

Build 54

Update Details:

** Enhancements

- * [IP-1436] - Option to print POS Description on Kitchen Print from terminal where order is taken
- * [IP-1699] - Import Promotions - support for Scan_Code field
- * [IP-1935] - Hourly Sales Dashboard display in chronological order
- * [IP-1976] - Yes/No Option - Show Tender Spend Limit on Receipts
- * [IP-1977] - Aristocrat Gaming - option to Combine Accounts into One Total
- * [IP-1987] - Assembly Payments EFTPOS - Support for Cash-Out functionality
- * [IP-1988] - Export Stock Items by Range - added Webstore Field
- * [IP-1995] - Journal Enquiry - Search by Table Range
- * [IP-1996] - Table Summary - Item view shows Paid/Partially Paid Items
- * [IP-1998] - POS Grids - Support for Chinese characters
- * [IP-2008] - "Admin" User - Inhibit ability to Override Permissions with other Users
- * [IP-2009] - Assembly Payments EFTPOS - Support for Settlement Enquiry functionality
- * [IP-2018] - Handheld - option to Force Bills to print to specific Network Printer
- * [IP-2025] - Table Alert minutes support for 3 digit values
- * [IP-2026] - Bill Prints - option to show Discounts White on Black
- * [IP-2027] - Ability to view Bar Tab/Table Items from POS Screen
- * [IP-2034] - Kitchen Docket - option to Print Stock Items Above Header
- * [IP-2042] - Speed Improvement in POS Screen with large number of Promotions
- * [IP-2055] - Table Map Setups - added Shortcut Functionality

Back Office – Dashboard

Hourly Sales Dashboard display in chronological order

This function updates the order which the hourly sales are displayed on the Dashboard.

Previously, the hourly sales were ordered by quantity of sales per hour, meaning that the hours which had the most sales would be displayed at the top and the sales which had the least sales would be displayed at the bottom.

This function updates the hourly sales dashboard so that hours are displayed in chronological order.

I.e. The order in which the hours occur during the day.

Note that this change will only affect recent monthly periods.

This means that previous periods may still be ordered by the quantity of sales per hour, with the hours that have the most sales displayed at the top and hours with least sales displayed at the bottom.

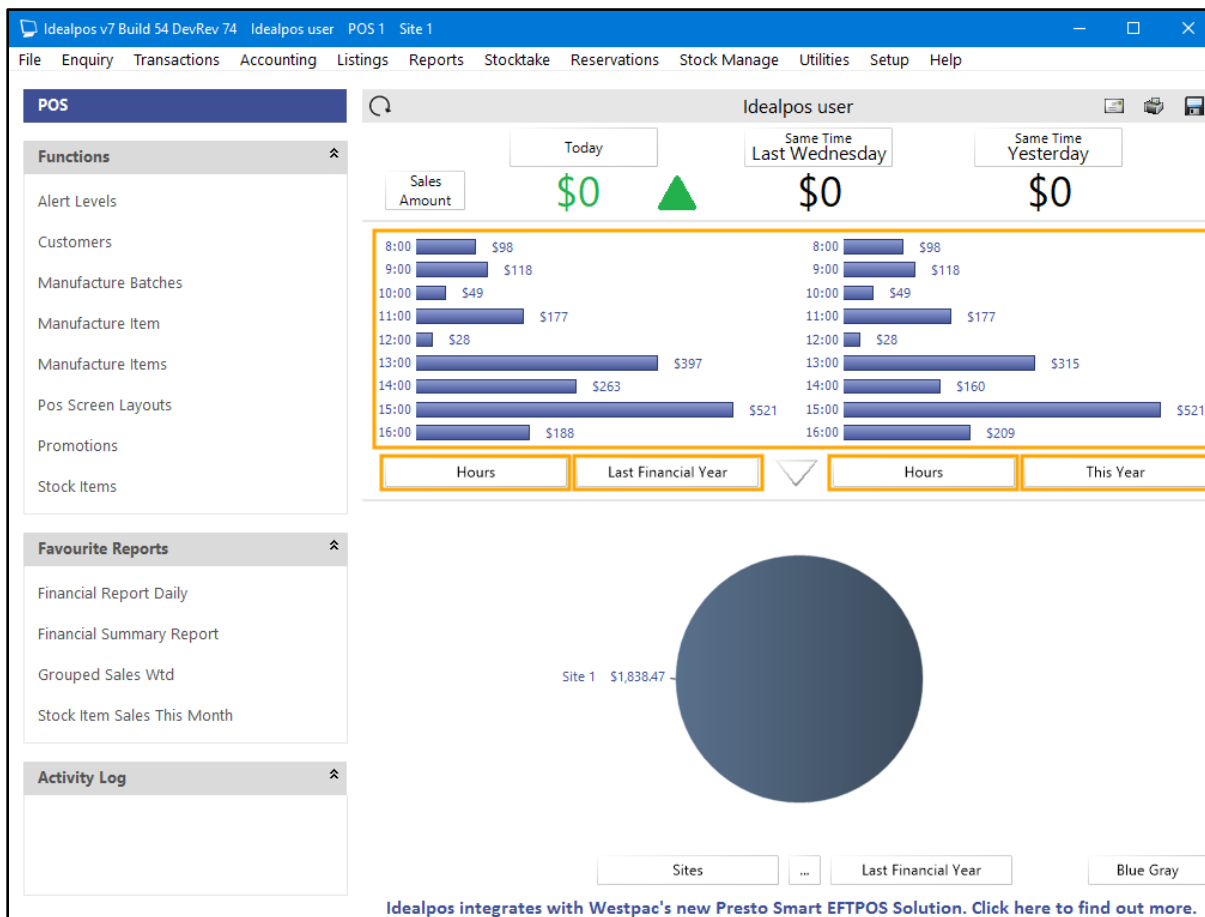
Previous periods can be cleared if desired which will be explained further below.

If the dashboard isn't displayed on the main Idealpos screen, search for "Dashboard" in Setup > Yes/No Options and ensure that it is enabled for the POS terminal you are using.

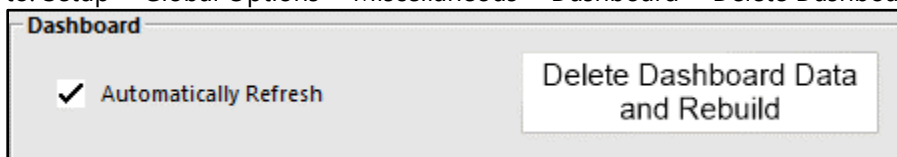
Also ensure that the logged on user has access to the Dashboard: go to Setup > Users > Select the logged on User > Modify > enter Dashboard into the Search field and ensure that it is enabled.

Go to the Idealpos main screen and select "Hours" from the first dropdown option and select the month/period which you are interested in from the second dropdown box. You can also compare the hourly sales to a previous period by selecting "Hours" from the third dropdown box and select the period from the fourth dropdown box.

The following example shows Hours from the "Last Financial Year" compared to the Hours of "This Year":



To delete dashboard data and rebuild (this will remove previous periods from the dashboard and can't be undone), go to: Setup > Global Options > Miscellaneous > Dashboard > Delete Dashboard Data and Rebuild



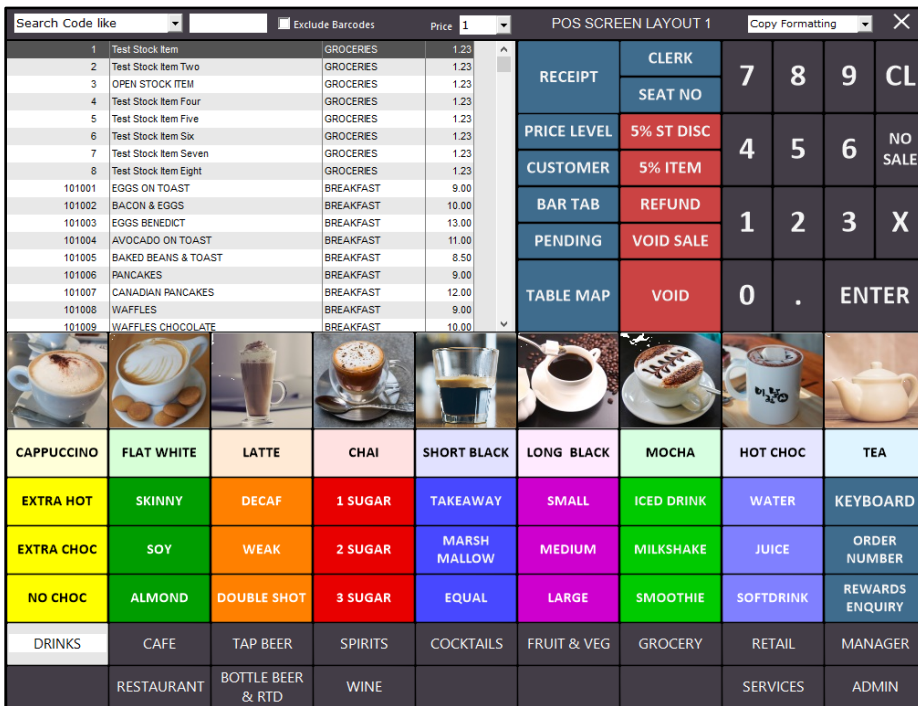
idealpos7 Update History

Discounts

Hide Item Discount Percentage on the POS Screen, Bill and Receipt

This function enables the ability to hide the percentage on the POS Screen, Bill and Receipt when using specific item discount buttons on the POS screen used to apply a discount. Note that this feature only applies to the Item Discount function and is not available for the Sub Total Discount function.

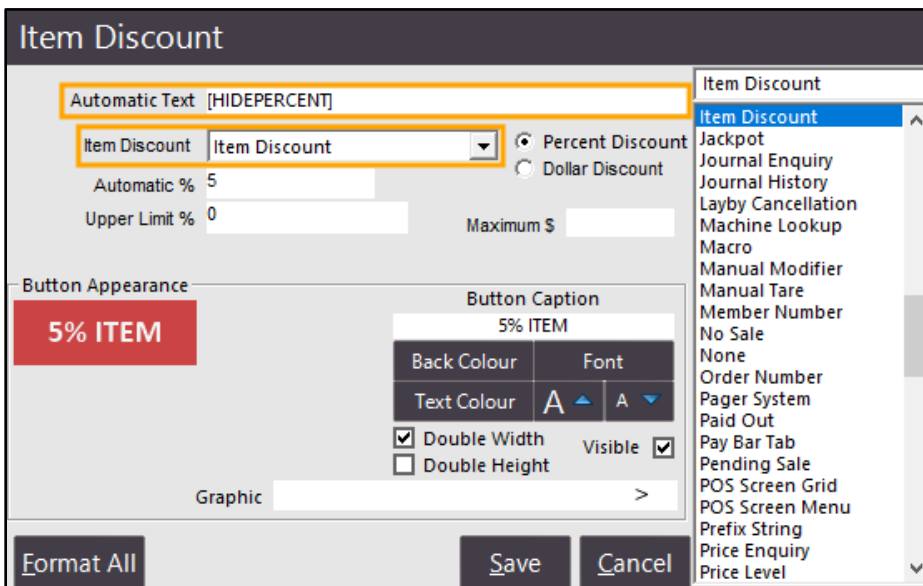
To enable this feature, go to: Setup > POS Screen > POS Screen Setup > Select POS Screen Layout > Buttons



Select an existing Item Discount button or create a new discount button.

When creating the Item Discount button, enter [HIDEPERCENT] into the Automatic Text field, enter the discount percentage into the Automatic % field.

Select the Item Discount from the Item Discount dropdown box. Idealpos has a total of four Item Discount types that can be selected. By default, the Item Discount 1 description is set to Item Discount and Item Discounts 1 – 4 are set to Item Disc 1 – Item Disc 4. The description of the selected Item Discount type will be displayed on the POS Screen, Bill and Receipt when a discount is applied using the discount.



Once you have configured the button, press the "Save" button to save the change then close the POS Screen Setup windows.

Should you wish to update the Discount Description, go to:

Setup > Function Descriptors > Select: Item Discount 1 – Item Discount 4 > Modify > Description: Enter the updated Description

| | |
|-------------|------------------------|
| Function | Item Discount 2 |
| Description | Complimentary |

Once the description has been updated, press the "Save" button then close the Function Descriptors screen.

Open the Idealpos POS screen.

The discount can be applied in one of two ways. You can either add all the desired items to the sale, then individually select an item and press the Item Discount button. The other option is to press the Item Discount button after adding an item to the sale. The discount will then apply to the item that was added to the sale.

The discount text will appear and will not include the discount percentage amount.

05 Jul 14:12 POS 1 Adult ID: 05/07/00
Terry STANDARD

| | | | | | | | | | |
|-----------------|---|-------|-----------|-------------|------------|---|-------|----|---------|
| CAPPUCCINO | 1 | 3.50 | RECEIPT | CLERK | 7 | 8 | 9 | CL | |
| FLAT WHITE | 1 | 3.50 | | SEAT NO | | | | | |
| LATTE | 1 | 3.50 | | PRICE LEVEL | 5% ST DISC | 4 | 5 | 6 | NO SALE |
| Item Discount | | -0.18 | | CUSTOMER | 5% ITEM | | | | |
| | | | BAR TAB | REFUND | 1 | 2 | 3 | X | |
| | | | PENDING | VOID SALE | | | | | |
| Discounts -0.18 | | | TABLE MAP | VOID | 0 | . | ENTER | | |
| 3x \$10.32 | | | | | | | | | |

| | | | | | | | | |
|------------|------------|-------------------|---------|--------------|-------------|------------|-----------|-----------------|
| | | | | | | | | |
| CAPPUCCINO | 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 |

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After saving the sale to a table and viewing the Table Details, the discount percentage will also be hidden.

| TABLE 11 | | 0 min | \$10.32 | | | | | × |
|-----------------------|---|--------|-------------|---------|-----|------|-------|---|
| 4 Covers - Avg \$2.58 | | Amount | Outstanding | Printed | Pay | Seat | Clerk | |
| CAPPUCCINO | | 3.50 | 3.50 | * | | | Terry | |
| FLAT WHITE | | 3.50 | 3.50 | * | | | Terry | |
| LATTE | | 3.50 | 3.50 | * | | | Terry | |
| Item Discount | 0 | -0.18 | -0.18 | * | | | | |
| | | ----- | ----- | | | | | |
| | | 10.32 | 10.32 | | | | | |



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

The discount percentage is also hidden from the bill as well as final receipt.

| | |
|--|---|
|  | |
| IDEALPOS 1/212 Curtin Ave West Eagle Farm QLD 4009 Australia TAX INVOICE 123-456-789-11 | |
| Table 11 Terry 05/07/18 14:19 Covers : 4 | |
| CAPPUCCINO 3.50 FLAT WHITE 3.50 LATTE 3.50 Item Discount -0.18 Includes Tax: GST Amount \$0.94 SUB TOTAL \$10.32 TIPS Amount GRAND TOTAL *indicates taxable supply Powered by Idealpos |  IDEALPOS 1/212 Curtin Ave West Eagle Farm QLD 4009 Australia TAX INVOICE 123-456-789-11 #000682 Terry 05/07/18 14:25:15 <hr/> Table 11 -----BEVERAGE----- CAPPUCCINO* \$3.50 FLAT WHITE* \$3.50 LATTE* \$3.50 Item Discount -0.18 Sub-Total \$10.32 ROUNDING -0.02 TOTAL \$10.30 GST Subtotal \$10.32 GST Amount \$0.94 CASH \$10.30 FOOD TOTAL \$0.00 BEVERAGE TOTAL \$10.32 Other Categories TOTAL \$0.00 COVERS TOTAL 4 *indicates taxable supply Powered by Idealpos |

EFTPOS

Assembly Payments EFTPOS – Support for Cash-Out functionality

This function adds support for performing cash-out either when tendering a transaction or performing a cash-out without any items in the sale.

To setup an EFTPOS Cash-out button, go to:

Setup > POS Screen > POS Screen Setup > Select a POS Screen Layout > Buttons

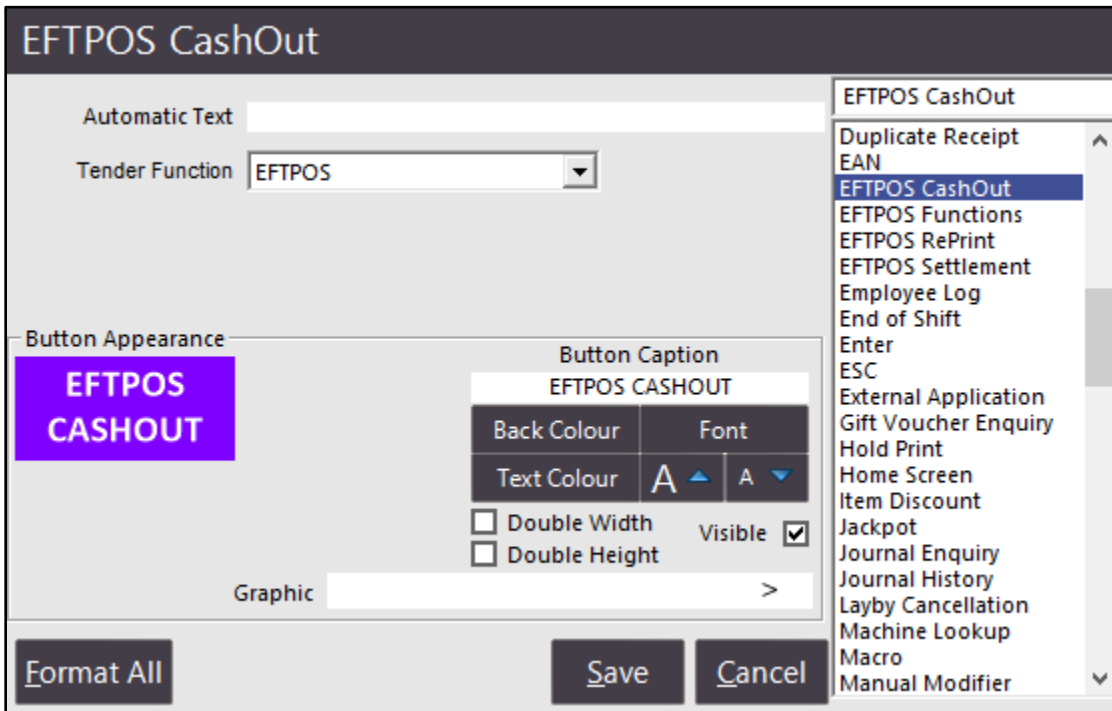
| Search Code like <input type="text"/> Exclude Barcodes <input type="checkbox"/> Price 1 | | | | POS SCREEN LAYOUT 1 | | | | | Copy Formatting | X | |
|---|-----------------------|-----------|-------|---------------------|------------|---|---|-----------------|-----------------|---|--|
| 1 | Test Stock Item | GROCERIES | 1.23 | RECEIPT | CLERK | 7 | 8 | 9 | CL | | |
| 2 | Test Stock Item Two | GROCERIES | 1.23 | PRICE LEVEL | 5% ST DISC | | | | | | |
| 3 | OPEN STOCK ITEM | GROCERIES | 1.23 | CUSTOMER | 5% ITEM | 4 | 5 | 6 | NO SALE | | |
| 4 | Test Stock Item Four | GROCERIES | 1.23 | BAR TAB | REFUND | | | | | | |
| 5 | Test Stock Item Five | GROCERIES | 1.23 | PENDING | VOID SALE | 1 | 2 | 3 | X | | |
| 6 | Test Stock Item Six | GROCERIES | 1.23 | TABLE MAP | VOID | 0 | . | ENTER | | | |
| 7 | Test Stock Item Seven | GROCERIES | 1.23 | | | | | | | | |
| 8 | Test Stock Item Eight | GROCERIES | 1.23 | | | | | | | | |
| 101001 | EGGS ON TOAST | BREAKFAST | 9.00 | | | | | | | | |
| 101002 | BACON & EGGS | BREAKFAST | 10.00 | | | | | | | | |
| 101003 | EGGS BENEDICT | BREAKFAST | 13.00 | | | | | | | | |
| 101004 | AVOCADO ON TOAST | BREAKFAST | 11.00 | | | | | | | | |
| 101005 | BAKED BEANS & TOAST | BREAKFAST | 8.50 | | | | | | | | |
| 101006 | PANCAKES | BREAKFAST | 9.00 | | | | | | | | |
| 101007 | CANADIAN PANCAKES | BREAKFAST | 12.00 | | | | | | | | |
| 101008 | WAFFLES | BREAKFAST | 9.00 | | | | | | | | |
| 101009 | WAFFLES CHOCOLATE | BREAKFAST | 10.00 | | | | | | | | |
| | | | | | | | | | | | |
| CAPPUCCINO | | | | 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 | | | | | | | |

Select a blank button. If there are no blank buttons available on your screen (as per the above example), try selecting another tab or page from the bottom of the screen.

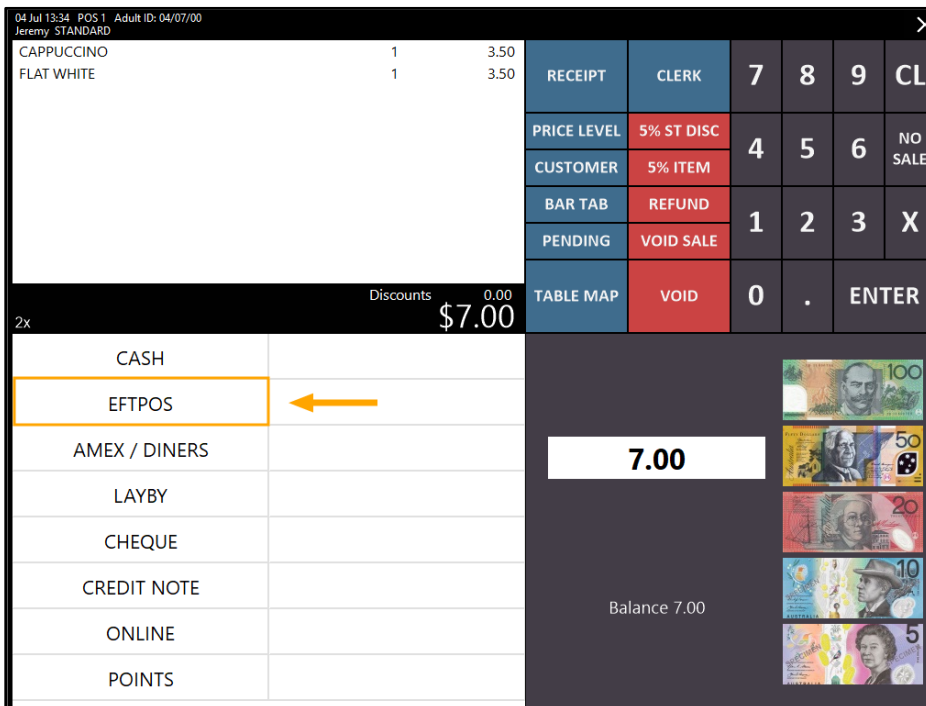
| Search Code like <input type="text"/> Exclude Barcodes <input type="checkbox"/> Price 1 | | | | POS SCREEN LAYOUT 1 | | | | | Copy Formatting | X | |
|---|-----------------------|-----------|-------|-----------------------|------------|---|---|---------------------------|-----------------|---|--|
| 1 | Test Stock Item | GROCERIES | 1.23 | RECEIPT | CLERK | 7 | 8 | 9 | CL | | |
| 2 | Test Stock Item Two | GROCERIES | 1.23 | PRICE LEVEL | 5% ST DISC | | | | | | |
| 3 | OPEN STOCK ITEM | GROCERIES | 1.23 | CUSTOMER | 5% ITEM | 4 | 5 | 6 | NO SALE | | |
| 4 | Test Stock Item Four | GROCERIES | 1.23 | BAR TAB | REFUND | | | | | | |
| 5 | Test Stock Item Five | GROCERIES | 1.23 | PENDING | VOID SALE | 1 | 2 | 3 | X | | |
| 6 | Test Stock Item Six | GROCERIES | 1.23 | TABLE MAP | VOID | 0 | . | ENTER | | | |
| 7 | Test Stock Item Seven | GROCERIES | 1.23 | | | | | | | | |
| 8 | Test Stock Item Eight | GROCERIES | 1.23 | | | | | | | | |
| 101001 | EGGS ON TOAST | BREAKFAST | 9.00 | | | | | | | | |
| 101002 | BACON & EGGS | BREAKFAST | 10.00 | | | | | | | | |
| 101003 | EGGS BENEDICT | BREAKFAST | 13.00 | | | | | | | | |
| 101004 | AVOCADO ON TOAST | BREAKFAST | 11.00 | | | | | | | | |
| 101005 | BAKED BEANS & TOAST | BREAKFAST | 8.50 | | | | | | | | |
| 101006 | PANCAKES | BREAKFAST | 9.00 | | | | | | | | |
| 101007 | CANADIAN PANCAKES | BREAKFAST | 12.00 | | | | | | | | |
| 101008 | WAFFLES | BREAKFAST | 9.00 | | | | | | | | |
| 101009 | WAFFLES CHOCOLATE | BREAKFAST | 10.00 | | | | | | | | |
| COUPON PROMO | | | | CR NOTE ENQUIRY | | | | ACCOUNT LAYBY ADJUST | | | |
| JACKPOT | | | | PRICE ENQUIRY | | | | GIFT VOUCHER | | | |
| BAR TAB BILL | | | | VOID LAST ITEM | | | | END OF SHIFT | | | |
| BANKING REPORT | | | | EFTPOS CASHOUT | | | | PROMO ENQUIRY | | | |
| ACCOUNT LAYBY CREDIT | | | | GIFT VOUCHER ENQUIRY | | | | PAY BAR TAB | | | |
| 10% ITEM DISCOUNT | | | | 10% ST DISCOUNT | | | | PRINT TAX INVOICE | | | |
| DEPT SALES REPORT | | | | REWARDS ENQUIRY | | | | RECEIPT IS OFF | | | |
| JOURNAL ENQUIRY | | | | STOCK SALES REPORT | | | | SEND MESSAGE | | | |
| STOCK ITEM SEARCH | | | | ACCOUNT LAYBY PAYMENT | | | | EFTPOS Settlement Enquiry | | | |
| BAR TAB REPORT | | | | Item Discount | | | | RECEIPT IS OFF | | | |
| JOURNAL ENQUIRY | | | | STOCK SALES REPORT | | | | DRINKS | | | |
| CAFE | | | | TAP BEER | | | | SPIRITS | | | |
| COCKTAILS | | | | FRUIT & VEG | | | | GROCERY | | | |
| RETAIL | | | | MANAGER | | | | RESTAURANT | | | |
| BOTTLE BEER & RTD | | | | WINE | | | | SERVICES | | | |
| ADMIN | | | | | | | | | | | |

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After selecting a blank button, set the Set the function to EFTPOS CashOut, Tender Function as EFTPOS and enter a Button Caption of EFTPOS CASHOUT or another caption of your preference.






To use the EFTPOS Cashout function during a sale, add items as you normally would to the sale, then press the Enter button to go to the Tender screen then select the EFTPOS option




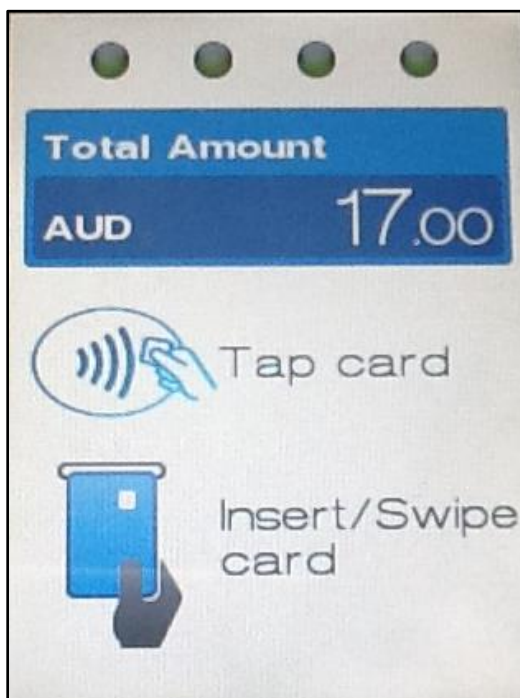
Enter the Cash-Out amount desired then press OK.

In the below example, the Purchase Amount for the transaction is \$7.00 and a Cash Out amount of \$10.00, bringing the total amount to \$17.00

| Enter Cash-Out Amount | | | | | |
|-----------------------|-------|---|---|---|--|
| Purchase Amount | 7.00 | 7 | 8 | 9 |  |
| CashOut Amount | 10.00 | 4 | 5 | 6 |  |
| Total Amount | 17.00 | 1 | 2 | 3 |  |
| OK | | 0 | . | C |  |

The following screen will be displayed in Idealpos and the Assembly Payments Pinpad will prompt for the card to be inserted

| eftpos : \$17.00 | |
|--|--|
| Asked EFTPOS to accept payment for \$Purchase: \$7.00; Tip: \$.00; Cashout: \$10.00; | |
|  | |



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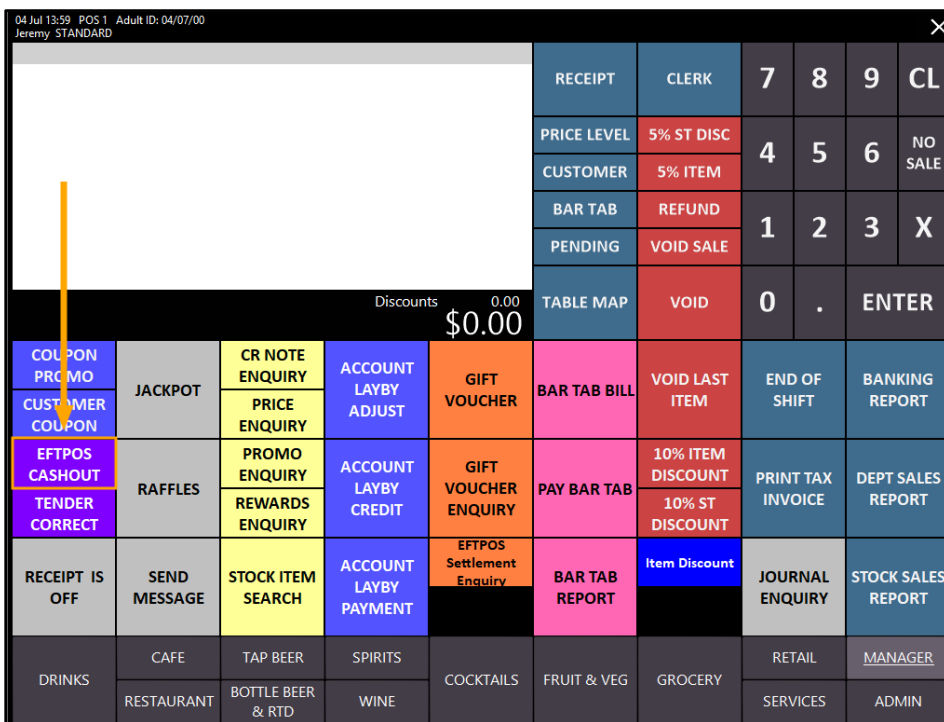
Follow the prompts on the pinpad. Once the payment has been approved, the pinpad will display the Approved prompt.



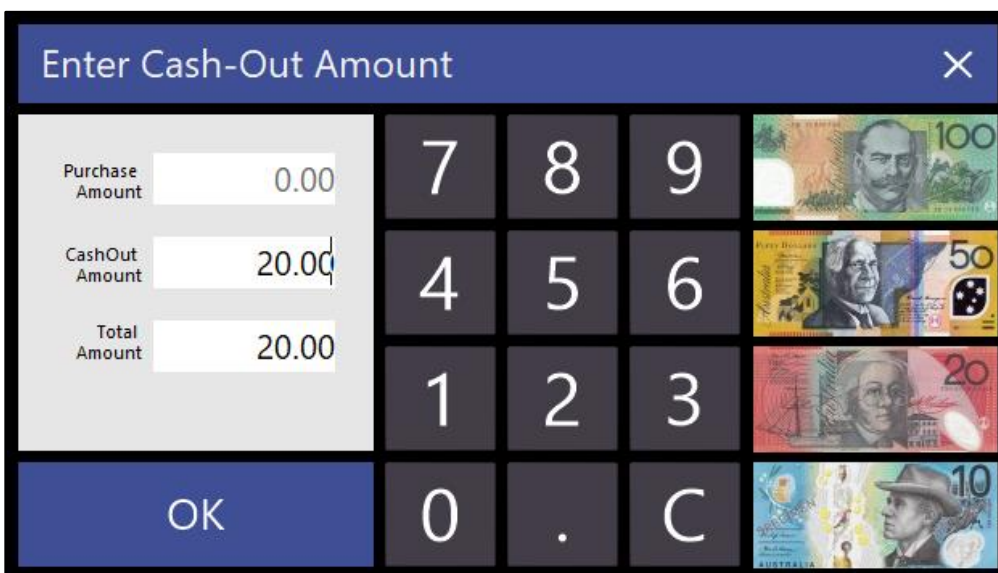
Idealpos will then display the cashout amount as "Change" – the customer can now be handed the amount they requested for cashout.

| 04 Jul 13:49 POS 1 Adult ID: 04/07/00 Jeremy STANDARD | | | | | | | | |
|--|-------|------|--|------------|---|---|-------|---------|
| CAPPUCCINO | 1 | 3.50 | RECEIPT | CLERK | 7 | 8 | 9 | CL |
| FLAT WHITE | 1 | 3.50 | PRICE LEVEL | 5% ST DISC | 4 | 5 | 6 | NO SALE |
| GST Subtotal | | 7.00 | CUSTOMER | 5% ITEM | 1 | 2 | 3 | X |
| GST Amount | | 0.64 | BAR TAB | REFUND | 0 | . | ENTER | |
| | | | PENDING | VOID SALE | | | | |
| | | | TABLE MAP | VOID | | | | |
| 2x | | | <p style="text-align: center;">Change \$10.00</p> | | | | | |
| CASH | | | | | | | | |
| EFTPOS | 17.00 | | | | | | | |
| AMEX / DINERS | | | | | | | | |
| LAYBY | | | | | | | | |
| CHEQUE | | | | | | | | |
| CREDIT NOTE | | | | | | | | |
| ONLINE | | | | | | | | |
| POINTS | | | | | | | | |

A cash-out transaction can also be completed without having to add any items to the sale. Go to the page/tab where the EFTPOS cash-out button was created as configured in the previous steps outlined above.



Press the EFTPOS CASHOUT button. The Enter Cash-Out Amount screen will be displayed. Enter the desired Cash-Out amount and press OK.



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Follow the instructions on the pinpad, then once the pinpad has approved the transaction, Idealpos will show the cashout amount as Change as per the below. You may now hand the customer their cash-out.

04 Jul 14:05 POS 1 Adult ID: 04/07/00
 Jeremy STANDARD

| | | | | | | |
|---------|-------------|------------|---|---|-------|---------|
| CASHOUT | RECEIPT | CLERK | 7 | 8 | 9 | CL |
| | PRICE LEVEL | 5% ST DISC | 4 | 5 | 6 | NO SALE |
| | CUSTOMER | 5% ITEM | 1 | 2 | 3 | X |
| | BAR TAB | REFUND | 0 | . | ENTER | |
| | PENDING | VOID SALE | | | | |
| | TABLE MAP | VOID | | | | |

| | | |
|---------------|-------|--------------------------|
| CASH | | Change \$20.00 |
| EFTPOS | 20.00 | |
| AMEX / DINERS | | |
| LAYBY | | |
| CHEQUE | | |
| CREDIT NOTE | | |
| ONLINE | | |
| POINTS | | |

Assembly Payments EFTPOS – Support for Settlement Enquiry Functionality

This function adds the ability to perform an EFTPOS Settlement Enquiry without triggering the EFTPOS Settlement to occur. This function is configured by setting up a button on the POS Screen which enables the Settlement Enquiry to occur.










To setup the Settlement Enquiry button, go to Setup > POS Screen > POS Screen Setup > Select: POS Screen Layout > Buttons

Search Code like
 Exclude Barcodes
Price **1**
POS SCREEN LAYOUT 1
Copy Formatting

| | | | |
|--------|-----------------------|-----------|-------|
| 1 | Test Stock Item | GROCERIES | 1.23 |
| 2 | Test Stock Item Two | GROCERIES | 1.23 |
| 3 | OPEN STOCK ITEM | GROCERIES | 1.23 |
| 4 | Test Stock Item Four | GROCERIES | 1.23 |
| 5 | Test Stock Item Five | GROCERIES | 1.23 |
| 6 | Test Stock Item Six | GROCERIES | 1.23 |
| 7 | Test Stock Item Seven | GROCERIES | 1.23 |
| 8 | Test Stock Item Eight | GROCERIES | 1.23 |
| 101001 | EGGS ON TOAST | BREAKFAST | 9.00 |
| 101002 | BACON & EGGS | BREAKFAST | 10.00 |
| 101003 | EGGS BENEDICT | BREAKFAST | 13.00 |
| 101004 | AVOCADO ON TOAST | BREAKFAST | 11.00 |
| 101005 | BAKED BEANS & TOAST | BREAKFAST | 8.50 |
| 101006 | PANCAKES | BREAKFAST | 9.00 |
| 101007 | CANADIAN PANCAKES | BREAKFAST | 12.00 |
| 101008 | WAFFLES | BREAKFAST | 9.00 |
| 101009 | WAFFLES CHOCOLATE | BREAKFAST | 10.00 |

| | | | | | |
|-------------|------------|---|---|-------|---------|
| RECEIPT | CLERK | 7 | 8 | 9 | CL |
| PRICE LEVEL | 5% ST DISC | 4 | 5 | 6 | NO SALE |
| CUSTOMER | 5% ITEM | 1 | 2 | 3 | X |
| BAR TAB | REFUND | 0 | . | ENTER | |
| PENDING | VOID SALE | | | | |
| TABLE MAP | VOID | | | | |

| | | | |
|---|---|-------|--|
| 0 | . | ENTER | |
|---|---|-------|--|

| | | | | | | | | |
|--|---|---|---|---|---|--|---|---|
|  |  |  |  |  |  |  |  |  |
| CAPPUCCINO | 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 |

idealpos7 Update History

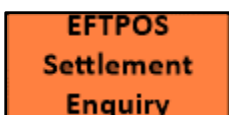
Select a desired location for the button. If there are no available spaces for a button on the initial screen, try selecting another department or option (e.g. Admin, Manager, etc.).

E.g. In the below example, the Manager screen contains a few empty locations where a new button can be created next to the Bar Tab Report button. You may want to rearrange your buttons so that similar functions are grouped together. For more in-depth information on programming POS Screen buttons, visit our Idealpos website, click on Support, then click on the User Guide link then enter a search term of "POS Screen Programming" for more information about programming the POS Screen.

| | | | | | | | | |
|-----------------|--------------|-------------------|-----------------------|----------------------|----------------|-------------------|-------------------|--------------------|
| COUPON PROMO | JACKPOT | CR NOTE ENQUIRY | ACCOUNT LAYBY ADJUST | GIFT VOUCHER | BAR TAB BILL | VOID LAST ITEM | END OF SHIFT | BANKING REPORT |
| CUSTOMER COUPON | | PRICE ENQUIRY | | | | | | |
| EFTPOS CASHOUT | RAFFLES | PROMO ENQUIRY | ACCOUNT LAYBY CREDIT | GIFT VOUCHER ENQUIRY | PAY BAR TAB | 10% ITEM DISCOUNT | PRINT TAX INVOICE | DEPT SALES REPORT |
| TENDER CORRECT | | REWARDS ENQUIRY | | | | 10% ST DISCOUNT | | |
| RECEIPT IS OFF | SEND MESSAGE | STOCK ITEM SEARCH | ACCOUNT LAYBY PAYMENT | | BAR TAB REPORT | Item Discount | JOURNAL ENQUIRY | STOCK SALES REPORT |
| DRINKS | CAFE | TAP BEER | SPIRITS | COCKTAILS | FRUIT & VEG | GROCERY | RETAIL | MANAGER |
| | RESTAURANT | BOTTLE BEER & RTD | WINE | | | | SERVICES | ADMIN |

To create an EFTPOS Settlement Enquiry button, select an empty button by clicking on it, then select the "EFTPOS Settlement" function. Enter the text ENQUIRY into the Automatic Text field, update the Button Caption to reflect the enquiry function and adjust the colour of the button as desired.

The new button will now appear on the POS Screen.



Close the POS Screen Setup windows and open the Idealpos POS screen.
 Press the EFTPOS Settlement Enquiry button.

An EFTPOS Settlement Enquiry will be performed and the resulting enquiry will be printed to the receipt printer.

```

EFTPOS FROM WESTPAC
Merchant_2605
275 Kent St
Sydney 2000
Australia

SETTLEMENT INQUIRY
TSP 100381972605
TIME 21JUN18 14:38
TRAN 000348-000353
FROM 21JUN18 05:00
TO 21JUN18 14:38

Debit
TOT 0 $0.00

MasterCard
TOT 0 $0.00

Visa
PUR 6 $21.00
TOT 6 $21.00

STOTAL 6 $21.00

Amex
TOT 0 $0.00

Diners
TOT 0 $0.00

JCB
TOT 0 $0.00

UnionPay
TOT 0 $0.00

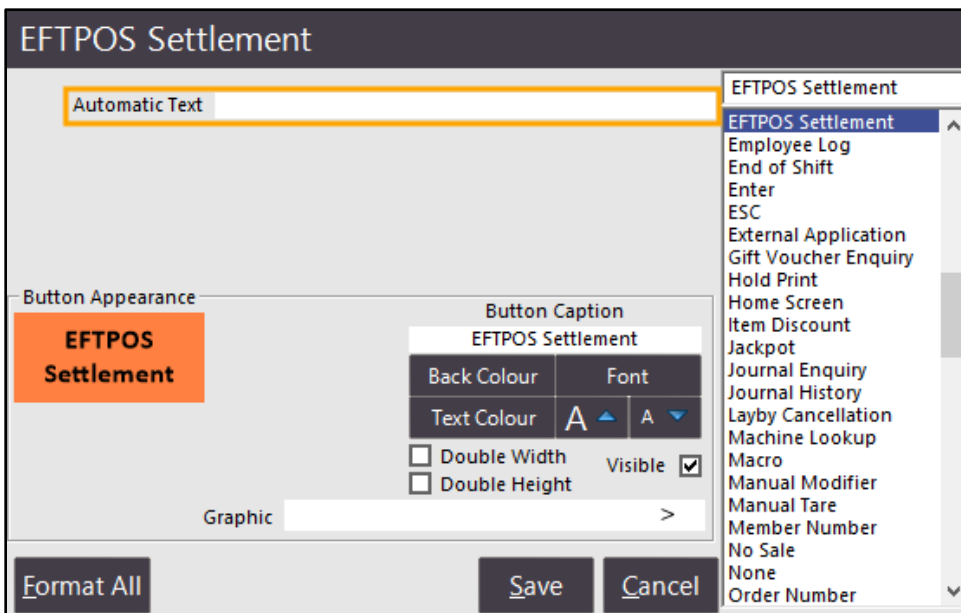
TOTAL
PUR 6 $21.00
TOT 6 $21.00

(000) APPROVED
  
```

If you don't already have an EFTPOS Settlement button on your POS Screen to perform the EFTPOS Settlement, you may want to create one.

Simply follow the above process, select another blank button and choose the EFTPOS Settlement function.

Note that when creating the EFTPOS Settlement button, ensure that you leave the Automatic Text field as blank.



idealpos7 Update History

Enquiry

Journal Enquiry – Search by Table Range

This function adds the ability to enter a table number range into the Table Field. Any Journals that contain a table number within the range entered will be displayed.

Go to Enquiry > Journal History

Select the date/date range, enter a Table Number range to query, then press the Select button

Click on the journal on the left-hand side column, then the contents of the journal will be displayed on the right-hand side column. The table number is displayed at the top of the journal details as shown below.

| Audit | POS | Date | Customer |
|-------|-----|-------------------------|----------|
| 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 | |
| 432 | 1 | Thu 08/03/2018 10:55:42 | |
| 431 | 1 | Thu 08/03/2018 10:54:56 | |
| 430 | 1 | Thu 08/03/2018 10:54:15 | |
| 401 | 1 | Fri 02/02/2018 15:05:48 | |
| 399 | 1 | Fri 02/02/2018 09:49:39 | |
| 398 | 1 | Fri 02/02/2018 09:49:23 | |

| Date | Audit | Customer |
|---------------------|------------------------------|----------|
| 13/03/2018 11:49:24 | 482,1 | Jeremy |
| Table 51 | | |
| 106007 | PASTA | 11.00 |
| 106001 | DUCK | 14.00 |
| 106002 | BEEF | 13.00 |
| 106006 | PORK | 13.00 |
| | -4.00 Daily Specials \$4 Off | |
| 22 | Daily Specials \$4 Off | -4.00 |
| | GST Subtotal | 47.00 |
| | GST Amount | 4.27 |
| | CASH | 47.00 |
| | Change | 0.00 |

Export Data – Stock Items

Export Stock Items by Range – added Webstore Field

This feature adds the ability to specify the WEBSTORE field when you export Stock Items using the Specific Fields by Range option. The WEBSTORE field in the Stock Item export corresponds to the Web Store field that is configured against each Stock Item.

Go to Utilities > Export Data > Stock Items > Export: Specific Fields by Range

In the Export Folder field, click on the ">" button to browse to the folder where you want the exported data saved to

In the Filename field, enter a name for the file to save

Then from any of the available fields, use the dropdown box to select the WEBSTORE option.

Select any other desired fields and/or settings that you want included in the export

export stock items

Export Specific Fields by Range

Options

Export Folder C:\Export\ >

Filename StockItems.txt

Append Date/Time to filename

Append Site Name to filename

Append Venue ID to filename

Include Headers

Include Discontinued Items

Export Specific Fields by Range

| | | | | | | | |
|----|------|----|-------------|----|----------|----|--|
| 1 | CODE | 2 | DESCRIPTION | 3 | WEBSTORE | 4 | |
| 5 | | 6 | | 7 | | 8 | |
| 9 | | 10 | | 11 | | 12 | |
| 13 | | 14 | | 15 | | 16 | |
| 17 | | 18 | | 19 | | 20 | |
| 21 | | 22 | | 23 | | 24 | |

Clear

Code > to >

Description > to >

Department > to >

Save as Default

OK

If you'd like the selected fields to be available for future exports, press the "Save as Default" button first, then press "OK" button to export the data.

idealpos7 Update History

When the data is exported, the value of the WEBSTORE field will be included in the export.

If the field is unticked for a Stock Item, the value displayed will be "False", if the field is ticked, the value displayed will be "True".

| A | B | C |
|--------|-------------------------|-------|
| 204007 | STILL MINERAL WATER | TRUE |
| 204008 | SPARKLING MINERAL WATER | TRUE |
| 205001 | COKE 250ML BTL | TRUE |
| 205002 | DIET COKE 250ML BTL | TRUE |
| 205003 | COKE ZERO 250ML BTL | TRUE |
| 205004 | SPRITE 250ML BTL | TRUE |
| 205005 | DRY GINGER 250ML BTL | TRUE |
| 205006 | TONIC 250ML BTL | TRUE |
| 205101 | COKE CAN | FALSE |
| 205102 | DIET COKE CAN | FALSE |
| 205103 | COKE ZERO CAN | FALSE |
| 205104 | SPRITE CAN | FALSE |
| 205105 | LIFT CAN | FALSE |
| 205106 | DRY GINGER CAN | FALSE |
| 205107 | FANTA CAN | FALSE |
| 205108 | TONIC CAN | FALSE |
| 205201 | COKE 600ML | FALSE |
| 205202 | DIET COKE 600ML | FALSE |
| 205203 | COKE ZERO 600ML | FALSE |
| 205204 | SPRITE 600ML | FALSE |
| 205205 | LIFT 600ML | FALSE |

Gaming

Aristocrat Gaming – Option to combine accounts into one total

This function adds the ability to combine accounts into one redeemable total for use with Aristocrat Gaming. The way this works is that when multiple points balances are configured for redemption within Idealpos and the Combine Accounts into one Redeemable Total is ticked, Idealpos will display the points as one total at the top of the POS Screen when added to the sale.

Then when a redemption occurs, the prompt to select the points account will no longer be displayed.

The system will draw from the POS Points first, with the remainder points being pulled from the Gaming Points if there are insufficient POS points available.

To setup, go to:

Setup > Global Options > Gaming > Gaming Points

Gaming Points

| | Enable | Description | Code | Points Per \$ | Point Value |
|----|-------------------------------------|---------------|-------|---------------|-------------|
| 1 | <input checked="" type="checkbox"/> | POS Points | BPNTS | 1 | 1 |
| 2 | <input checked="" type="checkbox"/> | Gaming Points | P2P | 0 | 1 |
| 3 | <input type="checkbox"/> | | | | |
| 4 | <input type="checkbox"/> | | | | |
| 5 | <input type="checkbox"/> | | | | |
| 6 | <input type="checkbox"/> | | | | |
| 7 | <input type="checkbox"/> | | | | |
| 8 | <input type="checkbox"/> | | | | |
| 9 | <input type="checkbox"/> | | | | |
| 10 | <input type="checkbox"/> | | | | |

Combine Accounts into one Redeemable Total ←

Global Options – Printing

Bill Prints – Option to show Discounts White on Black

This function adds the ability for discounts to be printed as white text on a black background when a bill is printed. This feature applies to % Item Discounts as well as % Subtotal Discounts.

To enable this function, go to: Setup > Global Options > Printing > Bill Format > Print Discounts White on Black. Note that the Print Discounts White on Black setting is available for all radio button selections above it (e.g. Standard, Order by Print Group, Order by Seat / Print Group, Order by Print Group / Seat).

The screenshot shows the 'global options' window for 'site 1 (Site 1)'. The 'Printing' tab is active. The 'Print Formats' section is expanded to show 'Kitchen Docket Format' and 'Bill Format'. In the 'Bill Format' section, the 'Print Discounts White on Black' checkbox is checked and highlighted with an orange box and an arrow. Other settings include 'Print on Coupons', 'Print on Receipt Footer', 'QR Code Size', 'Kitchen Printer Names', 'Other Options', 'Print Group Header Format - Kitchen Printers', 'Print Group Header Format - Receipts/Bills', and 'Show Total Discounts on Receipt'.

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

Print Formats

Kitchen Docket Format

- Standard
- Order by Print Group
- Order by Seat / Print Group
- Order by Print Group / Seat
- Group Instructions by Seat
 - Accumulate Items
 - Show each instruction on its own line
 - Print Instructions/Seats in small font
 - Print Instructions Red
 - Print Instructions White on Black
 - Use Course Separator instead of Print Groups
 - Use Instruction Separator Line
 - Print Entire Order to triggered Kitchen Printers

Bill Format

- Standard
- Order by Print Group
- Order by Seat / Print Group
- Order by Print Group / Seat
- Accumulate Items
- Print Discounts White on Black**

QR Codes

- Print on Coupons
- Print on Receipt Footer
- QR Code Size: 1 (2-9)
- Receipt QR Code Data:
- Text underneath Code:

Kitchen Printer Names

- KP 1 KITCHEN
- KP 2 Kitchen Printer 2
- KP 3 COFFEE
- KP 4 IKM
- KP 5 Kitchen Printer 5
- KP 6 Kitchen Printer 6
- KP 7 Kitchen Printer 7
- KP 8 Kitchen Printer 8
- KP 9 Kitchen Printer 9
- KP 10 Kitchen Printer 10
- KP 11 Kitchen Printer 11
- KP 12 Kitchen Printer 12

Other Options

- Use Smallest Line Spacing
- Double Height
- Double Width
- Bold
- Member Photo on IKM Runner Dockets

Print Group Header Format - Kitchen Printers

- MAIN Left-Aligned Centred
- MAIN---
- Double Height
- Double Width
- Bold

Print Group Header Format - Receipts/Bills

- MAIN Left-Aligned Centred
- MAIN---
- Double Height
- Double Width
- Bold

Show Total Discounts on Receipt

- This Sale
- Descriptor: TOTAL SAVINGS
- Customer Lifetime
- Descriptor: LIFETIME SAVINGS
- User-Defined Field: Don't Use

To use this function, add items to a sale, perform a discount on the sale, then save the sale to a table.

In this example, we'll perform a 5% ST Disc. Add Items to the sale, press the "5% ST DISC" button, then press the Table Map button. Items can be discounted in a similar manner by selecting the item from the list of items added to the sale, then pressing the "5% ITEM" button which will discount the item.

| | | | | | | | | |
|--|---|-----------------|-------------|------------|---|---|-------|---------|
| 03 Jul 09:57 POS 1 Adult ID: 03/07/00 Jeremy STANDARD | 1 | 3.50 | RECEIPT | CLERK | 7 | 8 | 9 | CL |
| CAPPUCCINO | 1 | 3.50 | PRICE LEVEL | 5% ST DISC | 4 | 5 | 6 | NO SALE |
| FLAT WHITE | 1 | 3.50 | CUSTOMER | 5% ITEM | 1 | 2 | 3 | X |
| LATTE | 1 | 3.50 | BAR TAB | REFUND | 0 | . | ENTER | |
| 5% ST Discount | | -0.53 | PENDING | VOID SALE | | | | |
| 3x | | Discounts -0.53 | TABLE MAP | VOID | | | | |
| | | \$9.97 | | | | | | |

Select a table from the Table Map

Legend:

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

Transfer Sale to

If prompted, enter the number of Covers then press OK

| | | |
|---|----|---|
| 7 | 8 | 9 |
| 4 | 5 | 6 |
| 1 | 2 | 3 |
| 0 | CL | |
| 3 | OK | |

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Select the table from the Table Map then press the "Bill" button



The Bill which is printed will show the Discount using White on Black.

In the below example, the Bill Format is Order by Print Group and a 5% ST Discount was applied – the discount is displayed using White on Black.



Global Options – Restaurant

Table Alert minutes support for 3-digit values

This function adds the ability to enter alert minutes which are 3 digits in length.

Prior to this change, the maximum alert minutes length that was allowed was 2 digits.

Alert Minutes are used to bring the operator's attention to any tables after the specified number of minutes have lapsed and the table has not been attended to. This is done by flashing any tables that have exceeded the specified number of minutes.

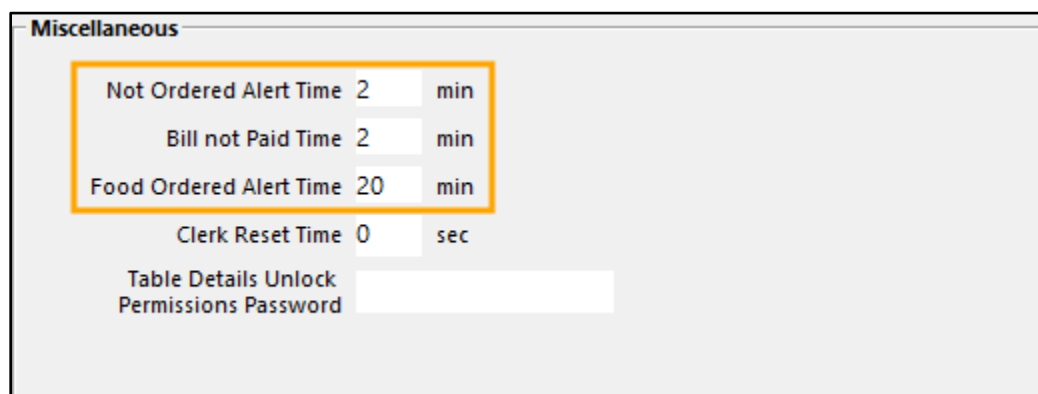
Each of the statuses are explained below.

Not Ordered Alert Time – This refers to a table which has a status of seated. If an order has not been placed after the configured number of minutes have lapsed, the table will flash to alert the operator to ensure the guests have been served.

Bill not paid time – This refers to a table which has a status of bill printed. If the table has not been paid after the configured number of minutes have lapsed, the table will flash to alert the operator to ensure the table is paid and that the guests have not left.

Food Ordered Alert Time – This refers to the time that food has been ordered and is used to ensure that the course has arrived at the table within the configured time period. After a course has been served to the guests at a table, the timer is reset and begins counting down from the configured period for the next course.

To configure Alert minutes, go to: Setup > Global Options > Restaurant > Miscellaneous



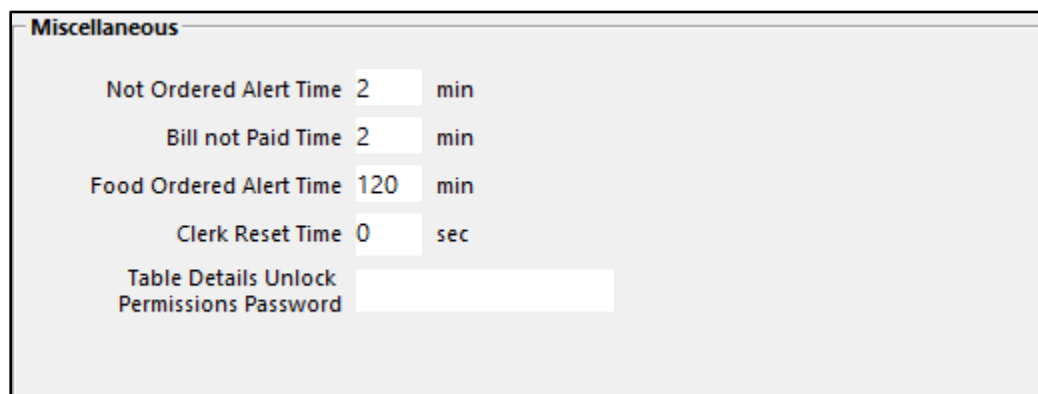
The screenshot shows the 'Miscellaneous' configuration page. It contains several settings with input fields and units. A yellow box highlights the 'Not Ordered Alert Time', 'Bill not Paid Time', and 'Food Ordered Alert Time' fields, which are currently set to 2, 2, and 20 minutes respectively. Below these are 'Clerk Reset Time' (0 sec) and 'Table Details Unlock Permissions Password' (a text input field).

| Setting | Value | Unit |
|---|-------|------|
| Not Ordered Alert Time | 2 | min |
| Bill not Paid Time | 2 | min |
| Food Ordered Alert Time | 20 | min |
| Clerk Reset Time | 0 | sec |
| Table Details Unlock Permissions Password | | |

Minutes can now be 3 digits in length. The fields which now support 3-digit length values are:

- Not Ordered Alert Time
- Bill not Paid Time
- Food Ordered Alert Time

The Food Ordered Alert Time has been set to 120 minutes in the below example:



The screenshot shows the 'Miscellaneous' configuration page with the 'Food Ordered Alert Time' field set to 120 minutes. The other settings are the same as in the previous screenshot.

| Setting | Value | Unit |
|---|-------|------|
| Not Ordered Alert Time | 2 | min |
| Bill not Paid Time | 2 | min |
| Food Ordered Alert Time | 120 | min |
| Clerk Reset Time | 0 | sec |
| Table Details Unlock Permissions Password | | |

idealpos7 Update History

After any of the above periods have lapsed, the table will flash between black and the colour of the table status. In the below example, the Bill Print status colour is purple (as per the Idealpos demo database) and the table had a status of Bill Printed. The colour of the table will be reflective of the table status and the colour used will be as per Table Status colour that has been configured in Idealpos:



Import Promotions

Import Promotions – Support for Scan_Code field

This function adds the ability to specify and use the Stock Item Scan Code when importing a promotion into Idealpos. To use this function, include a Header of SCAN_CODE in the import file.

Specify the Stock Item Scan Code under the SCAN_CODE header. If the Item_Code is blank, it will attempt to find the Stock Item using the Scan_Code.

The below example includes a promotion called TESTPROMO-3FOR4, Trip Quantity set to 3 items and the Promo Price is 4 (i.e. \$4.00). The Item_Code is blank and the Scan_Code contains the Scan Code of the Stock Item to be included in the Promotion.

| | A | B | C | D | E | F | G | H |
|---|------|-----------------|---------------|-------------|------------|-----------|-----------|---------------|
| 1 | ZONE | DESCRIPTION | TRIP_QUANTITY | PROMO_PRICE | START_DATE | END_DATE | ITEM_CODE | SCAN_CODE |
| 2 | 1 | TESTPROMO-3FOR4 | 3 | 4 | 01-Apr-18 | 31-Aug-18 | | 9861576846574 |
| 3 | 1 | TESTPROMO-3FOR4 | 3 | 4 | 01-Apr-18 | 31-Aug-18 | | 9805912478340 |
| 4 | 1 | TESTPROMO-3FOR4 | 3 | 4 | 01-Apr-18 | 31-Aug-18 | | 9857733878816 |
| 5 | 1 | TESTPROMO-3FOR4 | 3 | 4 | 01-Apr-18 | 31-Aug-18 | | 9840964095909 |
| 6 | 1 | TESTPROMO-3FOR4 | 3 | 4 | 01-Apr-18 | 31-Aug-18 | | 9801417442978 |
| 7 | 1 | TESTPROMO-3FOR4 | 3 | 4 | 01-Apr-18 | 31-Aug-18 | | 9842208099452 |
| 8 | 1 | TESTPROMO-3FOR4 | 3 | 4 | 01-Apr-18 | 31-Aug-18 | | 9835501150425 |
| 9 | 1 | TESTPROMO-3FOR4 | 3 | 4 | 01-Apr-18 | 31-Aug-18 | | 9859323939907 |

Promotion Imports occur automatically by copying the Promotion file into a pre-configured location which is constantly checked for the specified filename.

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

Automatic Import Settings

Import Folder

Delete files older than days

Delete files after importing

Import Stock Items

Filename

If imported items exist, update selling prices

Import Promotions

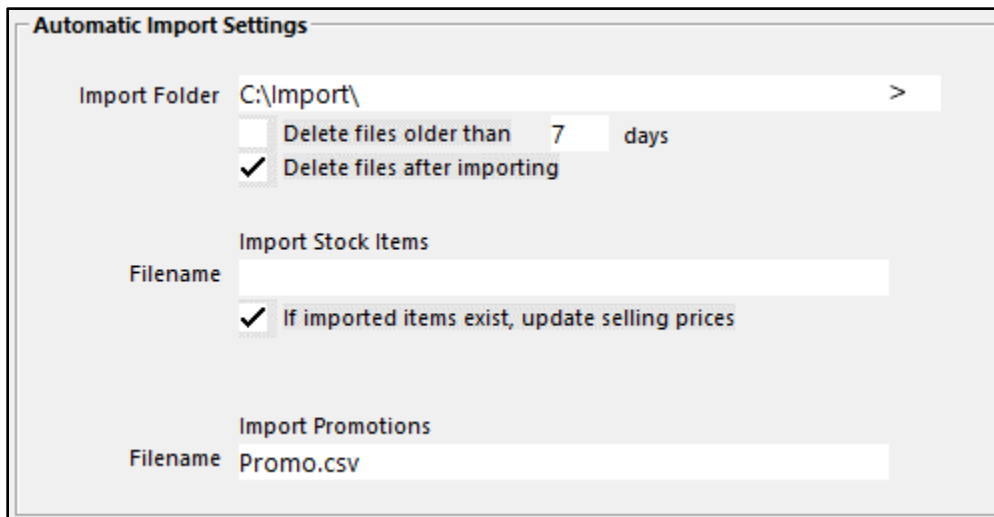
Filename

idealpos7 Update History

The Import Folder is the location where Idealpos will monitor and import any files from.

Specify an Import Folder where you want Idealpos to import your data from by clicking on the ">" button and browsing to your preferred folder.

There are also fields for specifying the Import Stock Items filename as well as the Import Promotions Filename. For the purposes of this example, we'll only specify the Import Folder and the Import Promotions Filename.



Automatic Import Settings

Import Folder >

Delete files older than days

Delete files after importing

Import Stock Items

Filename

If imported items exist, update selling prices

Import Promotions

Filename

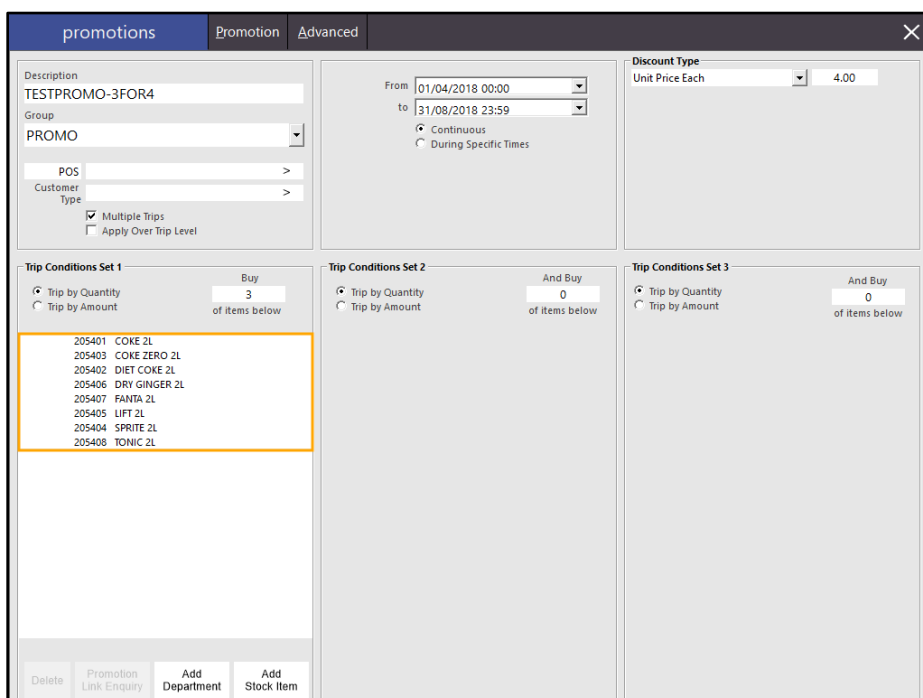
To import the promotion file, copy the Promotions file into the location that you've configured.

The promotions will be imported automatically and the file will be removed from the Import folder if the "Delete files after importing" setting has been enabled.

To view the imported promotion, go to:

File > Sales > Promotions > Promotions > Select Promotion from the list > Modify

The Promo will contain the Stock Items that were defined as a Scan_Code in the Import file.



promotions Promotion Advanced

Description: TESTPROMO-3FOR4

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

Unit Price Each: 4.00

Trip Conditions Set 1

Buy: 3 of items below

Trip by Quantity

Trip by Amount

205401 COKE 2L

205403 COKE ZERO 2L

205402 DIET COKE 2L

205406 DRY GINGER 2L

205407 FANTA 2L

205405 LIFT 2L

205404 SPRITE 2L

205408 TONIC 2L

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

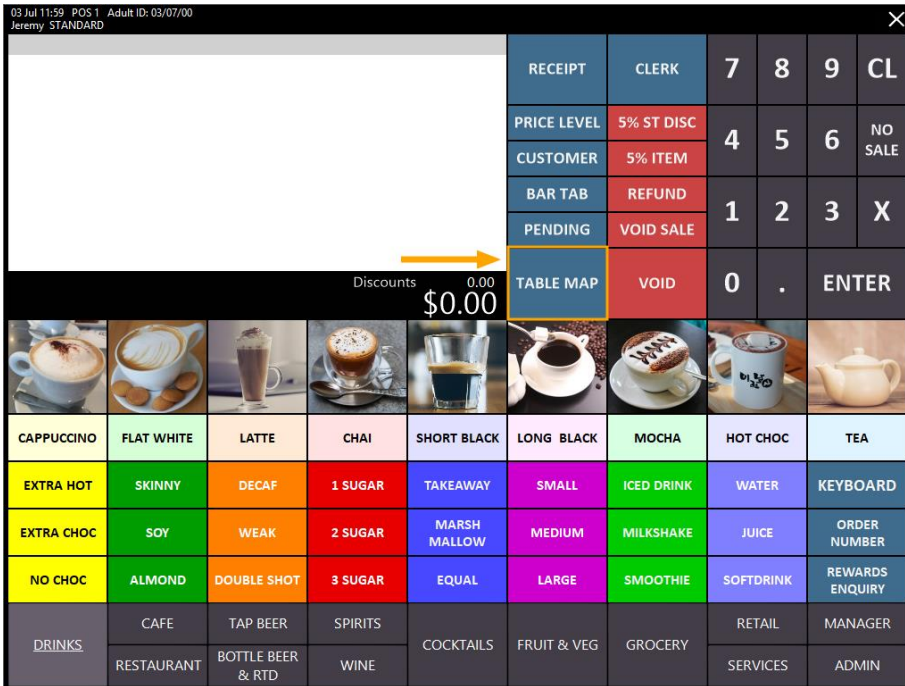
Delete Promotion Link Enquiry Add Department Add Stock Item

POS Screen

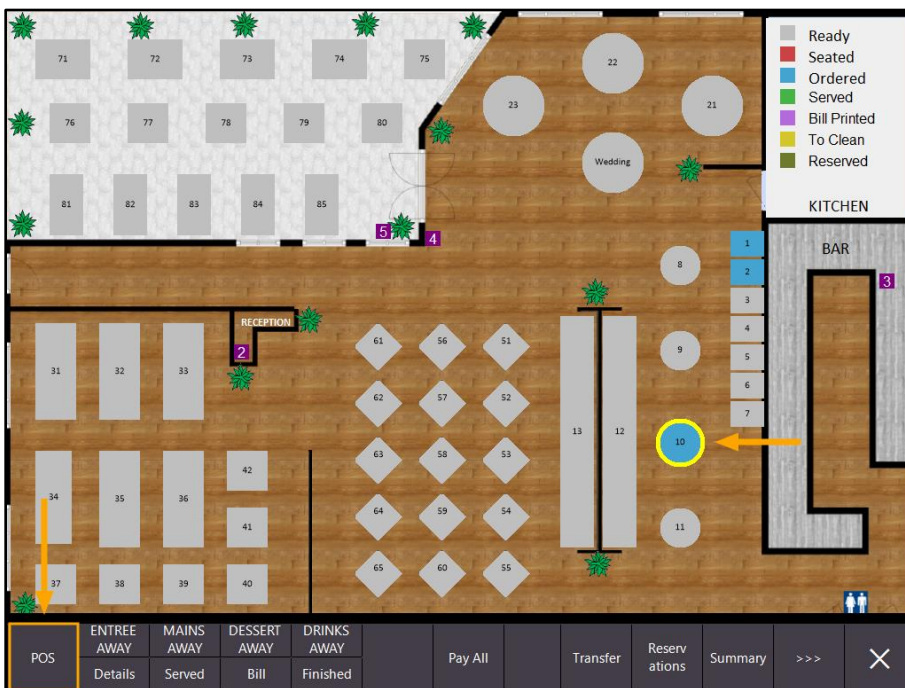
Ability to view Bar Tab/Table Items from POS Screen

This function adds the ability to view all the items that have been saved to a table or Bar Tab while on the POS Screen.

To use this function to view items that have been saved to a table, go to:
POS Screen > Table Map

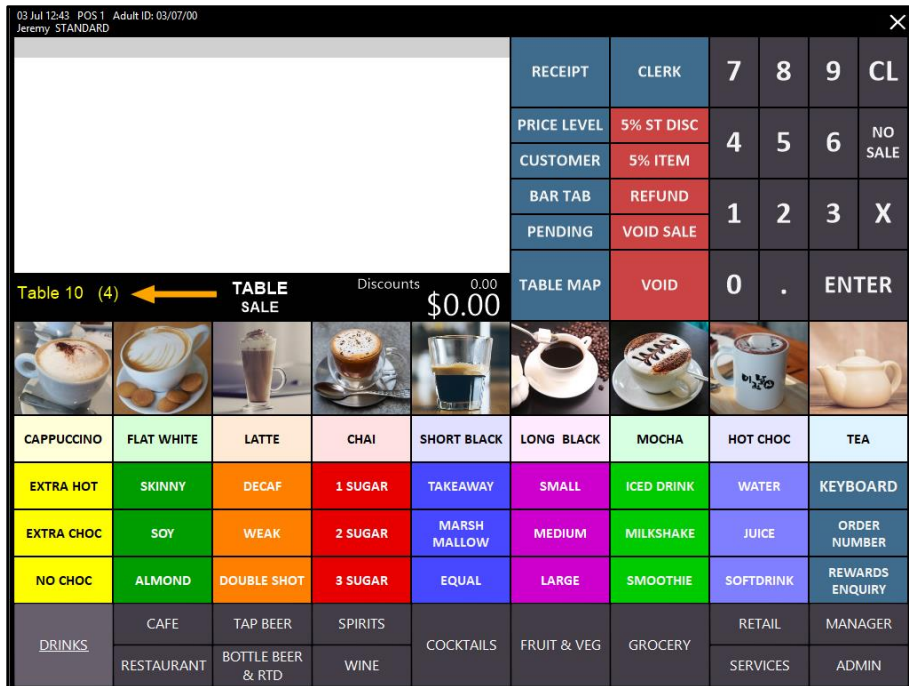


From the table map, select a table which contains items that have been ordered, then select the POS button

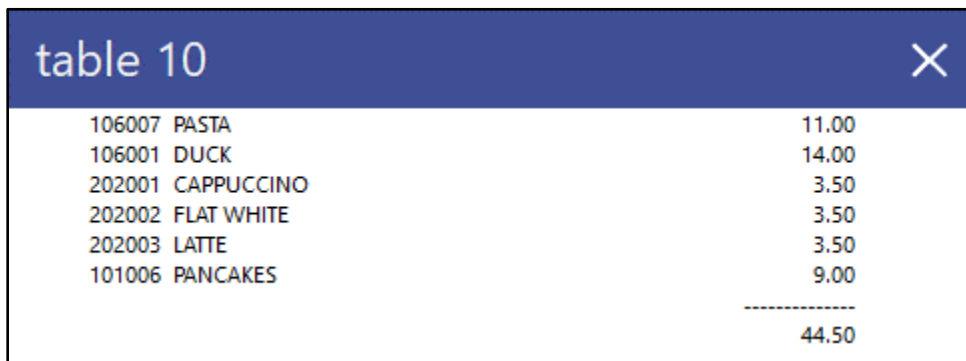


idealpos7 Update History

After selecting the POS button, the POS screen will be displayed and will show the Table number along with the number of covers on the table just below the white area where items are displayed when added to a sale. Press/click on this table number text to view the table items.



After pressing on the table number text, the items which are currently saved to the table will be displayed

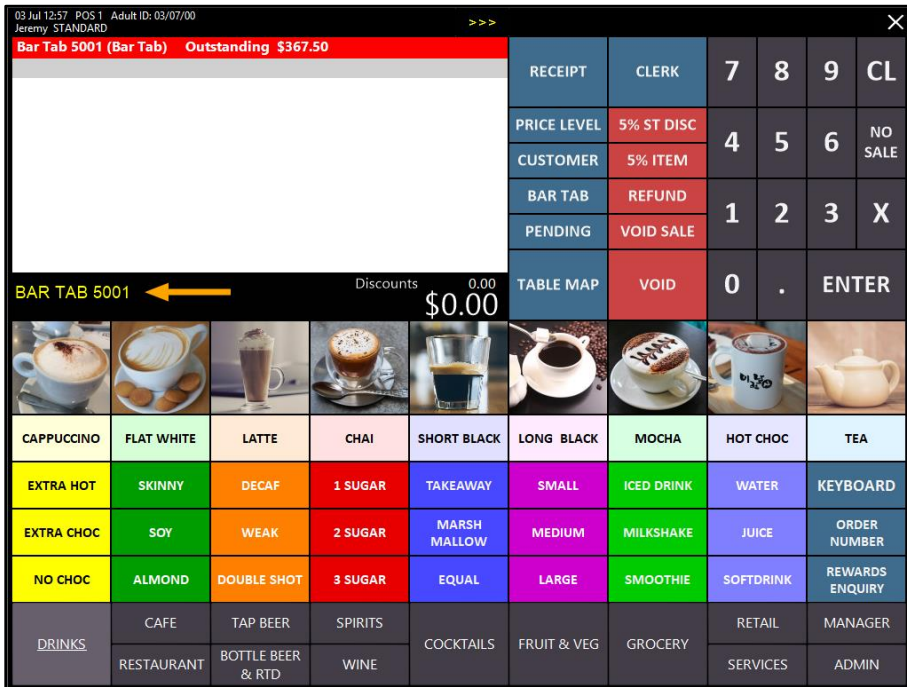


Press X to close the screen and return to the POS screen

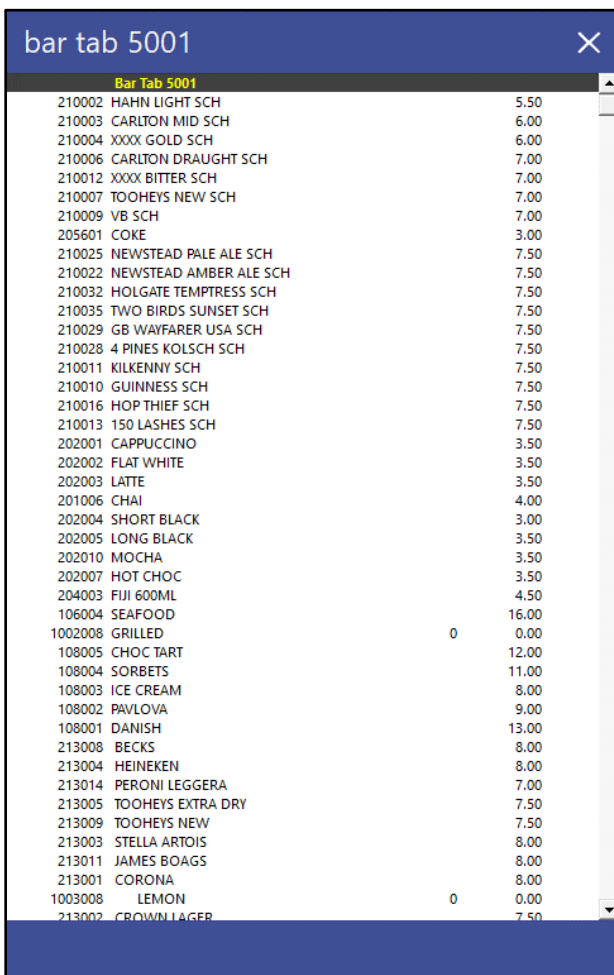
The same function can also be accessed to view items that have been saved to a bar tab. From the POS screen, press the "BAR TAB" button, then select a Bar Tab.



The POS screen will be displayed and will show the bar tab name just below the white area where items are displayed when added to a sale. Click/press on the Bar Tab name.



After selecting the bar tab name from the POS screen, the items which have been saved to the bar tab will be displayed.



Press X to close the screen and return to the POS screen

idealpos7 Update History

POS Terminals – Miscellaneous Settings

Handheld – Option to Force Bills to print to specific Network Printer

This function adds the ability to force bills to print to a specific network printer when printing a bill from the Handheld app. When the Force Bills Printer setting is left as blank, any Bills printed from the Handheld app will print to the Receipt printer configured on the POS terminal which acts as the POS Server. When the Force Bills Printer setting has been configured, any bills printed from the Handheld app will print to the specified printer.

In the event that printer that's set in the Force Bills Printer setting is unavailable, the POS terminal will display a standard printer error message allowing the print job to be retried or redirected to another printer.

Go to: Setup > POS Terminals > Select: POS Terminal which is the POS terminal acting as the POS Server > Modify > Miscellaneous Settings

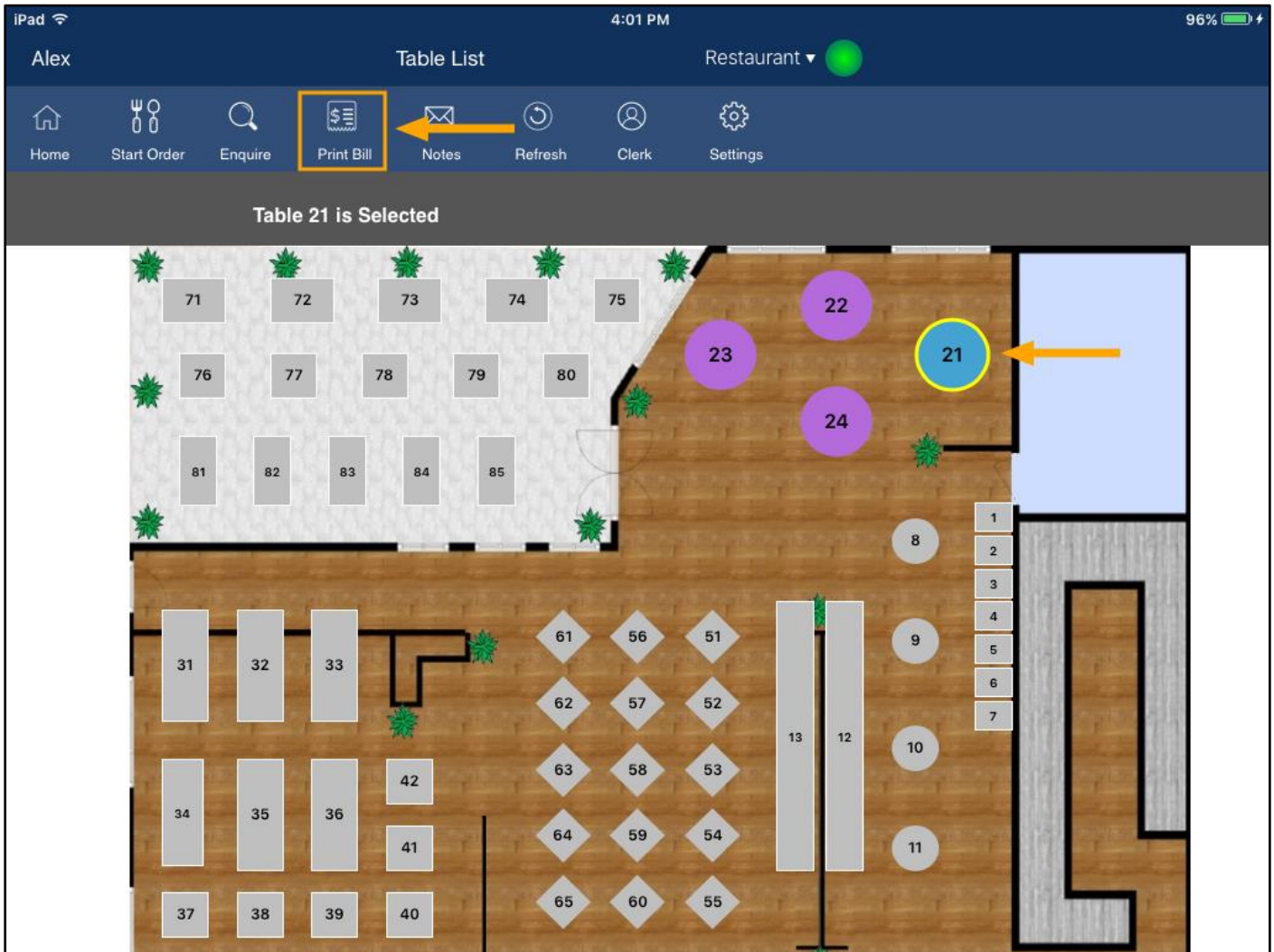
The screenshot shows the 'Miscellaneous Settings' page for a POS terminal. The 'Handhelds' section is highlighted with a yellow box, and the 'Force Bills Printer' dropdown menu is also highlighted with a yellow box, showing the value 'Handheld'. Other settings include 'Force Food to Print', 'Force Drinks to Print', 'Item Graphic Location', and 'Handheld Background'.

| Enable | Description | Code | Points Per \$ | Point Value |
|--------------------------|-------------|------|---------------|-------------|
| <input type="checkbox"/> | | | | |
| <input type="checkbox"/> | | | | |
| <input type="checkbox"/> | | | | |
| <input type="checkbox"/> | | | | |
| <input type="checkbox"/> | | | | |
| <input type="checkbox"/> | | | | |
| <input type="checkbox"/> | | | | |
| <input type="checkbox"/> | | | | |
| <input type="checkbox"/> | | | | |
| <input type="checkbox"/> | | | | |

Select the name of the Printer that you want bills to be printed from the "Force Bills Printer" dropdown box

This is a close-up view of the 'Handhelds' section from the screenshot above. The 'Force Bills Printer' dropdown menu is highlighted with a yellow box, showing the selected value 'Handheld'. Below it are the 'Item Graphic Location' and 'Handheld Background' text input fields.

To print a bill from the Handheld app, select a table which contains an order from the table map and press the "Print Bill" button.



A bill will be printed to the printer that has been specified in the Force Bills Printer setting.

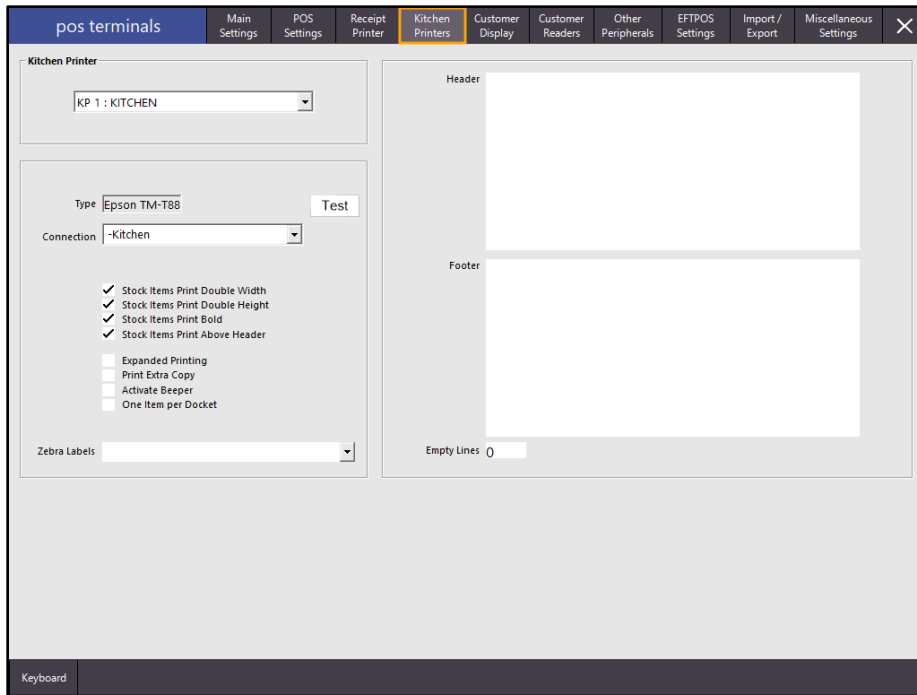
| IDEALPOS | |
|---|----------------|
| 1/212 Curtin Ave West Eagle Farm QLD 4009 Australia | |
| TAX INVOICE 123-456-789-11 | |
| Table 21 Jeremy 29/06/18 18:06 Covers : 0 | |
| -----ENTREE----- | |
| DUCK(1) | \$14.00 |
| GST | \$0.70 |
| SUB TOTAL | \$14.70 |
| TIPS Amount | ----- |
| GRAND TOTAL | ----- |
| *indicates taxable supply | |
| Powered by Idealpos | |

idealpos7 Update History

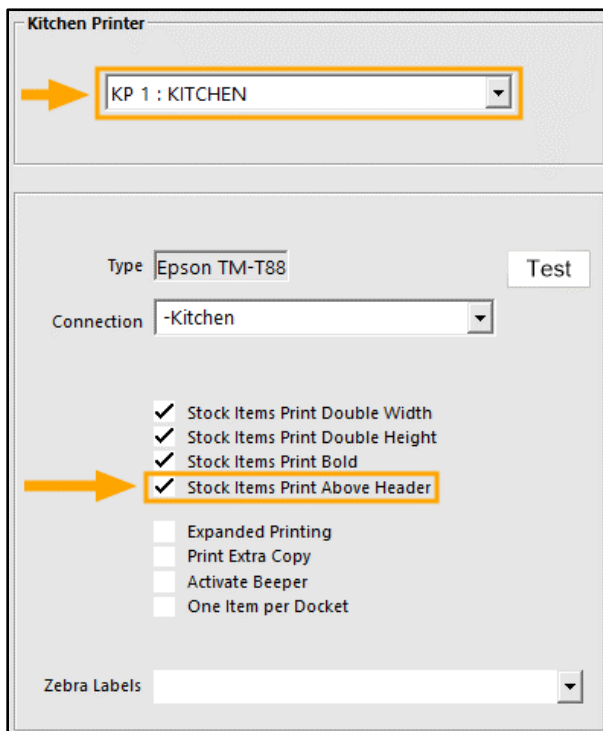
Kitchen Docket – Option to Print Stock Items Above Header

This function adds the ability to print the Stock Items above the header on the Kitchen Docket. To enable and configure this function, go to:

Setup > POS Terminals > Select POS Terminal: Modify > Kitchen Printers



Select the Kitchen Printer that you want the setting to apply to, then enable the option “Stock Items Print Above Header”



When an order is placed which contains Stock Items that print to the Kitchen Printer selected above, the Stock Items will print above the header as per the following example. Note that the following example has the options Stock Items Print Double Width, Double Height, Bold and Above Header enabled. Your Kitchen Print may appear differently depending on which options you have enabled for the Kitchen Printer.



For comparison to how the Kitchen Print appears when the Print Above Header option is disabled, the Kitchen Print will appear as below.



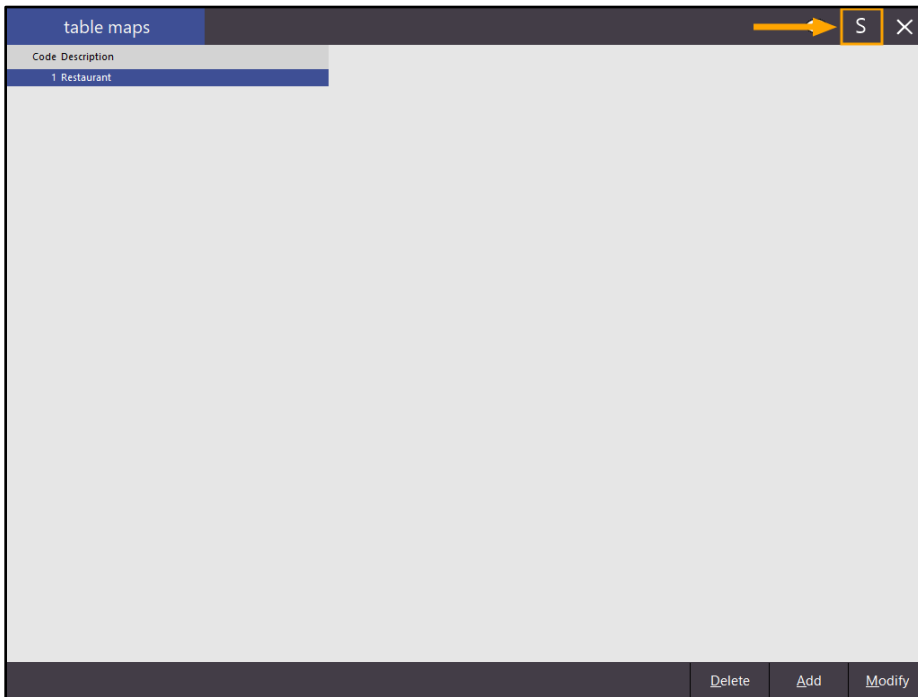
Restaurant & Table Map

Table Map Setups – Added Shortcut Functionality

This function adds the ability to create a shortcut to the Table Map setup screen on the main Idealpos screen.

To create a shortcut, go to:

Setup > Restaurant > Table Maps > S



The Shortcut to the Table Maps screen will be created under Functions section on the main Idealpos screen which is located on the left-hand side of the main Idealpos screen.

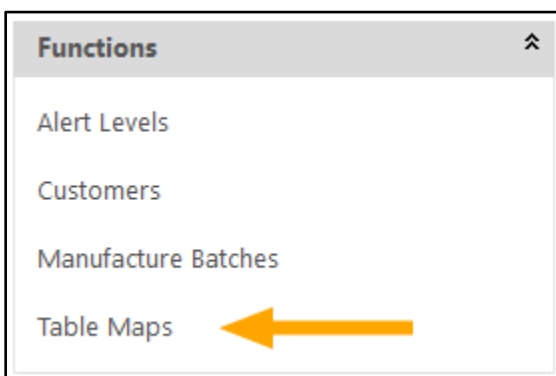


Table Summary – Item view shows Paid/Partially Paid Items

This function adds the ability to see any items which have been paid or partially paid for.

From the POS Screen, go to Table Map > Summary > Select a table from the list on the left

The right-hand side of the window will show any items which have already been paid or partially paid.

Partially paid items will be displayed in orange, fully paid items will be displayed in orange with strike-through

| # | Start | Total Time | Covers | Avg \$/Cover | Status | Total Amount | Outstanding | Cust Type | |
|----|-------|------------|--------|--------------|---------|--------------|-------------|-----------|--|
| 1 | | | | | | | | | |
| 2 | | | | | | | | | |
| 3 | | | | | | | | | |
| 4 | | | | | | | | | |
| 5 | | | | | | | | | |
| 6 | | | | | | | | | |
| 7 | | | | | | | | | |
| 8 | | | | | | | | | |
| 9 | | | | | | | | | |
| 10 | | | | | | | | | |
| 11 | | | | | | | | | |
| 12 | | | | | | | | | |
| 13 | 15:27 | 15 min | 4 | 8.00 | Ordered | 32.00 | 12.50 | | |
| 21 | | | | | | | | | |
| 22 | | | | | | | | | |
| 23 | | | | | | | | | |

| TABLE 13 | | |
|-------------------------|-------|--|
| 106007 PASTA | 5.50 | |
| 106001 DUCK | 14.00 | |
| 202001 CAPPUCCINO | 3.50 | |
| 202002 FLAT WHITE | 3.50 | |
| ----- | | |
| 12.50 | | |

If a table has been completely paid, the items can also be displayed via the Summary screen (provided that the table status is still marked as "To Clean"). Select the table which hasn't been cleaned from the Summary screen and all the items will be displayed as strike-through with a total of 0.00.

| # | Start | Total Time | Covers | Avg \$/Cover | Status | Total Amount | Outstanding | Clerk Name | |
|----|-------|------------|--------|--------------|----------|--------------|-------------|------------|--|
| 1 | | | | | | | | | |
| 2 | | | | | | | | | |
| 3 | | | | | | | | | |
| 4 | | | | | | | | | |
| 5 | | | | | | | | | |
| 6 | | | | | | | | | |
| 7 | | | | | | | | | |
| 8 | | | | | | | | | |
| 9 | | | | | | | | | |
| 10 | | | | | | | | | |
| 11 | | | | | | | | | |
| 12 | | | | | | | | | |
| 13 | | | | | To Clean | | | Jeremy | |
| 21 | | | | | | | | | |
| 22 | | | | | | | | | |
| 23 | | | | | | | | | |

| TABLE 13 | | |
|------------------------------|-------|--|
| 106007 PASTA | 11.00 | |
| 106001 DUCK | 14.00 | |
| 202001 CAPPUCCINO | 3.50 | |
| 202002 FLAT WHITE | 3.50 | |
| ----- | | |
| 0.00 | | |

Once the "To Clean" status has been cleared, viewing the table via the Summary screen will show no items.

| # | Start | Total Time | Covers | Avg \$/Cover | Status | Total Amount | Outstanding | Clerk Name | |
|----|-------|------------|--------|--------------|--------|--------------|-------------|------------|--|
| 1 | | | | | | | | | |
| 2 | | | | | | | | | |
| 3 | | | | | | | | | |
| 4 | | | | | | | | | |
| 5 | | | | | | | | | |
| 6 | | | | | | | | | |
| 7 | | | | | | | | | |
| 8 | | | | | | | | | |
| 9 | | | | | | | | | |
| 10 | | | | | | | | | |
| 11 | | | | | | | | | |
| 12 | | | | | | | | | |
| 13 | | | | | | | | | |
| 21 | | | | | | | | | |
| 22 | | | | | | | | | |
| 23 | | | | | | | | | |

| TABLE 13 | | |
|----------|--|--|
|----------|--|--|

idealpos7 Update History

Users

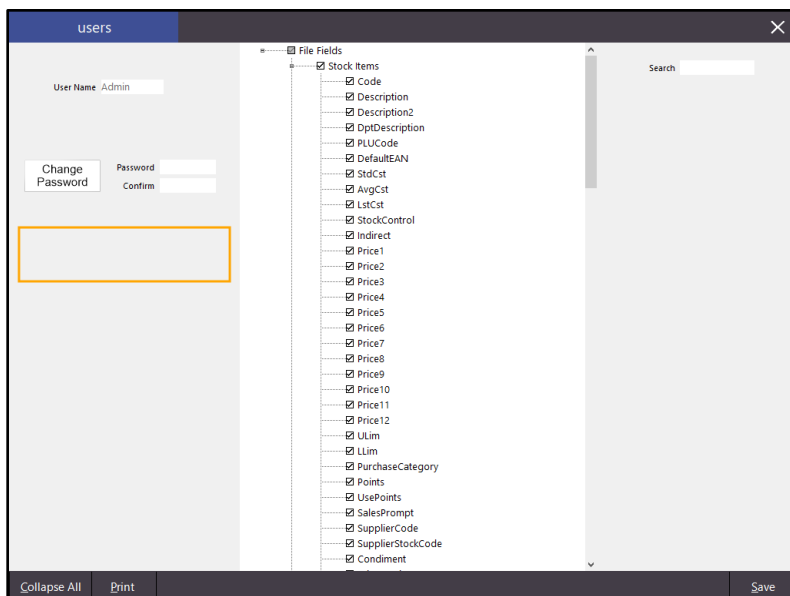
“Admin” User – Inhibit ability to Override Permissions with other Users

This function prevents the Admin User from having their permissions overridden with another User’s permissions. Previously, the Users screen would display the option “Override Permissions from Other User” when modifying the “Admin” user’s permissions and using this function could result in the Admin User from being locked out of functions in Idealpos.

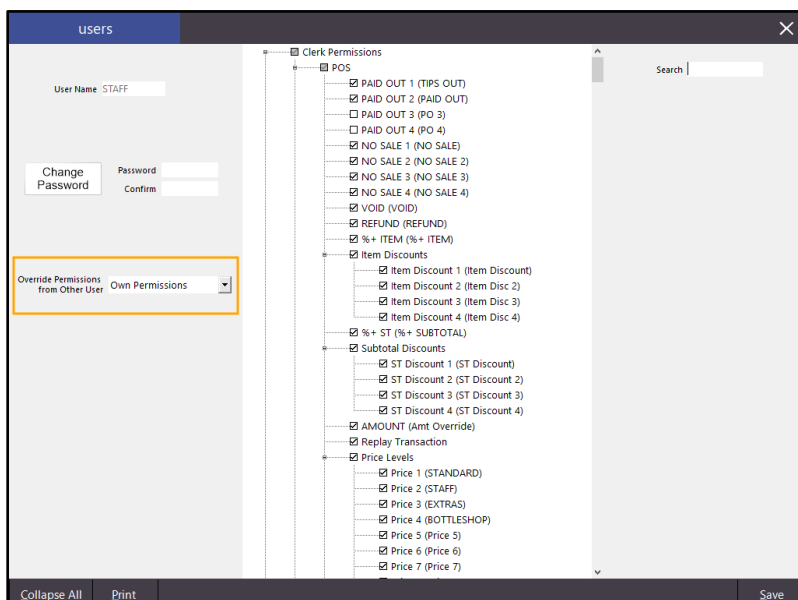
Idealpos has been updated so that the “Override Permissions from Other User” option is not displayed when modifying the Admin User’s permissions. The “Override Permissions from Other User” is still displayed when modifying other user types.

Go to Setup > Users > Select: Admin > Modify

The Override Permissions from Other User option is no longer displayed for the Admin User



When modifying other user types (e.g. Manager or Staff), the “Override Permissions from Other User” option is still available



Yes/No Options

Option to print POS Description on Kitchen Print from terminal where order is taken

This function updates the behaviour of the POS Description that is printed on the Kitchen Print when using Ideal Kitchen Monitor to print a runner docket. The runner docket will now show the POS terminal from where the order was placed.

Previously, the POS Description that was printed on the Kitchen docket was the description of the POS terminal which printed the order.

After this change, the Kitchen Print will show the POS terminal from where the order was placed.

Setting this up involves setting up Idealpos and Kitchen Monitor as summarised below:

- Enable a Yes/No option in Idealpos (Print POS Description on Kitchen Print)
- Configure printers if not setup already
- Enable runner docket in Ideal Kitchen Monitor

To enable the required Yes/No option in Idealpos, go to:

Setup > Yes/No options > Receipt/Kitchen > Enable: Print POS Description on Kitchen Print

| | ALL | 1 |
|--|-----|---|
| RECEIPT / KITCHEN | | |
| Print POS Description on Kitchen Print | ✓ | |

Close the Yes/No options, then confirm your printers exist and are configured correctly by going to:

Setup > Network Printers

| Name | POS Terminal | Printer Type | Connection | Settings | Redirect Printer |
|---------|--------------|-----------------|------------|---------------------|------------------|
| IKM | | Kitchen Monitor | Ethernet | 192.168.15.122,5510 | None |
| Printer | | Epson TM-T88 | Ethernet | 192.168.15.73,9100 | None |

printers by pos drag-and-drop from above

| POS | Description | Receipt Printer | KITCHEN | BAR | COFFEE | IKM | Kitchen Printer 5 | Kitchen Printer 6 | Kitchen |
|-----|-------------|-----------------|---------|---------|---------|-----|-------------------|-------------------|---------|
| 1 | POS 1 | Printer | Printer | Printer | Printer | IKM | | | |
| 2 | POS 2 | | | | | IKM | | | |

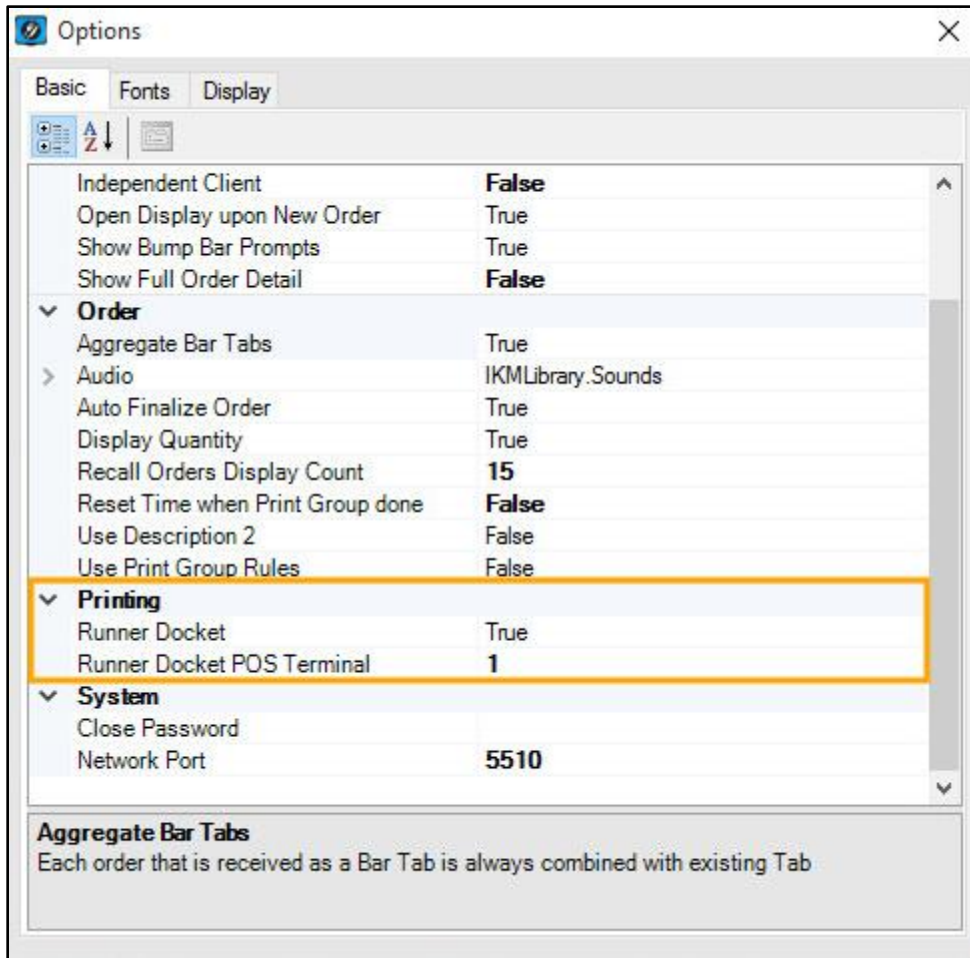
Clear All Clear Copy KP Timeout 4

Ensure that your receipt printers have been configured correctly for all your POS terminals.

idealpos7 Update History

If required, select the printer from the list and press the "Test" button to ensure that the printer can successfully print a receipt.

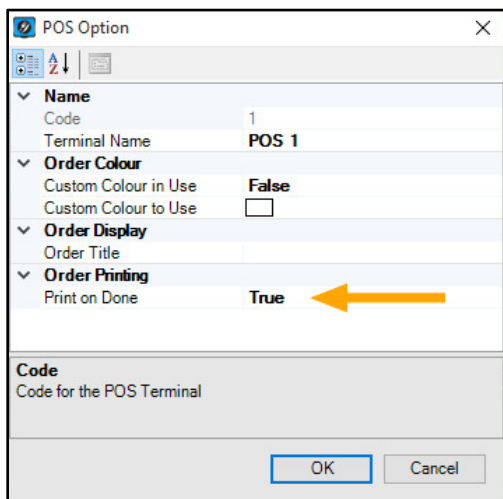
To setup Ideal Kitchen Monitor, open Kitchen Monitor and close the main IKM monitor screen, then go to:
Setup > Options



Set the Runner Docket setting to True

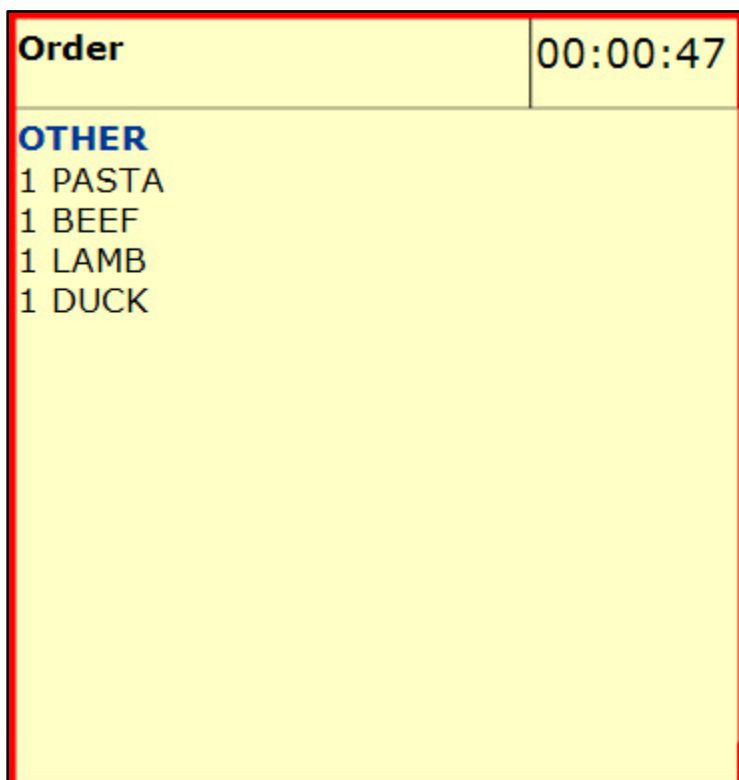
Set the Runner Docket POS Terminal setting to reflect the POS terminal number where you'd like the Runner Docket Printed to

Once you have configured the above settings, close the Options window in Ideal Kitchen Monitor. In order for the Runner Docket to print automatically when the order is done, you must define this for each POS Terminal in Kitchen Monitor. In Kitchen Monitor, go to Setup > POS Terminals, add or modify an entry and set the code to the POS Terminal number, and then set Order Printing > Print on Done to True.



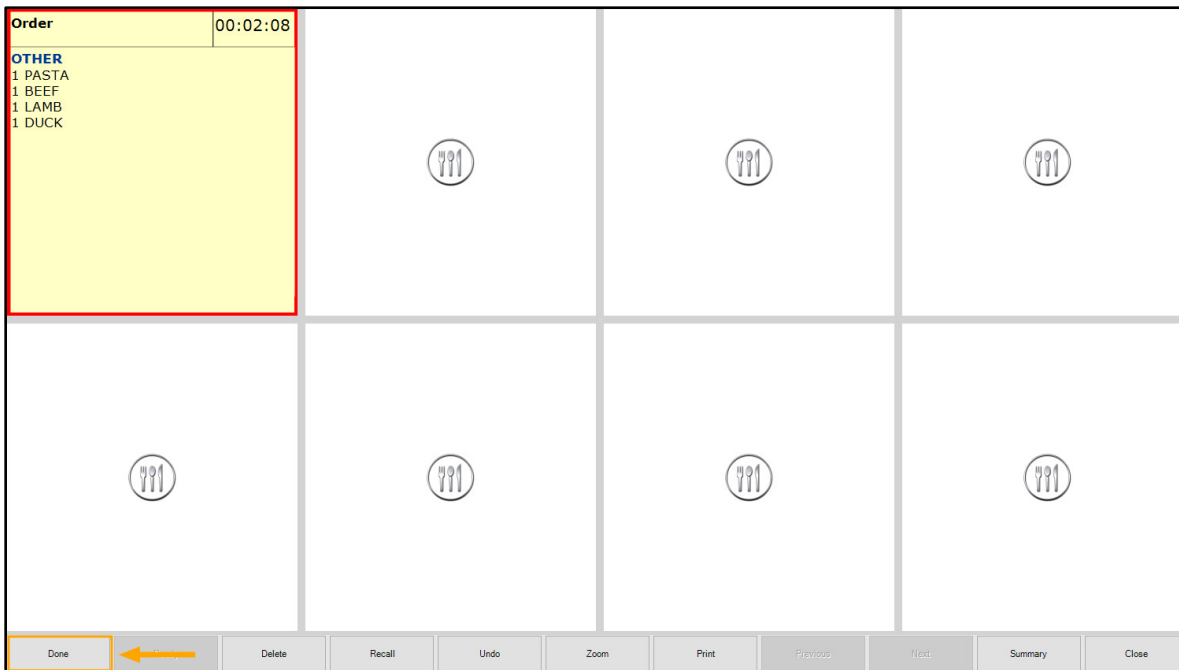
While you are enabling the Print on Done setting, now is also good time to ensure that your POS Terminal names are correct, as these names will be used when printing the IKM Runner Docket. If the names need adjusting, just select POS terminal from the list, press Modify, then update the terminal name that's displayed in the Terminal Name field. Once the Print on Done setting has been configured and any terminal name adjustments completed, open the Ideal Kitchen Monitor screen to show any orders that have been placed.

Place an order from a POS terminal by adding items which are configured to print to IKM, then either save the sale to a table or tender the sale. Any items that are ordered and configured to print to IKM will be displayed on the Ideal Kitchen Monitor screen.

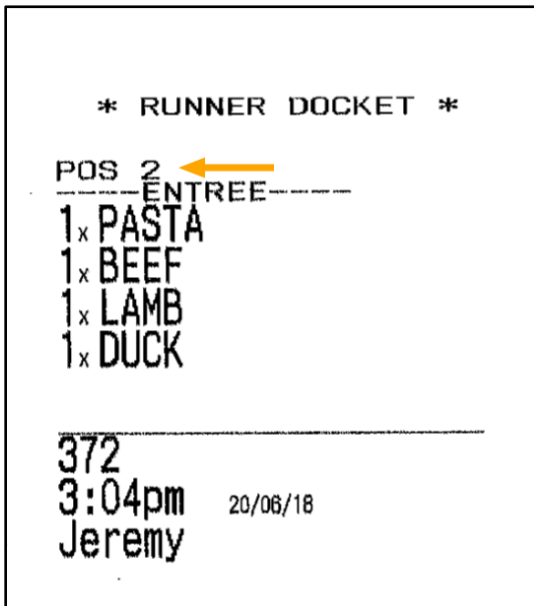


idealpos7 Update History

To print the runner docket, press the 'Done' button at the bottom left corner of the IKM screen.



The Runner Docket that is printed to the printer will contain the items that were ordered. The name of the terminal from where the order was placed will be printed at the top of the runner docket.



Show Tender Spend Limit on Receipts

Idealpos contains existing functionality which allows Tender Spend Limits to be imposed on customers and also contains functionality that allows the Tender Spend Limits to be either reset after a pre-set period of time or reset manually.

This particular feature introduces the ability to show the remaining balance of the Tender Spend Limit for the customer as well as the frequency that the spend limit is reset on the customer receipt. This way the customer will see the remaining spend limit on their receipt as well as the period of time that they need to wait until before the spend limit is reset.

To enable this function, go to:

Setup > Yes/No Options > Receipt/Kitchen > Show Tender Spend Limit on Receipt

| | ALL | 1 |
|------------------------------------|-------------------------------------|---|
| RECEIPT / KITCHEN | | |
| Show Tender Spend Limit on Receipt | <input checked="" type="checkbox"/> | |

In order for this function to be applied, you must have a Tender Spend Limit configured. Tender Spend Limits are configured on a per-customer basis.

Configuring the Customer Spend Limit involves two steps.

The first step is configuring the Tender Spend Limit settings in Global Options and the second step involves setting up a Tender Spend Limit for each customer.

Go to Setup > Global Options > Customers > User Defined

Select a User-Defined field that will be used for storing Spend Limits and enter a label that will be used to identify the field. In the below example, the 10th User Defined field has been chosen for the Daily Spend, however, you can choose any User Defined field and you may enter any label that you'd like to refer to the daily spend limit as.

User-Defined

Text Fields

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

Yes/No Fields

- 1 Pays Weekly?
- 2 User-Defined Yes/No
- 3 User-Defined Yes/No
- 4 User-Defined Yes/No
- 5 User-Defined Yes/No

idealpos7 Update History

Once the daily spend label has been configured, go to:
Setup > Global Options > Customers > Tender Spend Limits

The screenshot shows a window titled "Tender Spend Limits" with two rows of configuration options. Each row includes a "Tender Limit" dropdown, a "User-Defined Field" dropdown, and a "Reset" dropdown. The first row is configured with "POINTS" for the limit, "Daily Spend" for the field, and "Daily" for the reset period. The second row is configured with "No Spend Limit" for both the limit and the field, and "Manual" for the reset period.

| Tender Limit | User-Defined Field | Reset |
|----------------|--------------------|--------|
| POINTS | Daily Spend | Daily |
| No Spend Limit | No Spend Limit | Manual |

You have the ability to configure up to two Tender Spend Limits

- Tender Limit 1/Tender Limit 2 – Specify the tenders that you want the limit to be used against.
- User-Defined – Select the User Defined field that you will use to enter the spend limit amount against. This is the User Defined field that you just entered a label into in the previous step
- Reset – Select the period that you want the spend limit to be reset

Once Global Options have been configured, you'll need to configure the Tender Spend Limit for each Customer. Close the Global Options screen then go to:

File > Customers > Customers > Select a Customer: Modify > Advanced

Enter the tender spend limit into the User Defined field that has been configured for the spend limit then press Save. Repeat the process for each customer that you want to apply the daily spend limit against and save the changes

The screenshot shows the "modify customer" window with the "Advanced" tab selected. The "User-Defined Fields" section on the left contains a list of fields, with "Daily Spend" highlighted in orange and containing the value "20". Below this list are four checkboxes, each labeled "User-Defined Yes/No". The "Photo" section on the right has a "Photo Location" field with a right-pointing arrow and a large empty rectangular area below it. A "Save" button is located in the bottom right corner of the window.

Close the Customers screen.

Finally, ensure that the tender is enabled for use on the Tender screen via the Yes/No options screen.

Go to Setup > Yes/No Options > Tenders > Inhibit [Tender Name]

Ensure that the Tender Name/Type that you've selected for your Tender Spend Limit is not inhibited

| | ALL | 1 |
|-----------------------|-----|---|
| TENDERS | | |
| Inhibit CASH | | |
| Inhibit POINTS | | |
| Inhibit ROOM CHARGE | ✓ | |
| Inhibit TENDER 12 | ✓ | |
| Inhibit TENDER 13 | ✓ | |
| Inhibit TENDER 14 | ✓ | |
| Inhibit TENDER 15 | ✓ | |
| Inhibit TENDER 16 | ✓ | |
| Inhibit TENDER 17 | ✓ | |
| Inhibit TENDER 18 | ✓ | |
| Inhibit EFTPOS | | |
| Inhibit ACCOUNT | ✓ | |
| Inhibit AMEX / DINERS | | |
| Inhibit LAYBY | | |
| Inhibit CHEQUE | | |
| Inhibit GV REDEEM | ✓ | |
| Inhibit CREDIT NOTE | | |
| Inhibit ONLINE | | |

idealpos7 Update History

Then open the POS Screen, add a Customer to the transaction which has a daily spend limit applied and add Stock Item(s) to the transaction.

20 Jun 16:57 POS 1 Adult ID: 20/06/00
Jeremy STANDARD >>>









Sarah Charlton - 1482 Points (\$1482.00) \$20.00

| | | | | | | | | | |
|------------|---|------|--|--|--|--|--|--|--|
| CAPPUCCINO | 1 | 3.50 | | | | | | | |
|------------|---|------|--|--|--|--|--|--|--|

1482 Points (\$1,482.00)
Min Layby Deposit : \$0.35

Discounts 0.00
\$3.50

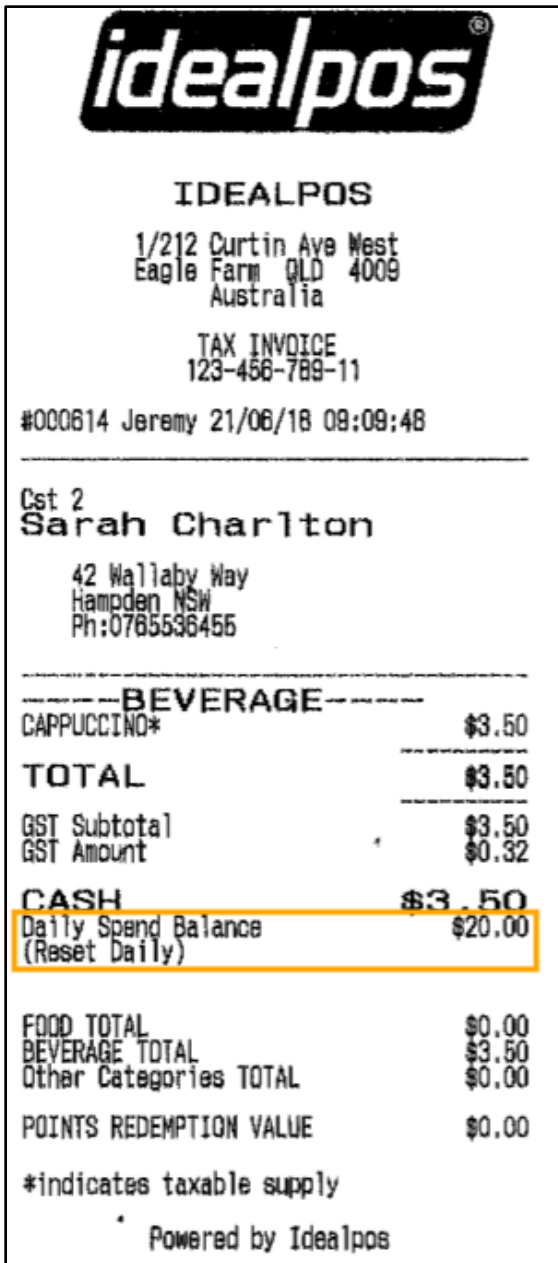
| | | | | | |
|-------------|------------|---|---|-------|---------|
| RECEIPT | CLERK | 7 | 8 | 9 | CL |
| PRICE LEVEL | 5% ST DISC | 4 | 5 | 6 | NO SALE |
| CUSTOMER | 5% ITEM | 1 | 2 | 3 | X |
| BAR TAB | REFUND | | | | |
| PENDING | VOID SALE | | | | |
| TABLE MAP | VOID | 0 | . | ENTER | |

| | | | | | | | | |
|------------|------------|-------------------|---------|--------------|-------------|------------|-----------|-----------------|
| Test Menu | 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 |

Tender the transaction by pressing the Enter button, then pay using the standard cash tender

The receipt printed will contain the Daily Spend Balance and the reset type (Daily, Weekly, Monthly, etc.)



In this particular example, the Daily Spend user-defined option has been associated with the Points tender. This means that when the customer spends their Points, they'll be limited to spending \$20.00 worth of points daily.

idealpos⁷ Update History

Perform another transaction, this time tender off the transaction using a tender which has been configured with a Tender Limit. In the below example, the daily spend balance has reduced down to \$6.00 after spending \$14.00 out of the \$20.00 limit.

idealpos
IDEALPOS
1/212 Curtin Ave West
Eagle Farm QLD 4009
Australia
TAX INVOICE
123-456-789-11
#000616 Jeremy 22/06/18 13:13:27

Cst 2
Sarah Charlton
42 Wallaby Way
Hampton NSW
Ph:0765538455

Redeem Points
-----**BEVERAGE**-----
CAPPUCCINO
4 @ \$3.50 ea \$14.00
TOTAL \$14.00

Points \$14.00
Daily Spend Balance \$6.00
(Reset Daily)

TOTAL \$0.00
POINTS REDEMPTION VALUE \$141.20

*indicates taxable supply
Powered by Idealpos

When the spend limit has been exceeded, the POS will display a prompt similar to the below showing the "Exceeded Spend Limit!" message along with the spend limit remaining

Exceeded Spend Limit!
\$6.00 remaining.
OK