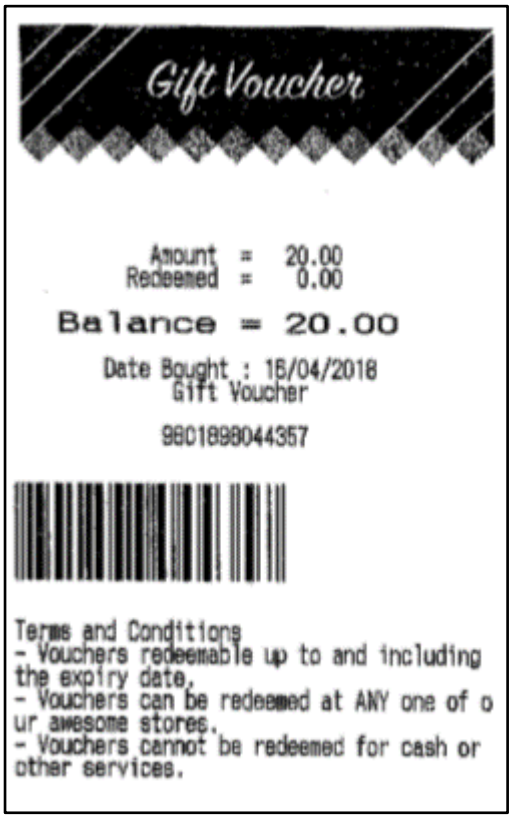
| | |
|---|---|
| GV PURCHASE | $20.00 |
| TOTAL | $20.00 |
| CASH | $20.00 |

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.

# Global Options

### Gaming Interface – Konami Gaming – Get Member by House Number

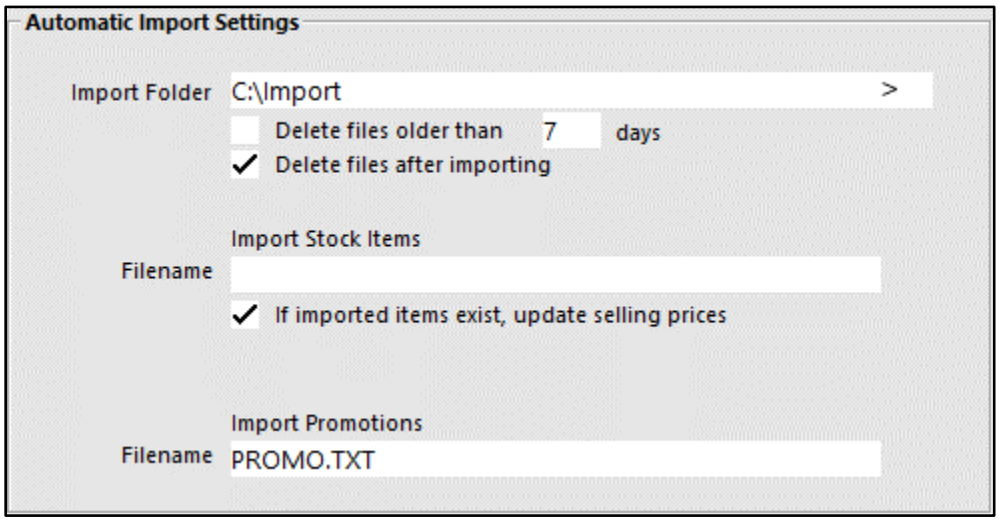
Idealpos previously looked up active members by sending a GMID number to the Konami Gaming System.
However, the GMID number was not known or easily remembered by staff at the venue.
The venue identifies machines by the House Number.
Therefore, Idealpos has been updated so that the House Number is sent 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




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 |

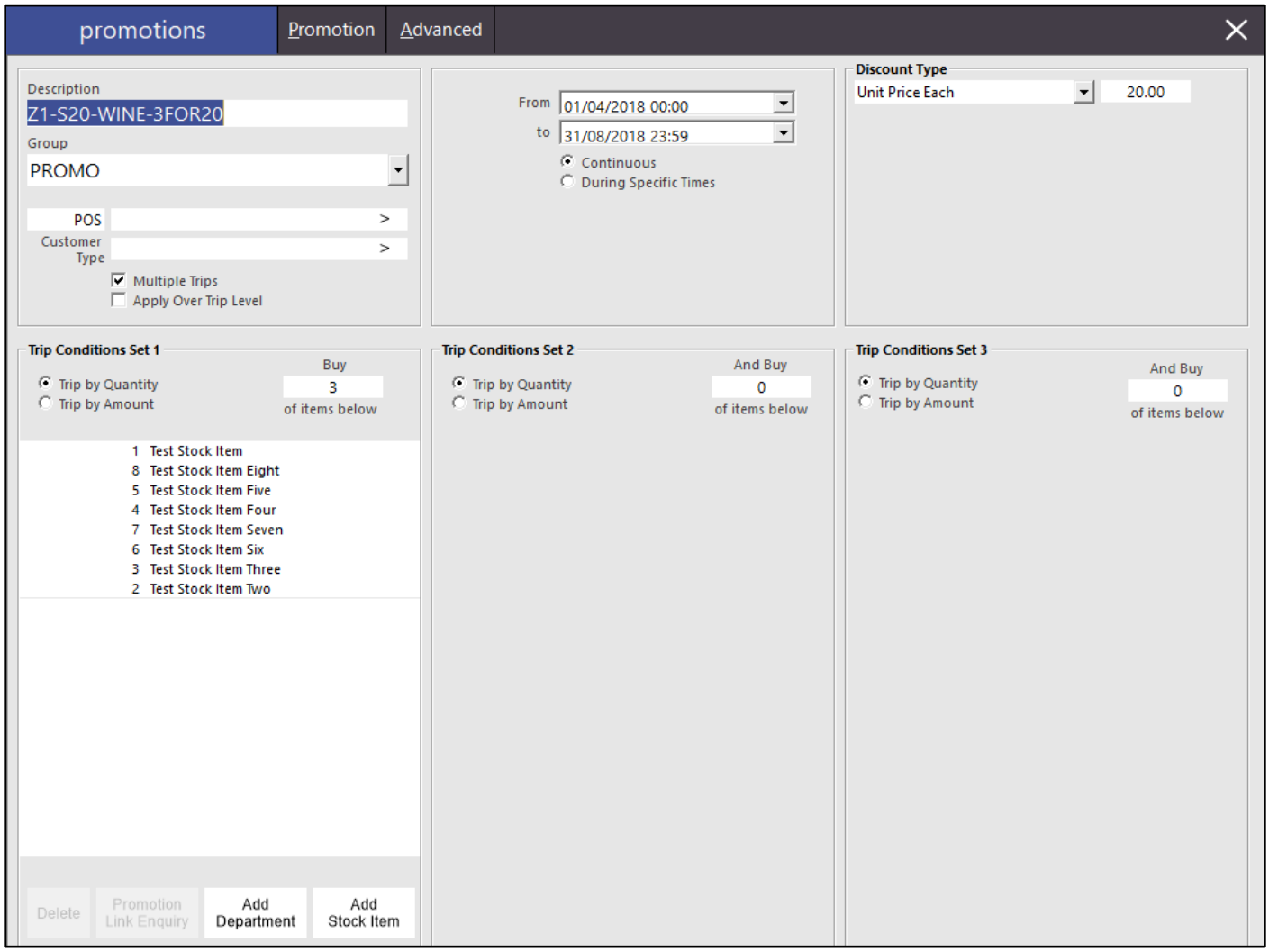
```
ZONE,DESCRIPTION,TRIP_QUANTITY,PROMO_PRICE,START_DATE,END_DATE,ITEM_CODE
1,Z1-S20-WINE-3FOR20,3,20,01-Apr-18,31-Aug-18,1
1,Z1-S20-WINE-3FOR20,3,20,01-Apr-18,31-Aug-18,2
1,Z1-S20-WINE-3FOR20,3,20,01-Apr-18,31-Aug-18,3
1,Z1-S20-WINE-3FOR20,3,20,01-Apr-18,31-Aug-18,4
1,Z1-S20-WINE-3FOR20,2,20,01-Apr-18,31-Aug-18,5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



# idealpos7 Update History

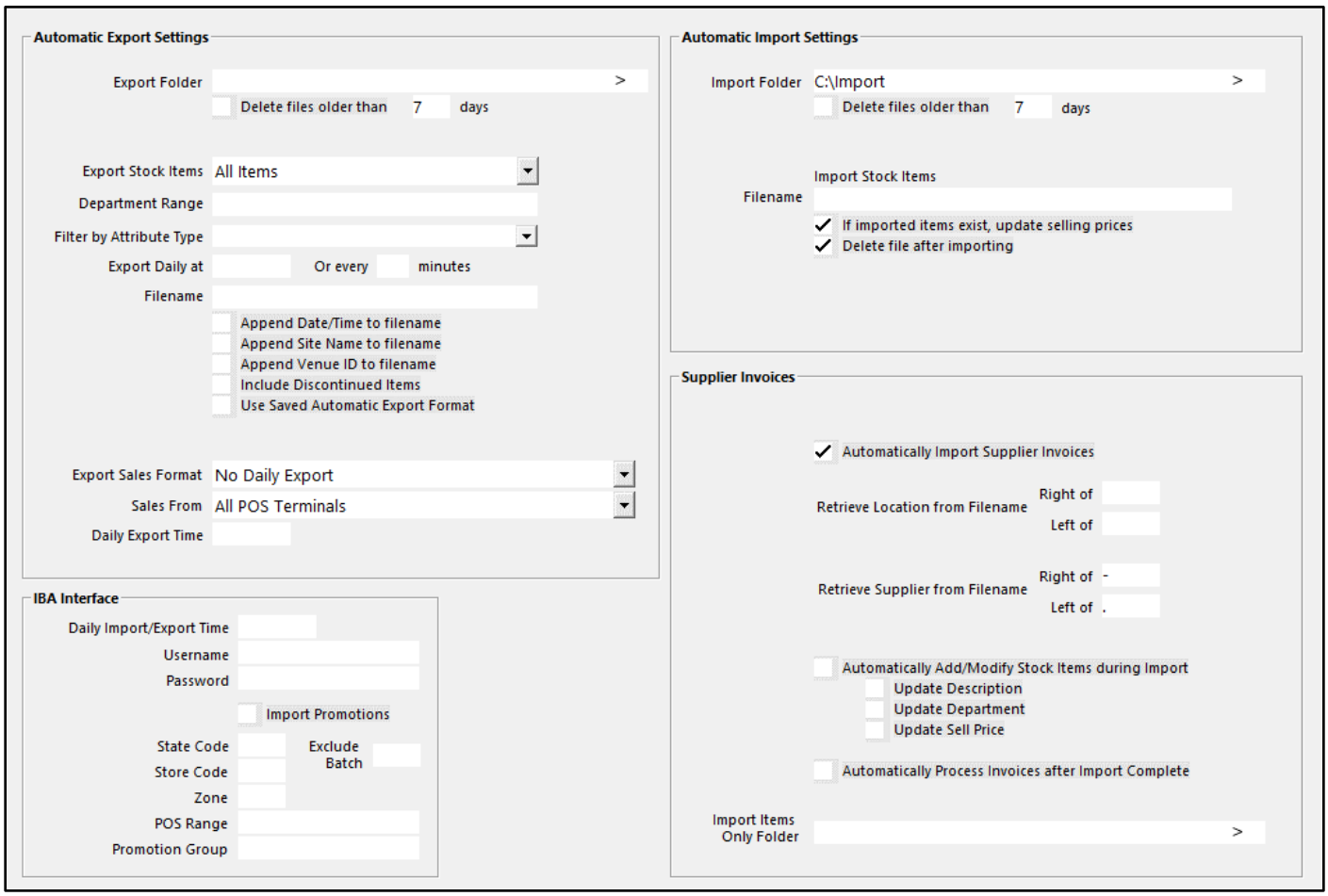
## Auto Import Supplier Invoices – Can find Supplier by Code

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.

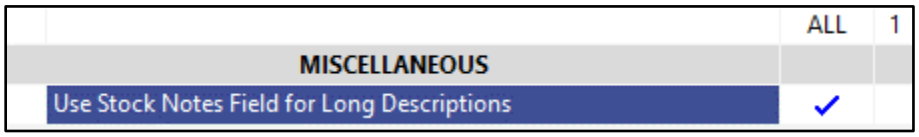


# Invoices

## 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.

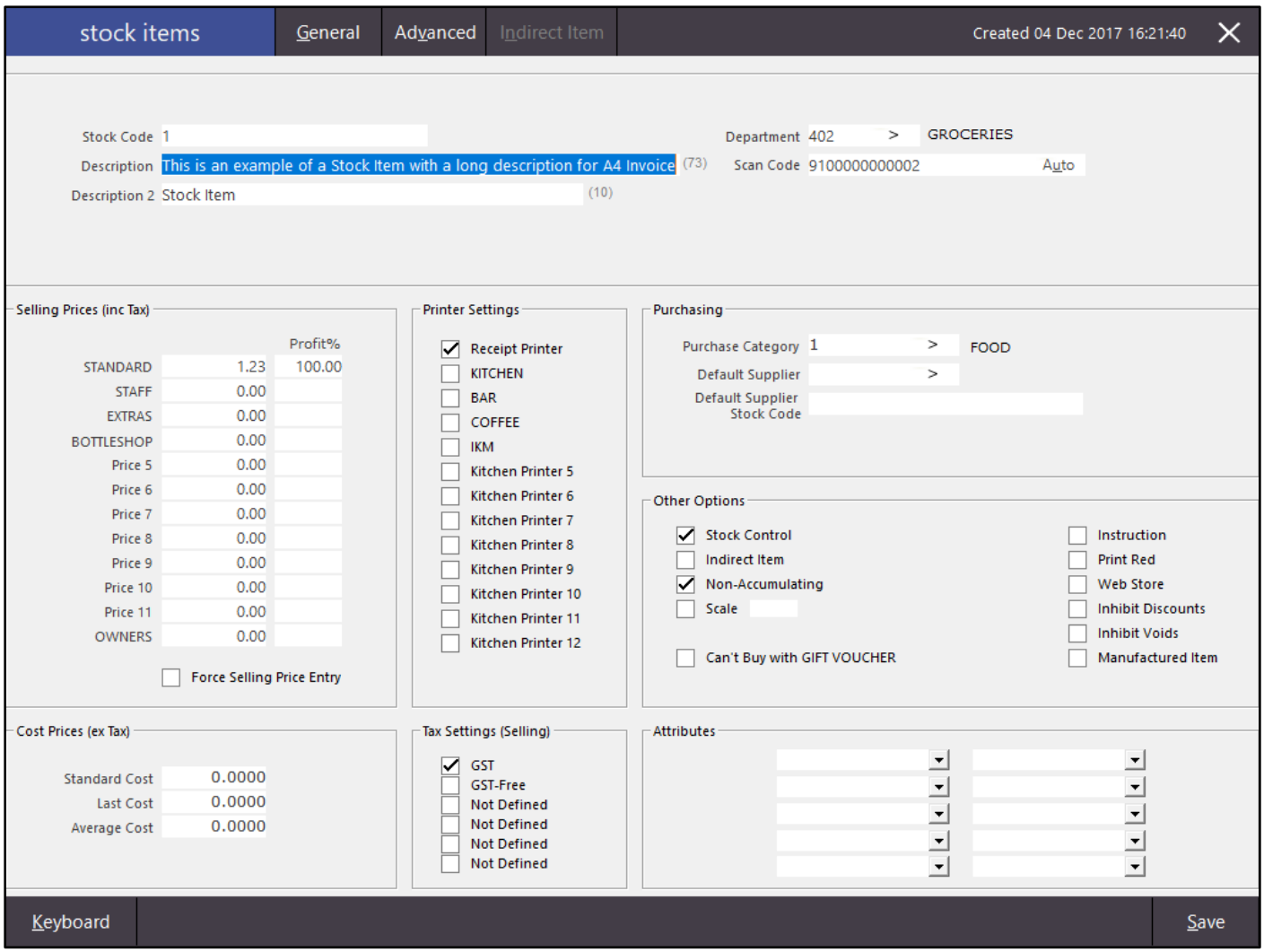
Go to Setup > Yes/No Options > Miscellaneous > Enable: Use Stock Notes Field for Long Descriptions




**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.**

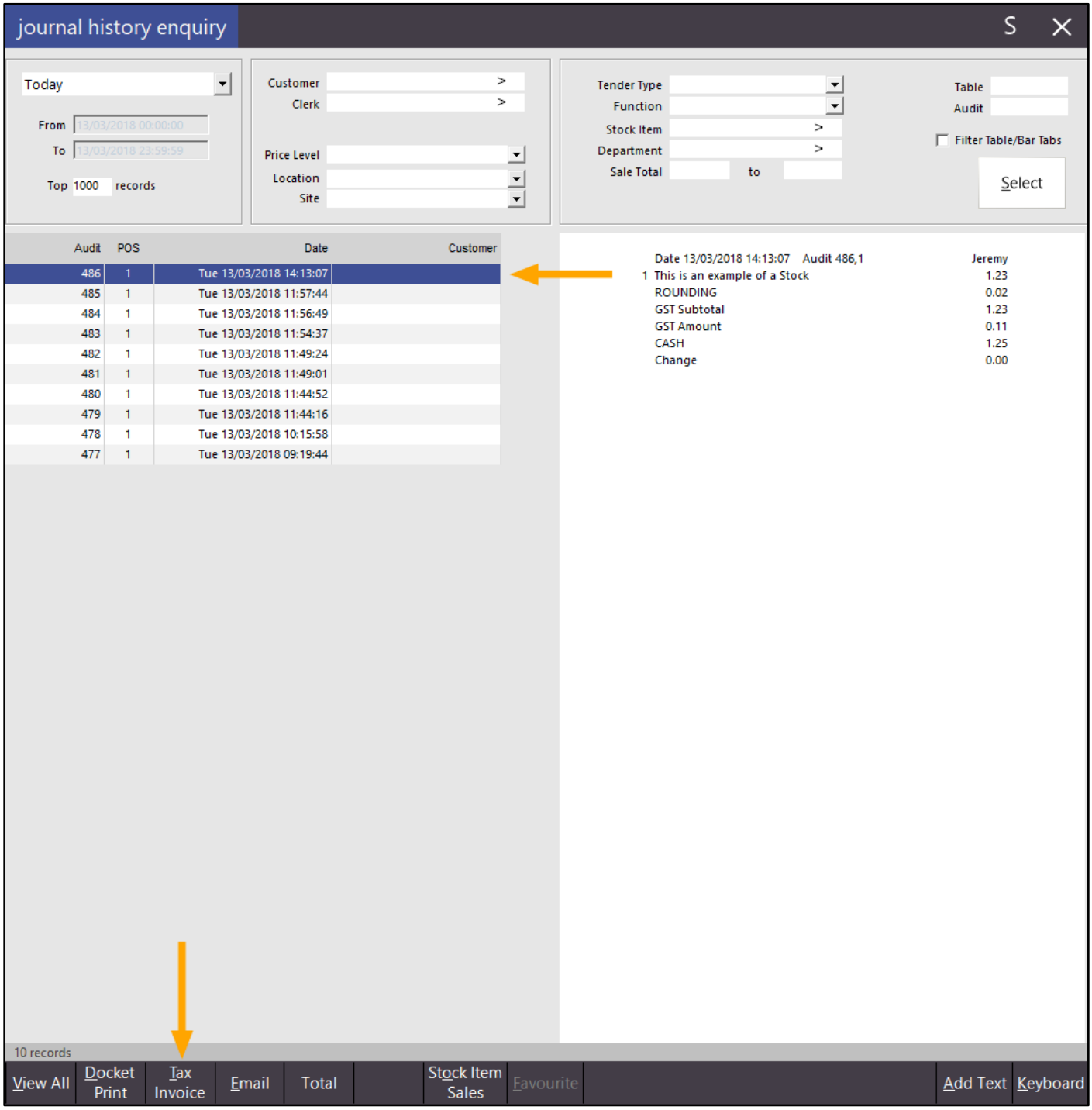
After enabling the above Yes/No option, a long Stock Item Description can be entered against the Stock Item.

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

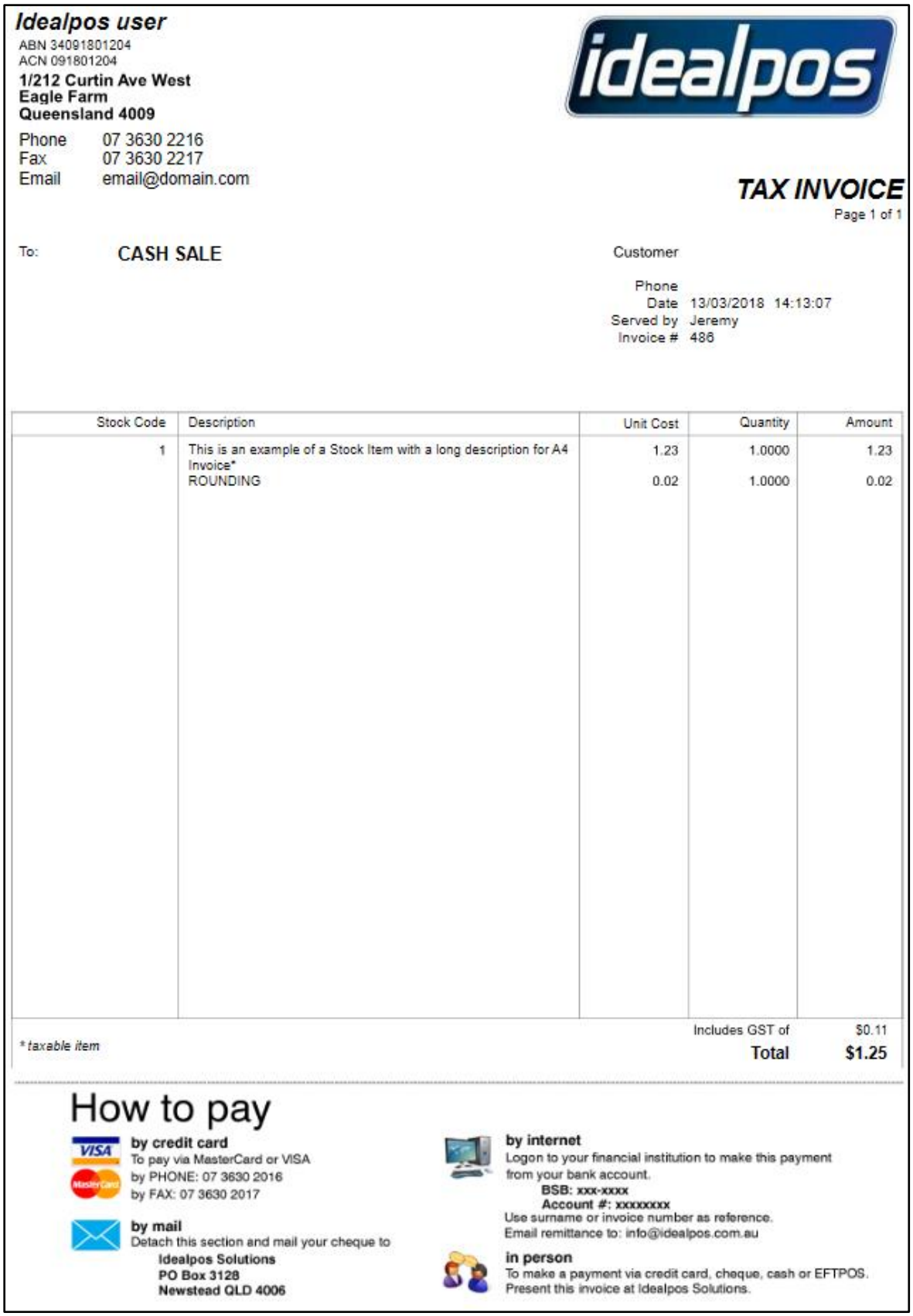



Open the POS screen and sell the Stock Item containing a long description in a Sale.
After the sale has been finalised, close the POS screen and go to:
Enquiry > Journal History > Select the Journal from the list > Press the Tax Invoice button

# idealpos7 Update History



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 |

** taxable item*

Includes GST of $0.11
**Total $1.25**

# How to pay

**by credit card**
To pay via MasterCard or VISA
by PHONE: 07 3630 2016
by FAX: 07 3630 2017

**by mail**
Detach this section and mail your cheque to
**Idealpos Solutions**
**PO Box 3128**
**Newstead QLD 4006**

**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

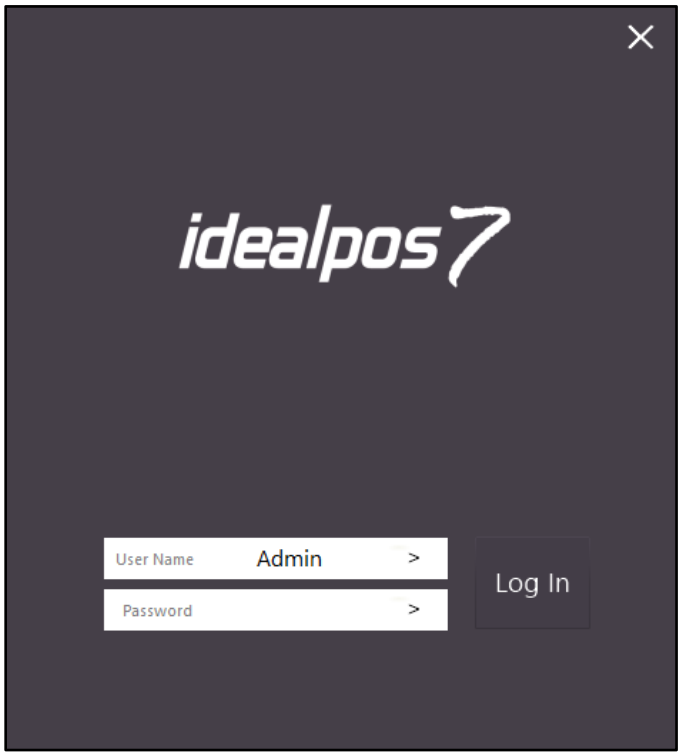
**in person**
To make a payment via credit card, cheque, cash or EFTPOS.
Present this invoice at Idealpos Solutions.

# 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



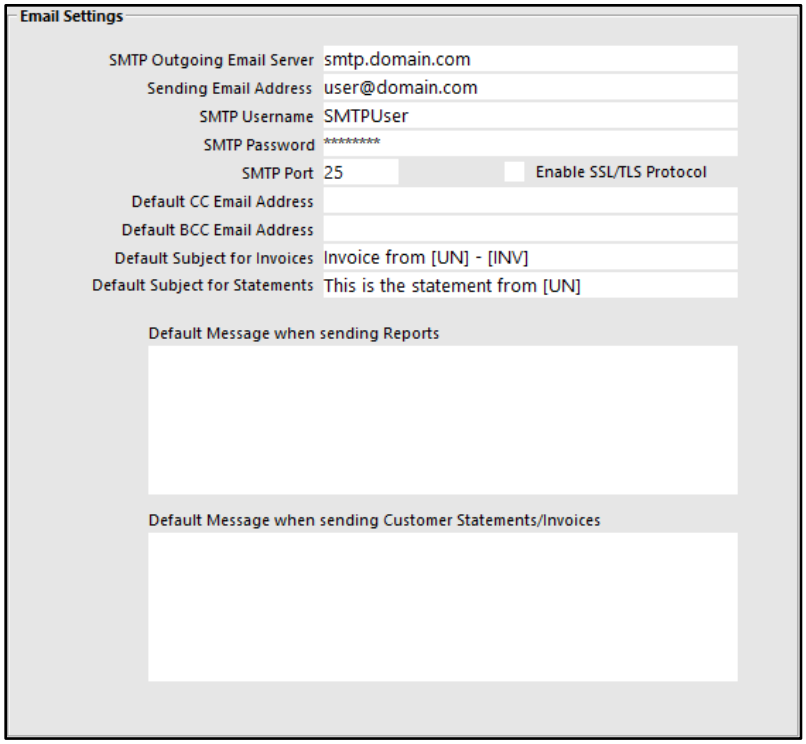

The Backoffice screen is now hidden and only the Idealpos 7 logon screen is displayed on the screen.

# 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.

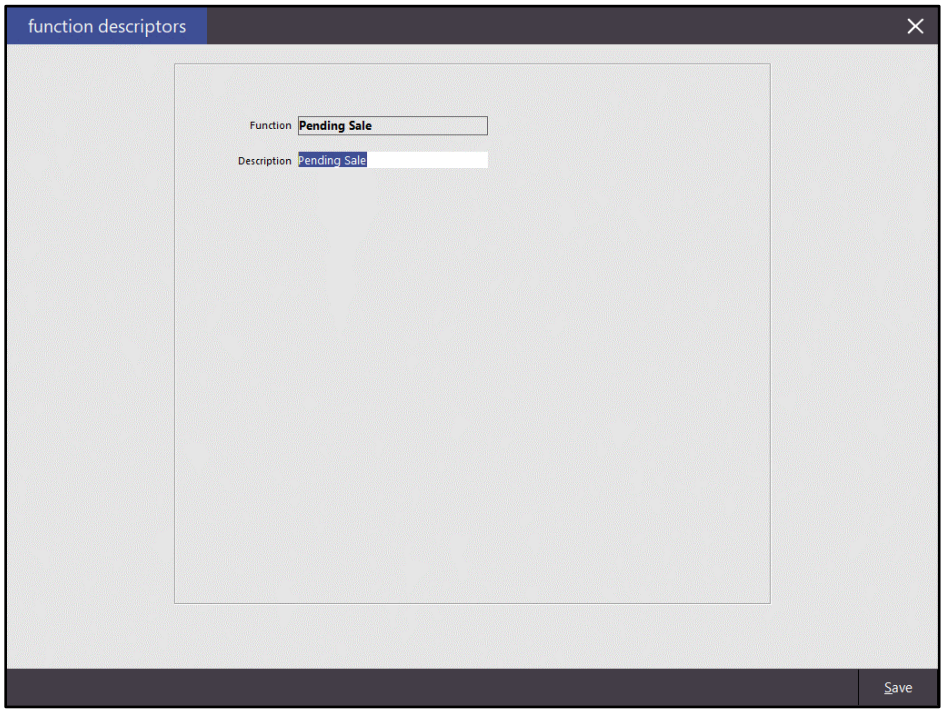
In order to use the Email Pending Sales feature, you will need to ensure that the Outgoing Email Server is configured in Idealpos.
Go to Setup > Global Options > Other Options > Email Settings




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



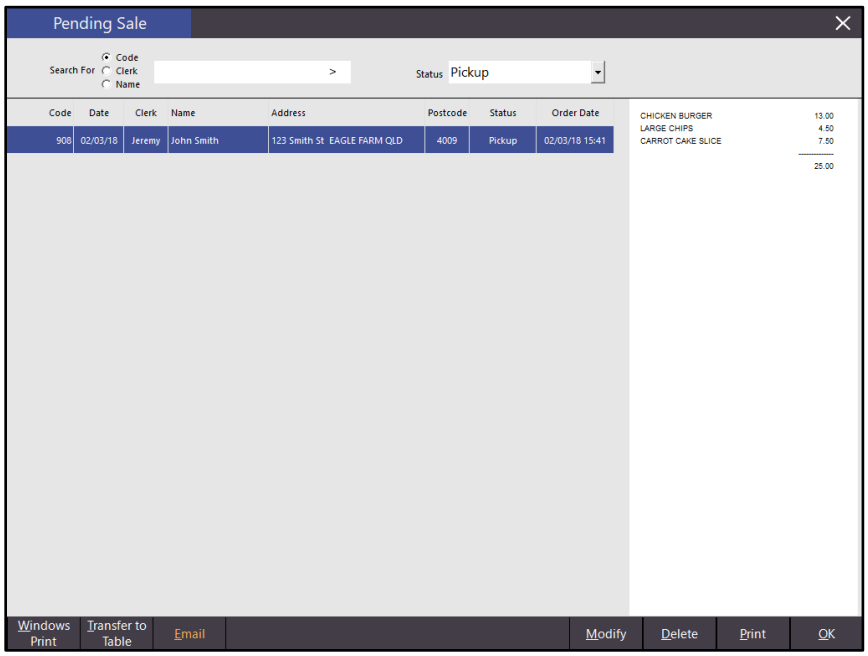

Enter your preferred Description for Pending Sales into the Description field, then press the 'Save' button.

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.

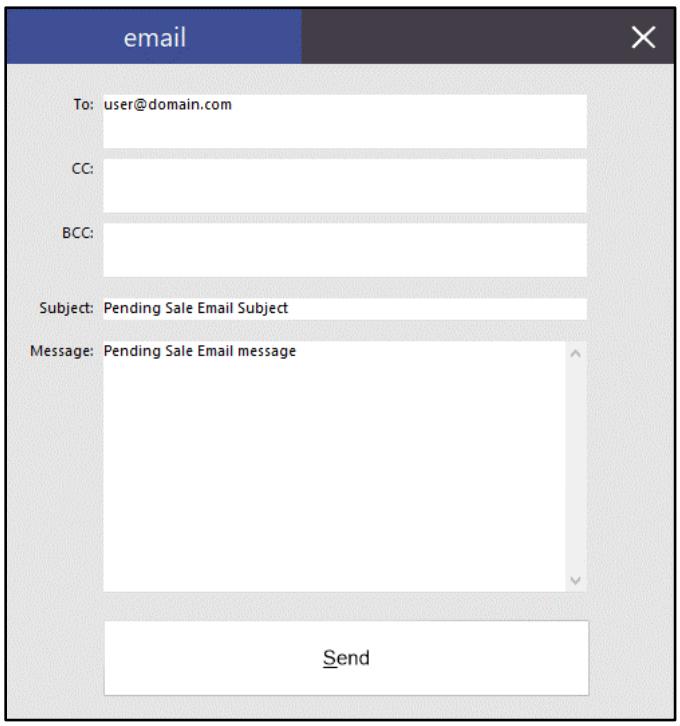
Press the Save button to Save the Pending Sale

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.



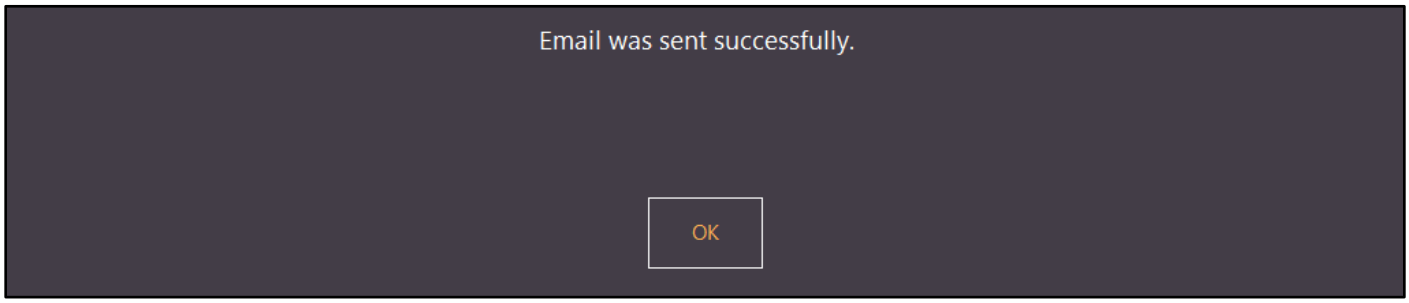

Press the Email button to Email the Pending Sale.

Fill in the details for the email.




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***

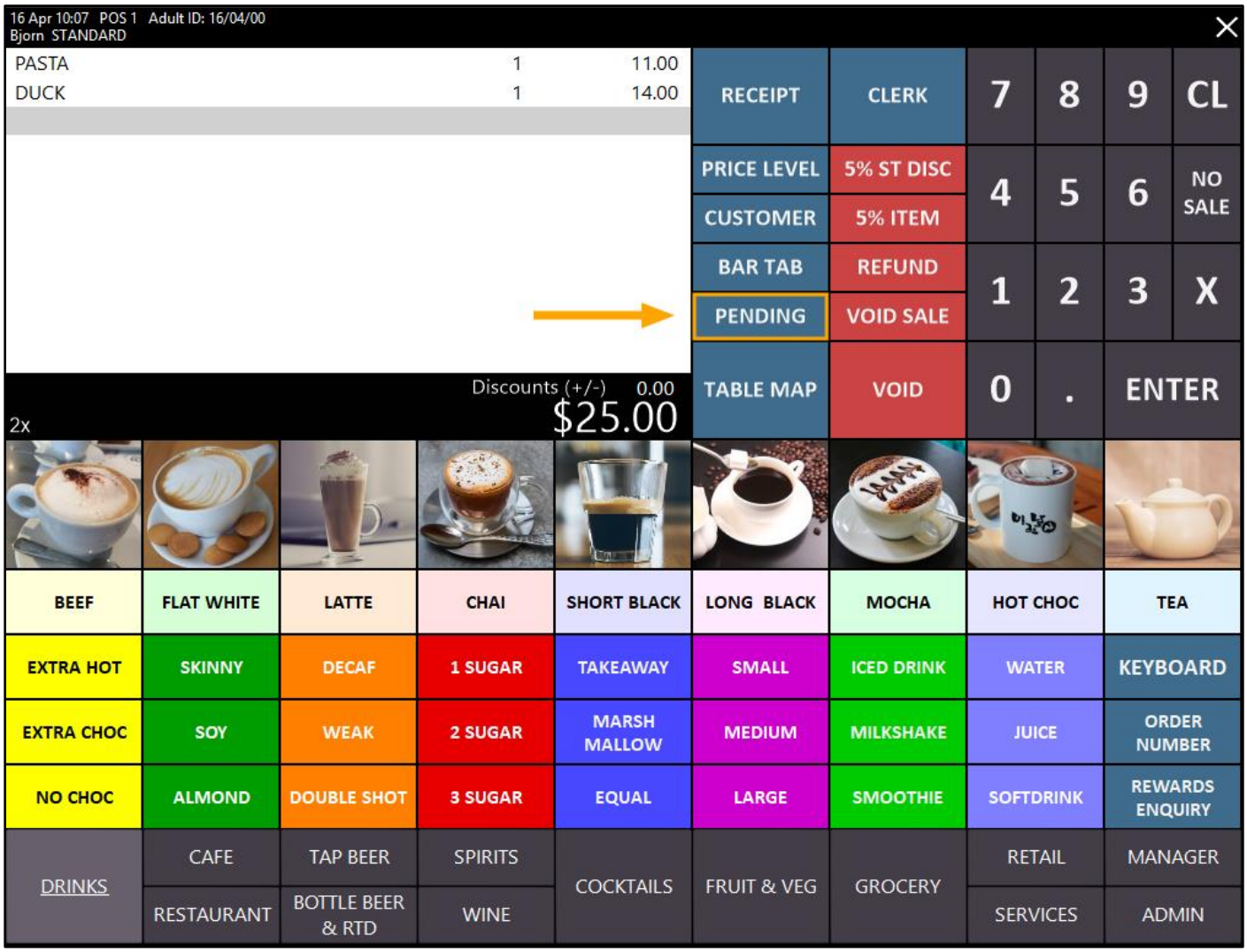
** indicates taxable supply*

# 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



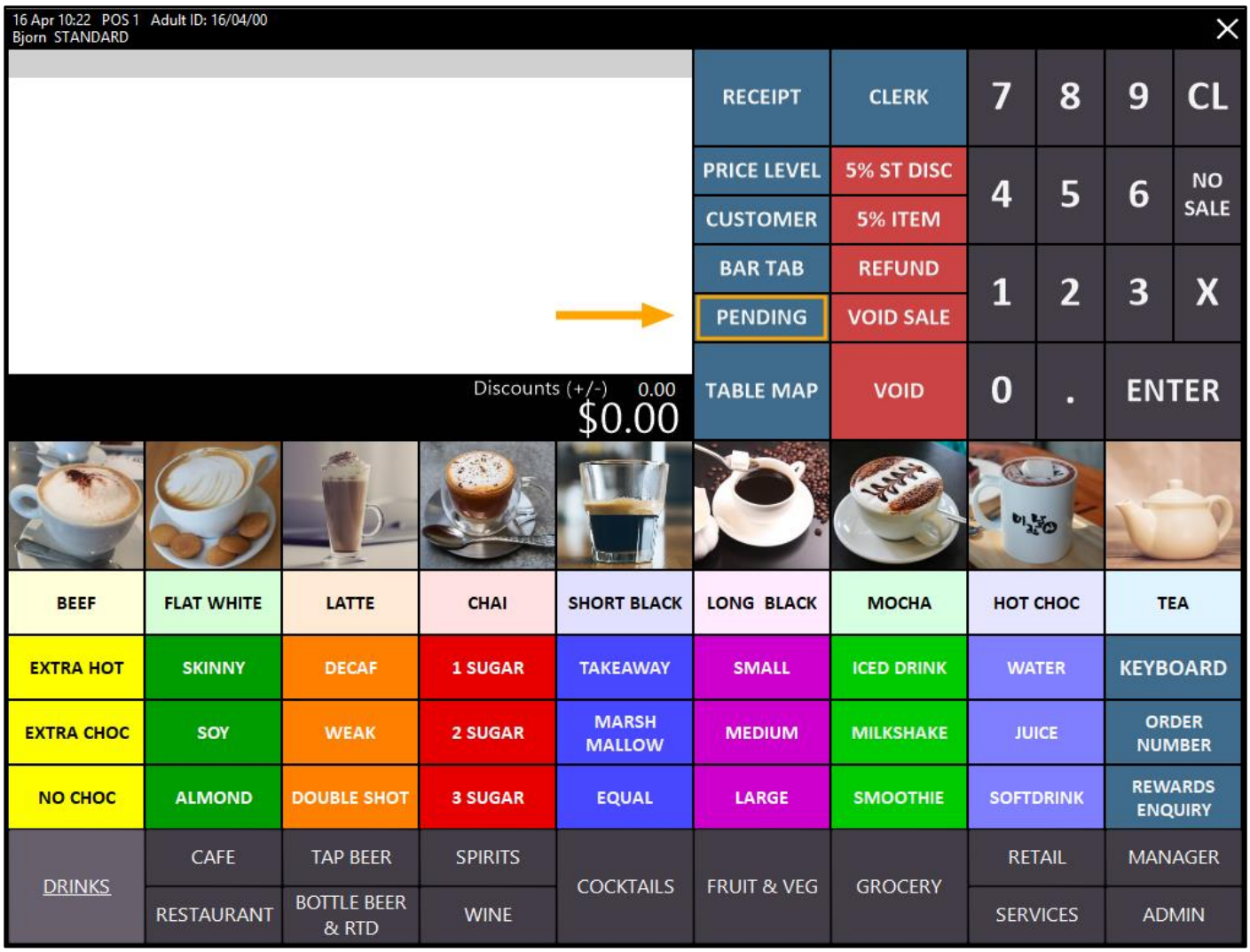

The 'Save Pending Sale' screen will appear.

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.

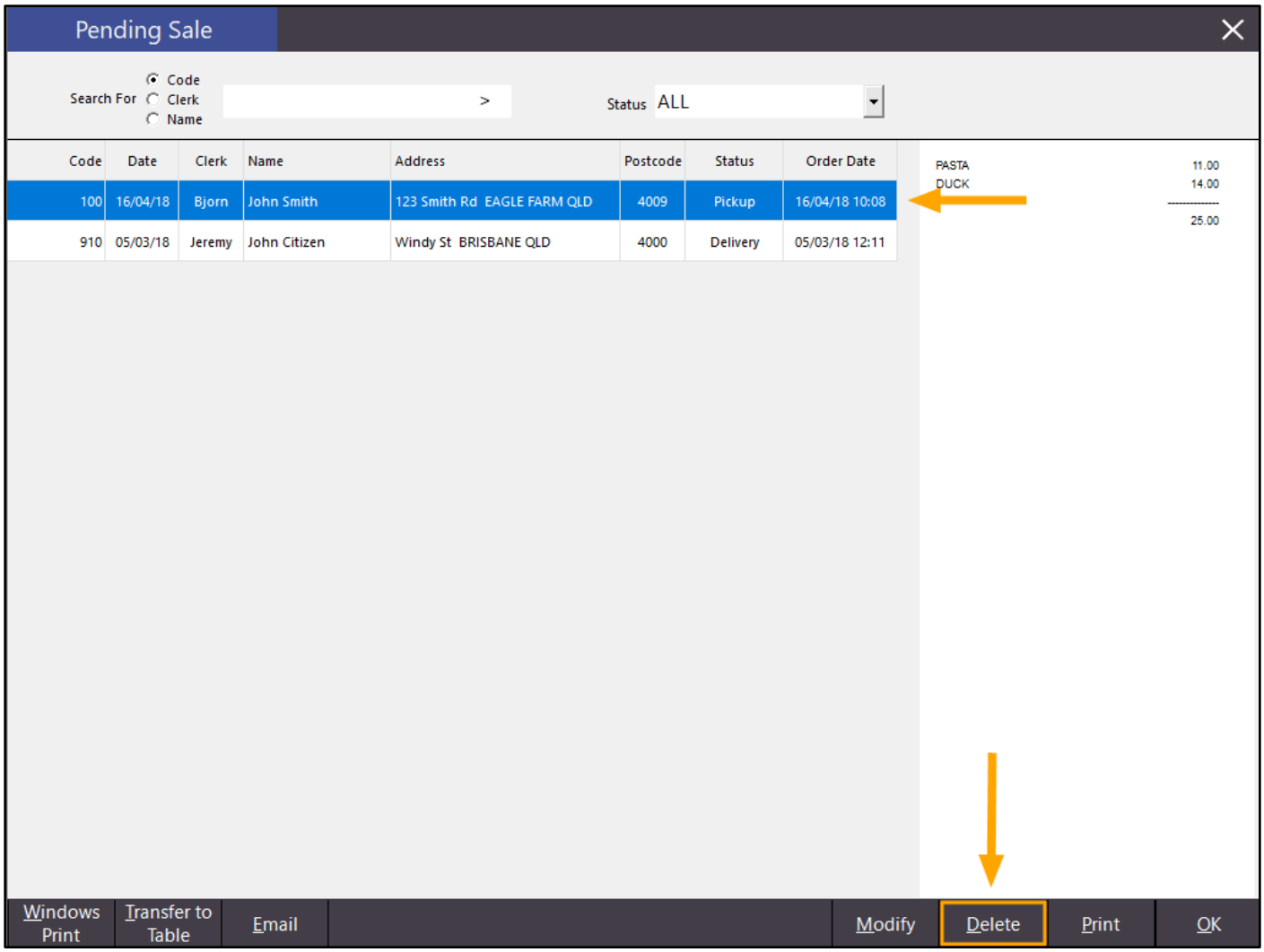
The Pending Sale has now been saved.

# idealpos7 Update History

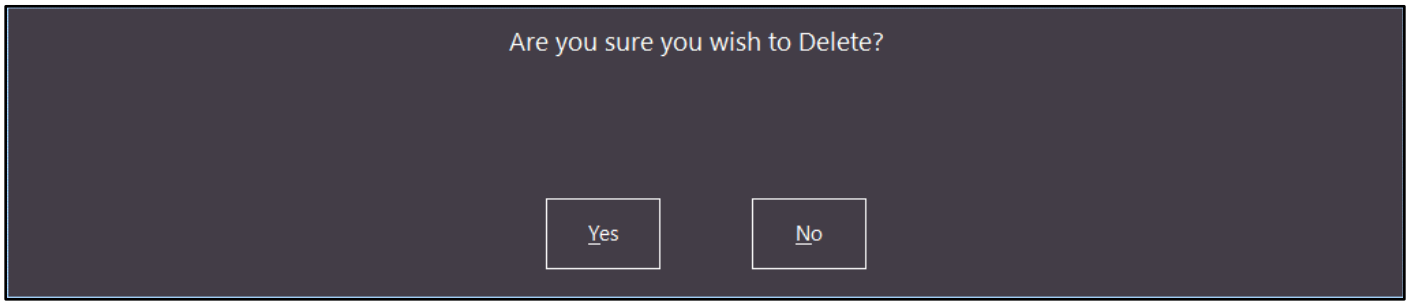
Now press the 'Pending' button to open the Pending Sales screen



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

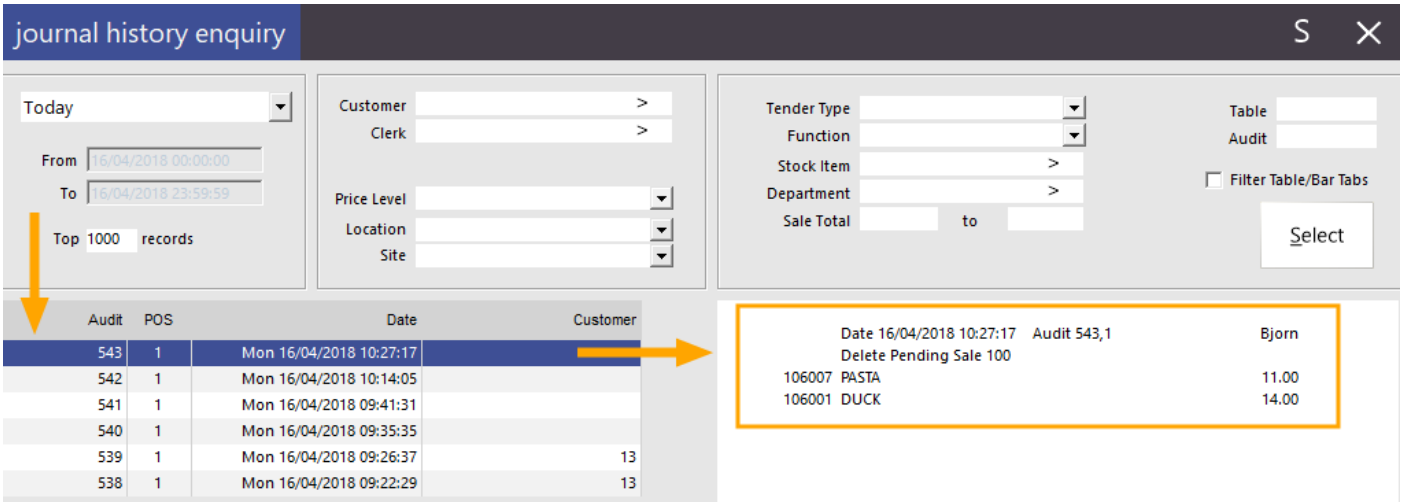



Confirm the deletion by pressing the 'Yes' button

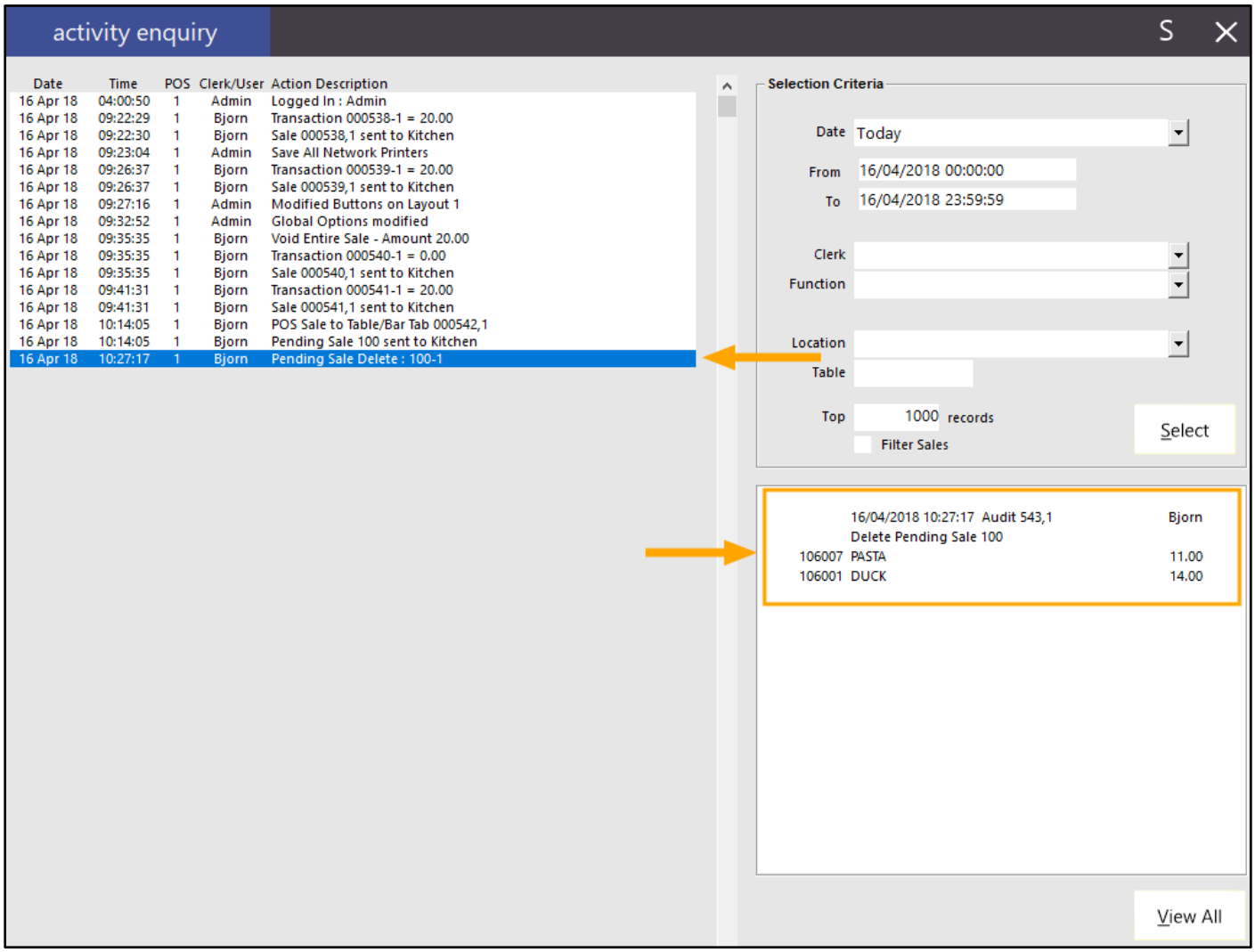


# idealpos7 Update History

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




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

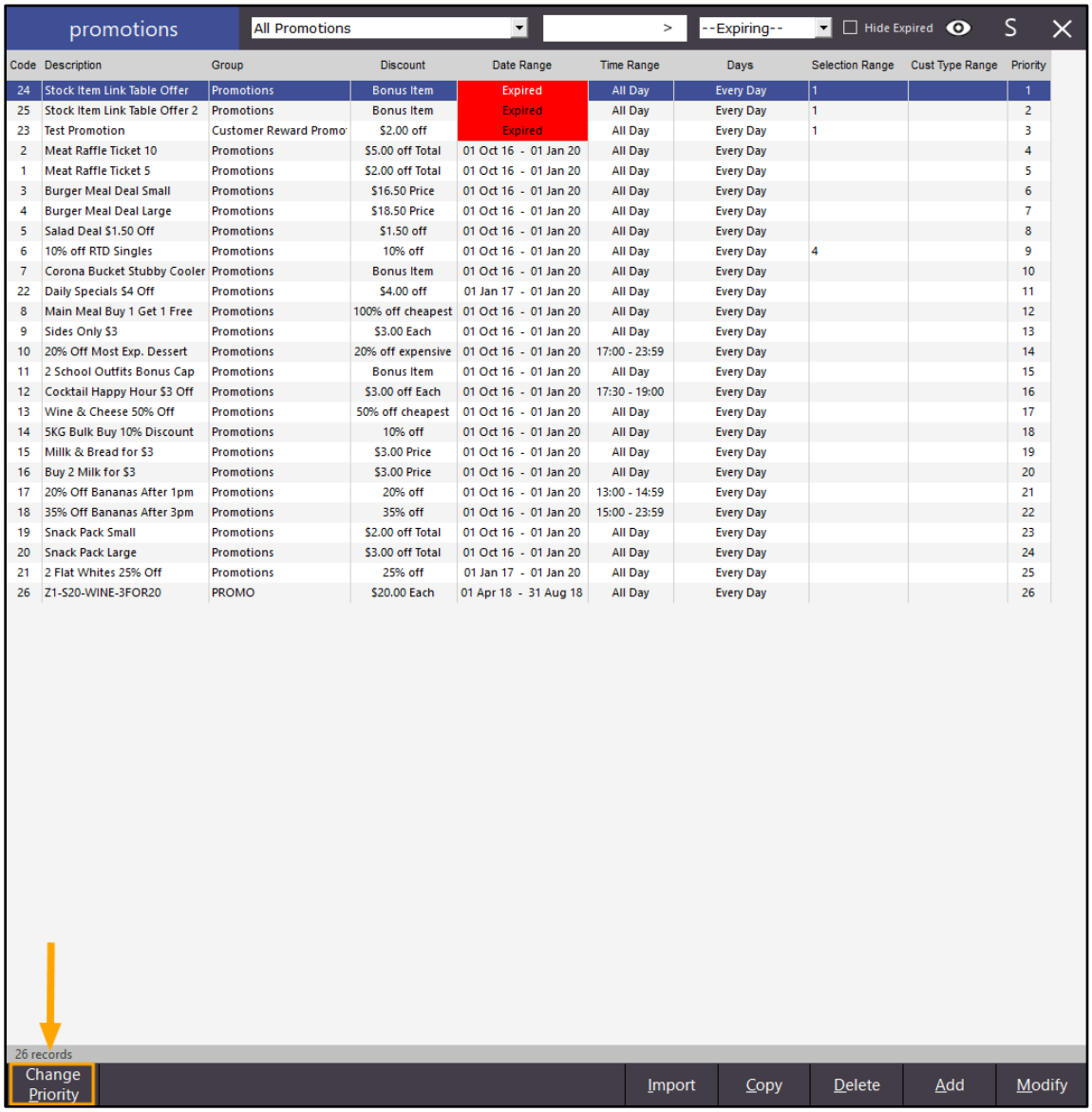


# Promotions

## 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.

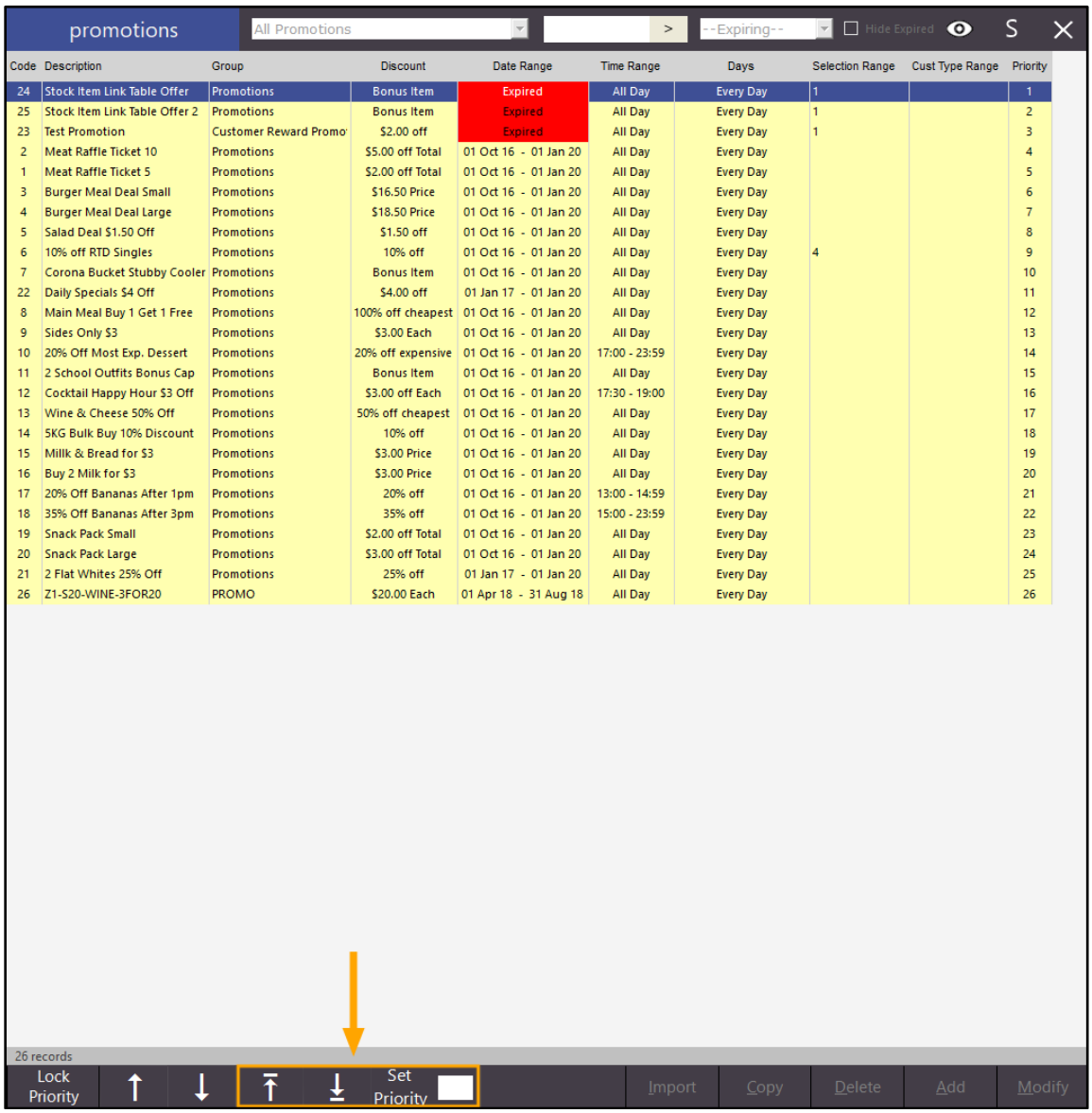
Go to File > Sales > Promotions > Promotions > Change Priority




| 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 |

# 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 |

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

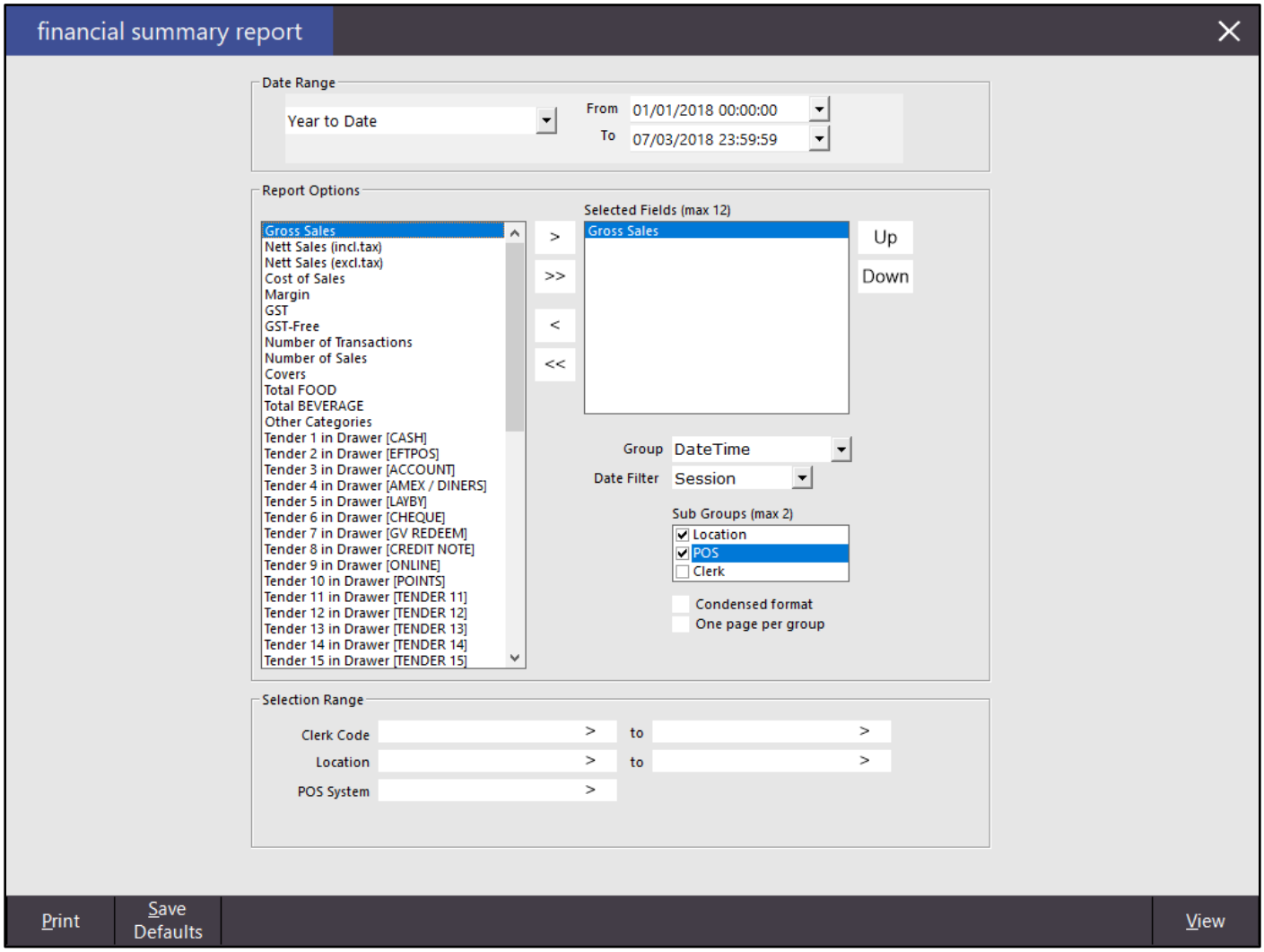
Idealpos has been updated to show the Tax Amount using the Currency Format that has been configured in Windows. There is no configuration required to enable this function; it is enabled automatically when upgrading to this build of Idealpos.

# 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



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*

01 Jan 2018 00:00:00 to 07 Mar 2018 23:59:59
Group by: Session

Printed 07/03/2018 13:36:43
Page 1 of 1

| | | 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** |
| | | 169.00 |

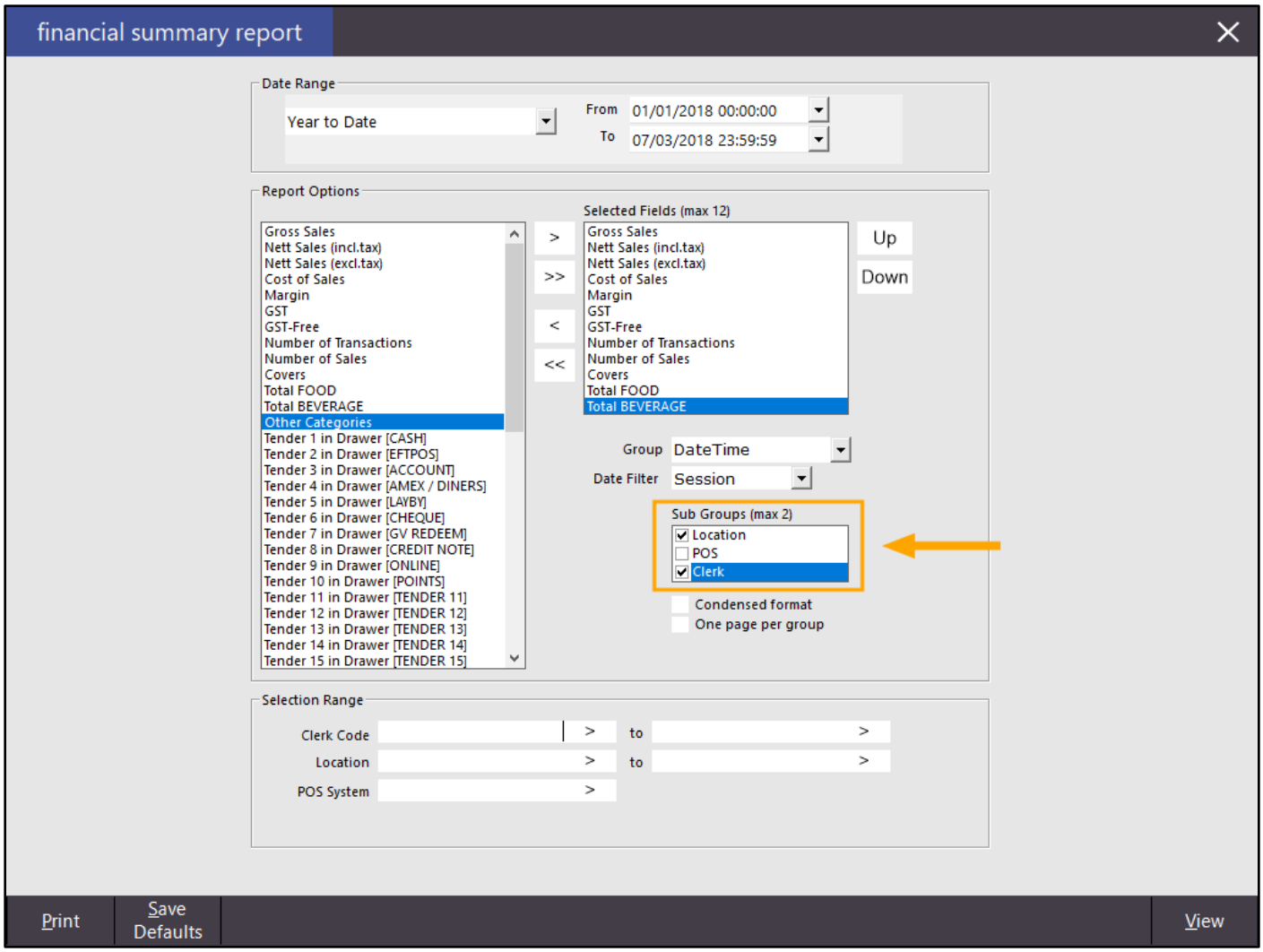
# idealpos7 Update History

**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

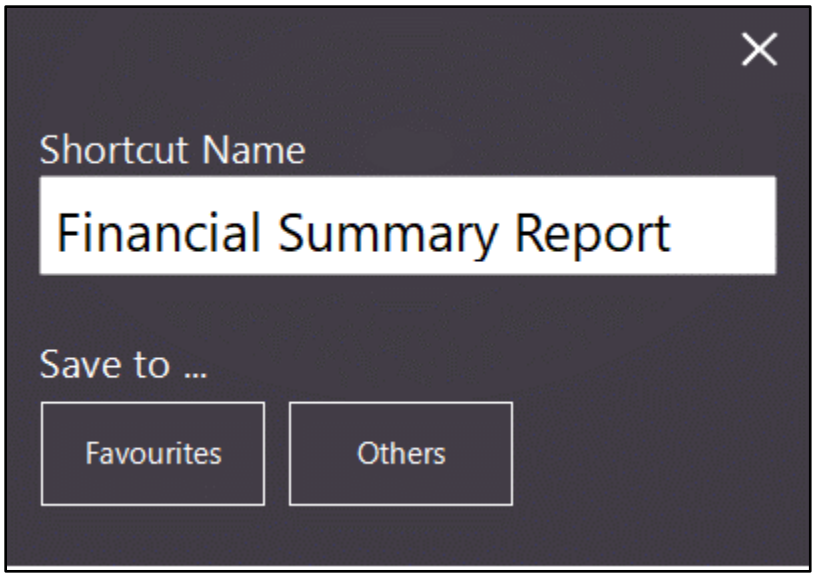
Select the criteria that you want included in your Shortcut Report. The Dynamic Grouping selections that are now supported in the Shortcut Report are illustrated below.



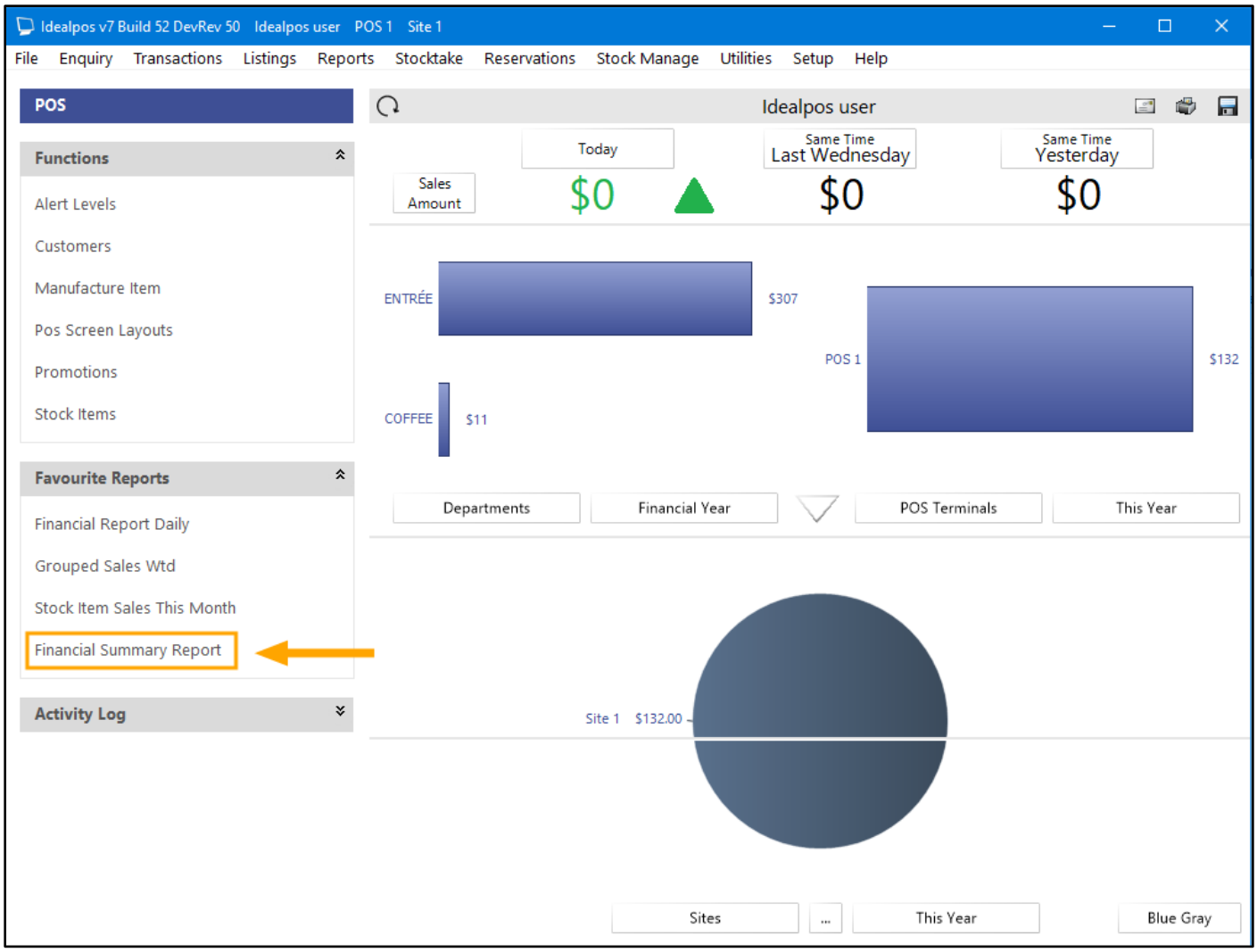

Press the 'View' button to run the report.

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.



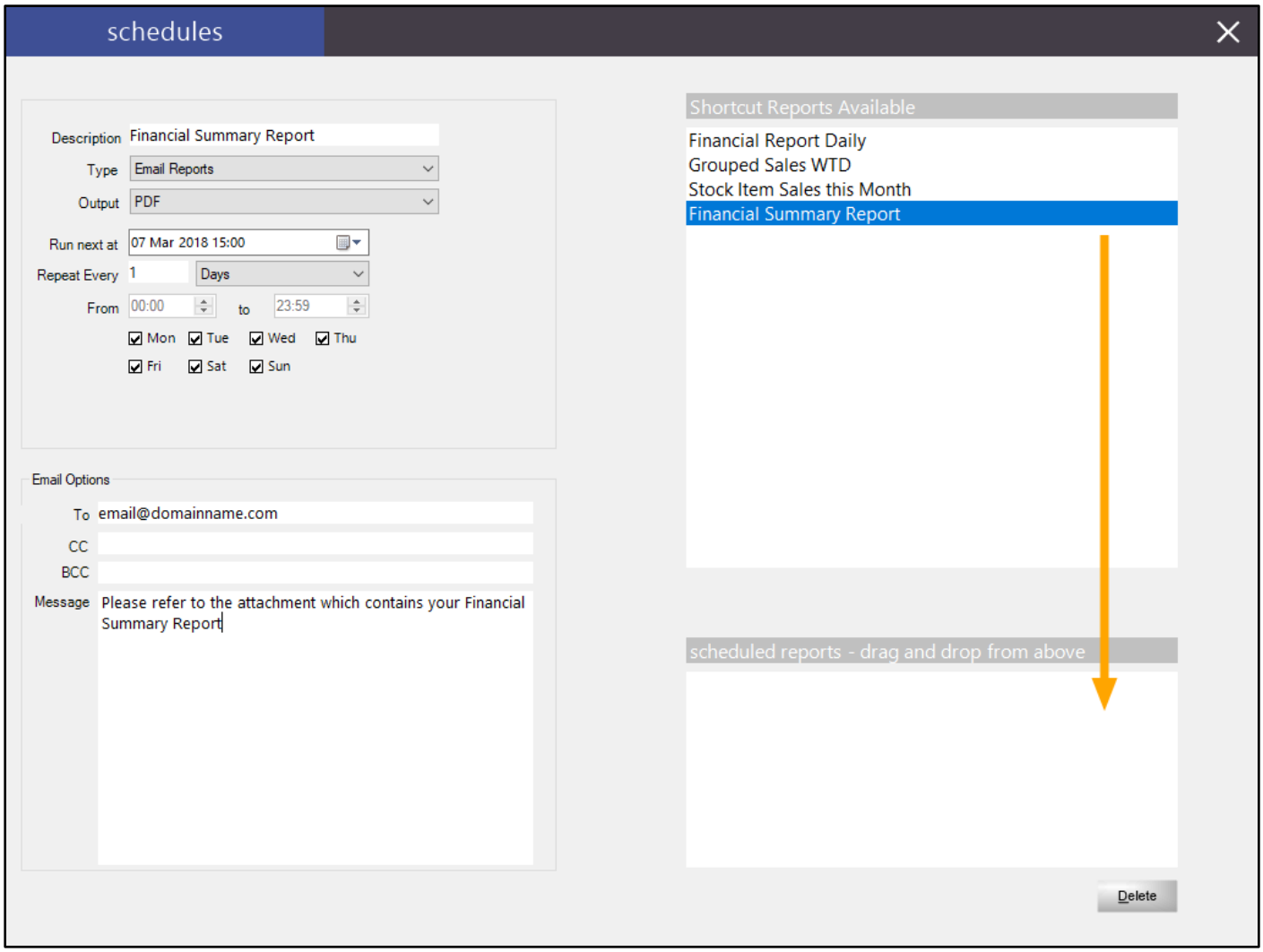

The report can now be run anytime by selecting it from the Favourite Reports section which is located on the left-hand side of the Dashboard on the main Idealpos window.



# idealpos7 Update History

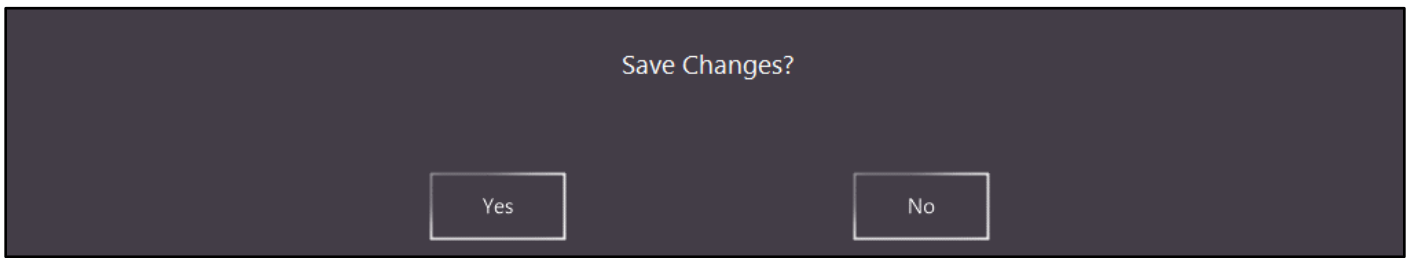
The Shortcut Report can also be scheduled to run.
Note that before setting up Schedules, ensure that your Email Settings have been configured in Idealpos
Go to Setup > Schedules > Add

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.




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.



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)

Printed 07/03/2018 13:51:25

Page 1 of 1

***Financial Summary Report***

01 Jan 2018 00:00:00 to 07 Mar 2018 23:59:59

Group by: Session

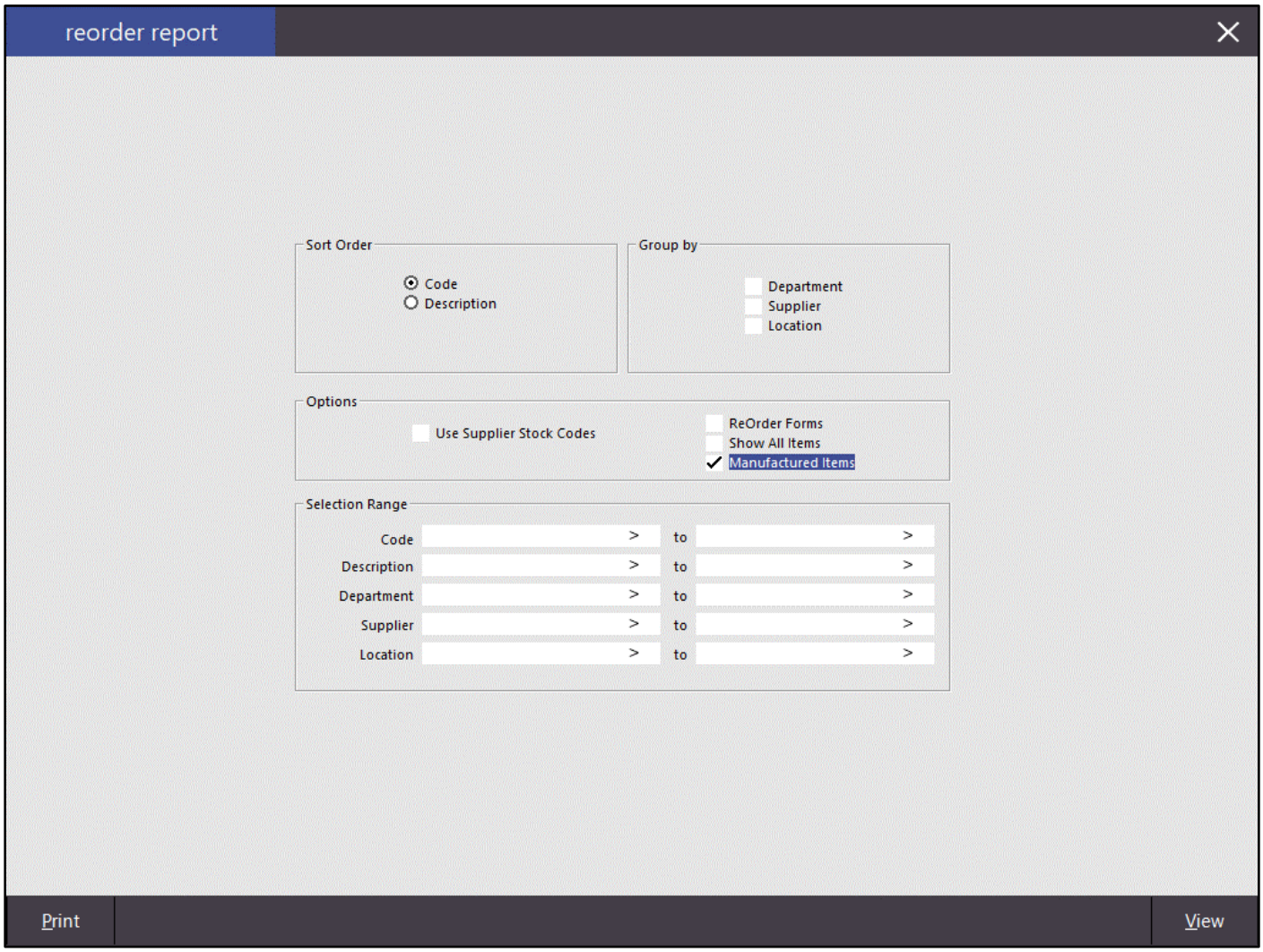
| | | Gross Sales | Nett Sales (incl.tax) | Nett Sales (excl.tax) | Cost of Sales | Margin | GST | GST-Free | Number of Transactio | Number of Sales | Covers | Total FOOD | Total BEVERAGE |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **(05:00 - 10:00) Brekky** | | | | | | | | | | | | | |
| 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




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

Idealpos user (pos1) — Printed 13/03/2018 11:19:10 — Page 1 of 1

**Re-Order Report**

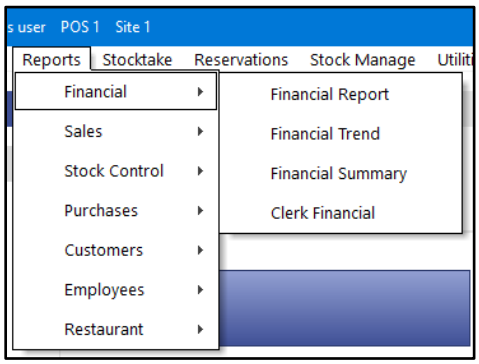
Manufactured Items

| StockCode | Description | Stk Level | Recomm. Level | Reorder Level | Reorder Qty | Cost |
|---|---|---|---|---|---|---|
| 126019 | MUD CAKE | 7.7000 | 10 | 8 | 3 | $13.77 |
| | | | | | | 13.77 |

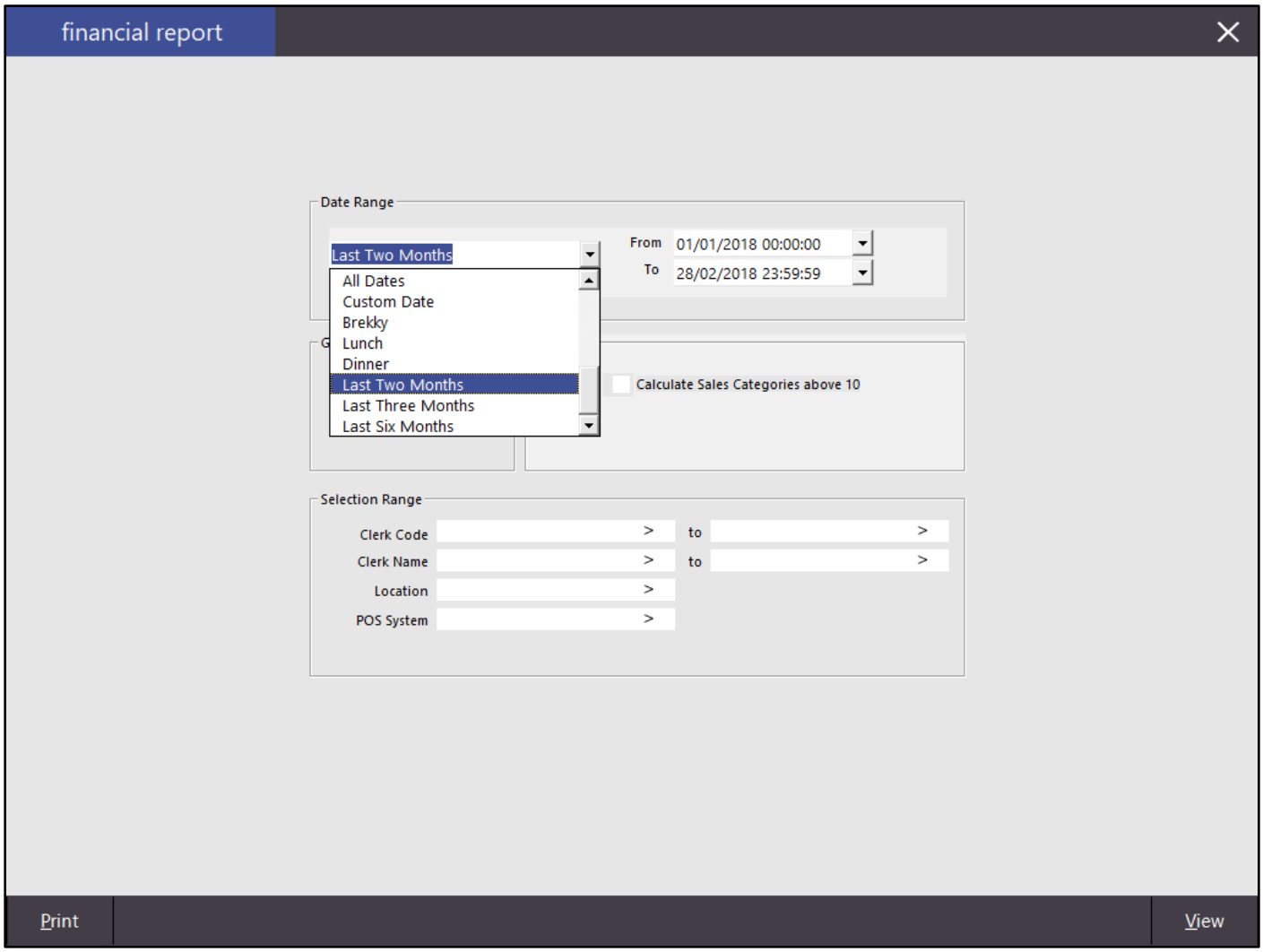
## Reports Date Selection drop-down list includes last 2, 3 and 6 months

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

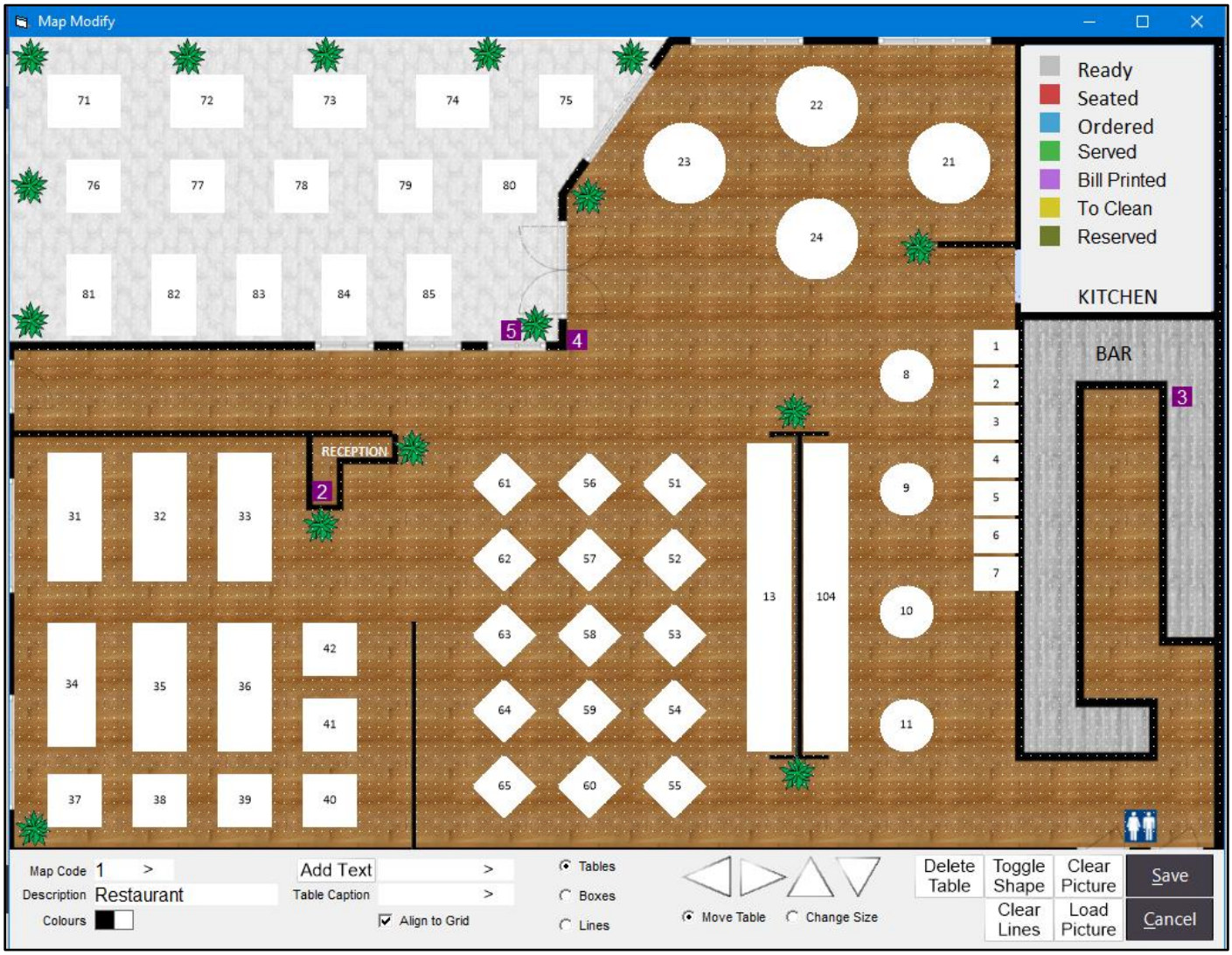


# Restaurant & Table Map

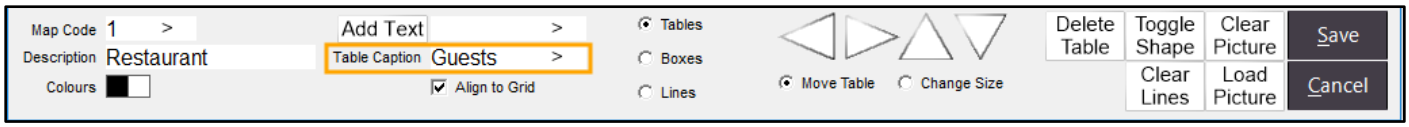
### Support for Alpha Table Codes

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

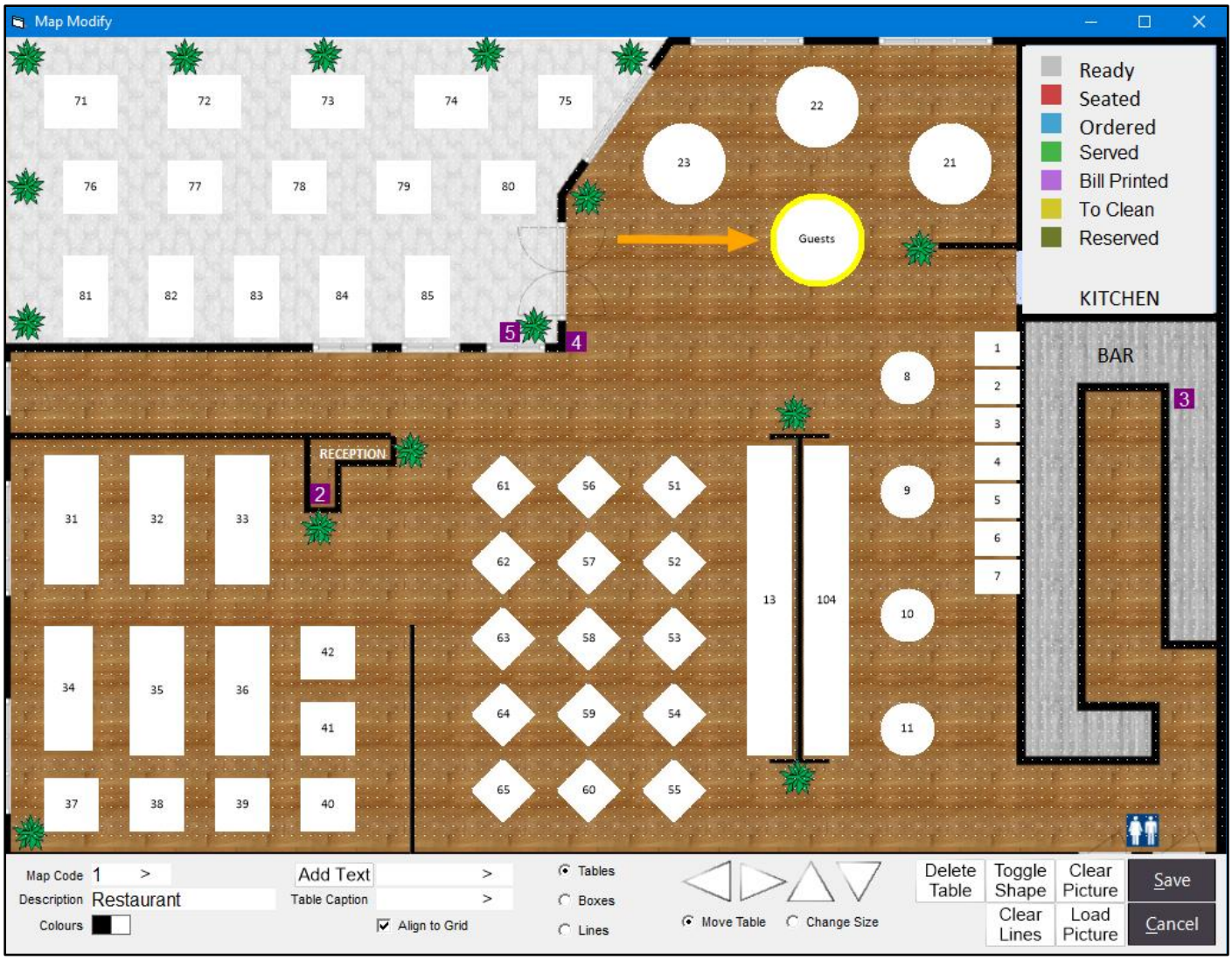
Go to Setup > Restaurant > Table Maps > Select: Table Map > Modify




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.

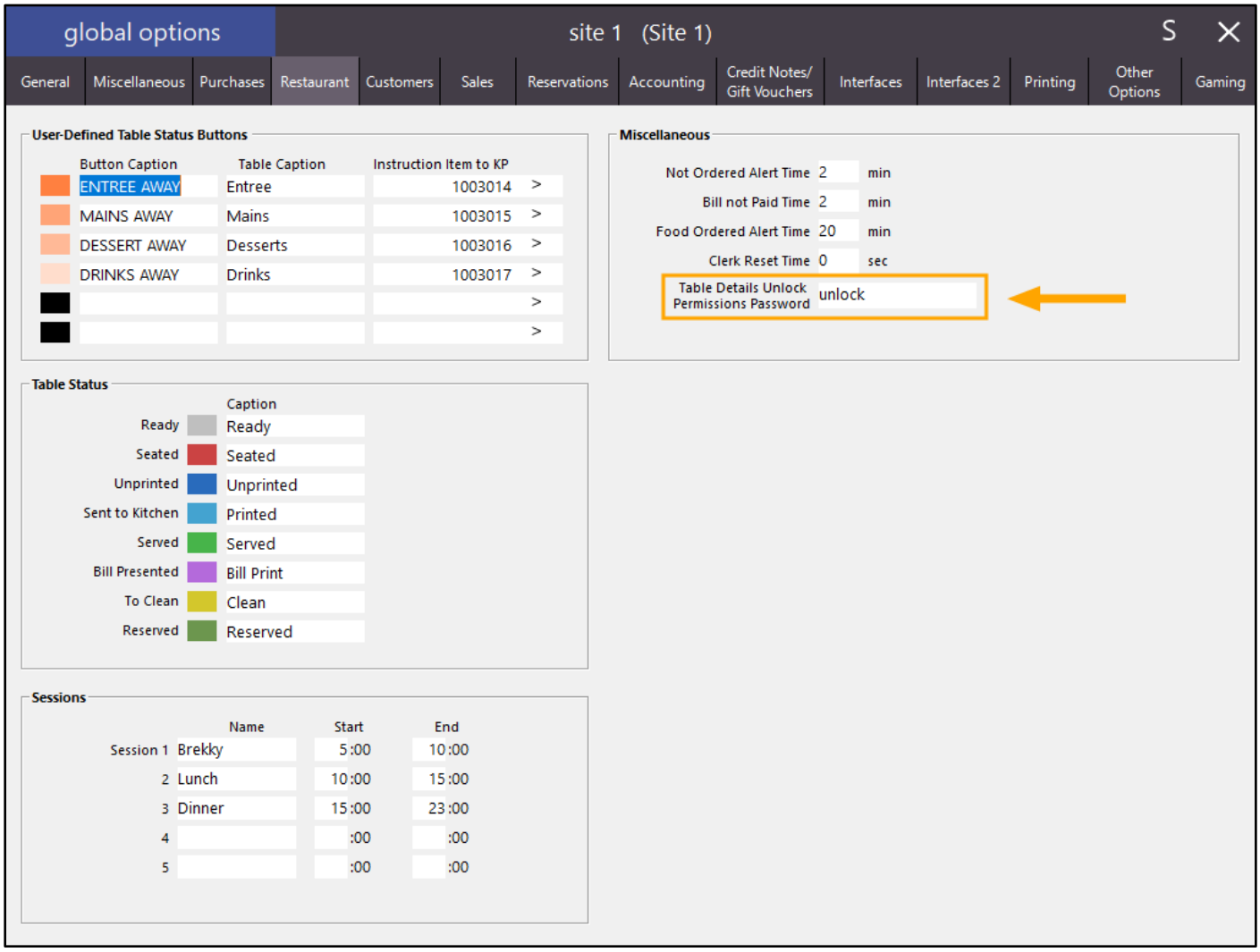
**Please note that support for Alpha Table Codes on the Ideal Handheld app will be released shortly.**
**In the meantime, Tables will appear on the Handheld app with the Table Number that was set for the table at the time the table was created.**

# 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 eAll 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



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

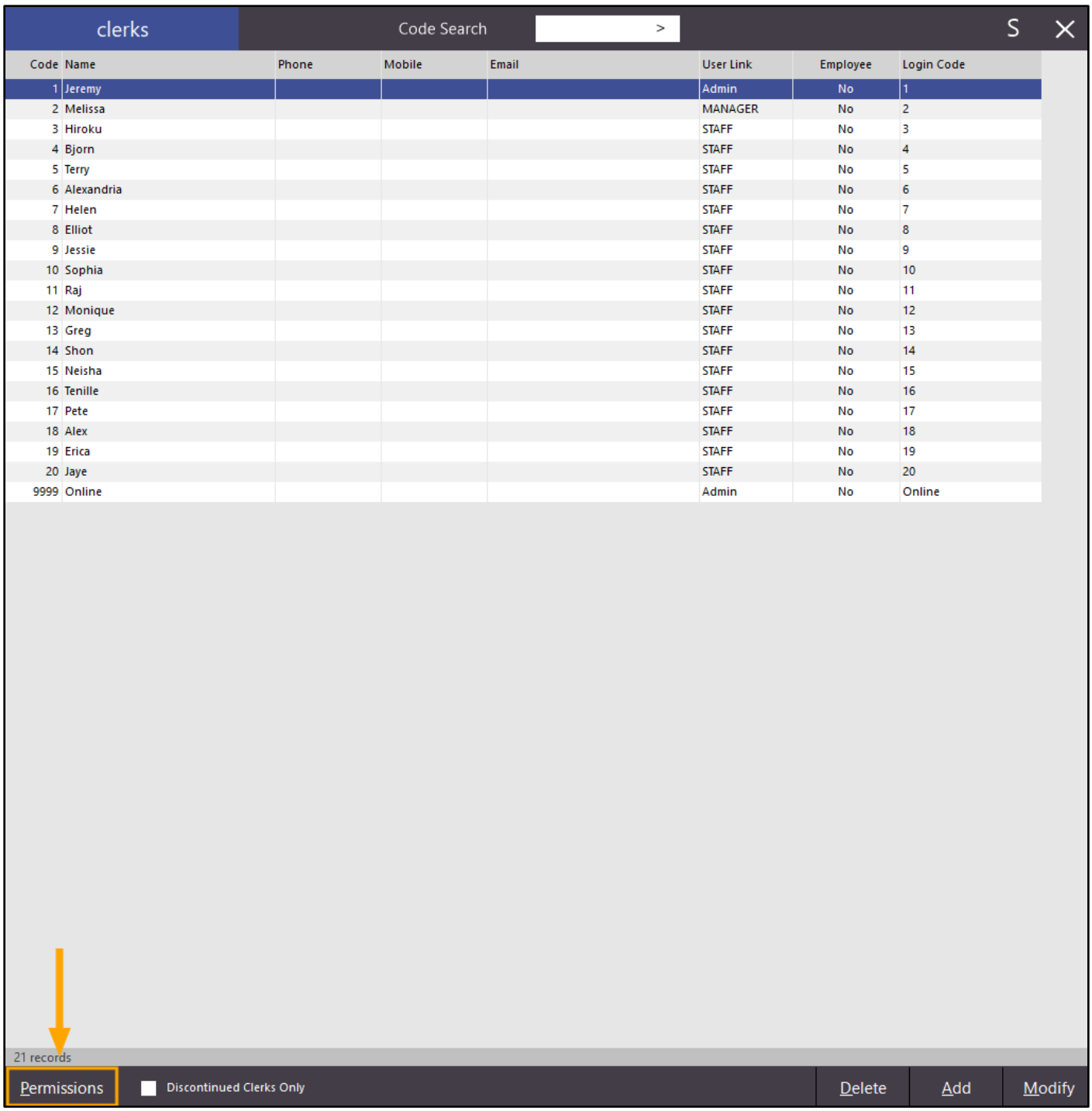
| | ALL | 1 |
|---|---|---|
| **CLERKS** | | |
| Compulsory Clerk | ✓ | |

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

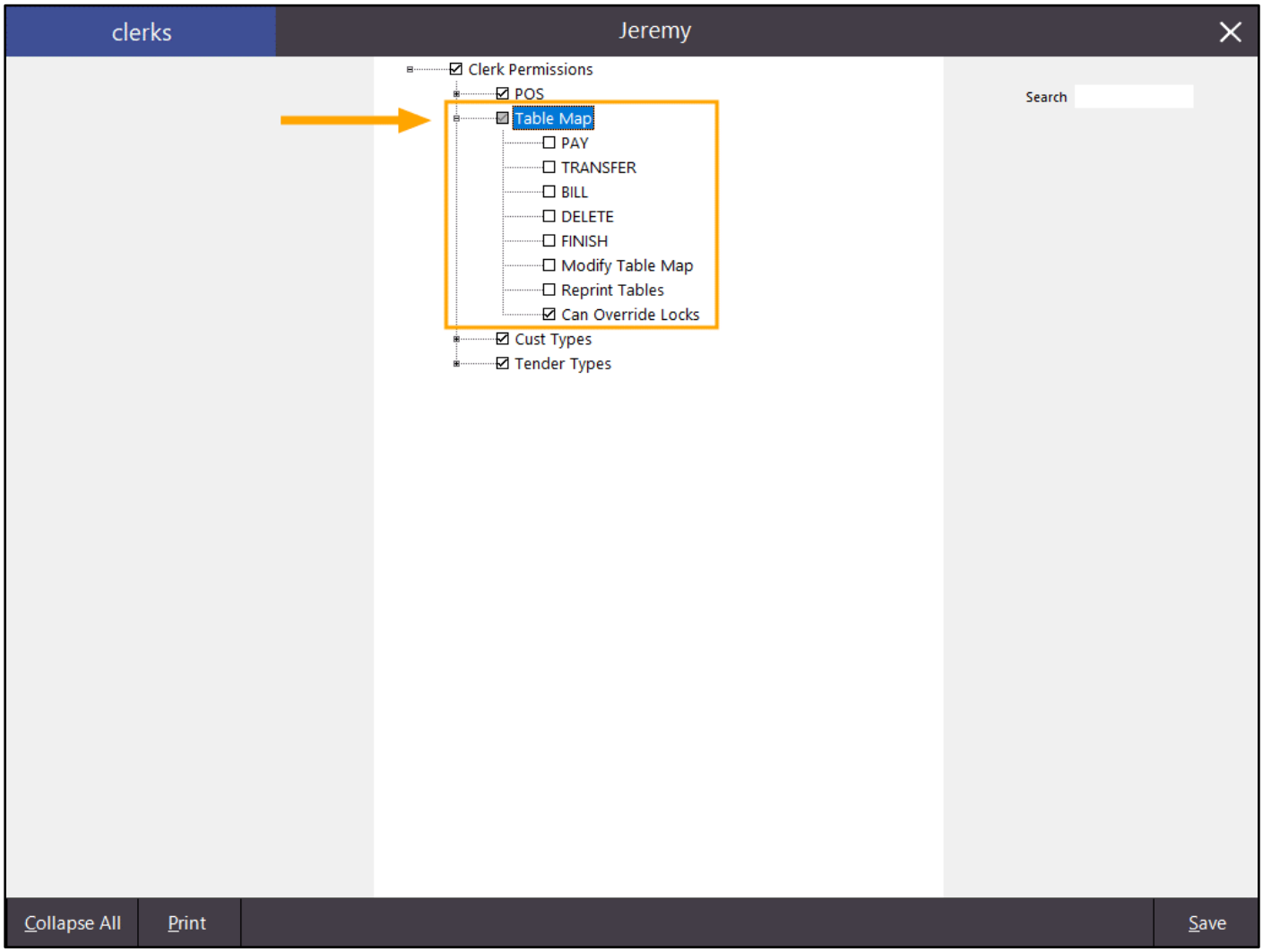
| | ALL | 1 |
|---|---|---|
| **CLERKS** | | |
| Require Clerk Entry on Table Map | ✓ | |

# idealpos7 Update History

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

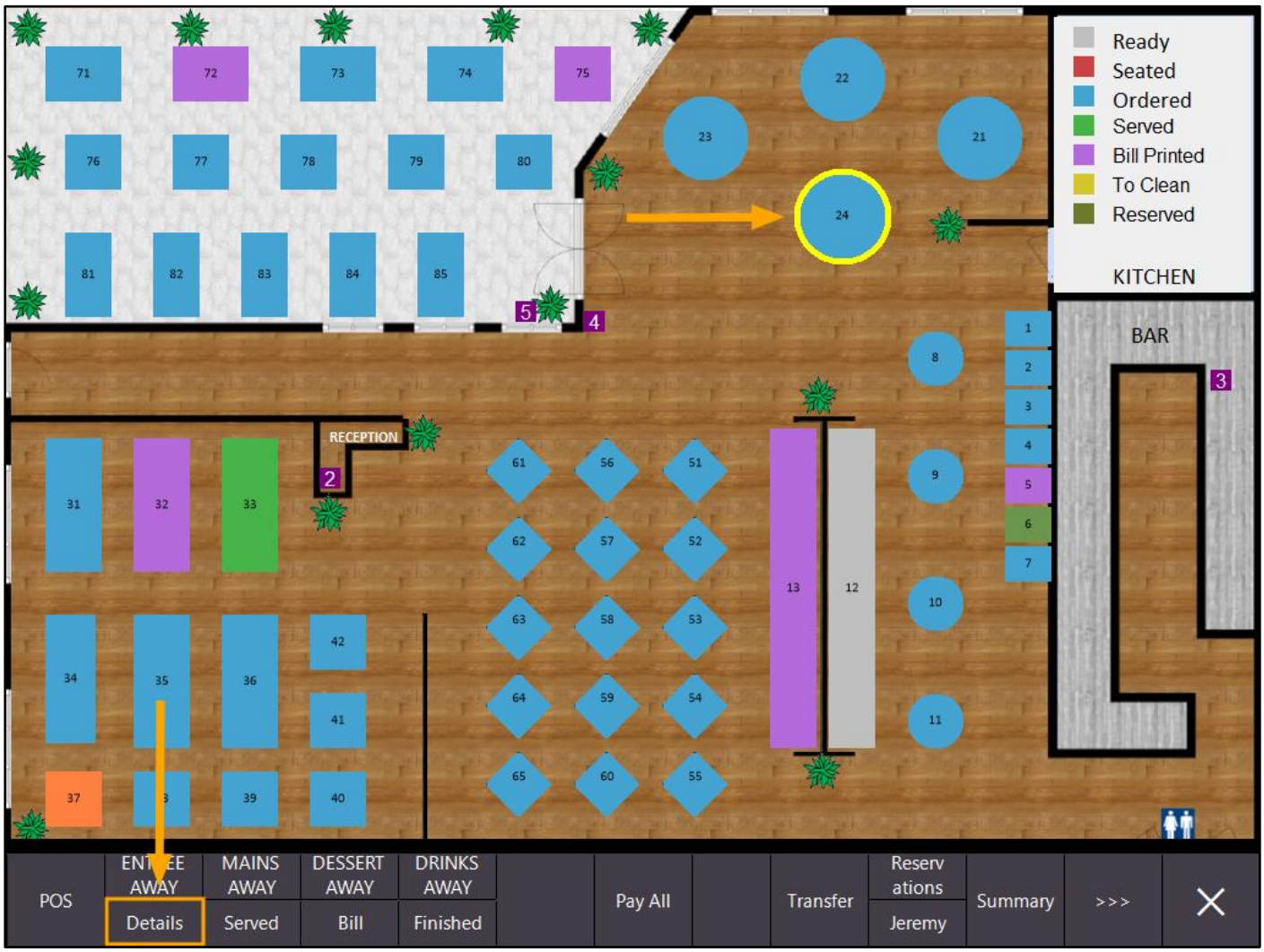


Then under Clerk Permissions > Table Map, enable/disable the options that the Clerk should have access to, then press the 'Save' button to apply the changes

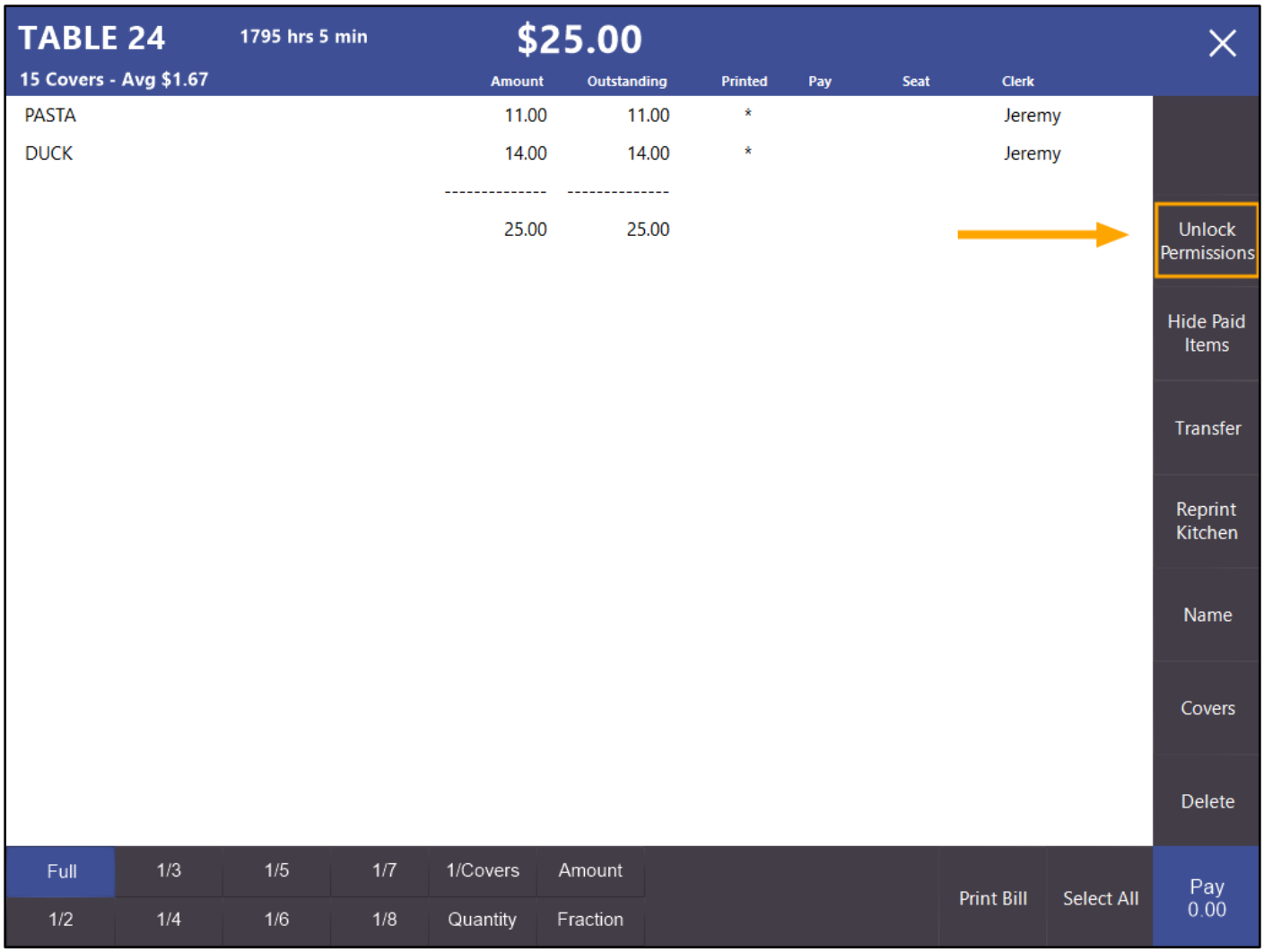


# idealpos7 Update History

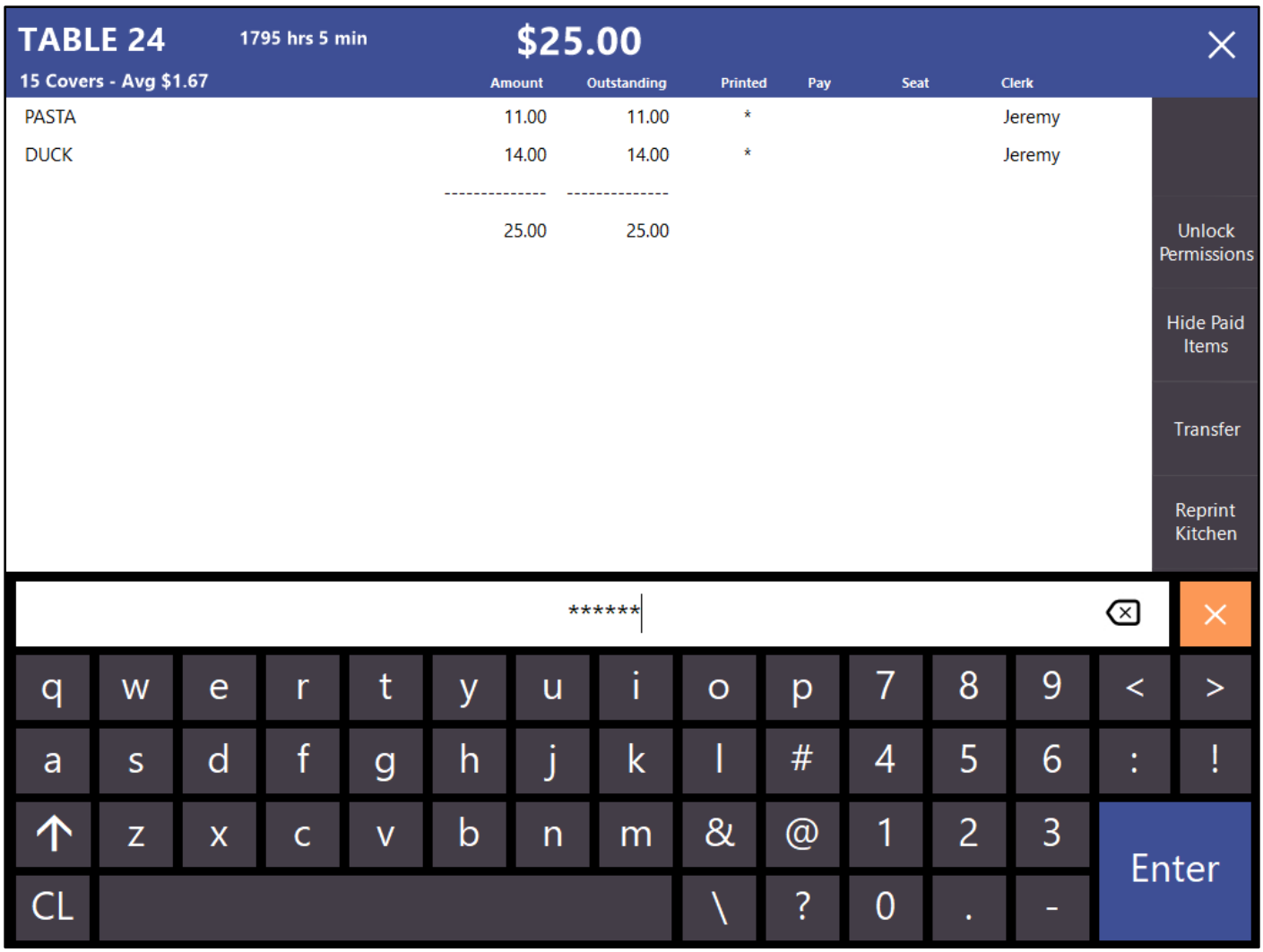
Open the Idealpos POS Screen and login using the clerk that has had the permissions applied to them
Press the 'Table Map' button, select a table that contains an Order on it then press the 'Details' button



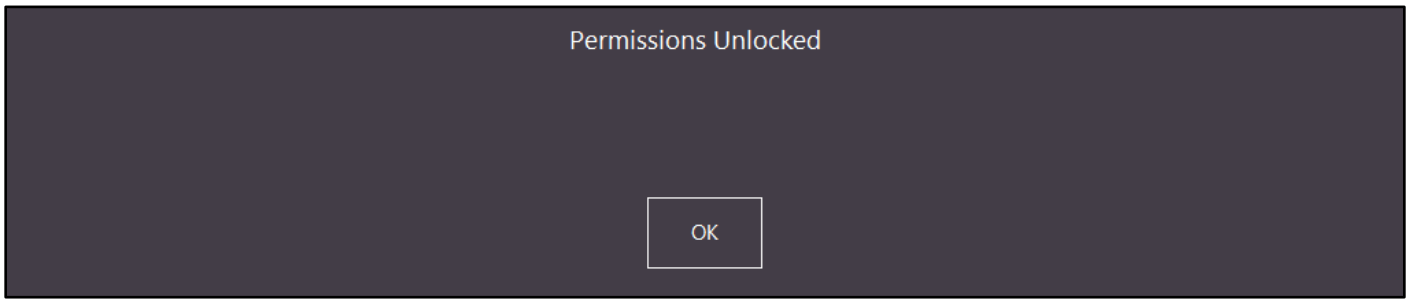
Then press the 'Unlock Permissions' button



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




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.



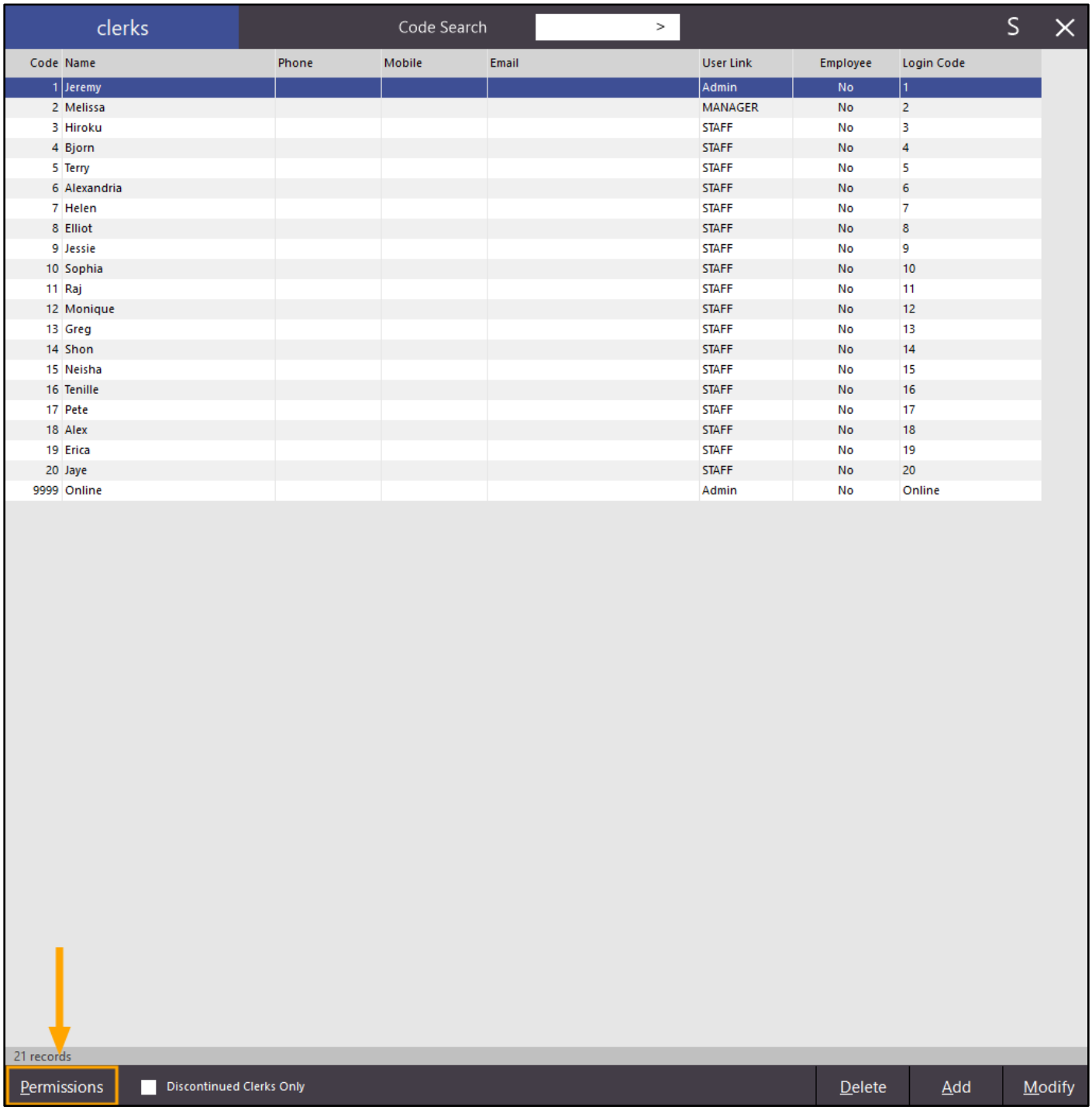

Once the required actions have been performed under the supervision of the supervisor/manager, close the Table Details screen. After closing the Table Details screen, the Permissions for that Clerk will be locked.

# 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

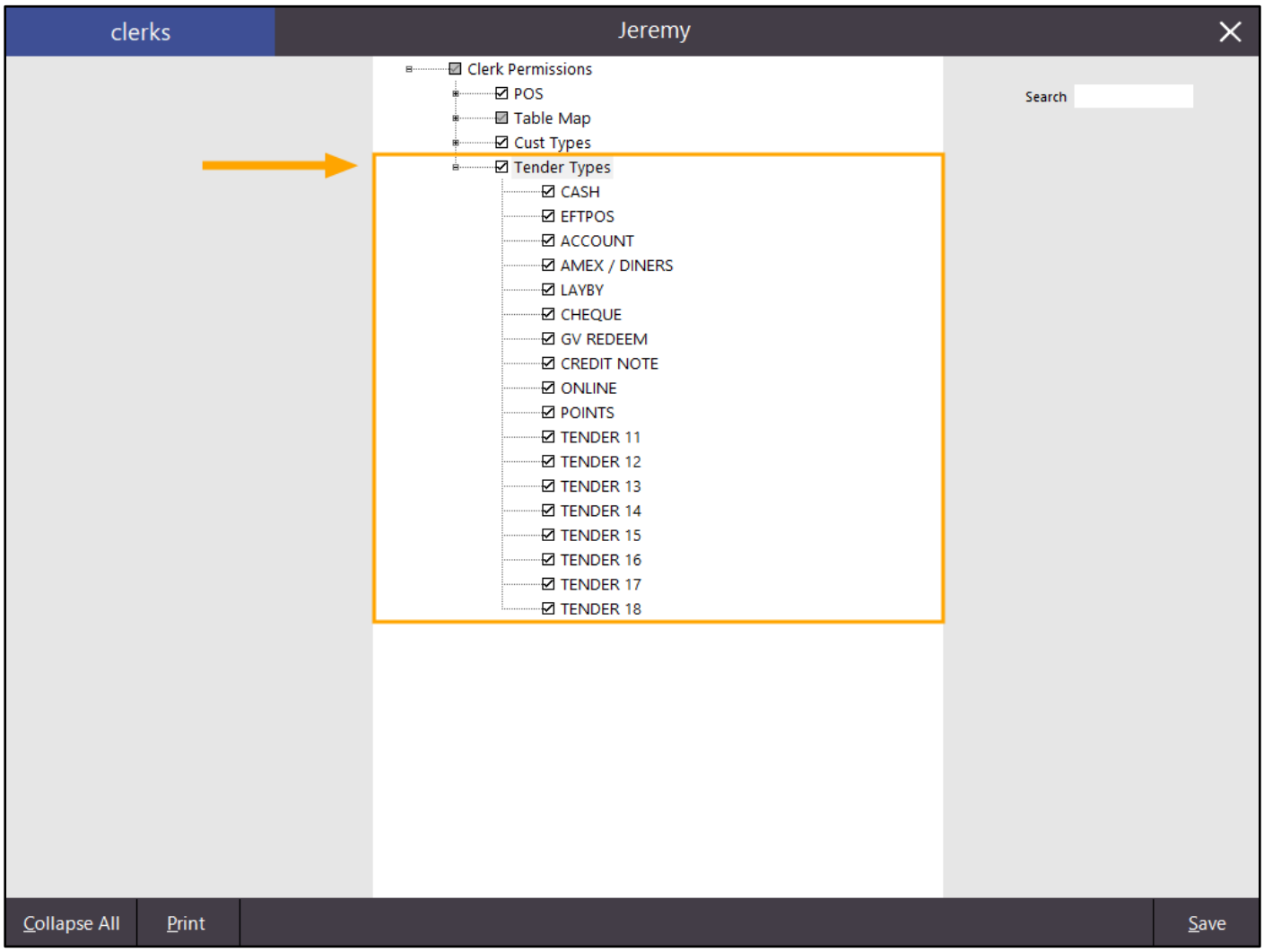
To configure Tender Types for a particular Clerk, go to:
Setup > Clerks > Select Clerk > Permissions



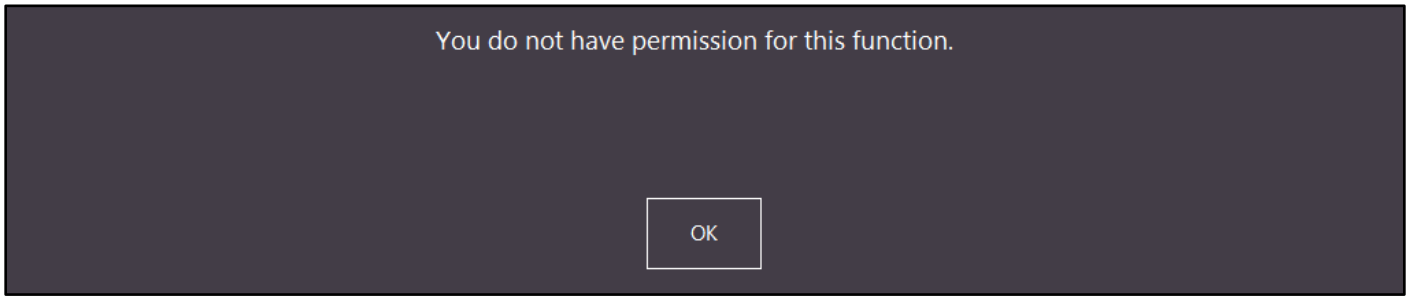

| Code | Name | Phone | Mobile | Email | User Link | Employee | Login Code |
|---|---|---|---|---|---|---|---|
| 1 | Jeremy | | | | Admin | No | 1 |
| 2 | Melissa | | | | MANAGER | No | 2 |
| 3 | Hiroku | | | | STAFF | No | 3 |
| 4 | Bjorn | | | | STAFF | No | 4 |
| 5 | Terry | | | | STAFF | No | 5 |
| 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 |

# 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

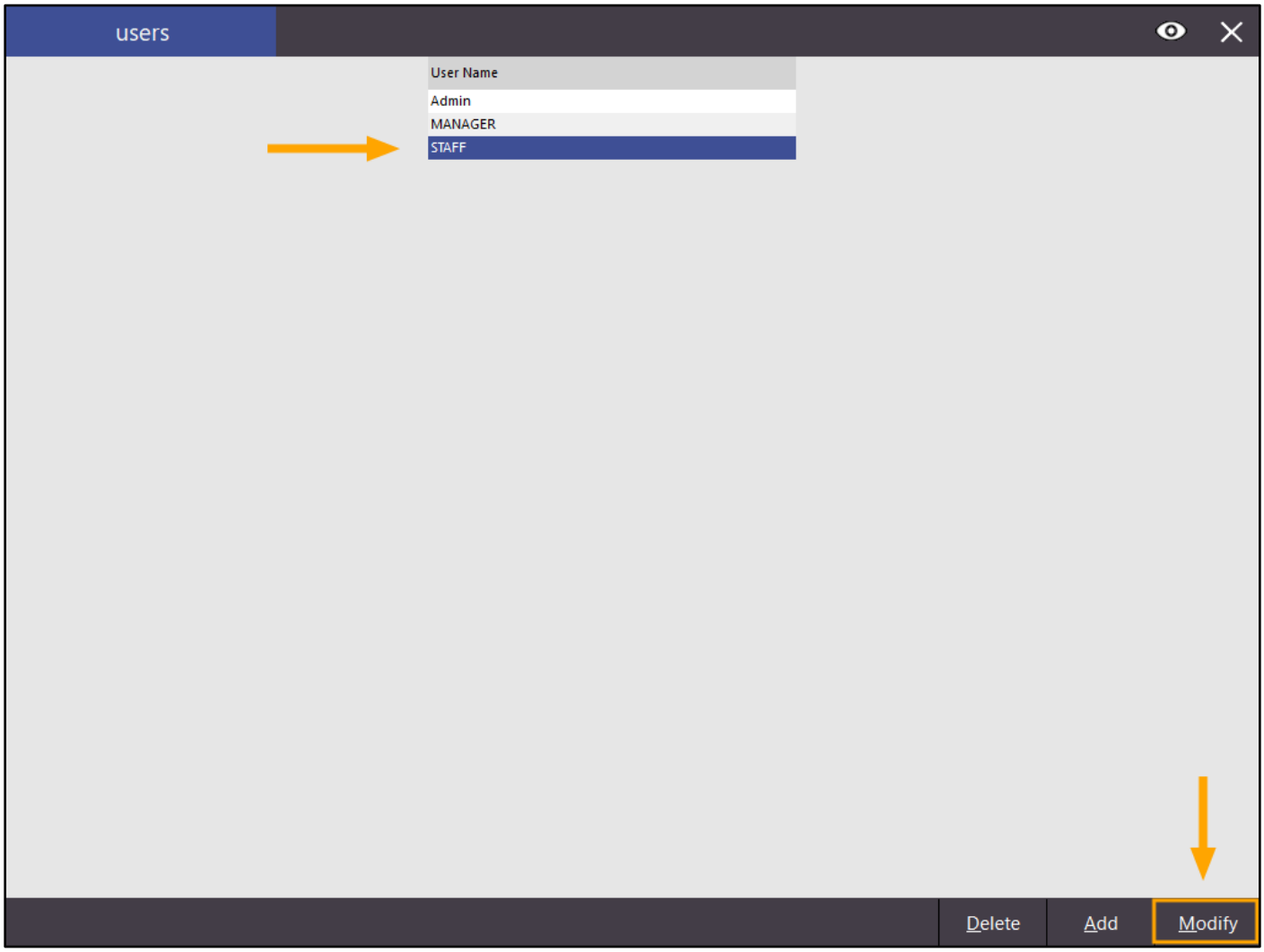



Any Tender Types that have been enabled for the Clerk will continue to work as normal.
When the Clerk attempts to use a Tender Type that they don't have permission to use, the POS will display the following prompt.



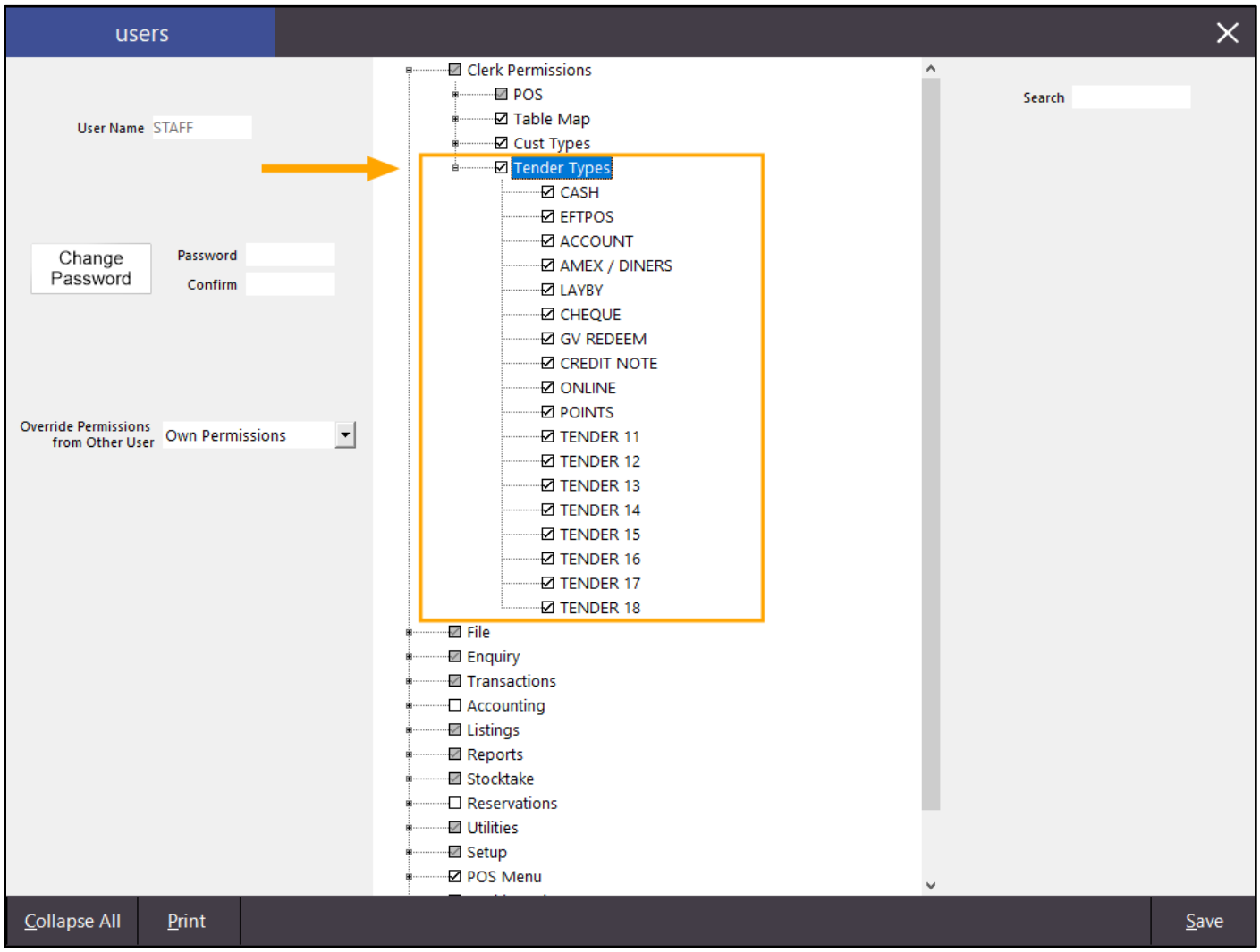
In addition to having the ability to set Tender Type access for Clerks, the same can be configured for a User. When a Tender Type is disabled for a specific User, any Clerk that is linked to that User will also be denied access to that Tender Type, even if access to the Tender Type has been enabled under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

Go to Setup > Users > Select User Name > Modify

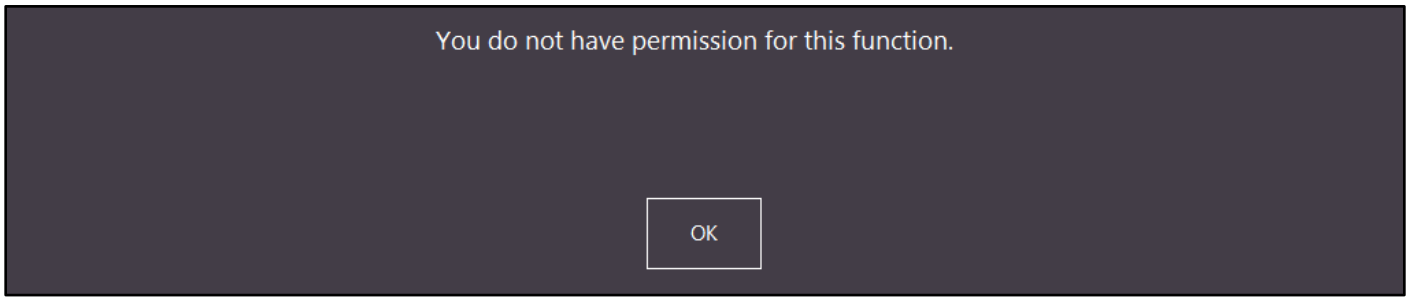


# idealpos7 Update History

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.

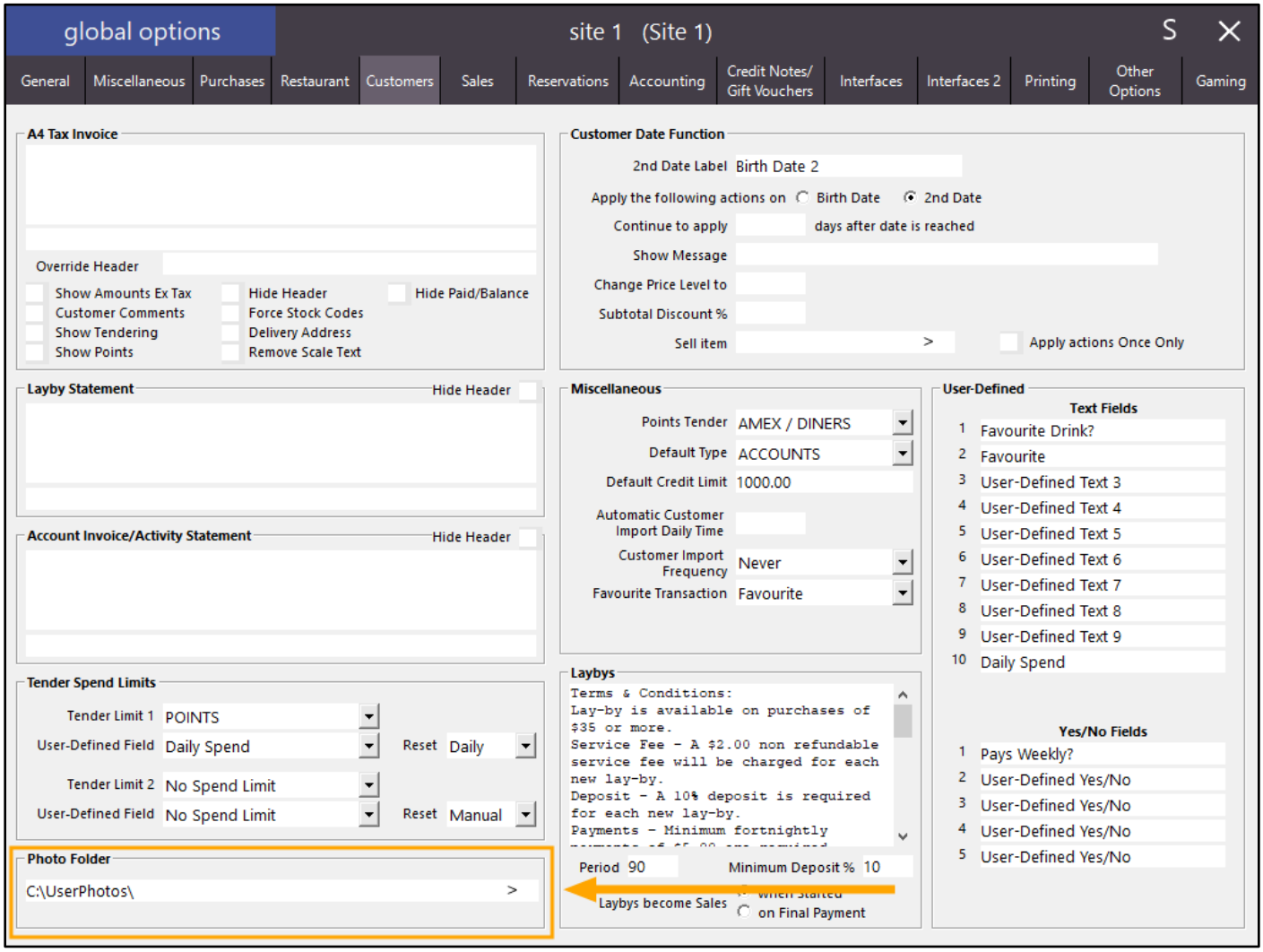


# Setup – Global Options

## 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.



# idealpos7 Update History

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

customers | Name/Company Search >

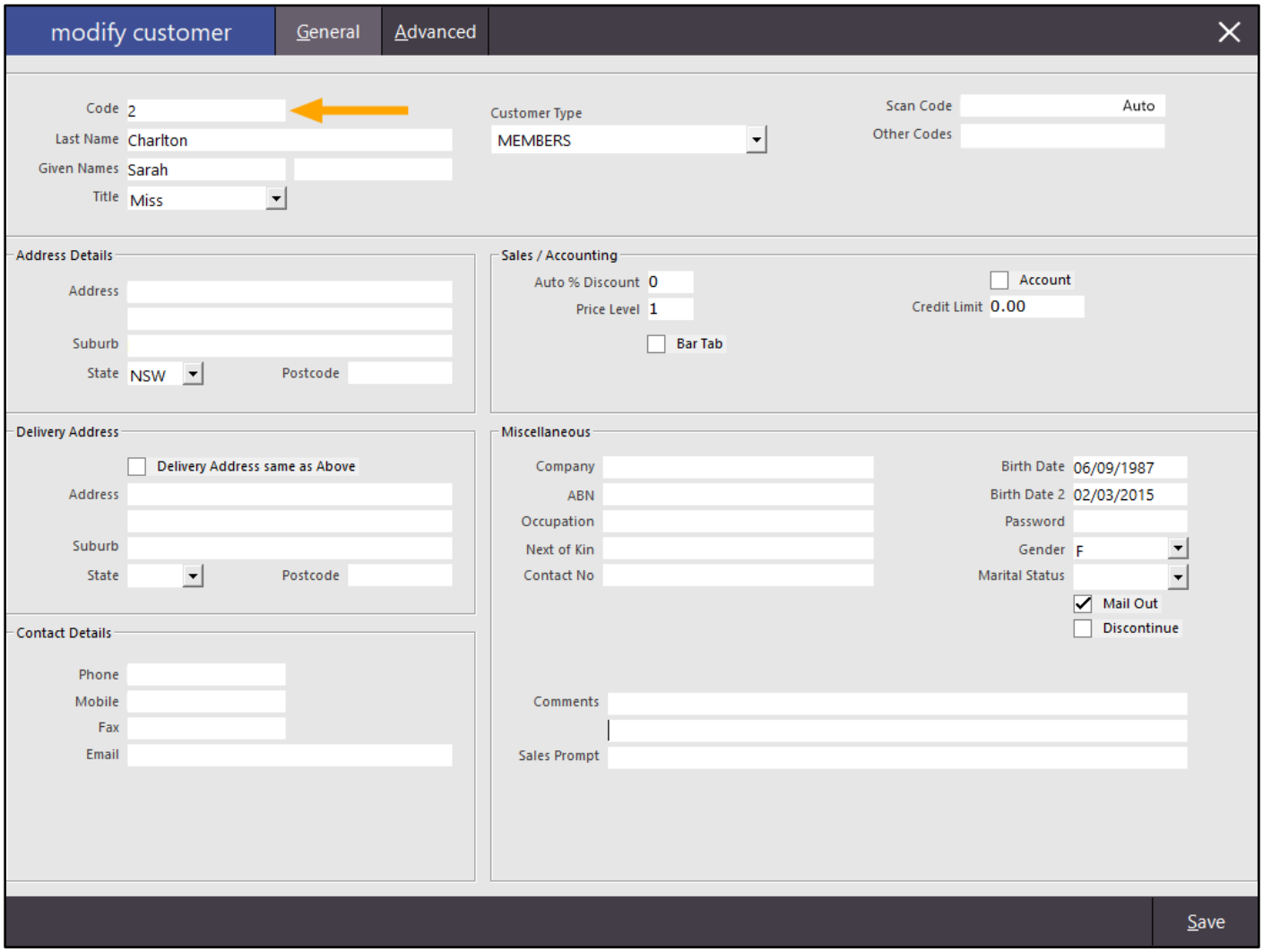
| Code | Last Name | First Name | Address 1 | Address 2 | Suburb | Scan Code |
|---|---|---|---|---|---|---|
| 5001 | Bar Tab 5001 | | | | | |
| 5002 | Bar Tab 5002 | | | | | |
| 5003 | Bar Tab 5003 | | | | | |
| 5004 | Bar Tab 5004 | | | | | |
| 5005 | Bar Tab 5005 | | | | | |
| 5006 | Bar Tab 5006 | | | | | |
| 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

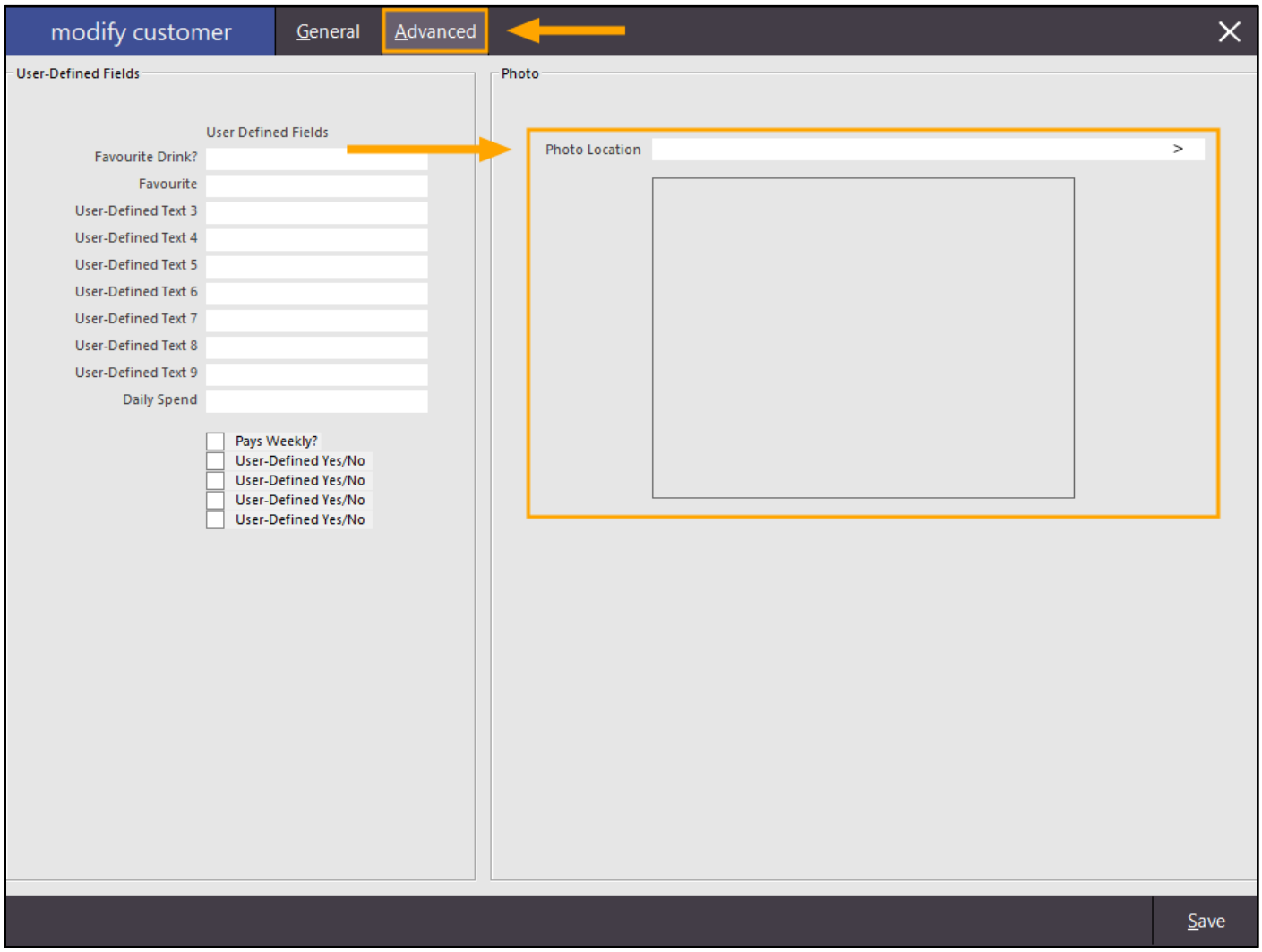
Discontinue | Add | Modify

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

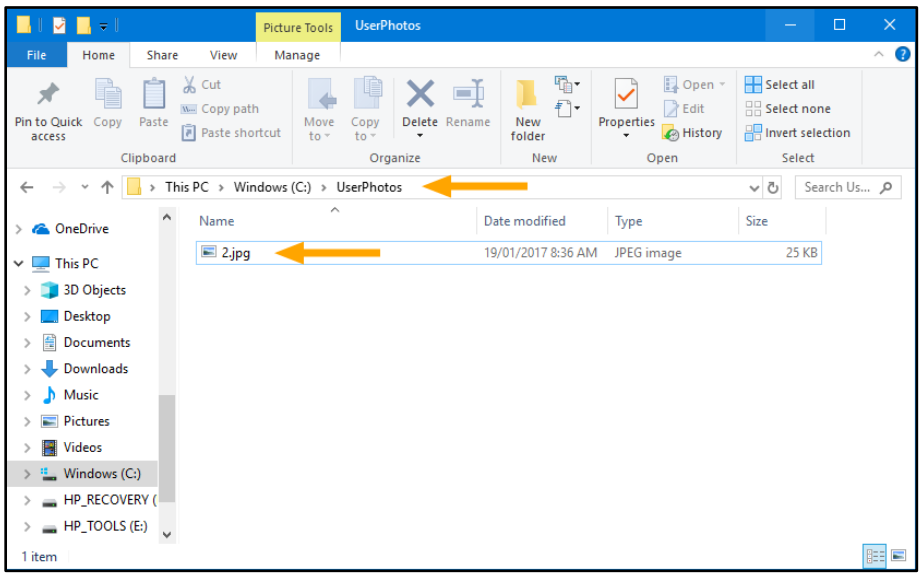


# idealpos7 Update History

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

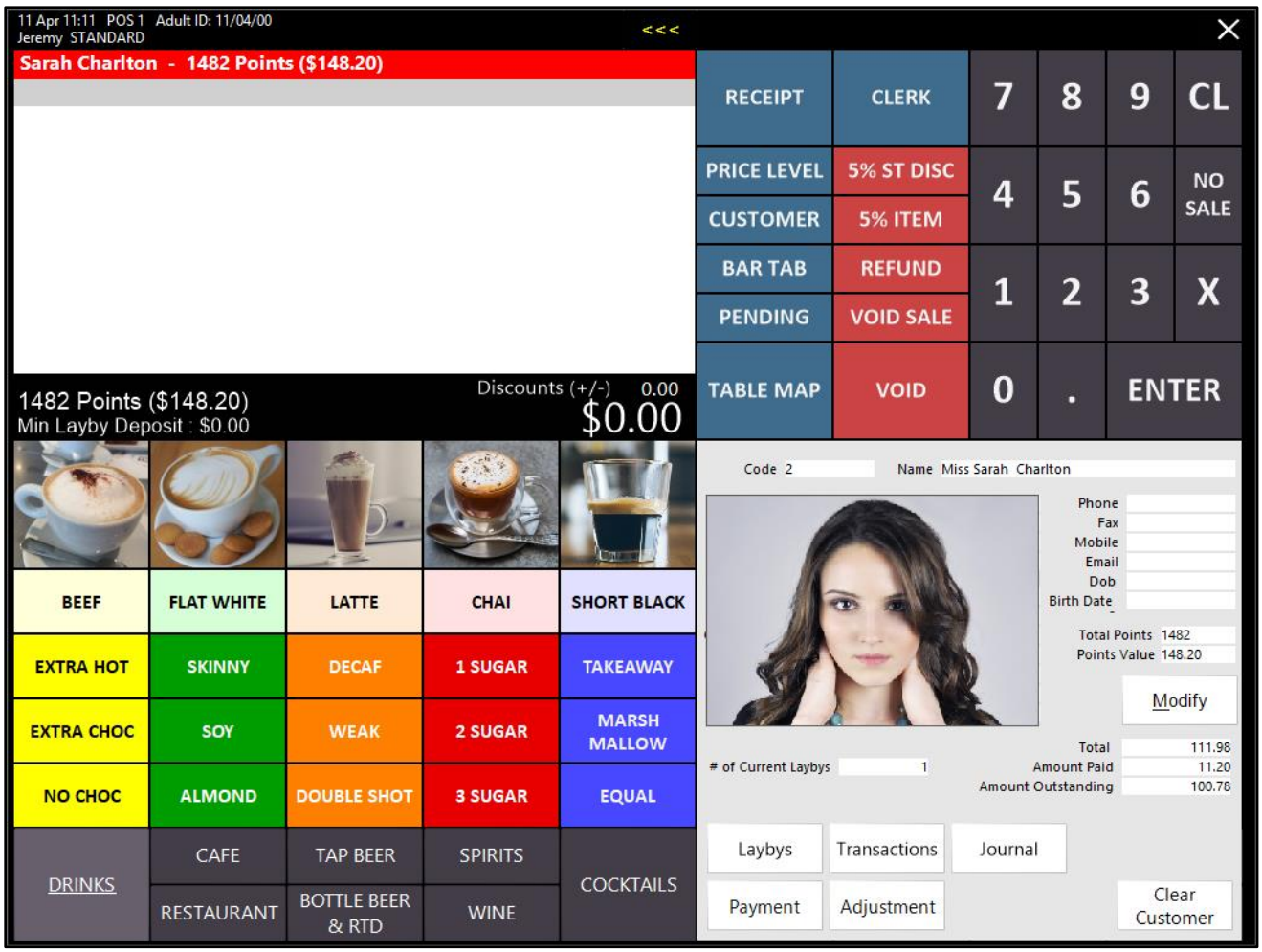



In addition to the Code and as mentioned previously, the Customer's Photo that exists in the Photo Folder will only be used if the Customer doesn't already have a Photo assigned to them.
Copy the photo to the Photo Folder that's configured in Global Options as per the above steps



# idealpos7 Update History

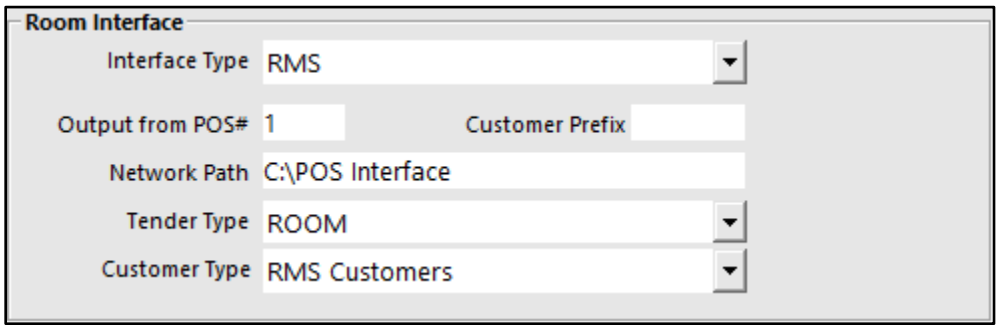
When the Customer is selected during a POS transaction, their photo will now appear



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

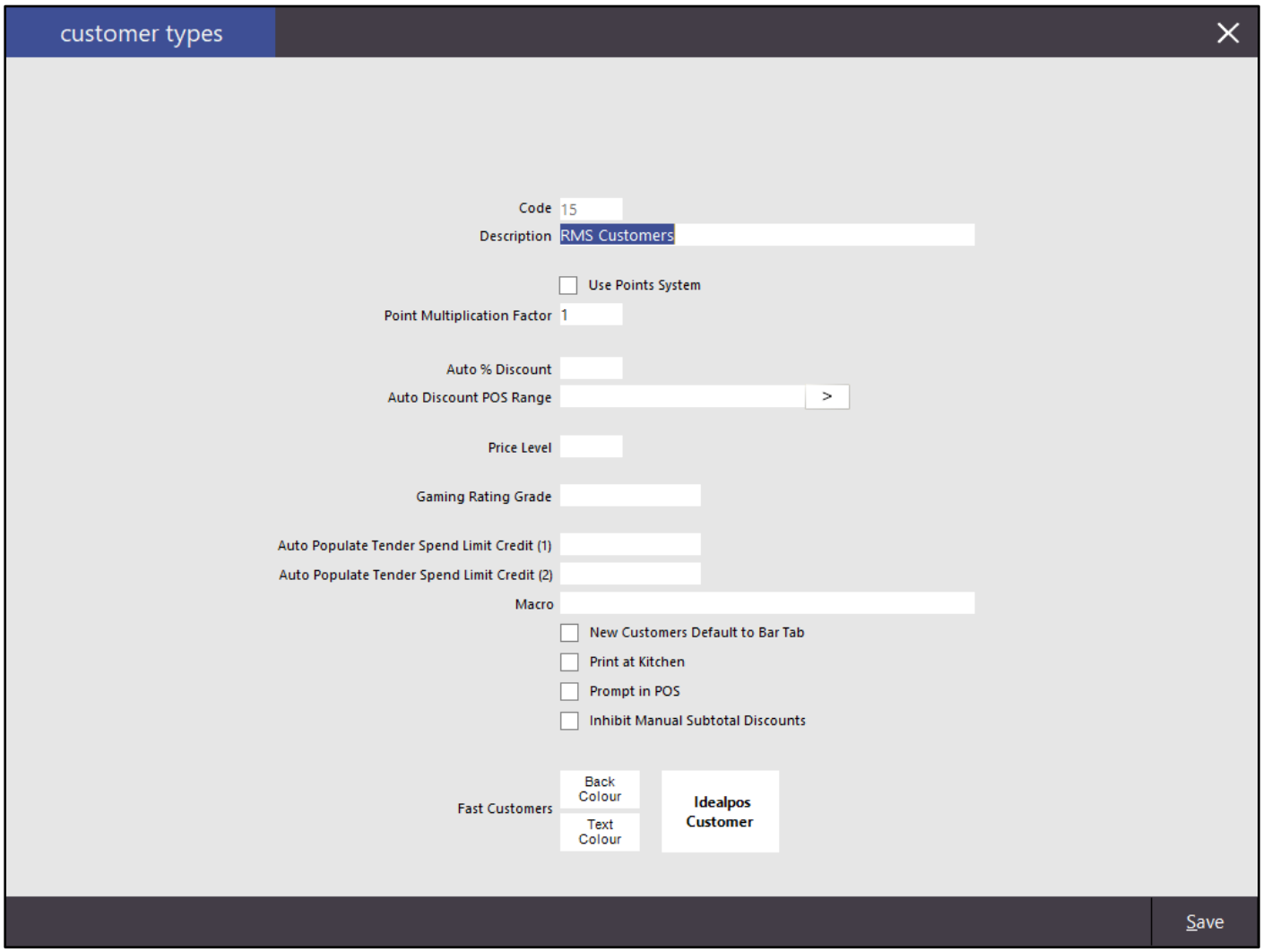
This function allows you to specify a Customer Type for new RMS Customers. When customers are read from the RMS data file, they will be assigned to the Customer Type that has been selected.

Go to Setup > Global Options > Interfaces > Customer Type




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.



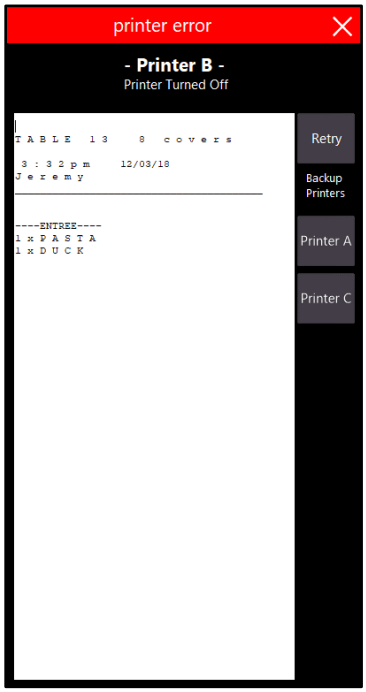

Note that after adding a new Customer Type, you may need to restart Idealpos in order for the Customer Type to show as an available Customer Type from the Customer Type dropdown box in the above Room Interface settings.

# 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.

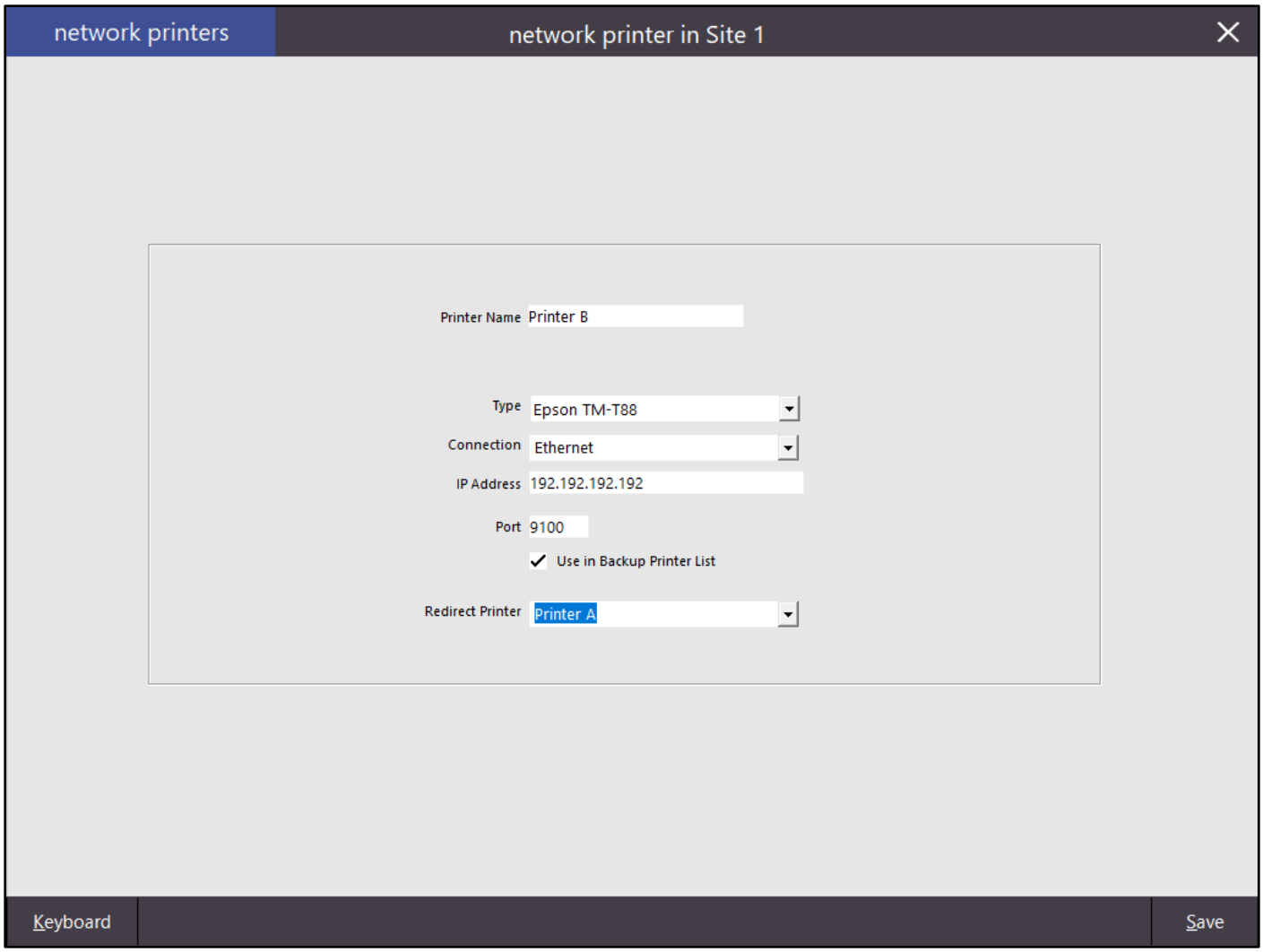



After selecting the desired printer, the Kitchen Receipt will print and will show the Kitchen Print Job will show the printer from where it was redirected from.

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



# 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
```

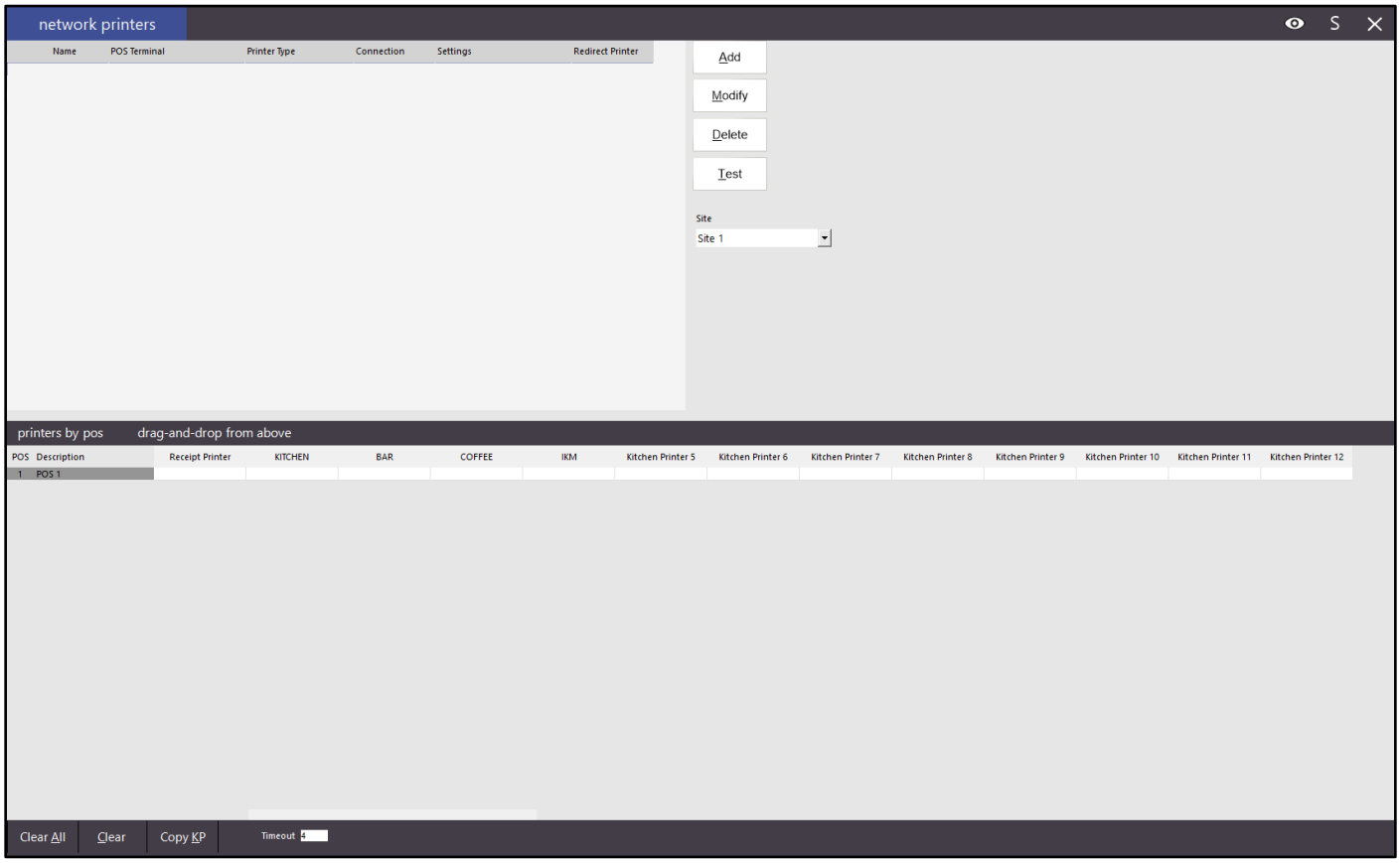
Note that if there are multiple levels of Receipt Redirection, each level will be printed at the top of the receipt.
E.g. There are three printers in the system; Printer A, Printer B and Printer C.
The system is configured to print to the Kitchen Printer which is Printer C.
Printer C is configured to 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
```

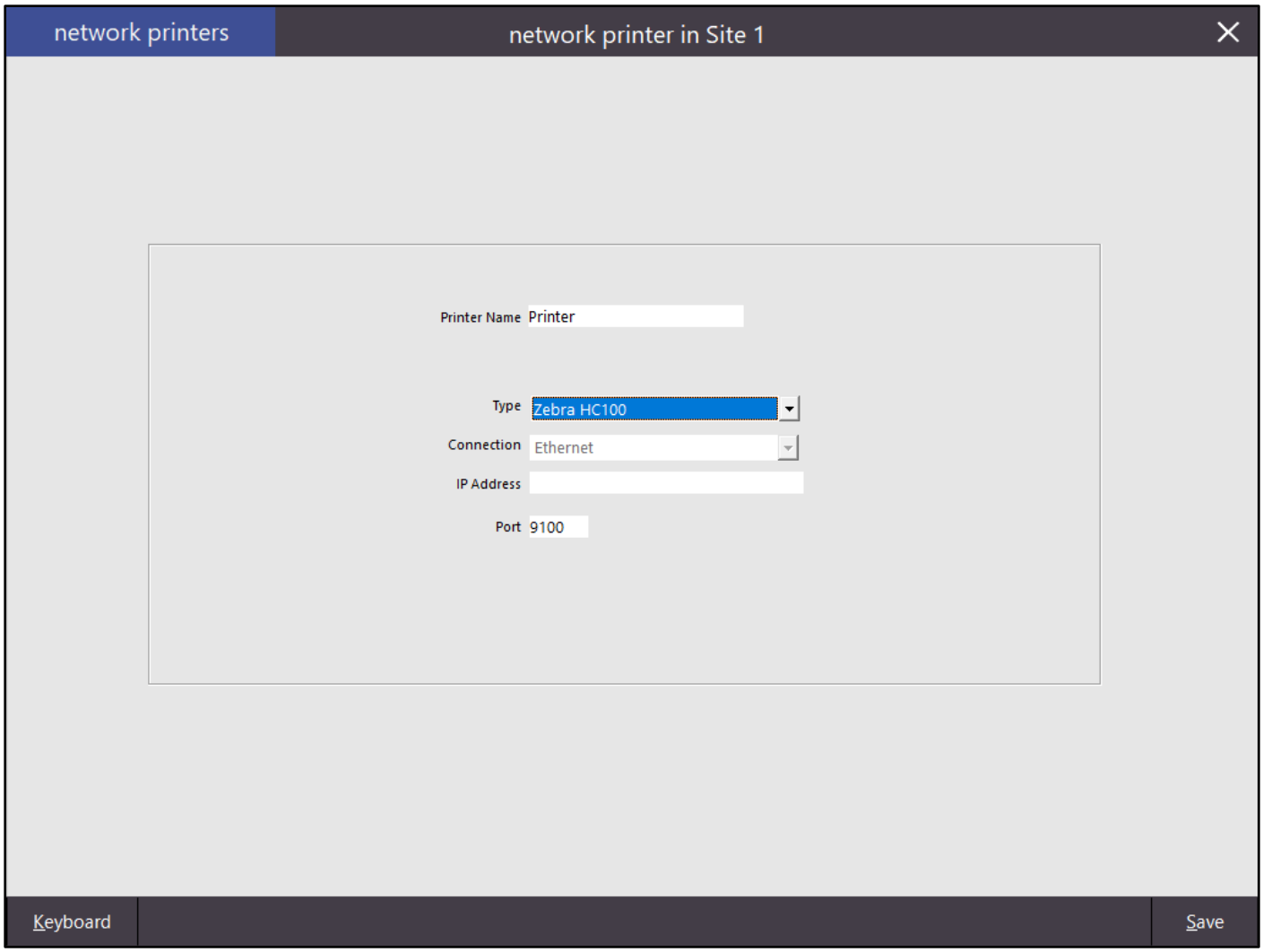
## Support for Multiple HC 100 Wristband Printers per Site

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

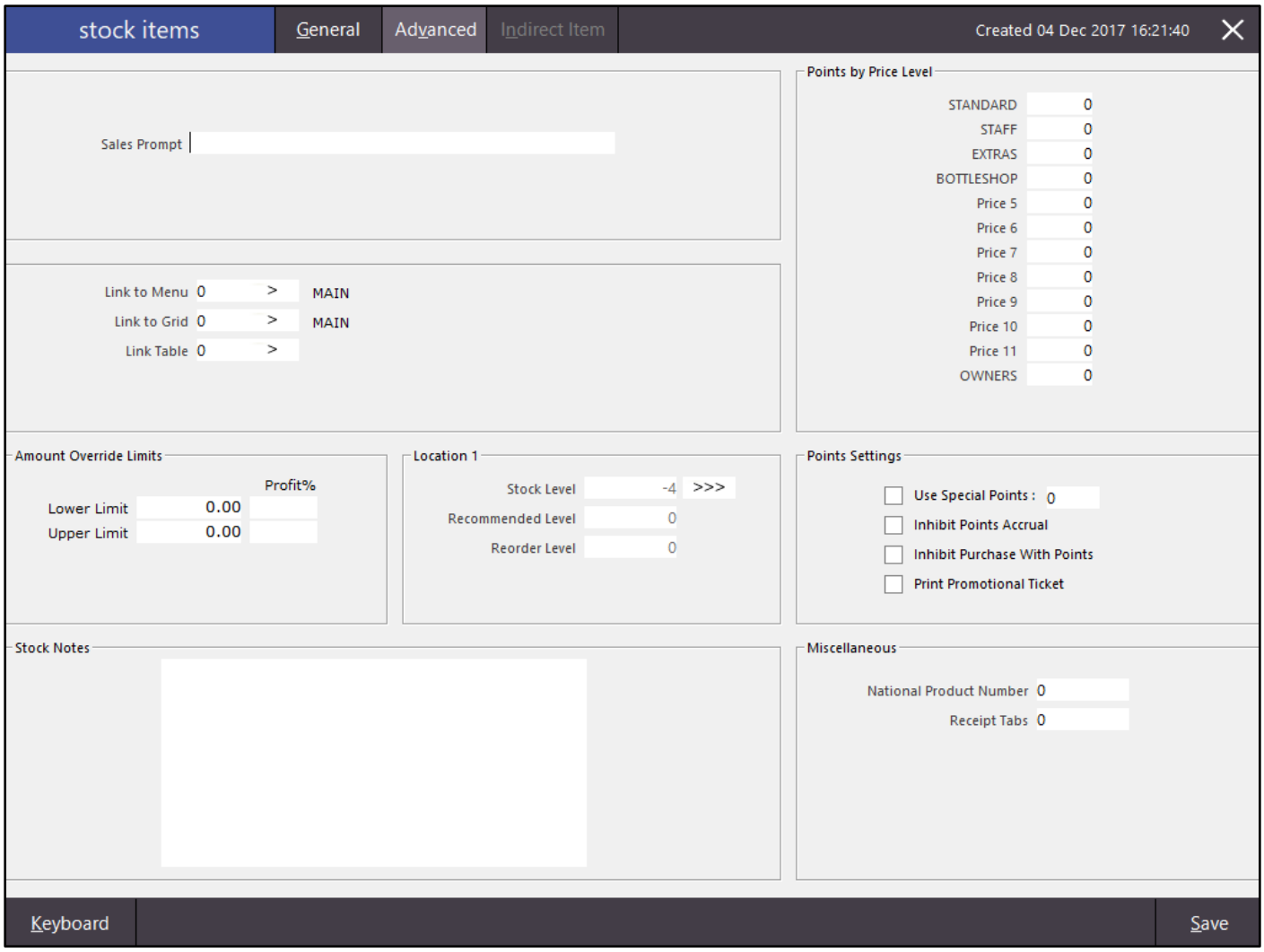


Enter a Printer Name, under Type, select 'Zebra HC100', then specify the IP address and Port (if it is not the default port of 9100). Then press 'Save' to save the printer. Repeat this step for each printer, ensuring that each HC100 printer has a unique Printer Name.



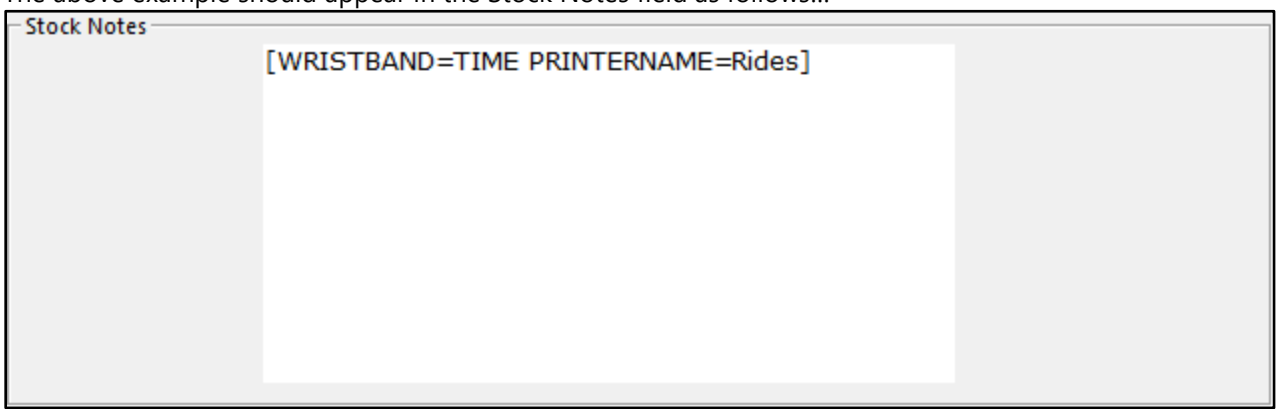

After the HC100 printers have been configured, open a wristband Stock Item.

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




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…




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.

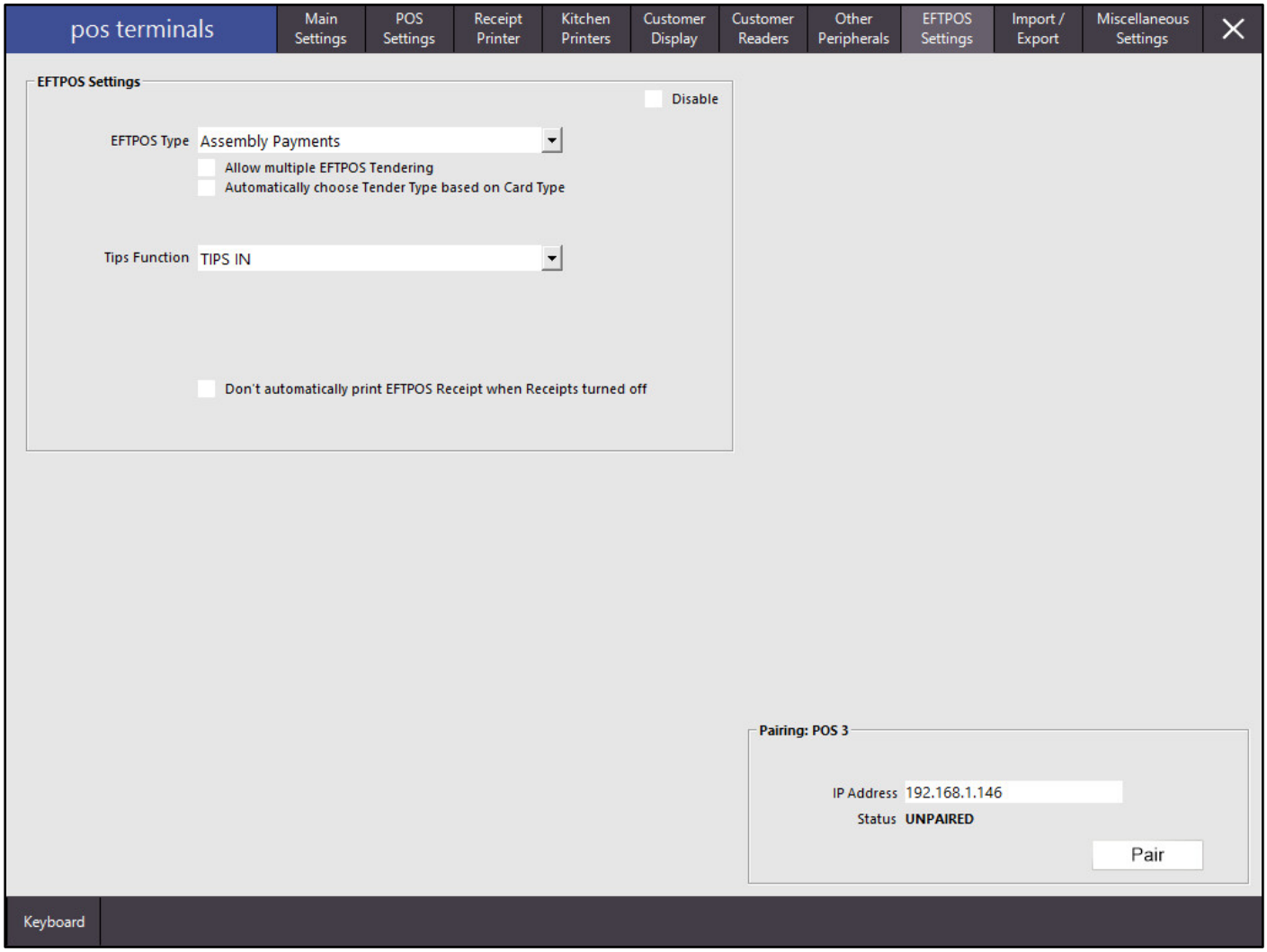
# Setup – POS Terminals

### 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

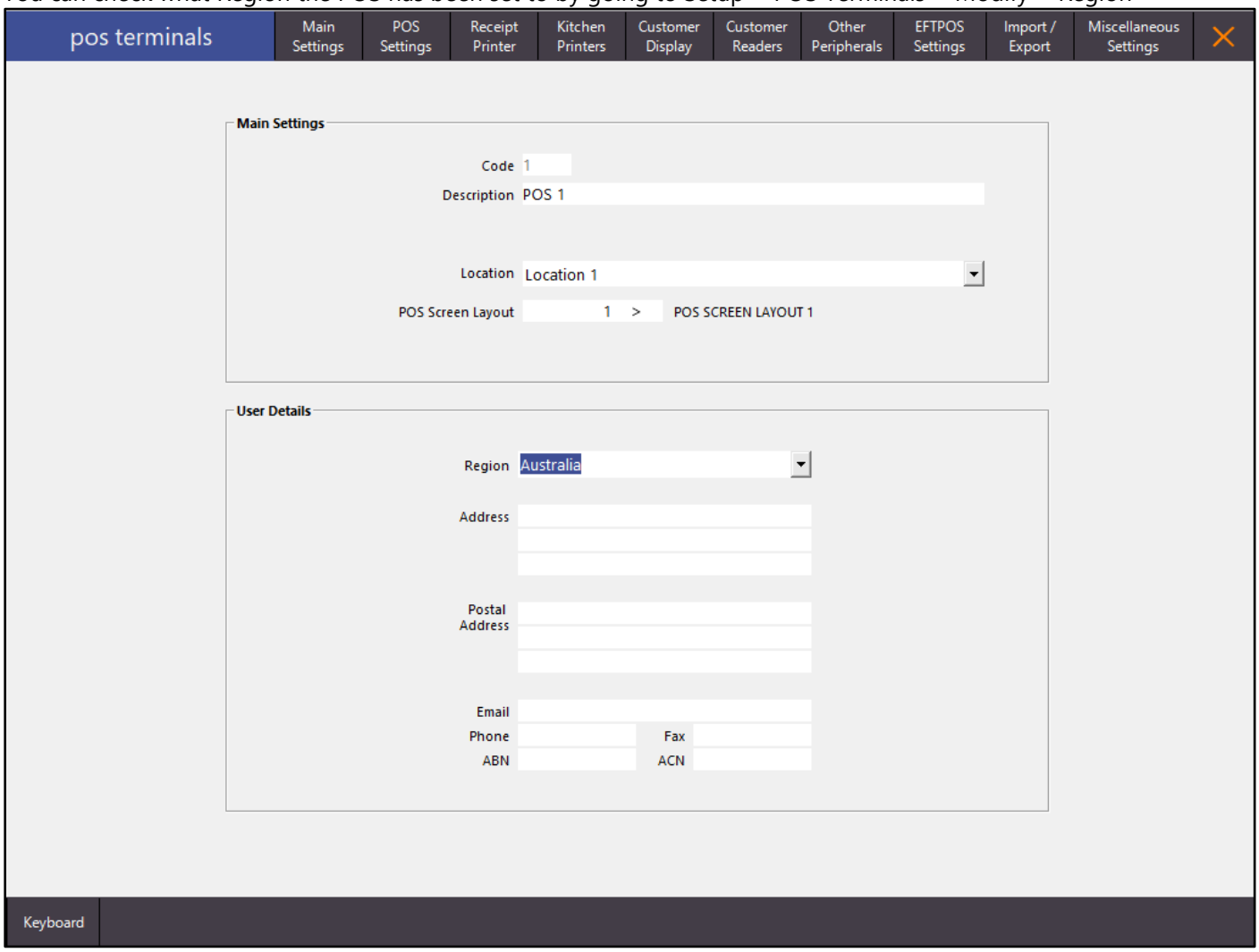



Ensure that the Disable box is unticked. If Disable is ticked, untick the box to enable EFTPOS.
Enter the IP address of the Pinpad into the IP Address field on the bottom right corner of the EFTPOS Settings window, then press the Pair button. Follow the remaining instructions on-screen and on the pinpad.
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



# idealpos7 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.

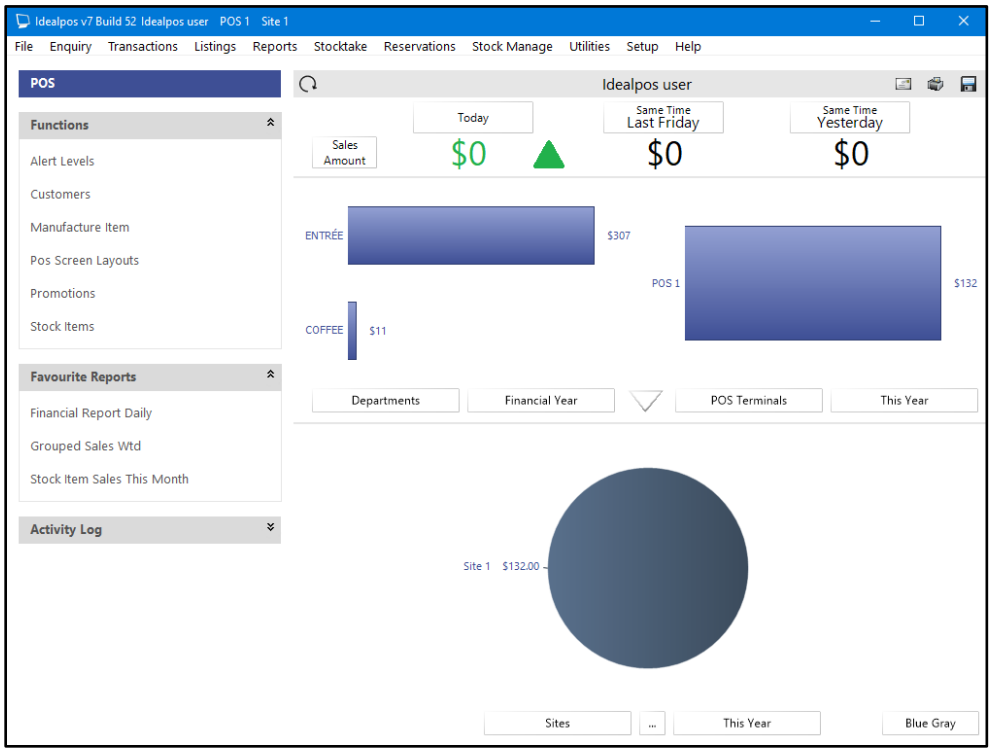
- The default mode (set from Tyro) is to have the surcharges deducted from the settlement amounts. Tyro then sends the settlement amounts without the surcharges, so that Idealpos will balance with the Tyro settlement
- You can also configure Tyro to have the settlement amounts sent to Idealpos as part 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

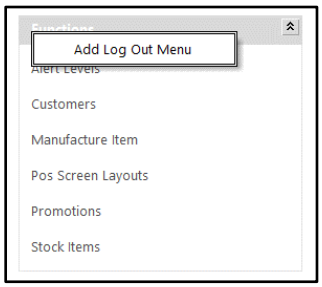
## Ability to add Log Out function to Shortcut Bar

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

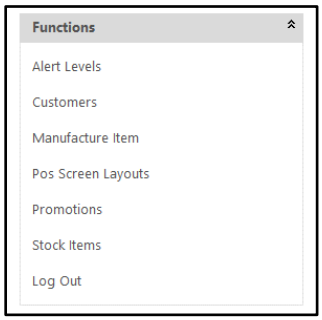
Go to the main Idealpos window




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

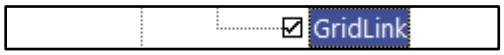


# Stock Control

### Stock Items Grid – Show Grid Link Field

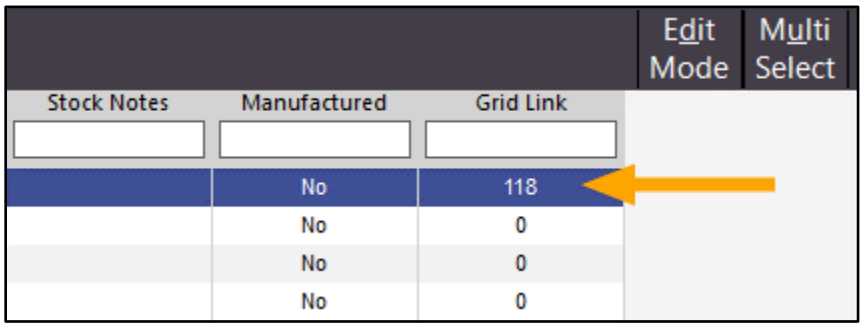
This function enables the Grid Link Field to be displayed in the Stock Items Grid.

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



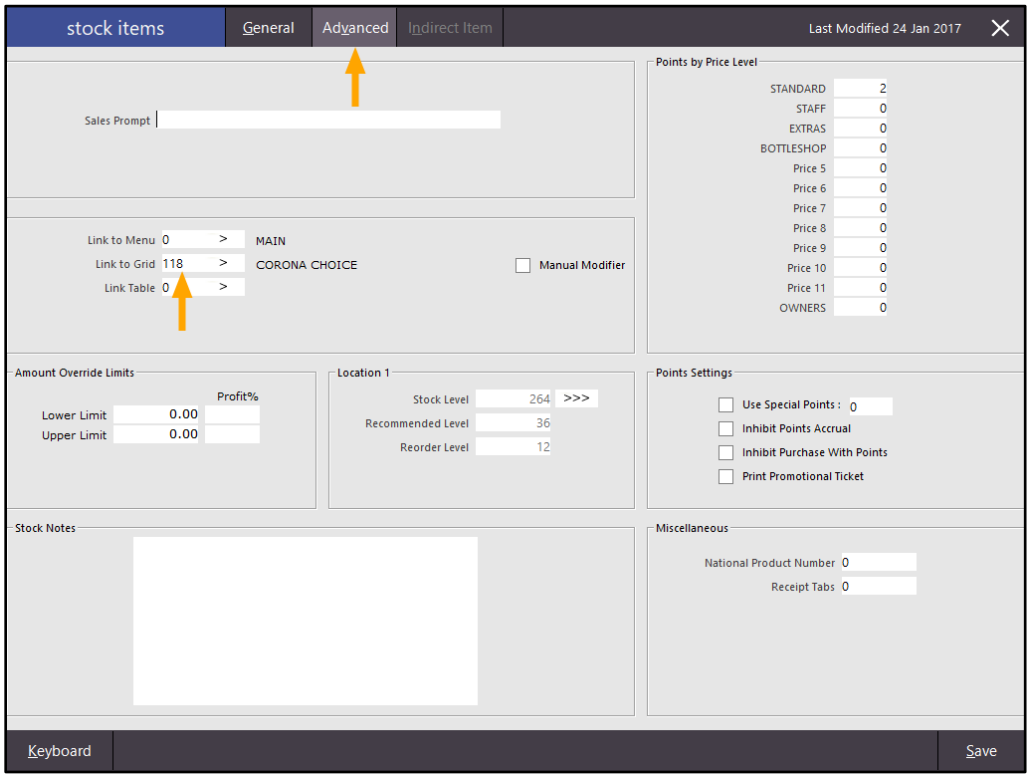

Enable the GridLink option, then press the Save button to save the change.
After the GridLink option has been enabled for the User, close the Users screen, return to the main Idealpos dashboard, then open the Stock Items screen.

Go to File > Stock Control > Stock Items
The GridLink option will be displayed at the far right-hand side of the Stock Items grid




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.

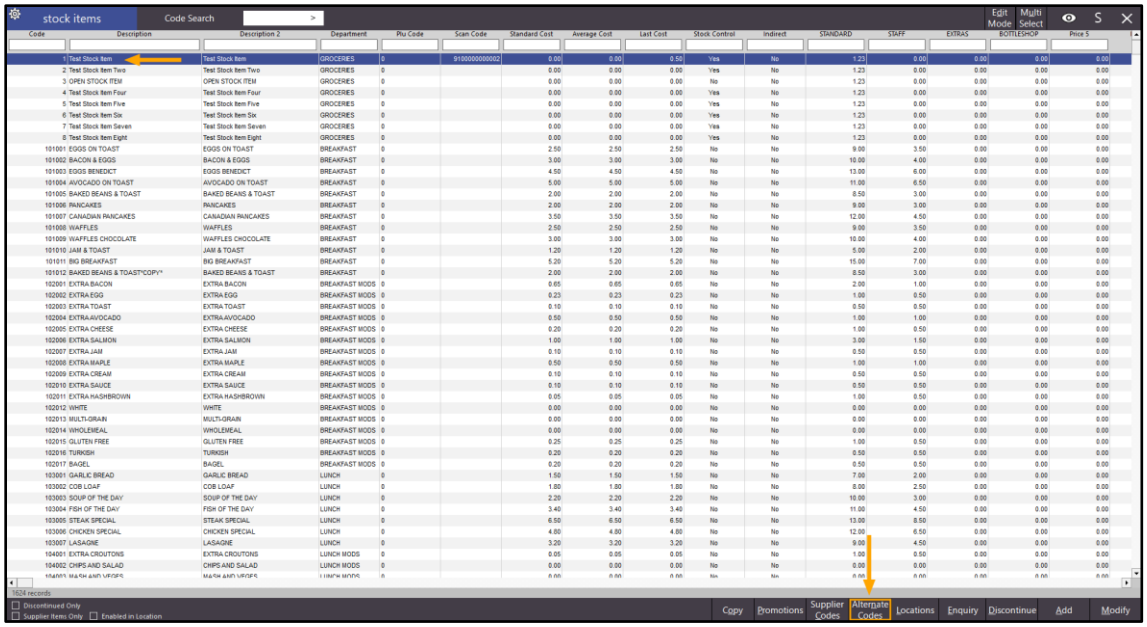


# idealpos7 Update History

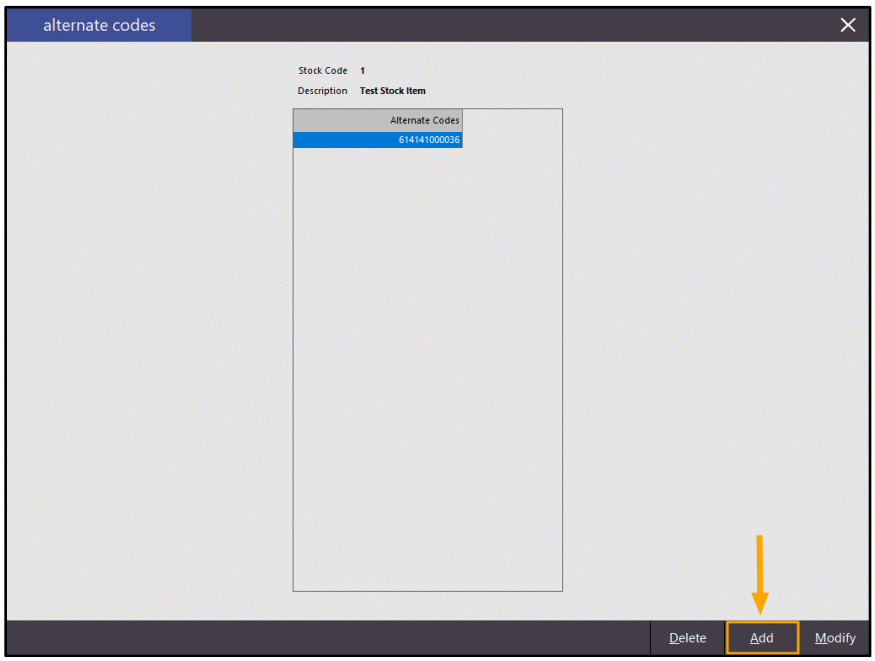
## Support for longer Alternate Codes

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.

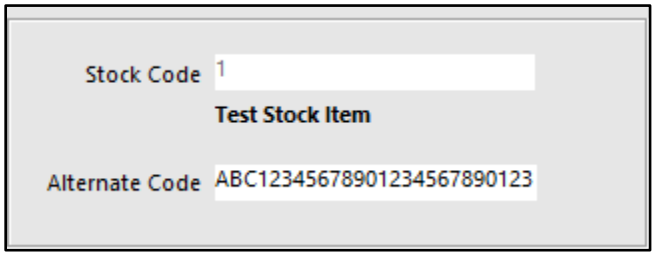
Go to File > Stock Control > Stock Items > Select Stock Item > Alternate Codes




Press the 'Add' button

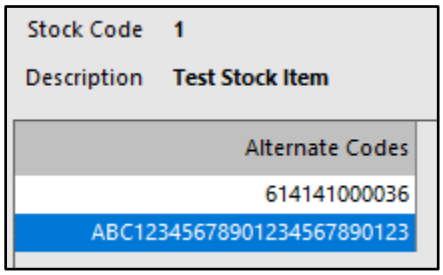


Enter the Alternate Code for the Stock Item.
An alphanumeric Alternate Code of up to 30 characters may now been entered.
Once the code has been entered, press the 'Save' button.




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



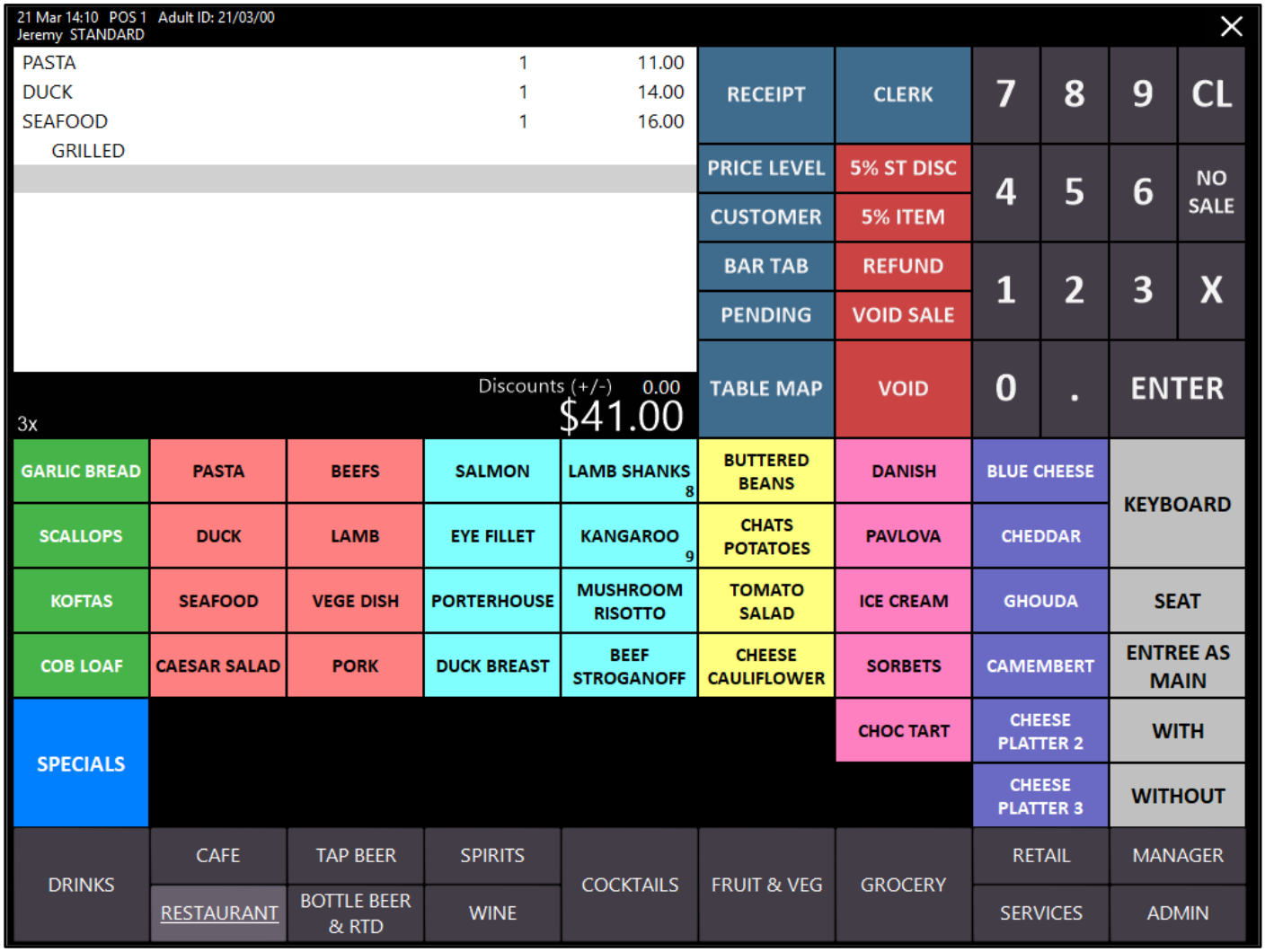
# Yes/No Options

### 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

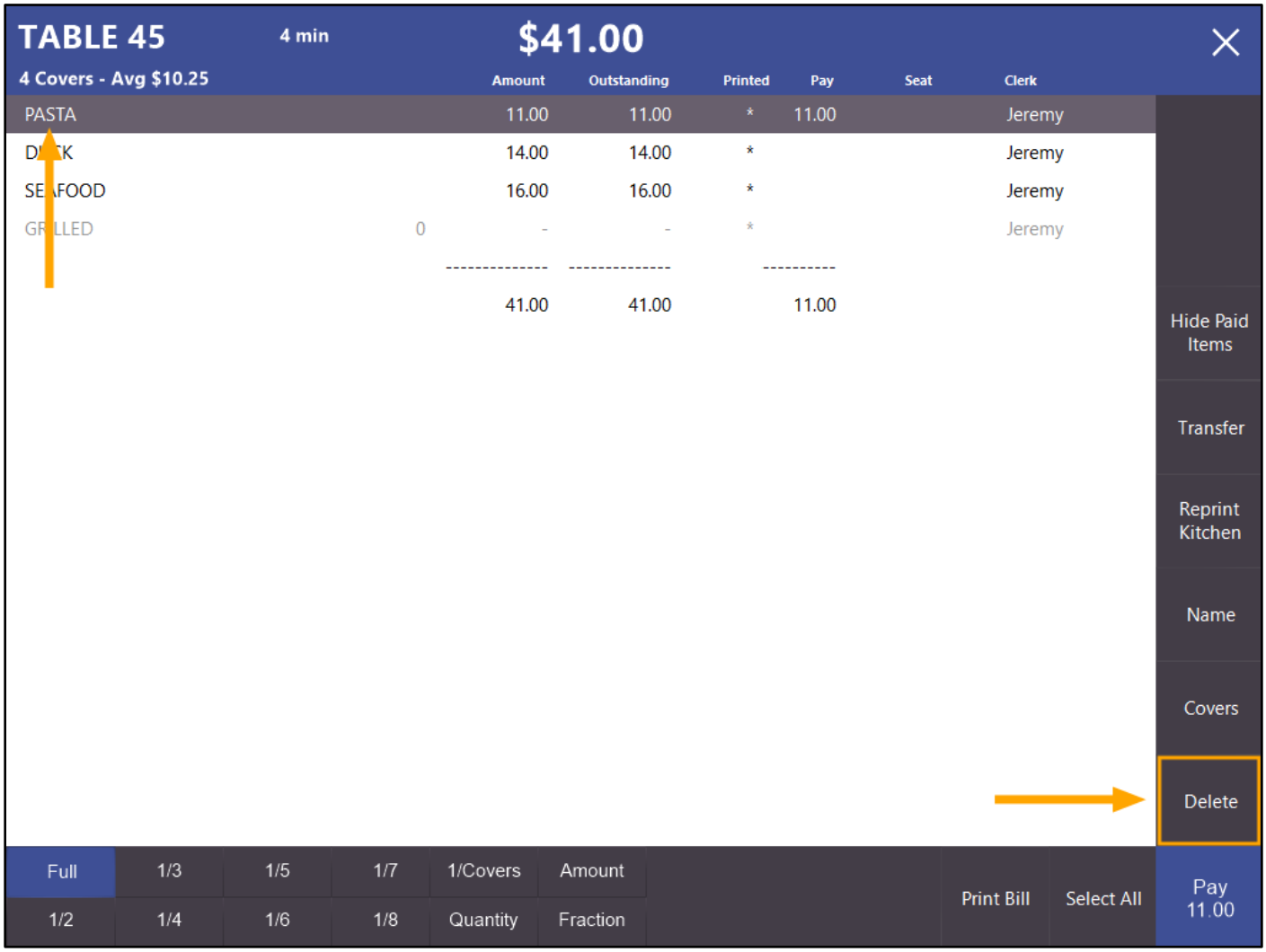
Open the POS Screen and add items to the sale



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.

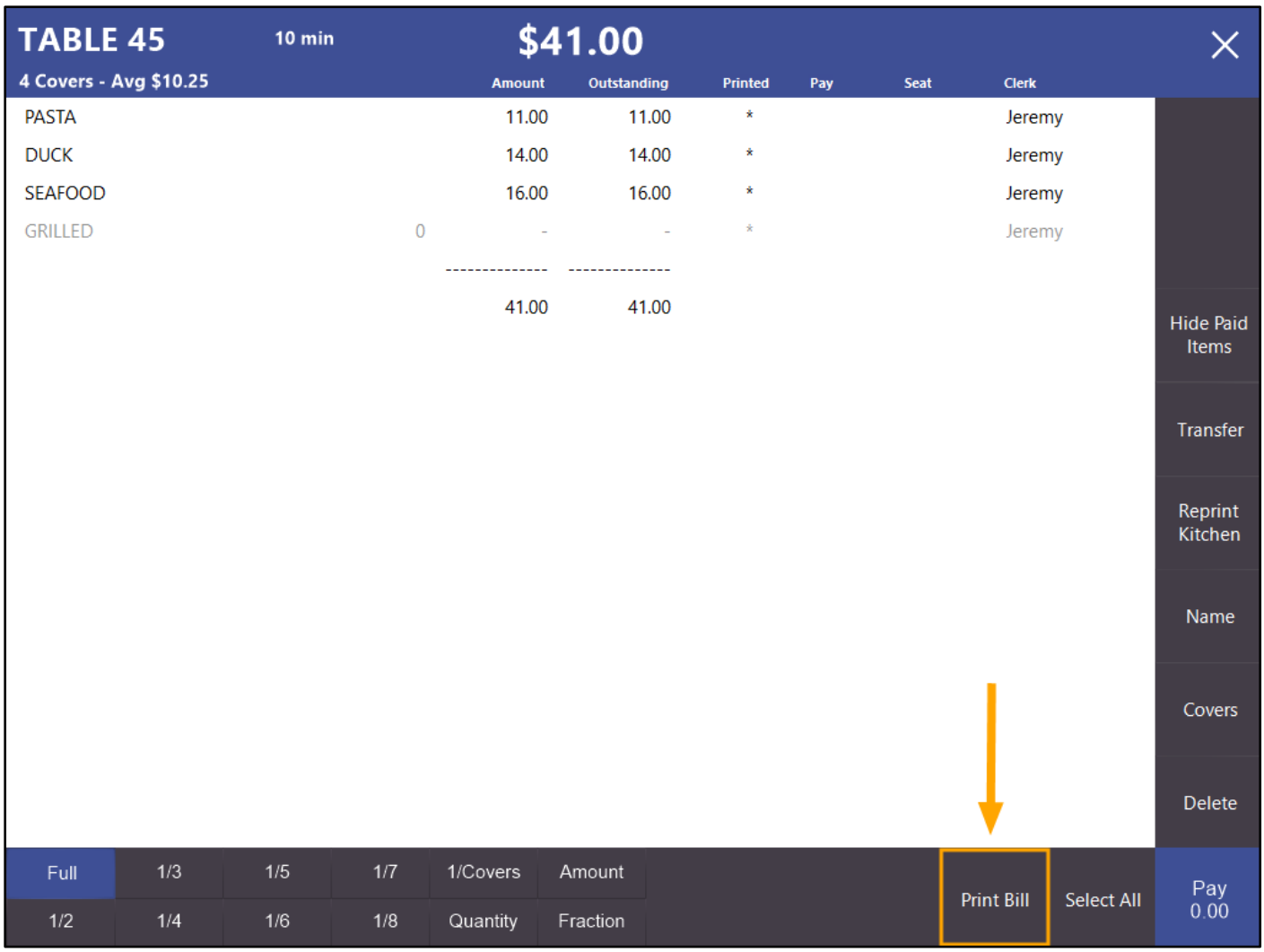
Then open the Table Map, select the table and press the Details button.

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

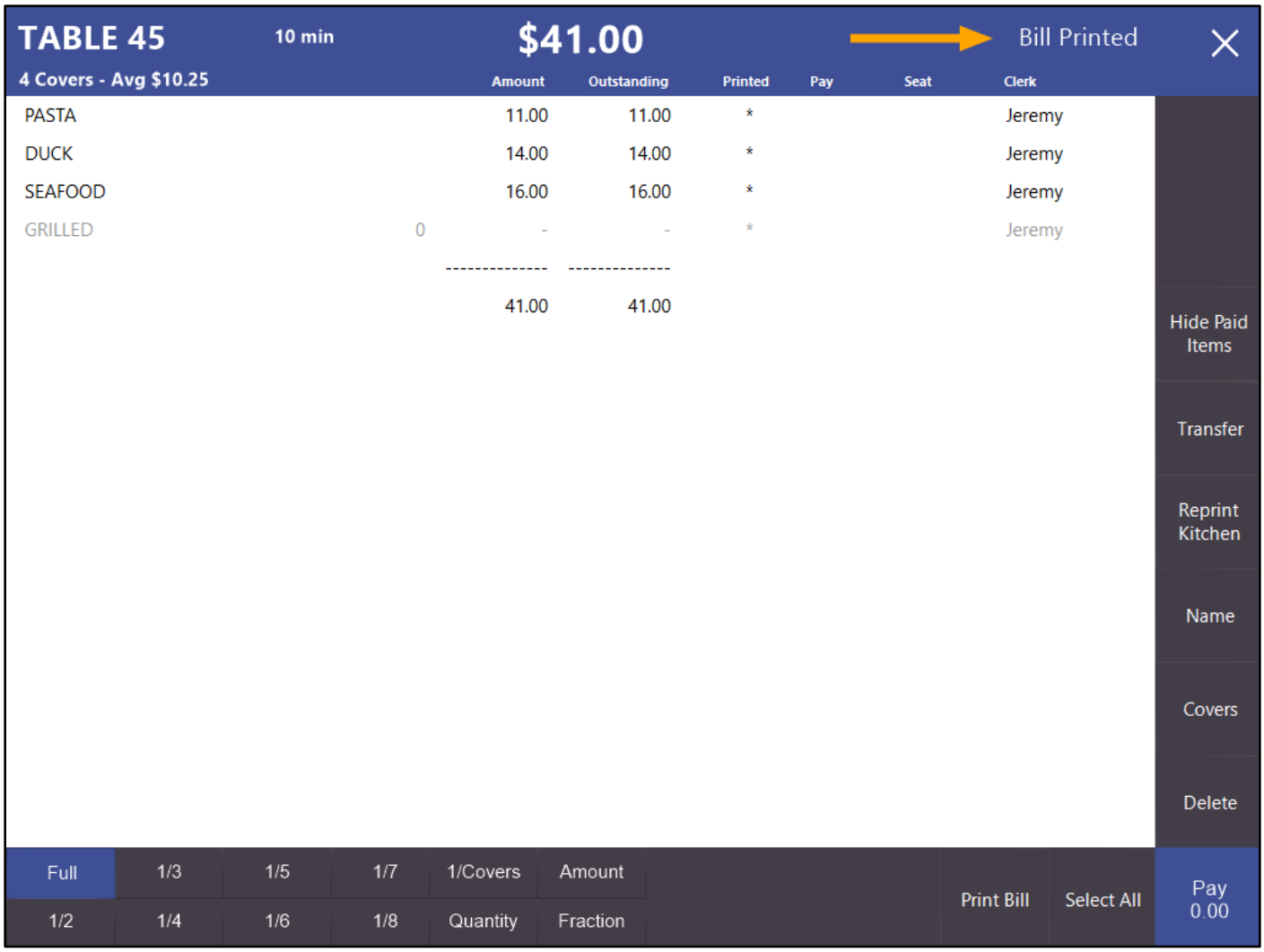


# idealpos7 Update History

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

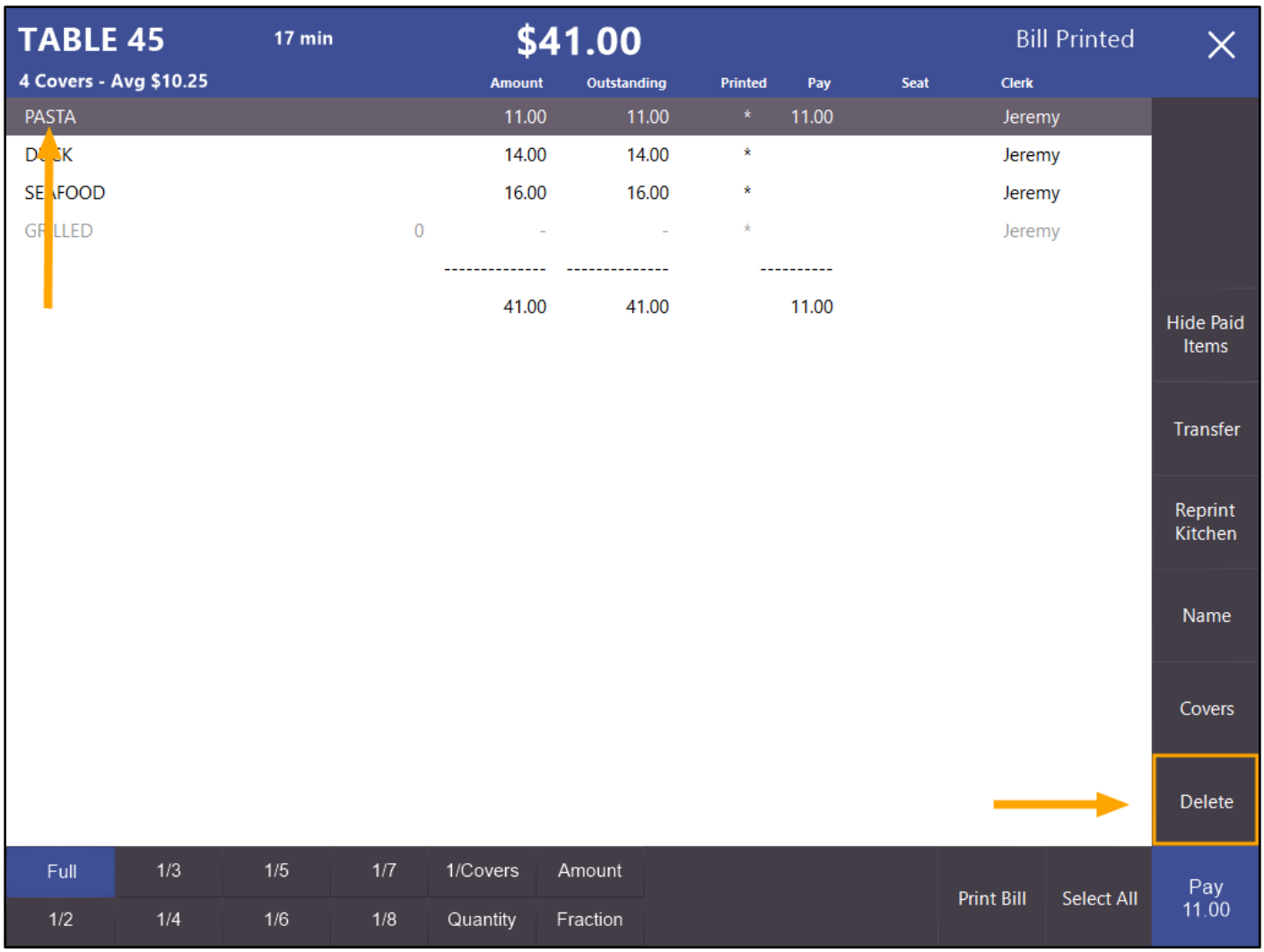


After a Bill has been printed, the 'Bill Printed' status will be displayed at the top right corner of the Table Details screen.

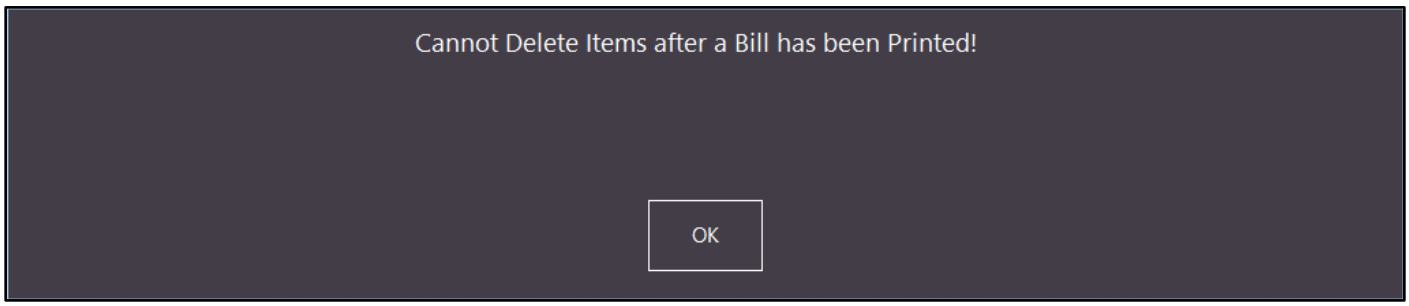


# idealpos7 Update History

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




The following prompt will be displayed.




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

## Inhibit Order Number on Table Kitchen Prints

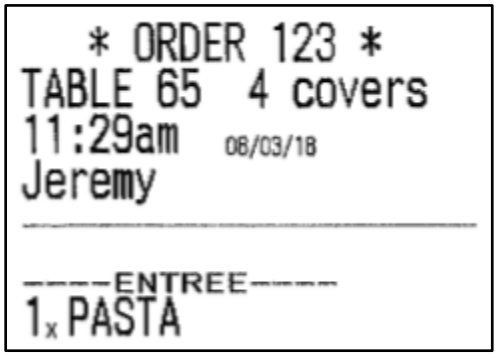
This function prevents the Order Number from printing on Table Kitchen Prints.

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

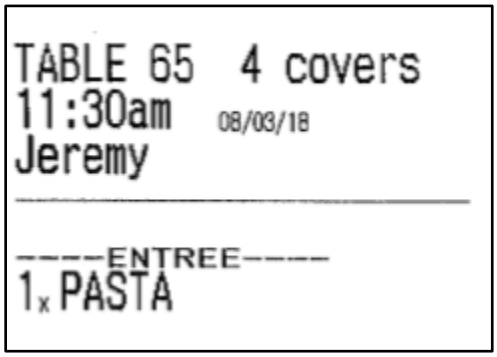
When you enter an Order Number into a sale that also contains Stock Items which print to a Kitchen Printer and save the sale to a table, the Order Number will not be printed on the Kitchen Printout.
If the Inhibit Option is not enabled, the Order Number will print to the Kitchen Print in the above scenario.

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)




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

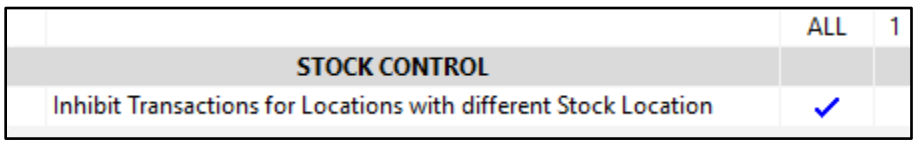


# idealpos7 Update History

## Inhibit Transactions for Locations with different Stock Location

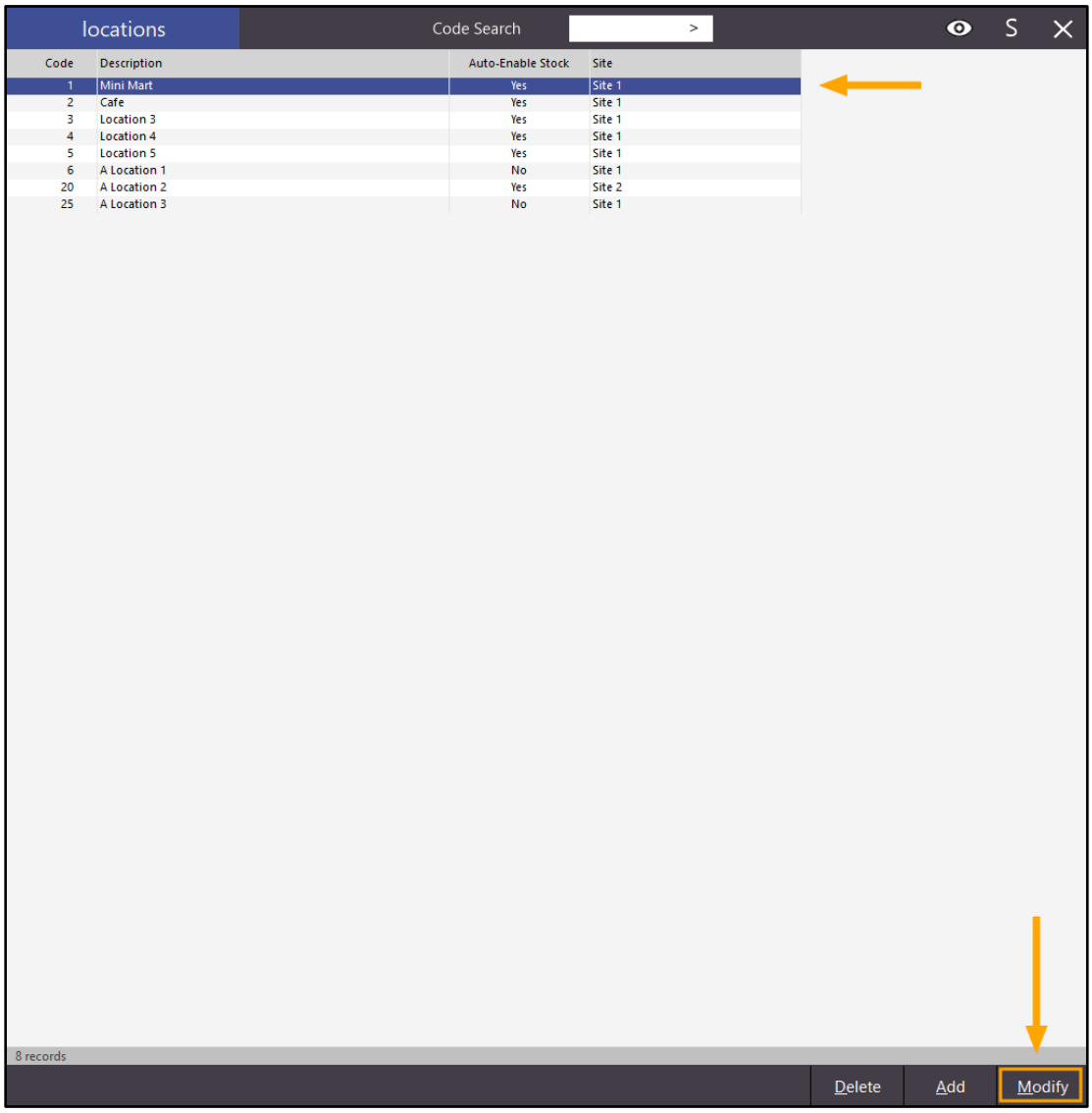
This function will stop Transactions (Transfers, Purchases, Stocktakes) from occurring at a Location which has a Location other than its own Location set as the Stock Location.
This function is useful for scenarios where a site has two locations such as a Mini Mart and a Café.
All Stock is located in 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

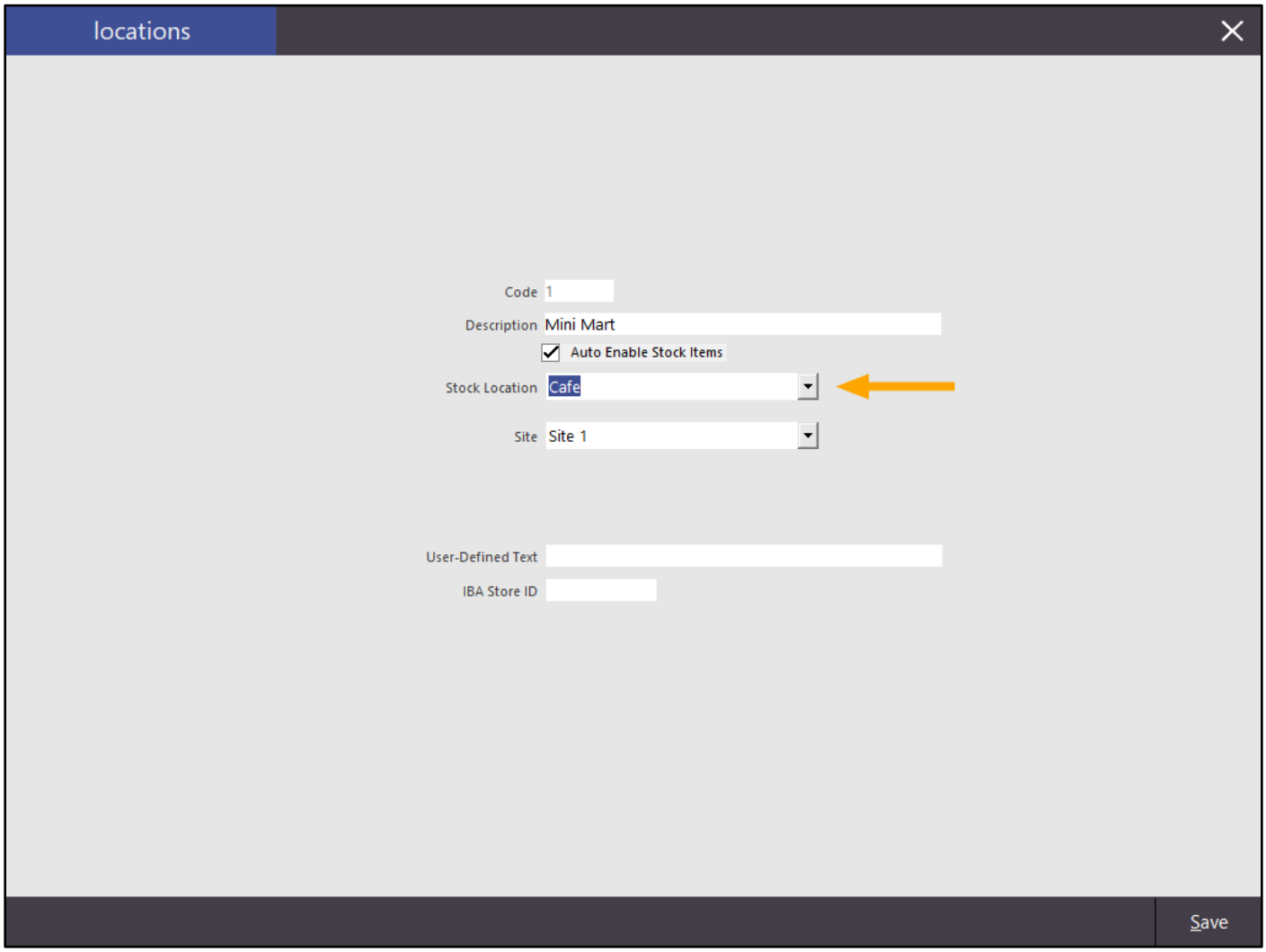



If required, setup/update your Locations so they reflect the Stock Location.

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



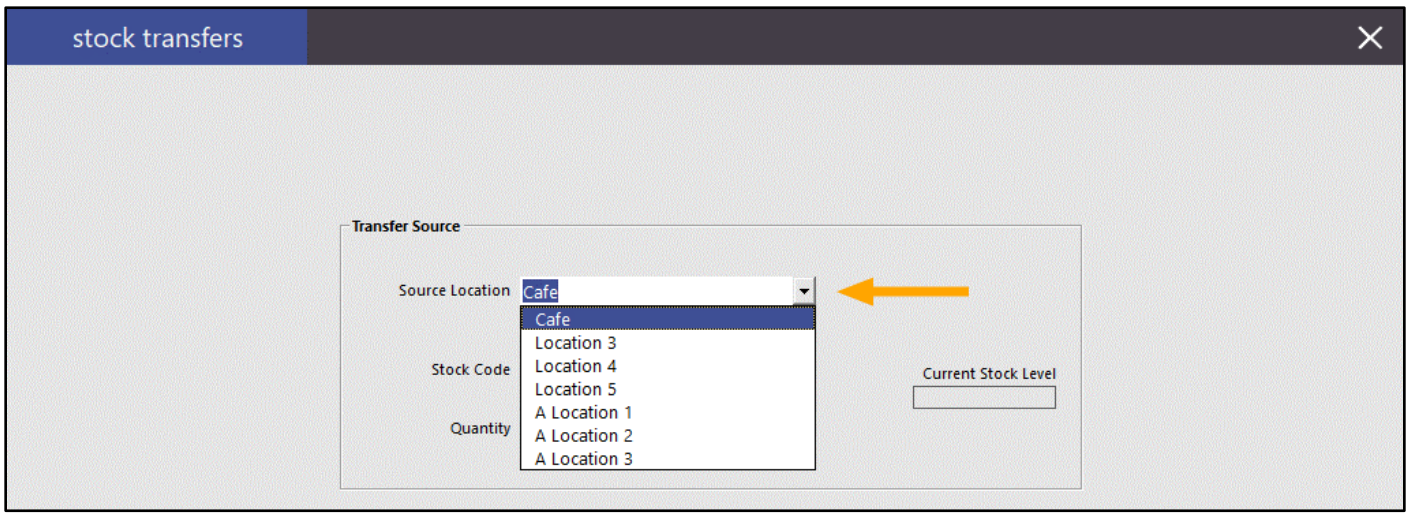
Select the Stock Location from the Stock Location dropdown list which reflects the location of where the Stock is located for the current location then press Save to save the change.

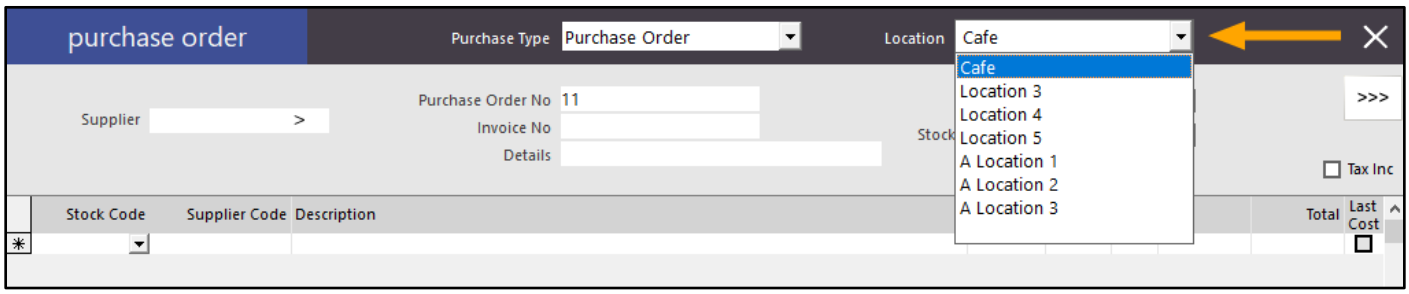


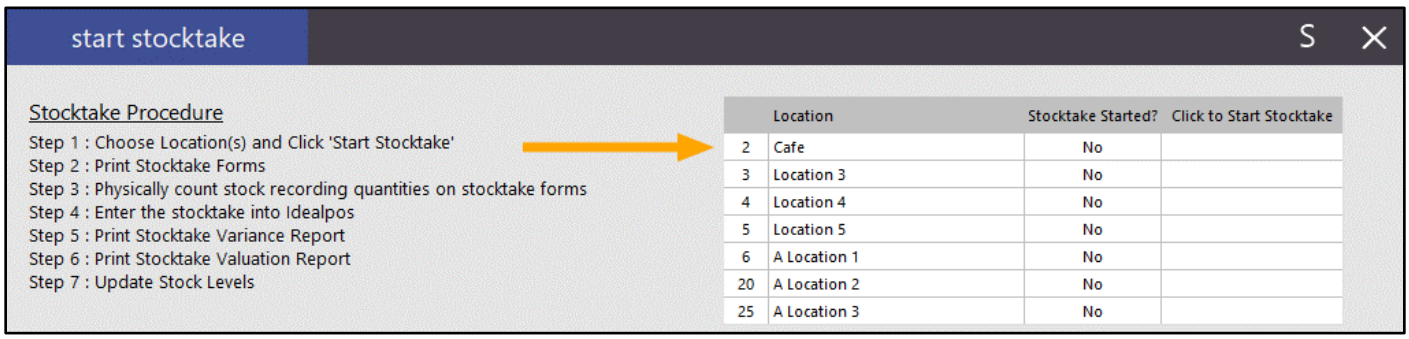

Using the above as an example, transactions (Transfers, Purchases or Stocktakes) will be inhibited.
This means that the Mini Mart Location will not be shown as an available Location when performing Transfers, Purchases or Stocktakes.

# idealpos7 Update History

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



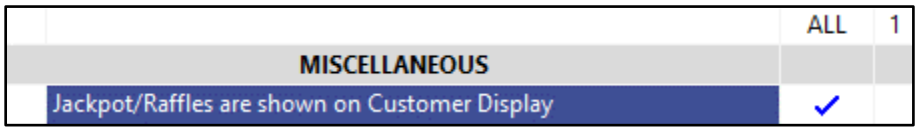



### Jackpot/Raffles are shown on Customer Display

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




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

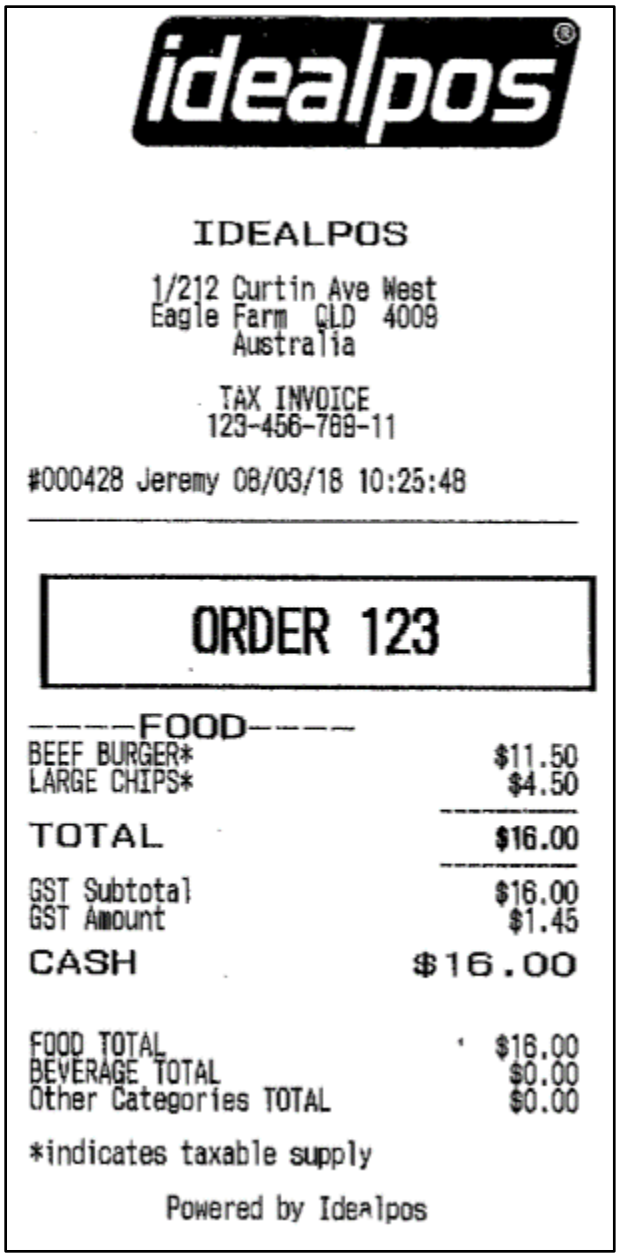
| | ALL | 1 |
|---|---|---|
| RECEIPT / KITCHEN | | |
| Print Large Order Number | ✓ | |

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

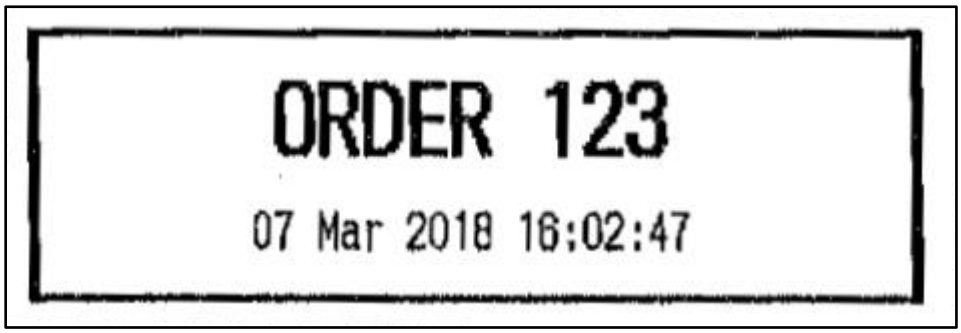
*** ORDER 123 ***

----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