

Idealpos 8 Build 8 - Update History

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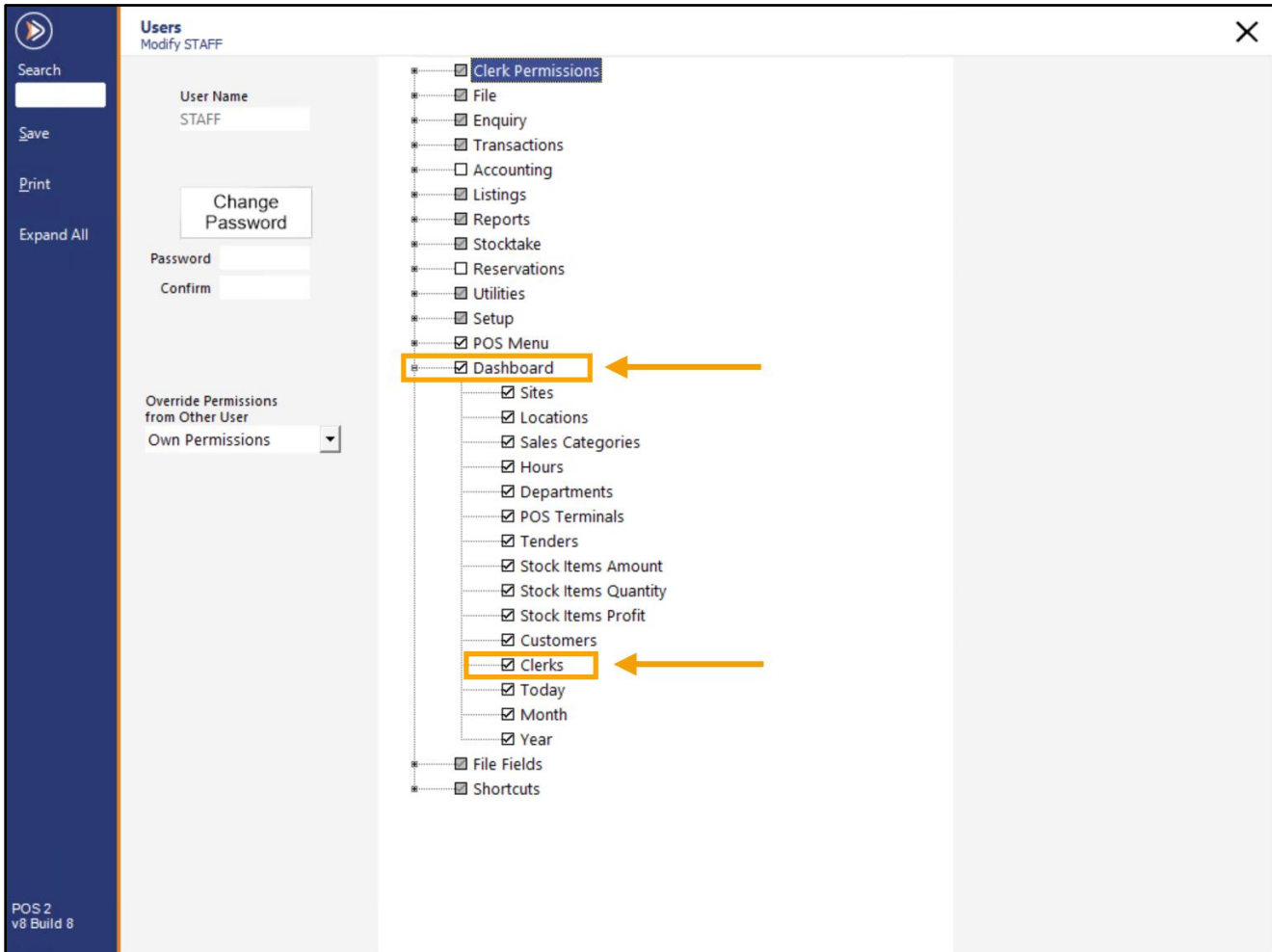
Back Office

IP-4977 – Dashboard – Pie Chart support for Clerks Totals

This function adds the ability to view the Clerk Totals on the Back Office Dashboard – Pie Chart.

To use this function, go to: Back Office > Setup > Users > Select User > Modify

Ensure that the Dashboard and the Clerks option is enabled for the User.



Close the User permission windows.

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From the Back Office Dashboard, select the 'Clerks' option from the menu at the bottom of the window.

The screenshot shows the Idealpos v8 POS interface. The window title is 'Idealpos v8 Build 8 DevRev 84' and 'Site 1 - POS 2(200)'. The menu bar includes File, Enquiry, Transactions, Listings, Reports, Stocktake, Stock Manage, Utilities, Setup, and Help. The left sidebar contains a 'POS' menu with various options like Functions, Alert Levels, Customers, Log Out, etc. The main area displays sales statistics for 'Today' (\$30), 'Same Time Last Friday' (\$0), and 'Same Time Yesterday' (\$10). Below this is a transaction entry for 'ENTRÉE' with a price of \$26, associated with 'Jeremy'. At the bottom, a dropdown menu is open, listing options: Sites, Locations, Sales Categories, Hours, Departments, POS Terminals, Tenders, and Clerks. The 'Clerks' option is highlighted with a yellow border and an orange arrow points to it. A red ring graphic is also visible in the background.

BEVERAGE (100.0%)

17:11:05	Audit 625	POS 200	Jeremy
CAPPUCCINO			3.50
FLAT WHITE			3.50
SHORT BLACK			3.00

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The Back Office Dashboard will display the Clerk totals on the Pie Chart for the currently selected day – If required, you can select the required day by clicking on 'Today' and select the required day.

If the Clerk Totals are not current, the refresh button (located on the top-left corner of the Dashboard) can be pressed which will trigger Idealpos to fetch the latest data.

The screenshot displays the Idealpos v8 Build 8 DevRev 84 interface for Site 1 - POS 2(200). The dashboard includes a menu on the left with options like Functions, Alert Levels, Customers, Log Out, Manufacture Item, Pos Screen Layouts, Promotions, Stock Items, Favourite Reports, Financial Report Daily, Stock Item Sales This Month, Other Reports, and Activity Log. The main content area shows sales figures for 'Today' (\$30), 'Same Time Last Friday' (\$0), and 'Same Time Yesterday' (\$10). Below this, there are two blue boxes representing sales for 'ENTRÉE' and 'Jeremy', both valued at \$26. A pie chart shows the distribution of sales by clerk: Sophia (66.7%) at \$20.00 and Jeremy (33.3%) at \$10.00. The pie chart is highlighted with a yellow box and an arrow. At the bottom, there are buttons for 'Clerks' and 'Today', with an arrow pointing to the 'Today' button. A refresh button (circular arrow icon) is located in the top-left corner of the dashboard area, also highlighted with a yellow box and an arrow. The footer includes the Idealpos logo and 'User Guide' text, along with a note: 'Idealpos integrates with Mr Yum for Table Ordering, Pickup & Delivery. Click here for a Special Offer!'.

Coupon Promotions

IP-4982 – Coupon Promotions – Redeem by Customer

This function adds the ability to redeem Coupon Promotions by Customer when using Serialized Tracking.

When this function is enabled and a Customer meets the required criteria to obtain a Coupon, the Coupon Promotion will be saved against the Customer's record. The next time the Customer visits the store and wants to redeem their Coupon, the Clerk will add the Customer to the sale, then press a Customer Coupon button on the POS Screen and any Coupons that the customer has previously acquired will appear in the list.

The Clerk can select the required Coupon from the list and can then apply it to the current sale.

This option is customisable, enabling you to configure the system to behave to your requirements as follows:

Redeem by Customer – When enabled, any Coupons that the customer acquires will be saved against the Customer's record.

Print to Docket – When enabled, any Coupons that the customer acquires will be printed at the end of the sale.

You can enable either one or both options as required.

If both options are enabled and the Coupon is redeemed using the Customer Coupon button (instead of scanning the physical printed Coupon), the physical Coupon will also be marked as used, which prevents the customer from abusing the Coupon Redemption function.

To configure this function, go to: Back Office > File > Sales > Promotions > Coupon Promotions.

Select the Coupon Promotion from the list > Modify

Ensure that the 'Serialized Tracking' option is enabled, then enable the option 'Redeem by Customer'.

If required, you can have both Print to Docket and Redeem by Customer enabled.

Coupon Promotions
Modify 4

Promotion Advanced Coupon Design

Description: Get \$30 Coupon
Group: Coupons
POS: >
Customer Type: >
 Multiple Trips

From: 01 Oct 2016 00:00
to: 01 Jan 2025 00:00
 Continuous
 During Specific Times

Discount Type: \$ Discount off Total 30.00
 Multiple Redemptions per Sale

Serialized Tracking
 Redeem by Customer
 Print to Docket
 Print Only

Redeem at POS: >
Redeem from: 01 Oct 2016 00:00
to: 01 Oct 2025 00:00
OR 10 Days from Print Date

Apply Discount to: All Items
 Only Items Below

Trip Conditions Set 1: Buy 1 of Anything of items below
1001102 \$30 COUPON

Trip Conditions Set 2: And Buy 0 of items below

Delete Promotion Link Enquiry Add Department Add Stock Item

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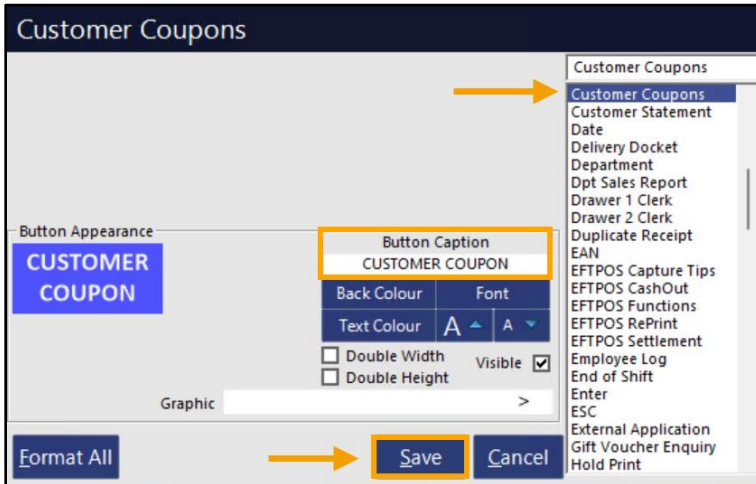
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Once you have configured this function as required, close the Modify Coupon promotion window and save changes.

In addition to configuring the Coupon Promotion, you will also need to have a button configured on the POS Screen to enable the Clerk to redeem the Customer Coupon when requested by the Customer.

Go to: Back Office > Setup > POS Screen > POS Screen Setup > Select POS Screen Layout > Buttons

Assign a blank button to the Customer Coupon function as per the below example:



Save changes and close the POS Screen Setup windows.

Add a Customer to the sale and sell the required quantity/value of items as per the Coupon Promotion. The example used here refers to the Get \$30.00 Coupon which can be triggered by spending \$300.00 on the items included in the promotion.

For this example, we'll add the 'MELISSA' customer which is also assigned to the STAFF Group/Price Level. We will add 50x BEEF which brings the sale to a total of \$400.00, triggering the \$30.00 Coupon to be issued to this Customer.



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Tender the sale to finalise the transaction.

15 Aug 16:34 Adult ID: 15-Aug-2004
POS 200 Jeremy STAFF #664

Melissa - 0 Points


BEEF	50	400.00					
\$30 COUPON	1	0.00					
\$30 COUPON	1	0.00					

0 Points
50x

\$400.00

CASH	
EFTPOS	
AMEX/DINERS	
POINTS	
LAYBY	
GV REDEEM	
CREDIT NOTE	
ACCOUNT	

400.00



Balance 400.00

The Customer Docket will be printed.

If you enabled the Print to Docket option, the Coupon will also be printed.

```

CONGRATULATIONS!!!

You have spent $300 and we want to give
you $30 to spend on whatever you want!

You only have 10 days, so spend wisely

Valid 15 Aug 2022 to 24 Aug 2022 23:59:59

Customer STAFF002
Melissa

Printed : 15 Aug 2022 16:35:14
Audit # : 664-200

96000000920089200
    
```

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To redeem the Customer Coupon via the Customer Coupon button, add the same Customer to the sale.

15 Aug 16:37 Adult ID: 15-Aug-2004
POS 200 Jeremy STAFF #665

Melissa - 0 Points

0 Points **\$0.00**

Add items to the sale to the value of \$30.00 or more (to maximise the use of the \$30.00 coupon).

15 Aug 16:38 Adult ID: 15-Aug-2004
POS 200 Jeremy STAFF #665

Melissa - 0 Points

PASTA	1	3.50
BEEF	1	8.00
LAMB	1	7.50
DUCK	1	10.00
PASTA	1	3.50

0 Points **\$32.50**
5x

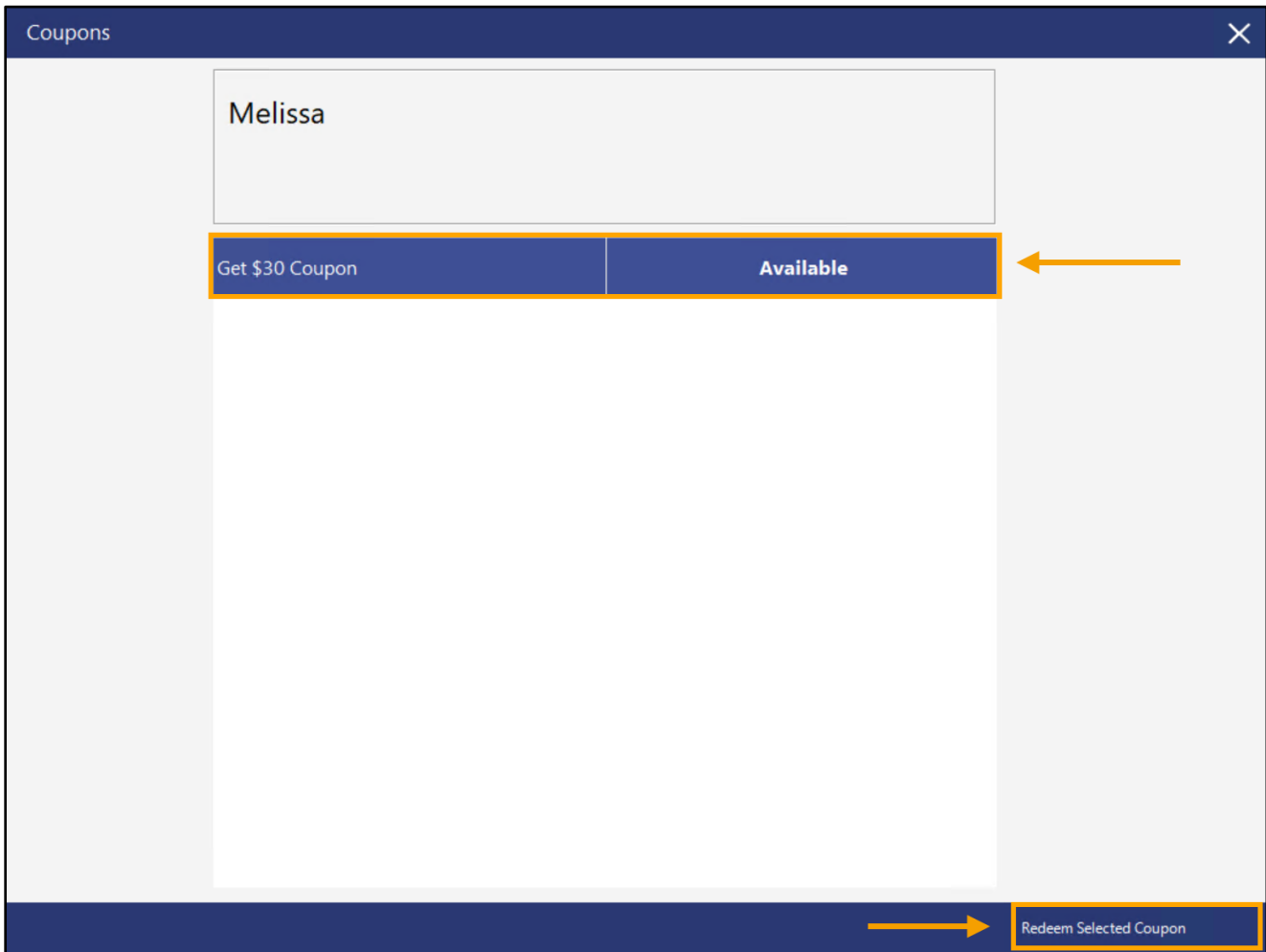
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Press the CUSTOMER COUPON button.

The list of Coupons that are available to this Customer will be displayed on the POS screen.

Select the required Coupon, then press the 'Redeem Selected Coupon' button located on the bottom-right corner of the screen.



The Coupon is applied to the sale and the total amount is discounted by the value of the Coupon.



The sale can now be tendered off by pressing the ENTER button, then tender the remaining amount.

End of Shift

IP-151 – Cash Declaration by Clerk functionality by Site

This function adds the ability for Clerks to be able to perform a Cash Declaration by Clerk by Site.

To explain this in simple terms, when this option is enabled, the Clerk themselves will become the till (i.e. they store any cash from sales in their pocket and issue change from their pocket). The Clerk will also have the ability to login to any POS Terminal in the venue using their Clerk Code. Any sales performed by the Clerk across all POS Terminals in the venue will be counted towards their Shift and must be counted/included in their Cash Declaration.

Once they're finished their shift, they can perform an End of Shift on any POS Terminal in the venue and they will enter the total cash they have in their pocket into the Cash Declaration screen – the End of Shift Docket/Report will include all the sales that the Clerk performed across all POS Terminals during their shift. The End of Shift Docket/Report will also include the cash amount they entered into the Cash Declaration screen and will show the counted cash/expected cash and any variance between the two.

The Y/N Option 'Do Cash Declarations for each Clerk' will need to be enabled when configuring this functionality. Also note that you will need to disable the following Yes/No Options during the configuration of this function:

- **Employee to Choose Drawer when logging in**
- **Delay Cash Declaration Count**

Before enabling this function, we recommend that you finalise any shifts currently in progress via the End of Shift function.

To configure and use this function, go to: Back Office > Setup > Global Options > Miscellaneous.

In the Financial section, enable the option 'Cash Declarations by Clerk – Group by Site'

The screenshot shows the 'Global Options' configuration window for 'Site 1 (Site 1)'. The 'Miscellaneous' tab is selected. The 'Financial' section is expanded, showing the following options:

- Start of Financial Year (dd/mm): 01/07
- Business Tax Descriptor: ABN
- Company Number Descriptor: ACN
- Aging Type: 30/60/90+ Days, By Month
- GST Accounting: Cash, Accrual
- Cash Declarations by Clerk - Group by Site** (highlighted with a yellow box and an orange arrow)

Other sections visible include:

- POSServer:** IP Address: 192.168.15.101, Centralize Points, Floating Clerks, Order Numbers, Centralize Accounts, Unicode, Transfer (Customer Points, Table Data, Customer Account Transactions), Clear Data (Customer Points, Table Data, Customer Account Transactions), Retrieve Account Transactions, Reset Order Number, Release Locks.
- Promotional Tickets:** Ticket Printer: No Ticket Printer, None, One per Sale, Multiple by \$: 1, Show Graphic Logo, Stock Item Format, Attach Instructions, Show Customer Code, Customer Daily Limit, Non-Customer Sales, Cash Sale. Write Customer Details.
- Magstripe Settings:** Clerks: Track 1, Track 2, Track 3; Customers: Track 1, Track 2, Track 3.
- Dashboard:** Automatically Refresh (checked), Delete Dashboard Data and Rebuild.
- Packet Processing:** Number of Packet Commands to process at End of Sale: 500, Packet Processing Idle Time: 6.
- Ideal Handheld:** Enable v7 Features (checked), Menus in Code Order, Use Price Level from Menu, Tab Layer Colours (Tab 1-18), Notes, Default Map, Price Level: 1, POS Screen Layout: 1, Print Group Shift 1, Print Group Shift 2.

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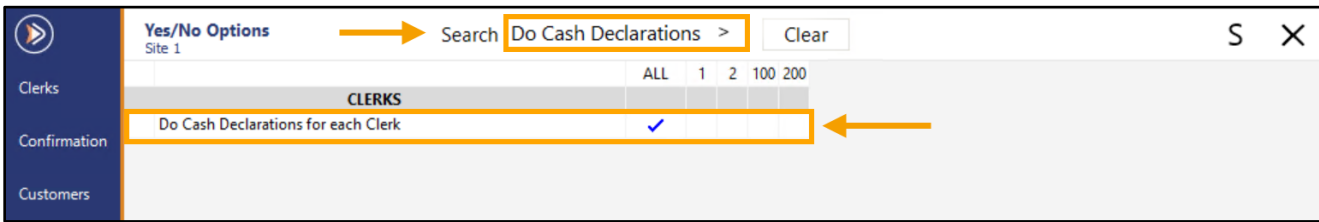
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Close the Global Options window to save the change.

Go to: Back Office > Setup > Yes/No Options.

Enter Search: 'Do Cash Declarations'

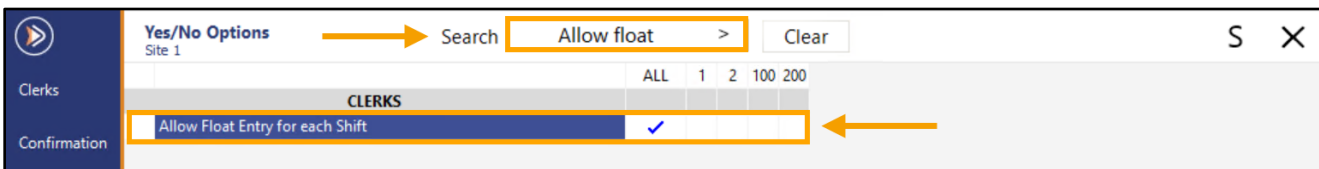
Enable the Yes/No Option 'Do Cash Declarations for each Clerk'



If you want your Clerks to perform their Float Entry when starting their shift, ensure that you enable the option 'Allow Float Entry for each Shift'.

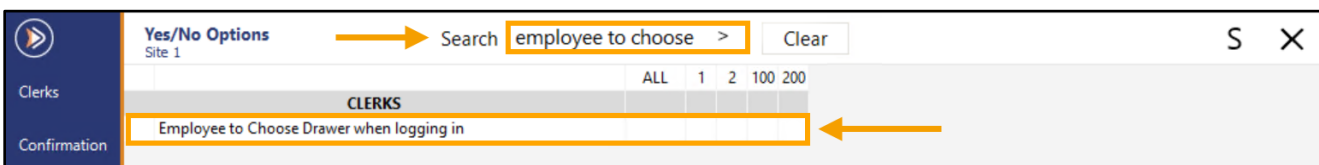
Note that as part of enabling the option 'Cash Declarations by Clerk – Group by Site', when a Clerk performs their Float Entry on a POS Terminal, their Float Entry will be applicable to all POS Terminals in the venue. This means that once they have performed their Float Entry for their shift, they will be able to login to any POS Terminal in the venue and they won't see the Float Entry prompt again for their current shift.

If the 'Cash Declarations by Clerk – Group by Site' option were disabled, their Float Entry only will only apply to the terminal that they completed it on.

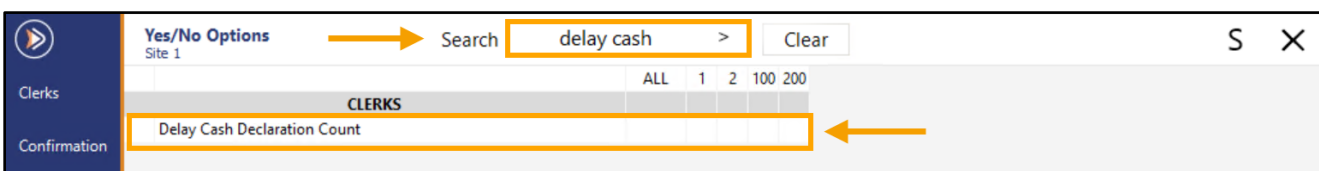


Ensure that the following Yes/No Options are disabled, as they're not compatible with this functionality:

Disable 'Employee to Choose Drawer when logging in'



Disable 'Delay Cash Declaration Count'



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Close the Yes/No Options window.

We recommend performing a Close Suite/Open Suite to ensure that the options have been applied.

After restarting Idealpos, login to the POS Screen using a Clerk Code.

If the 'Allow Float Entry for each Shift' was enabled in the Yes/No Options, the Float Entry prompt will appear.

The Clerk will need to enter their Float (i.e. the cash they have in their pocket/apron/etc.).

Float Entry

Enter Full Amount

CASH 10.00

Or Each Denomination

\$100		\$0.50	
\$50		\$0.20	
\$20		\$0.10	
\$10		\$0.05	
\$5			
\$2			
\$1			

Open Drawer

7 8 9

4 5 6

1 2 3

0 . -

CL OK

After pressing 'OK', the receipt printer will print the Float Denominations Counted.

POS 200 - POS 2

12/08/2022 11:09:47

Clerk 10 : Sophia

FLOAT DENOMINATIONS COUNTED

Total Cash -----

10.00

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The Clerk may now login to any POS Terminal using their Clerk Code and perform sales.

For this example, we will login to two separate POS Terminals (POS100 and POS200) using this Clerk Code and perform a sale totalling \$10.00, also tendering with \$10.00 each time (so that no change is required).

POS200:

12 Aug 11:13 Adult ID: 12-Aug-2004		
POS 200 Sophia STANDARD #623		
CAPPUCCINO	1	3.50
FLAT WHITE	1	3.50
SHORT BLACK	1	3.00
<hr/>		
3x		\$10.00

POS100:

12 Aug 11:15 Adult ID: 12-Aug-2004		
POS 100 Sophia STANDARD #512		
CAPPUCCINO	1	3.50
FLAT WHITE	1	3.50
SHORT BLACK	1	3.00
<hr/>		
3x		\$10.00

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Finally, we will perform an End of Shift on POS 200, entering a cash total of \$30.00 (2x \$10.00 sales, plus the \$10.00 float entry).

Note that when completing a Cash Declaration with the Global Option 'Cash Declarations by Clerk – Group by Site' enabled, you will notice the following on the Cash Declaration Screen.

- Clerk Number/Clerk Name at the top of the Cash Declaration window.
- A warning at the top of the Cash Declaration window:
'You are ending the shift for multiple POS Terminals. Ensure trading has finished and all packets have been processed'.

Enter the Cash amount, then press 'Proceed'

Cash Declaration - Clerk 10 : Sophia

Enter Full CASH Amount

CASH EFTPOS

You are ending the shift for multiple POS Terminals. Ensure trading has finished and all packets have been processed.

or Each Denomination

\$100 \$0.50

\$50 \$0.20

\$20 \$0.10

\$10 \$0.05

\$5

\$2

\$1

7 8 9

4 5 6

1 2 3

0 . -

CL Proceed

Calc

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The End of Shift Docket/Report will be printed and will show the Site and Clerk Name, along with the Sale amounts and amounts tendered:

```
END OF SHIFT
SALES REPORT FROM 01-Jan-2022 00:00:00
                  TO 12-Aug-2022 11:23:50
Site 1 : Site 1
Audit # 8
Clerk: Sophia
Gross Sales      6.0000      20.00
                  -----
NETT Sales              20.00
                  =====
                  20.00
AMOUNTS TENDERED:
  CASH      2      20.00
                  -----
                  20.00
                  =====
                  20.00
BANKING:
  CASH              20.00
                  -----
                  20.00
SALES CATEGORIES:
  BEVERAGE              20.00
PRICE LEVELS:
  1-STANDARD      6.0000      20.00
TAX AMOUNTS:
  GST      1.82      20.00
  GST-Free      0.00      0.00
                  -----
                  20.00
FUNCTIONS:
  Number of Sales              2
  Avg $ per Sale              10.00
CASH DECLARATION:      Audit 624,200
Expected  Actual  Variance
CASH      20.00   20.00   0.00
-----
Totals    20.00   20.00   0.00
Name: _____
Signed: _____
Printed from POS 200 at 12-Aug-2022 11:23:51
```

The Cash Denominations Counted will also be printed and will contain the total cash amount (\$30.00), minus the \$10.00 Float which equals \$20.00.

```
Clerk 10 : Sophia
CASH DENOMINATIONS COUNTED
-----
          -----
          30.00
- Float          10.00
          =====
          20.00
Printed from POS 200 at 12-Aug-2022 11:23:50
```

IP-2292 – End of Shift can include figures for Multiple POS Terminals

This function adds the ability to include figures from multiple POS Terminals on a single POS Terminal's End of Shift Docket/Report.

For the purpose of explaining this function in simple terms, we will colloquially name the terminals as follows:

Master Terminal/Main Terminal – Any terminal which has been configured to include figures from Multiple Terminals.

Slave Terminal – Any terminal which has its figures appearing on a Master or Main terminal.

The way this function works is by configuring one or more master Terminals to include figures from Multiple POS Slave Terminals via the 'Include Figures for Multiple Terminals' list. Once a Slave POS Terminal has been included on a Master or Main Terminal's Multiple Terminal List, it cannot be configured on any other Master or Slave Terminal's Multiple Terminal List.

When an End of Shift is performed on a Master or Main terminal, the Cash Declaration window will appear and the Clerk will need to count the cash from all the slave tills that the Master POS Terminal is getting its figures from. Once they've counted the cash, they will enter the combined cash amount into the Master POS Terminal's Cash Declaration screen. The End of Shift/Cash Declaration Docket will then be printed and will include the combined figures from all the slave POS Terminals that were included in the Master POS Terminal's 'Include Figures for Multiple Terminals' list.

Before enabling this function, we recommend that you finalise any shifts currently in progress via the End of Shift function.

Please also note the following points:

- This function is not compatible with the following Yes/No Options (these Y/N options must be disabled).
Employee to Choose Drawer when logging in
Delay Cash Declaration Count
- The Yes/No Option '**Inhibit ability to End Shift on Different POS**' must be disabled on the main/master POS Terminals which are configured to include Figures of Multiple Terminals
- The End of Shift function will be unavailable on all slave POS terminals which have been included in the Multiple POS Terminal list of a Master POS Terminal. Once configured, the End of Shift will need to be performed from the Master POS Terminal that is configured to include figures for those slave POS Terminals via the Multiple POS Terminals list.

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To configure this function, go to:

Back Office > Setup > POS Terminals > Select the main POS Terminal that will receive the figures > Modify.

Within the Miscellaneous Settings tab, enter the POS Terminal Codes as a comma separated list into the 'Include Figures for Multiple Terminals' field (e.g. 100,200).

Alternatively, you can click on the '>' button within the field which will open a list of POS Terminals, from which you can select the required Terminal to add to the list.

The screenshot shows the 'Miscellaneous Settings' tab for a POS Terminal. The 'Include Figures for Multiple Terminals' field is highlighted with a yellow box and contains the text '100,200'. A yellow arrow points to the dropdown arrow on the right of this field. Other settings include 'Points per Dollar' (1), 'Point Redemption Value' (0.10), 'Delete Points when Customer Inactive for' (0 Months), 'Lock Price Level to', 'Default Table Map' (1), 'Default User' (Admin), 'Customer Codes From', 'Stock Item Codes From' (0 to), 'Show Order' to, 'Pending Sales From' (1 to 999), 'Force Order Menu', 'Force Receipt Amount', 'Auto Expand Activity', 'Gaming Override Options' (Price Level 0, Remote POS, Ticket Threshold 0, System ID 0 2nd 0, Username, Password), 'Dashboard' (Sales in Locations, Shortcut Bar Small Font), and 'Handhelds' (Force Food to Print, Force Drinks to Print, Force Bills Printer, Item Graphic Location, Handheld Background).

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It should be noted that POS Terminal Codes entered into the Multiple POS Terminal list for Cash Declarations cannot overlap with other POS Terminals.

E.g. Each POS Terminal has the capability of configuring a Multiple POS Terminal list for Cash Declarations.

Once a POS Terminal has been added to a POS Terminal's Multiple POS Terminal list for Cash Declarations, it cannot be entered into any other POS Terminal's Multiple POS Terminal list for Cash Declarations.

E.g.

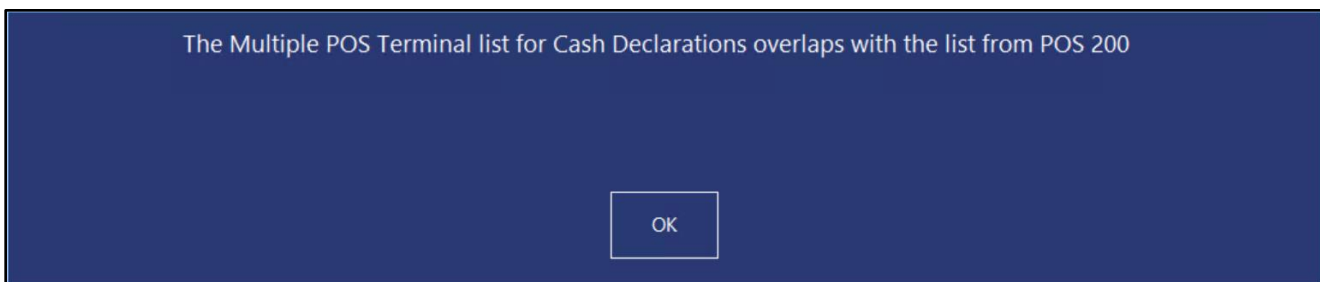
You have an environment that consists of three POS Terminals - POS100, POS200, POS300.

You go to: Back Office > Setup > POS Terminals > Select **POS100** > Modify.

In the Miscellaneous Settings tab > Configure 'Include Figures for Multiple Terminals' > Enter **100,200,300**.

Once **POS100** has been configured to include figures from POS **100,200,300**, the figures from those terminal codes are now being included on the End of Shift/Cash Declaration of POS100 and cannot be configured in any other POS Terminal's Multiple POS Terminal list for Cash Declarations.

Attempting to configure another POS Terminal to include figures from those POS Terminal Codes will result in the following message being displayed – the message will notify you which POS Terminal has already been configured to include those codes:



If you change your mind and/or want a different POS Terminal to include figures from those POS Terminals, you will need to modify the POS Terminal settings for the terminal listed in the prompt above, then remove the terminal codes from the Multiple POS Terminal list for Cash Declarations (Miscellaneous Settings tab > Include Figures for Multiple Terminals).

Once the Multiple POS Terminal list for Cash Declarations has been configured, close the POS Terminal config windows.

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You will also need to ensure that the following Yes/No Options are disabled.

Employee to Choose Drawer when logging in

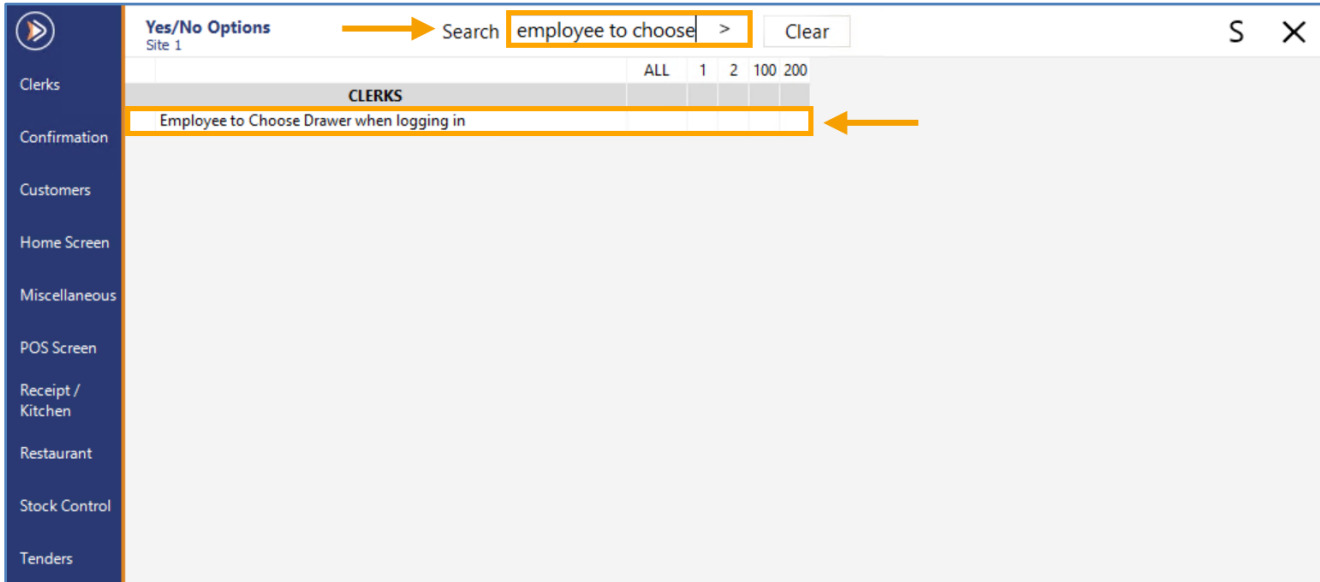
Delay Cash Declaration Count

Inhibit ability to End Shift on Different POS

Go to: Back Office > Setup > Yes/No Options

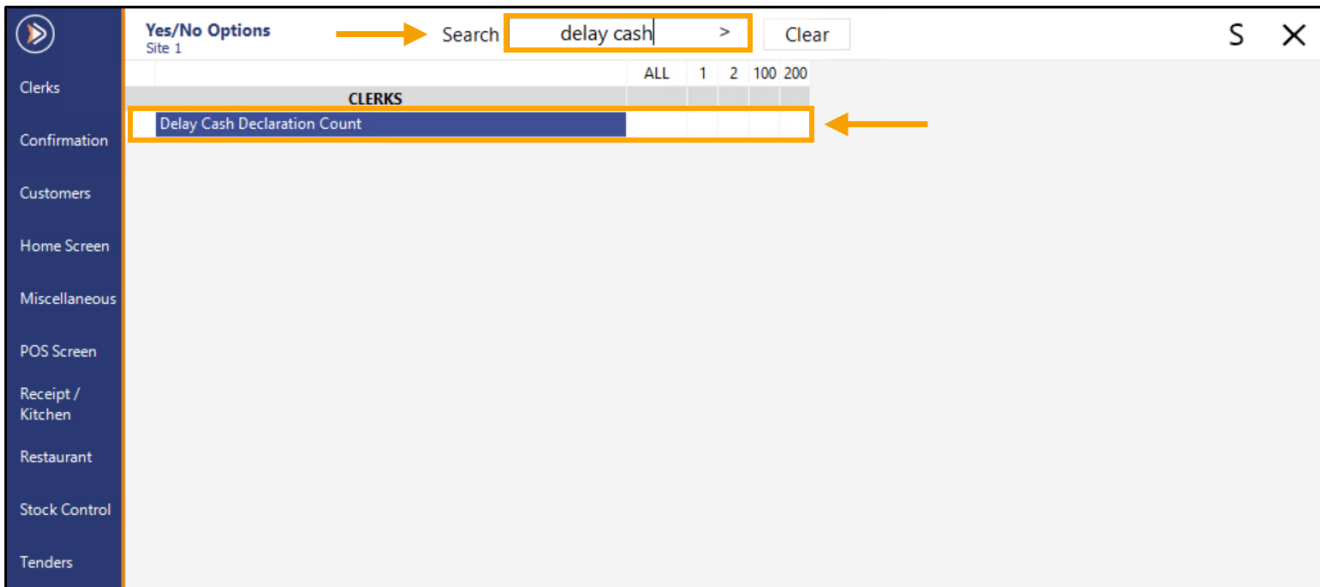
Enter Search: employee to choose

Ensure that 'Employee to Choose Drawer when logging in' is disabled.



Enter search: Delay cash

Ensure that 'Delay Cash Declaration Count' is disabled.

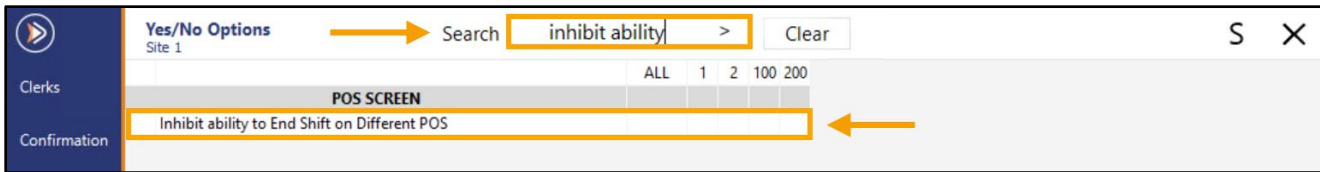


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Enter search: Inhibit ability

Ensure that 'Inhibit ability to End Shift on Different POS' is disabled on the terminals that will be Including Figures for Multiple Terminals.

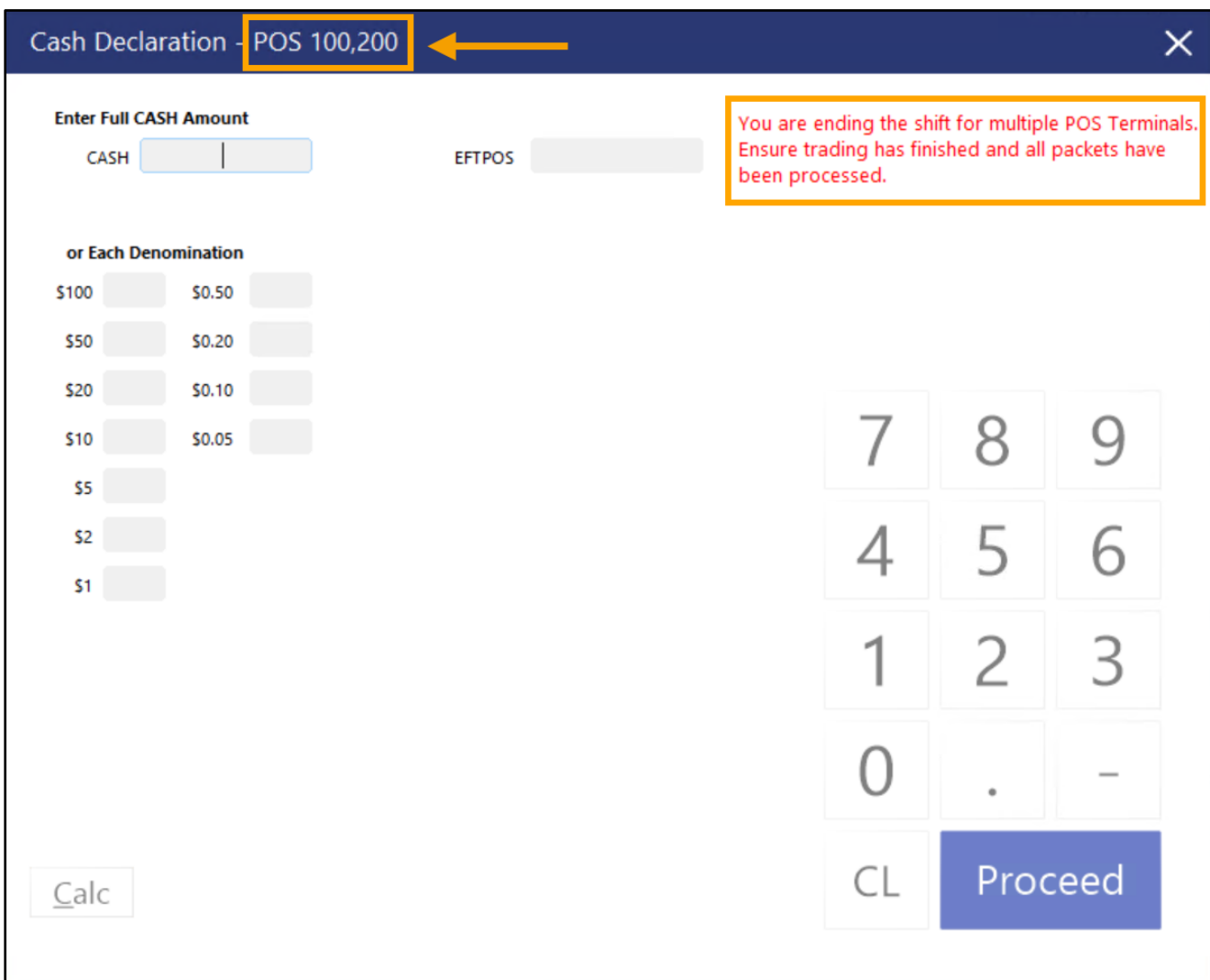


Close the Yes/No Options, then go to: POS Screen

On each POS Terminal, complete any sales as required, noting the sale amounts performed at each POS.

Go to the main POS Terminal(s) which had POS Terminal Codes entered into the 'Include Figures for Multiple POS Terminals' setting and perform an End of Shift.

The End of Shift window will be displayed, and the top of the window will display a list of all the POS Terminals which are being included on this POS Terminal's End of Shift/Cash Declaration. The Cash Declaration screen will also display a warning in red, which is to remind you that you are ending the shift for multiple POS Terminals, and to ensure that trading has finished and all packets have been processed:



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Enter the Cash amount from all POS Terminal numbers displayed at the top of the Cash Declaration screen, then press 'Proceed' to continue. In this example, we performed \$10.00 worth of sales on each terminal, which results in a total amount of \$20.00 cash.

Cash Declaration - POS 100,200 ✕

Enter Full CASH Amount

CASH ← EFTPOS

You are ending the shift for multiple POS Terminals. Ensure trading has finished and all packets have been processed.

or Each Denomination

\$100	<input type="text"/>	\$0.50	<input type="text"/>
\$50	<input type="text"/>	\$0.20	<input type="text"/>
\$20	<input type="text"/>	\$0.10	<input type="text"/>
\$10	<input type="text"/>	\$0.05	<input type="text"/>
\$5	<input type="text"/>		
\$2	<input type="text"/>		
\$1	<input type="text"/>		

7 8 9
4 5 6
1 2 3
0 . -
CL Proceed

idealpos Update History

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The End of Shift Docket/Report will be produced, and will contain figures from all POS Terminals that were included in this POS Terminal's 'Include Figures for Multiple Terminals' list.

The End of Shift Docket/Report also contains an 'includes' list that identifies which POS Terminal's figures have been included on the End of Shift Docket/Report:

```
END OF SHIFT
SALES REPORT FROM 11-Aug-2022 17:25:17
                  TO 11-Aug-2022 17:34:25

POS 200 - POS 2
(Includes POS 100,200)
Audit # 6

Gross Sales      6.0000      20.00
                -----
NETT Sales              20.00
                =====
                        20.00

AMOUNTS TENDERED:
  CASH      2              20.00
                -----
                        20.00
                =====
                        20.00

BANKING:
  CASH              20.00
                -----
                        20.00

SALES CATEGORIES:
  BEVERAGE              20.00

PRICE LEVELS:
  1-STANDARD  6.0000      20.00

TAX AMOUNTS:
  GST      1.82          20.00

FUNCTIONS:
  Number of Sales              2
  Avg $ per Sale              10.00

CASH DECLARATION:  Audit 620,200

      Expected  Actual  Variance
CASH   20.00   20.00    0.00
      -----  -----  -----
Totals  20.00   20.00    0.00

Name: _____

Signed: _____

Printed from POS 200 at 11-Aug-2022 17:34:26
```

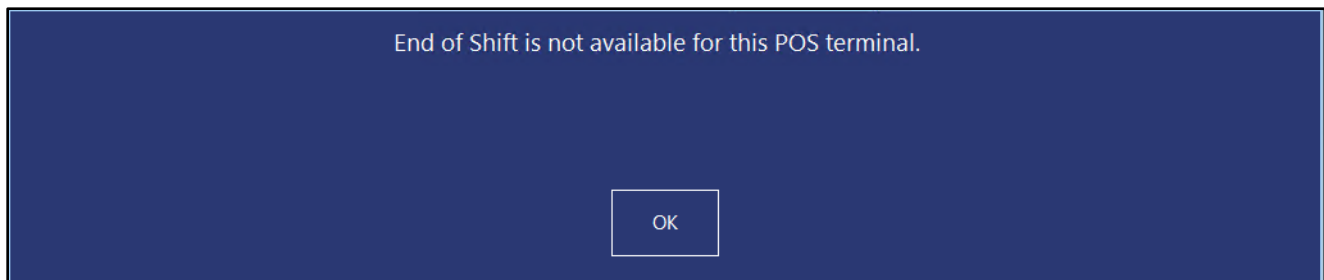
idealpos Update History

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The Cash Denominations Counted will also be printed and contain the total denominations counted:

```
Clerk 1 : Jeremy  
  
CASH DENOMINATIONS COUNTED  
-----  
  
                -----  
                20.00  
  
- Float          0.00  
                =====  
                20.00  
  
Printed from POS 200 at 11-Aug-2022 17:34:25
```

If a Clerk attempts to perform an End of Shift on any 'slave' POS Terminal which has its End of Shift figures going to a 'master' POS Terminal, the slave POS Terminal will display the following prompt:



IP-3472 – End of Shift Report – Option to inhibit various sections

This function adds the ability to control which sections are displayed on the Cash Declaration Docket. The sections which can be enabled/disabled are as follows:

- **Stock Sales** – This section will include a list of all the Stock Items that were sold during the shift.
- **Department Sales** – This section will include a list of all the Departments from which Stock Items were sold during the shift. Included in the Department Sales section is the quantity of items sold from each Department, as well as the total sales amount for each Department.
- **Price Levels** – This section will include a list of all the Price Levels that were used during the shift, the quantity of items that were sold using each Price Level, and the total sales amount of each Price Level.
- **Waste Mode** – This section will include a list of all Waste Mode transactions that took place during the shift, including the Stock Items and quantities that were written off/wasted.
- **Promotions** – This section will include a list of all Promotions that triggered and applied to sales during the shift.

When upgrading to this build or newer, the options which are enabled by default are:

- **Price Levels**
- **Waste Mode**
- **Promotions**

To configure this function, go to: Back Office > Setup > POS Terminals.

Select the POS Terminal from the list > Modify.

Within the Miscellaneous Settings tab, enable/disable the sections that you require on your Cash Declaration Docket:

The screenshot shows the 'Miscellaneous Settings' window for a POS Terminal. The 'Cash Declaration' section is highlighted with an orange box, showing options for 'Print to Receipt Printer', 'Print to Windows Printer', and 'Don't Print'. A sub-section within 'Cash Declaration' is also highlighted, showing checkboxes for 'Stock Sales', 'Department Sales', 'Price Levels', 'Waste Mode', and 'Promotions'. The 'Gaming Override Options' section includes fields for Price Level, Remote POS, Ticket Threshold, System ID, Username, and Password. The 'Dashboard' section has a dropdown for 'Sales in Locations' and a checkbox for 'Shortcut Bar Small Font'. The 'Handhelds' section has dropdowns for 'Force Food to Print', 'Force Drinks to Print', and 'Force Bills Printer', along with fields for 'Item Graphic Location' and 'Handheld Background'.

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Once the sections have been configured as required, close the POS Terminal windows.

When performing an End of Shift via the End of Shift button, the enabled sections will be included and printed on the End of Shift/Cash Declaration docket.

The below shows all possible sections that can be enabled on the End of Shift docket:

Stock Item Sales – Separate Docket/Cut from other portions of the End of Shift Report/Cash Declaration:

```
*****
*
*   STOCK ITEM SALES   *
*
*****

      From 09-Aug-2022 16:47:11
      To   09-Aug-2022 16:52:09

POS    200

ENR-----
DUCK           2.0000      24.00
BEEF           2.0000      21.00
LAMB           2.0000      19.50
PASTA          2.0000      14.50
-----
           8.0000      79.00

COFFEE
-----
CAPPUCCINO     2.0000       4.00
FLAT WHITE     4.0000       9.25
SHORT BLACK    1.0000       3.00
-----
           7.0000      16.25

=====
TOTAL          15.0000      95.25

Printed from POS 200 at 09-Aug-2022 16:52:11
```

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End of Shift portion which includes:

- Price Levels (1-STANDARD 9 QTY at total of \$65.25, 6 QTY at total of \$30.00)
- Waste mode (BANANA 2.0000)
- Promotions (2 Flat Whites 25%)
- Department Sales (FOOD – 8 QTY at total of \$79.00, BEVERAGES – 7 QTY at total of \$16.25 total)

```

END OF SHIFT
SALES REPORT FROM 09-Aug-2022 16:47:11
                  TO 09-Aug-2022 16:52:09
POS 200 - POS 2
Audit # 2

Gross Sales 15.0000    97.00
Promotions  1         (1.75)
-----
NETT Sales   95.25

=====
AMOUNTS TENDERED:
CASH 3         95.25
-----
95.25
=====

BANKING:
CASH         95.25
-----
95.25

SALES CATEGORIES:
FOOD        79.00
BEVERAGE   16.25

PRICE LEVELS:
1-STANDARD  9.0000    65.25
2-STAFF     6.0000    30.00

WASTE MODE:
BANANA [+1.55/kg] 2.0000

PROMOTIONS:
2 Flat Whites 25% 1 (1.75)
-----
(1.75)

TAX AMOUNTS:
GST 8.66 95.25
GST-Free 0.00 0.00
-----
95.25

FUNCTIONS:
Number of Sales 3
Avg $ per Sale 31.75
Voids 1 0.00

CASH DECLARATION: Audit 609,200
Expected Actual Variance
CASH 95.25 95.25 0.00
-----
Totals 95.25 95.25 0.00

DEPARTMENT SALES
-----
From 09-Aug-2022 16:47:11
To 09-Aug-2022 16:52:09

FOOD
----
106 ENTR
      8.0000    79.00
-----
      8.0000    79.00

BEVERAGE
-----
202 COFFEE
      7.0000    16.25
-----
      7.0000    16.25
-----
      15.0000    95.25

Name: _____
Signed: _____

Printed from POS 200 at 09-Aug-2022 16:52:11
    
```

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Cash Denominations Counted:

```
Clerk 1 : Jeremy
CASH DENOMINATIONS COUNTED
-----
          95.25
- Float      0.00
-----
          95.25

Printed from POS 200 at 09-Aug-2022 16:52:10
```

When all sections on the End of Shift docket are disabled, the End of Shift Docket is reduced and will appear similar to the below:

End of Shift:

```
END OF SHIFT
SALES REPORT FROM 09-Aug-2022 16:52:09
TO 09-Aug-2022 17:16:38
POS 200 - POS 2
Audit # 3

Gross Sales 15.0000 97.00
Promotions 1 (1.75)
NETT Sales 95.25
-----
          95.25

AMOUNTS TENDERED:
CASH 3 95.25
-----
          95.25

BANKING:
CASH 95.25
-----
          95.25

SALES CATEGORIES:
FOOD 79.00
BEVERAGE 16.25

TAX AMOUNTS:
GST 8.66 95.25
GST-Free 0.00 0.00
-----
          95.25

FUNCTIONS:
Number of Sales 3
Avg $ per Sale 31.75
Voids 1 0.00

CASH DECLARATION: Audit €14,200

Expected Actual Variance
CASH 95.25 95.25 0.00
-----
Totals 95.25 95.25 0.00

Name: _____
Signed: _____

Printed from POS 200 at 09-Aug-2022 17:16:38
```

Cash Denominations Counted:

```
Clerk 1 : Jeremy
CASH DENOMINATIONS COUNTED
-----
          95.25
- Float      0.00
-----
          95.25

Printed from POS 200 at 09-Aug-2022 17:16:38
```

idealpos Update History

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IP-5008 – End of Shift docket includes Waste Mode quantities

This function adds the ability to include Waste Mode transactions/quantities to appear on the End of Shift docket which is printed when performing an End of Shift.

To configure and use this function, go to:

Back Office > Setup > POS Terminals > Select Terminal > Modify > Miscellaneous Settings.

Toggle Waste Mode as shown in the screenshot below.

After upgrading your system to this build (or newer) of Idealpos, this option is enabled by default, which should trigger the Waste Mode section to appear on the Cash Declaration docket/End of Shift docket.

The screenshot shows the 'Miscellaneous Settings' window for a POS terminal. The 'Cash Declaration' section is expanded, showing the following options:

- Print to Receipt Printer
- Print to Windows Printer
- Don't Print
- Stock Sales
- Department Sales
- Price Levels
- Waste Mode
- Promotions

The 'Waste Mode' checkbox is highlighted with a yellow box and an orange arrow. The 'Current Shift Start' is 09 Aug 2022 17:16:38.

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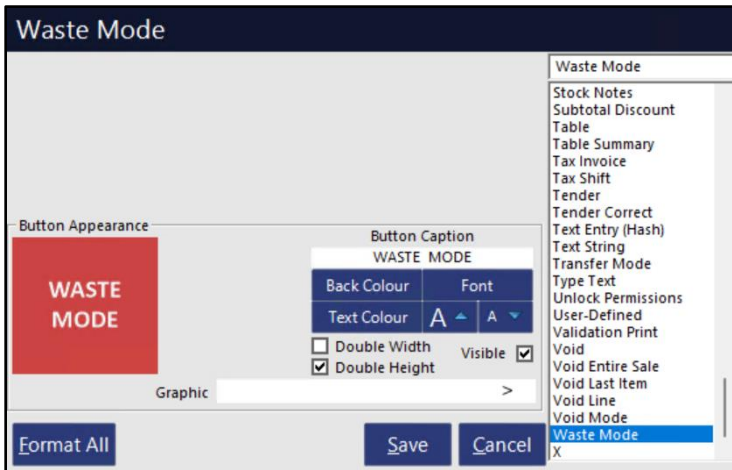
Close the POS Terminal configuration windows.

Ensure that you have a Waste Mode button on your POS Screen to perform Waste Mode transactions.

A button for the Waste Mode function can be added to the POS Screen by going to:

Back Office > Setup > POS Screen > POS Screen Setup > Select POS Screen Layout > Buttons.

Select an unused/blank button and link it to the Waste Mode Function > Save.



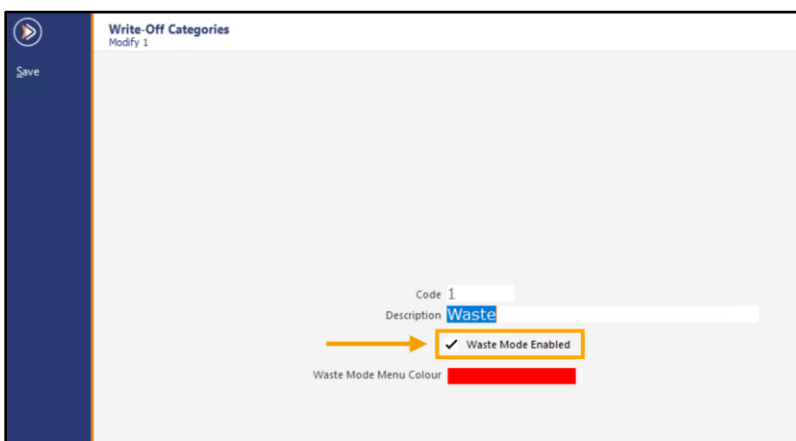
You will also require Write-Off Categories enabled for the Waste Mode Function.

Go to: Back Office > File > Stock Control > Write-Off Categories

Create a new Category and/or select an existing Category > Modify



Ensure that the 'Waste Mode' checkbox has been enabled on each Write-Off Category that you wish to use for the Waste Mode function > Press 'Save' after enabling the Waste Mode checkbox.

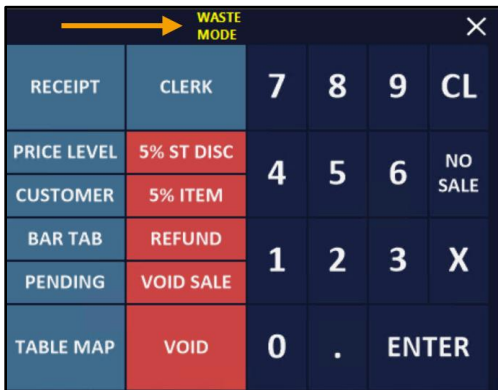


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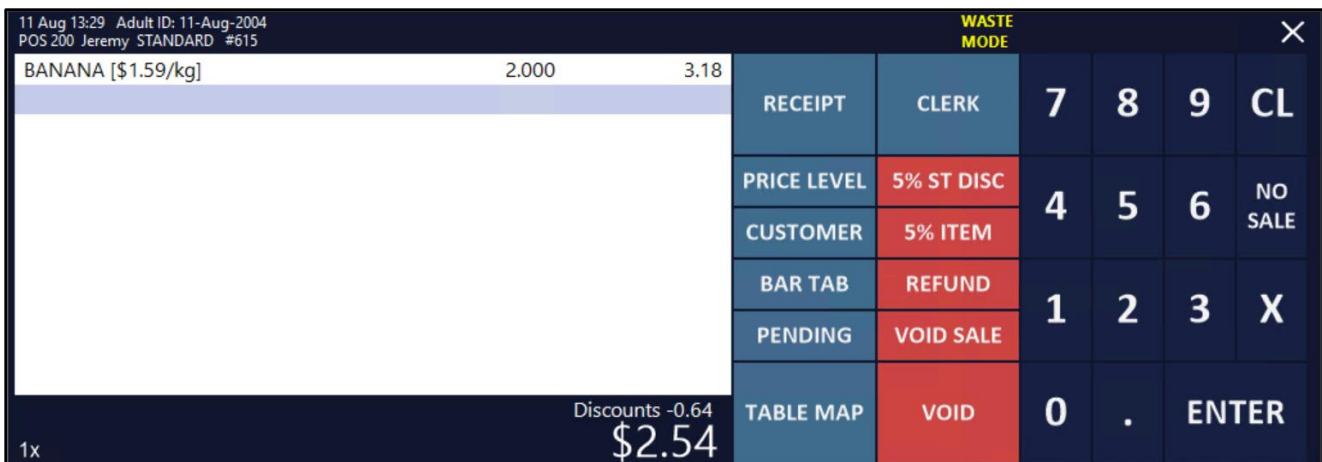
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Close the Write-Off Categories window, then open the POS Screen.
Press the 'WASTE MODE' POS Screen button to enable the Waste Mode.

The top-right corner of the POS Screen will show 'WASTE MODE' which indicates that the mode is active.



Add the items that are required for Writing off > They will appear in the sale window area of the POS Screen.



Press the ENTER button to proceed. Idealpos will display the Write-Off Category window, where you will need to select the Write-off Category.



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The Waste Mode docket is produced:

```
IDEALPOS

1/212 Curtin Ave West
Eagle Farm QLD 4009
Australia

TAX INVOICE
123-456-789-11

#000615-200 Jeremy 11-Aug-2022 13:31:53

* WASTE MODE *

Write Off Category: Waste

2 x
BANANA [1.59/kg]

Signed: _____

*indicates taxable supply

Powered by Idealpos
```

Press the End of Shift button to finalise the shift > Enter the amount of Cash in the till > Proceed.

Cash Declaration - POS 200 : POS 2 ✕

Enter Full CASH Amount

CASH EFTPOS

or Each Denomination

\$100	<input type="text"/>	\$0.50	<input type="text"/>
\$50	<input type="text"/>	\$0.20	<input type="text"/>
\$20	<input type="text"/>	\$0.10	<input type="text"/>
\$10	<input type="text"/>	\$0.05	<input type="text"/>
\$5	<input type="text"/>		
\$2	<input type="text"/>		
\$1	<input type="text"/>		

7	8	9
4	5	6
1	2	3
0	.	-
CL	Proceed	

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The End of Shift Docket is produced, which includes any sales that were performed during the shift, along with the Waste Mode section that includes the Stock Items and quantities that were written off using the Waste Mode function:

END OF SHIFT		
SALES REPORT FROM	09-Aug-2022 17:16:38	
TO	11-Aug-2022 13:34:30	
P O S 2 0 0 - P O S 2		
Audit # 4		
Gross Sales	3.0000	10.00

NETT Sales		10.00
		=====
		10.00
AMOUNTS TENDERED:		
CASH	1	10.00

		10.00
		=====
		10.00
BANKING:		
CASH		10.00

		10.00
SALES CATEGORIES:		
BEVERAGE		10.00
PRICE LEVELS:		
1-STANDARD	3.0000	10.00
WASTE MODE:		
BANANA [±1.59/kg]	2.0000	

Interfaces

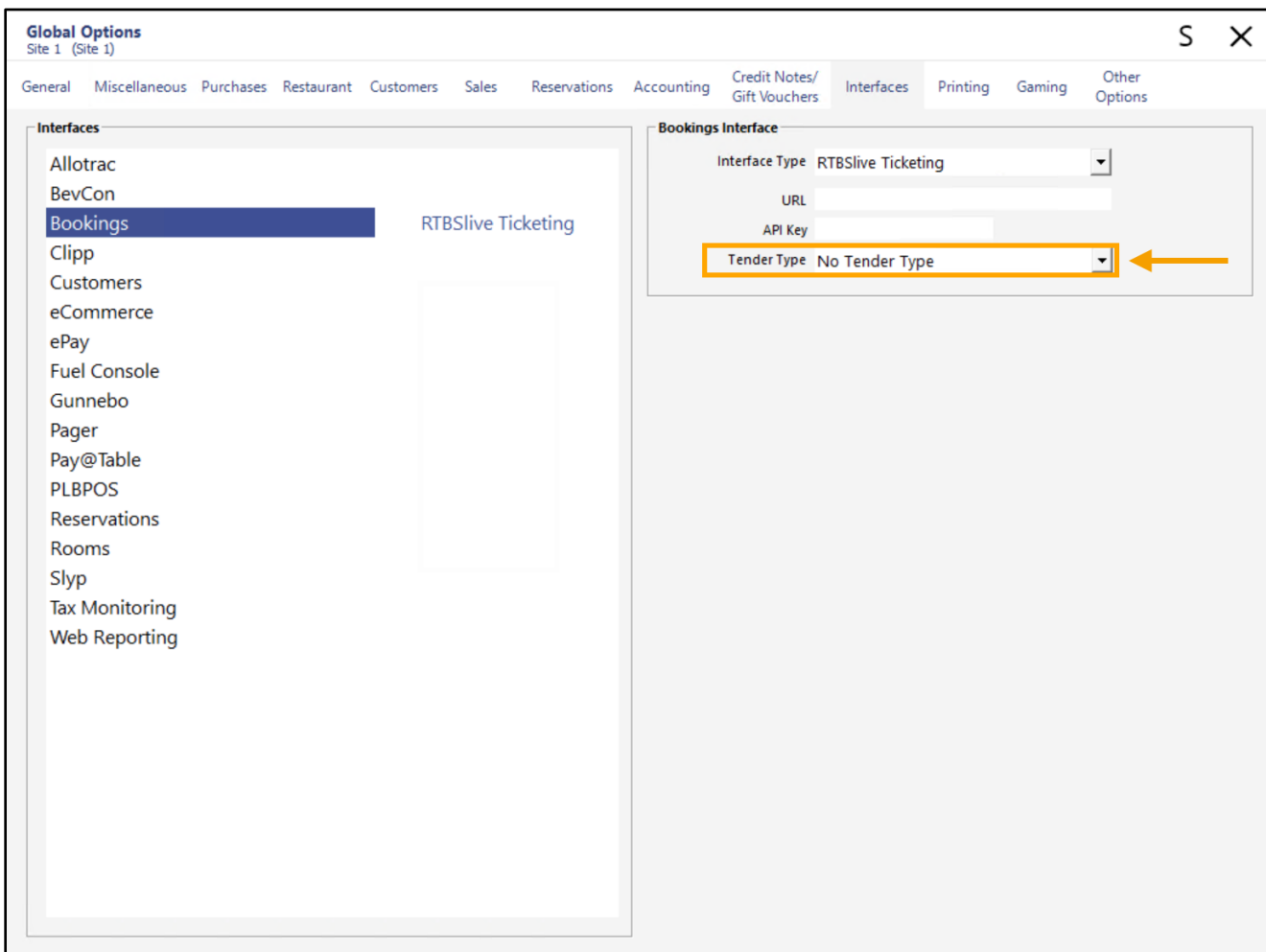
IP-5006 – RTBS Live Ticketing – No Tender Type allows manual tendering

This function adds the ability for the User to manually select the tender as per the request when using the RTBS Live Ticketing integration.

To enable the User to manually select the Tender Type, go to: Back Office > Setup > Global Options > Interfaces.

Select the Bookings Interface from the left-hand side, then set the Tender Type to 'No Tender Type'.

This will allow the User to manually select the tender as per the request.



Journal History Enquiry

IP-4975 – Journal Enquiry Screen – Option to Hide Voids

This function adds the ability to hide voids from the Journal Enquiry screen via a new 'Hide Voids' checkbox.

When the new checkbox is enabled, voids that are hidden include:

- Individual items that were voided within a transaction (only the voided items are hidden, non-voided items are visible)
- Void Entire Sale (the entire sale is hidden)
- Delete Items from table (The Journal which the delete was performed is still displayed in the Journal History Enquiry, but the individual items that were removed from the table are hidden)

To use this function, go to: Back Office > Enquiry > Journal History

The new 'Hide Voids' checkbox is available on the top-right corner of the window.

The below example shows the 'Hide Voids' option unchecked.

The below example also shows a Journal which contains items that were voided in the sale which are visible (due to the checkbox being unchecked):

The screenshot shows the 'Journal History Enquiry' window with 8 records. The interface includes a left sidebar with navigation options like 'View All', 'Docket Print', 'Email', 'Tax Invoice', 'Total', 'Stock Item Sales', 'Favourite', 'Add Text', and 'Keyboard'. The main area is divided into filter sections and a data display area.

Filters:

- Date:** Today, From 09 Aug 2022 00:00:00, To 09 Aug 2022 23:59:59, Top 1000 records.
- Customer:** Clerk, POS, Price Level, Location, Site.
- Tender Type:** Function, Stock Item, Department, Sale Total.
- Table:** Audit, Filter Table/Bar Tabs, Hide Voids (highlighted with an orange box and an arrow).

Table Data:

Audit	POS	Date	Customer
591	200	Tue 09 Aug 2022 11:20:56	
590	200	Tue 09 Aug 2022 11:17:18	
589	200	Tue 09 Aug 2022 11:16:43	
588	200	Tue 09 Aug 2022 11:06:34	
587	200	Tue 09 Aug 2022 11:04:38	
586	200	Tue 09 Aug 2022 11:04:00	
585	200	Tue 09 Aug 2022 10:50:44	
584	200	Tue 09 Aug 2022 10:49:57	

Item List:

Item ID	Description	Price
202001	CAPPUCCINO	3.50
202002	FLAT WHITE	3.50
202004	SHORT BLACK	3.00
106007	PASTA	11.00
106002	BEEF	13.00
106003	LAMB	12.00
106001	DUCK	14.00
	GST Subtotal	60.00
	GST Amount	5.45
303001	BREVILLE BLENDER (VOID)	70.99
303002	STICK BLENDER (VOID)	40.99
303003	FOOD PROCESSOR (VOID)	90.99
303004	MICROWAVE (VOID)	90.99
303005	HAND MIXER (VOID)	30.99
303006	BREAD MAKER (VOID)	80.99
	CASH	60.00
	Change	0.00

The voided items (303001-303006) are highlighted with an orange box in the screenshot.

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When the 'Hide Voids' option is enabled, the items that were voided within the sale are now hidden.

Journal History Enquiry
S X

6 records

Today

From 09 Aug 2022 00:00:00

To 09 Aug 2022 23:59:59

Top 1000 records

Customer >

Clerk >

POS >

Price Level >

Location >

Site >

Tender Type >

Function >

Stock Item >

Department >

Sale Total to

Table >

Audit >

Filter Table/Bar Tabs

Hide Voids

Select

Audit	POS	Date	Customer
591	200	Tue 09 Aug 2022 11:20:56	
590	200	Tue 09 Aug 2022 11:17:18	
589	200	Tue 09 Aug 2022 11:16:43	
588	200	Tue 09 Aug 2022 11:06:34	
587	200	Tue 09 Aug 2022 11:04:38	
585	200	Tue 09 Aug 2022 10:50:44	

09 Aug 2022 11:20:56 Audit 591,200 Jeremy

202001 CAPPUCCINO 3.50

202002 FLAT WHITE 3.50

202004 SHORT BLACK 3.00

106007 PASTA 11.00

106002 BEEF 13.00

106003 LAMB 12.00

106001 DUCK 14.00

GST Subtotal 60.00

GST Amount 5.45

CASH 60.00

Change 0.00

POS 2
v8 Build 8

Idealpos 8 Build 8 - Update History

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When the 'Hide Voids' checkbox is enabled, Void Entire Sales are also hidden from the Journal History Enquiry window. The below example shows Journal 586 which is a Void Entire Sale and is visible when the checkbox is disabled, however, is hidden on the screenshot shown on the previous page which has the 'Hide Voids' checkbox enabled.

Journal History Enquiry

S X

Today ▼

From 09 Aug 2022 00:00:00 ▼

To 09 Aug 2022 23:59:59 ▼

Top 1000 records

Customer >

Clerk >

POS >

Price Level ▼

Location ▼

Site ▼

Tender Type ▼

Function ▼

Stock Item >

Department >

Sale Total to >

Table >

Audit >

Filter Table/Bar Tabs

Hide Voids

Select

	Audit	POS	Date	Customer	
	584	200	Tue 09 Aug 2022 10:49:57		
	585	200	Tue 09 Aug 2022 10:50:44		
	586	200	Tue 09 Aug 2022 11:04:00		09 Aug 2022 11:04:00 Audit 586,200 Jeremy
	587	200	Tue 09 Aug 2022 11:04:38		VOID ENTIRE SALE 405.94
	588	200	Tue 09 Aug 2022 11:06:34		303001 BREVILLE BLENDER (VOID) 70.99
	589	200	Tue 09 Aug 2022 11:16:43		303002 STICK BLENDER (VOID) 40.99
	590	200	Tue 09 Aug 2022 11:17:18		303003 FOOD PROCESSOR (VOID) 90.99
	591	200	Tue 09 Aug 2022 11:20:56		303004 MICROWAVE (VOID) 90.99
					303005 HAND MIXER (VOID) 30.99
					303006 BREAD MAKER (VOID) 80.99
					Change 0.00

Labels

IP-5028 – Label Printing – Fast entry of items

This function adds the ability to perform fast entry of Stock Items into the Label Printing window by simply entering the Code or Scan Code into the respective field, followed by pressing Enter. After the Enter button is pressed, the Stock Item will be added to the list of items in the Labels window.

This functionality also facilitates the fast entry of items into the Labels window via a Wedge Barcode Scanner.

To utilise this functionality, go to: Back Office > Utilities > Labels

Place the cursor into either the Code or Scan Code fields, enter the required code, then press the Enter button on your keyboard.

The screenshot shows the 'Labels' window with the following elements:

- Format:** A dropdown menu and a 'Delete' button.
- Settings:** Data Type (Stock Items), Output To (Idealpos A4 Labels), A4 Printer (SHARP MX-2600N PCL6 on IPSS-FILE01 (re...)), Dimensions (22 labels (2 x 11) Portrait), Design (Format 1), Top Margin (0), Left Margin (0), Start Position (1), Price Level (1).
- Barcode Options:** Use Stock Code as Barcode, Show Print Dialog Box, and Barcode Type (Auto, EAN 13, EAN 8, UPCE, UPCA, Code 128, Code 39).
- Input Fields:** Code, Scan Code, Description, Department, Indirect.
- Sort and Quantity:** Sort by (Code, Department / Description, Description), Quantity (1).
- Buttons:** Multi Select, Add to Grid, Preview, Print.
- Table:** A table with columns for Code, Description, and Quantity.

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Enter the Code then press ENTER

The 'Labels' dialog box is shown with the following configuration:

- Format: [Empty]
- Data Type: Stock Items
- Output To: Idealpos A4 Labels
- A4 Printer: SHARP MX-2600N PCL6 on IPSS-FILE01 (re
- Dimensions: 22 labels (2 x 11) Portrait
- Design: Format 1
- Top Margin: 0, Left Margin: 0, Start Position: 1
- Price Level: 1
- Barcode Type: Auto
- Use Stock Code as Barcode:
- Show Print Dialog Box:

On the right side, the 'Scan Code' field contains '9861576846574', which is highlighted with an orange box. Below this, there is a table with the following header and one row:

Code	Description	Quantity
205401	COKE 2L	1

The Stock Item is moved into the list of items:

The 'Labels' dialog box is shown with the same configuration as above. The 'Scan Code' field is now empty. The table on the right now contains one item:

Code	Description	Quantity
205401	COKE 2L	1

An orange arrow points from the 'Price Level' dropdown to the 'COKE 2L' row in the table. The 'Total' at the bottom right is now 1.

Promotions

IP-4984 – Promotions – Support for Discount based on Price Level

This function adds the ability to create a Promotion that when tripped, Idealpos will calculate the difference between the current Price Level and the Price Level in the Promotion, and apply the difference, resulting in the item being discounted. Note that when a Stock Item has been discounted this way, the Stock Item will not appear under the discounted Price Level in Sales Reports – Group by Price Level. It will appear under the Price Level that was active at the time the item was sold.

E.g. A Stock Item has Price Levels 1 to 12, each Price Level containing a unique Sell Price.

A Promotion can be configured with a Trip Quantity/amount so that when the Promotion is tripped, the Stock Items included in the Promotion will be discounted by the required amount so that their Sell Price matches the Price Level which has been configured in the Promotion.

To configure this function, go to: Back Office > File > Stock Control > Stock Items.

Modify the required Stock Item and ensure that the Sell Prices in the Price Levels are configured as required.

For this example, we will use Price Level 12 (OWNERS) as the Price Level for the Promotion.

Set the Sell Price in Price Level 12 as per the desired Sell Price for the Promotion.

Stock Items
Modify 205401

Department 205 > SOFT DRINK

Description COKE 2L (7)

Kitchen Description COKE 2L (7)

Long Description COKE 2L (7)

Scan Code 9861576846574 Auto

Last Modified 04 Oct 2016 X

Save

Keyboard

Selling Prices (inc Tax)		Profit	
		%	\$
STANDARD	2.50	64.49	1.46
STAFF	1.50	40.73	0.55
EXTRAS	0.00		
BOTTLESHOP	1.50	40.73	0.55
Price 5	0.00		
Price 6	0.00		
Price 7	0.00		
Price 8	0.00		
Price 9	0.00		
Price 10	0.00		
Price 11	0.00		
OWNERS	1.00		

Force Selling Price Entry

Printer Settings

- Receipt Printer
- KITCHEN
- BAR
- COFFEE
- IKM
- Kitchen Printer 5
- Kitchen Printer 6
- Kitchen Printer 7
- Kitchen Printer 8
- Kitchen Printer 9
- Kitchen Printer 10
- Kitchen Printer 11
- Kitchen Printer 12

Purchasing

Purchase Category 2 > BEVERAGE

Default Supplier 3 > Coca Cola

Default Supplier Stock Code 124KSS333

Other Options

- Stock Control
- Has Variants
- Indirect Item
- Non-Accumulating
- Can't Buy with GIFT VOUCHER
- Scale
- Instruction
- Print Red
- Web Store
- Inhibit Discounts
- Inhibit Voids
- Manufactured Item

Tags

Cost Prices (ex Tax)

Standard Cost 0.8100

Last Cost 0.8100

Average Cost 0.8061

Tax Settings (Selling)

- GST
- GST-Free
- Not Defined
- Not Defined
- Not Defined
- Not Defined

Attributes

Container Type 2L Bottle +

POS 2
v8 Build 8

Save the change.

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Go to: Back Office > File > Sales > Promotions > Promotions.
Create a new Promotion or select an existing Promotion and Modify it.

Description: Coke 2L Buy 5 For Price Lvl 12

Add the Stock Item configured in the previous step to Trip Conditions Set 1.

Enter 5 into the Buy # of items below.

Set the Discount Type to 'Discount Based on Price Level' > Enter 12.

Close the window to save your change.

The screenshot shows the 'Promotions' window in 'Advanced' mode. The main description is 'Coke 2L Buy 5 For Price Lvl 12'. The 'Discount Type' is set to 'Discount Based on Price Level' with a value of 12. The 'From' date is 01 Aug 2022 00:00 and the 'to' date is 01 Sep 2022 00:00. The 'Continuous' option is selected. Under 'Trip Conditions Set 1', 'Trip by Quantity' is selected with a 'Buy' value of 5. The item '205401 COKE 2L' is listed below. 'Trip Conditions Set 2' and 'Trip Conditions Set 3' are also shown with 'Trip by Quantity' selected and 'And Buy' values of 0. At the bottom, there are buttons for 'Delete', 'Promotion Link Enquiry', 'Add Department', and 'Add Stock Item'. A checkbox 'Calculate Discount from these items only' is also present.

A dark blue dialog box with the text 'Save Changes?' at the top. Below the text are two white buttons with blue borders: 'Yes' and 'No'.

idealpos Update History

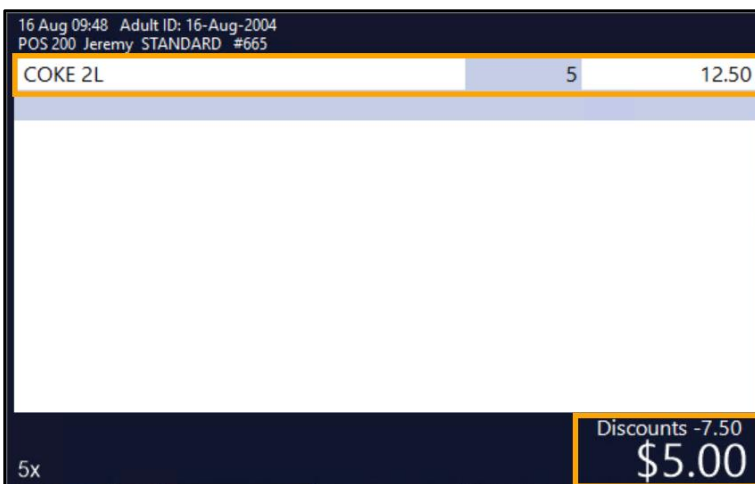
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Add 5x COKE 2L to the sale (Stock Code 205401).

When adding 4x COKE 2L, the Price Level of 1 is used ($2.50 \times 4 = \$10$).



Adding the 5th item to the sale will trigger the sale, bringing the total down to \$5.00 (Sell Price of $\$1.00 \times 5$ items = \$5.00).



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Pressing ENTER to proceed to the Tender screen will show the name of the promotion that was applied.

16 Aug 09:52 Adult ID: 16-Aug-2004
 POS 200 Jeremy STANDARD #665

COKE 2L 5 12.50 -7.50 Coke 2L Buy 5 For Price lvl 12 Coke 2L Buy 5 For Price Lvl 12 1 -7.50	RECEIPT CLERK 7 8 9 CL PRICE LEVEL 5% ST DISC 4 5 6 NO SALE CUSTOMER 5% ITEM BAR TAB REFUND 1 2 3 X PENDING VOID SALE TABLE MAP VOID 0 . ENTER
---	---

5x	Discounts -7.50 \$5.00
----	---

CASH	
EFTPOS	
AMEX/DINERS	
POINTS	
LAYBY	
GV REDEEM	
CREDIT NOTE	
ACCOUNT	

5.00

Balance 5.00

Reports

IP-4378 – Journal History Report – Option to Hide Voids

This function adds the ability to Hide Voids when running the Journal History Report via a 'Hide Voids' checkbox. There is no additional configuration required to utilise this functionality, other than to simply toggle the checkbox as required prior to running the report.

To use this function, go to: Back Office > Reports > Sales > Journal History.

Toggle the 'Hide Voids' checkbox as required.

Enabling/ticking the checkbox will hide any items which were voided within a sale, as well as hiding any Void Entire Sales.

Leaving the checkbox as disabled/unticked will display any items which were voided within a sale, as well as displaying any Void Entire Sales.

The screenshot displays the 'Journal History Report' interface. On the left, there is a dark blue sidebar with a navigation arrow icon, 'View', and 'Print' options. The main content area is titled 'Journal History Report' and contains several sections:

- Date Range:** A dropdown menu set to 'Today', and 'From' and 'To' date pickers both set to '09 Aug 2022 00:00:00' and '09 Aug 2022 23:59:59' respectively.
- Group by:** Radio buttons for 'Clerk', 'POS System', and 'Location'.
- Options:** Radio buttons for 'Show Totals/Tendering', 'Show Tenders Only', and 'Hide Voids'. The 'Hide Voids' option is checked and highlighted with a yellow box and an orange arrow.
- Selection Range:** Input fields for 'Clerk Code', 'Clerk Name', 'Location', and 'POS System', each with a '>' button and a 'to' label.

At the bottom left of the sidebar, the text 'POS 2 v8 Build 8' is visible.

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Any Voids that were performed will be hidden from the Journal History Report.

idealpos		Journal History		Printed 09/08/2022 15:01:41	
Idealpos POS 2(200)		09 Aug 2022 00:00:00 to 09 Aug 2022 23:59:59		Page 1 of 1	
09/08/2022 11:43:53	100 000501 Jeremy				
	202001 CAPPUCCINO		3.50		
	202002 FLAT WHITE		3.50		
	202004 SHORT BLACK		3.00		
09/08/2022 11:44:01	100 000502 Jeremy				
	106007 PASTA		11.00		
	106002 BEEF		13.00		
	106003 LAMB		12.00		
	106001 DUCK		14.00		
09/08/2022 11:44:28	100 000503 Jeremy				
	225003 DRY GIN MARTINI		16.00		
	225004 DRY VODKA MARTINI		16.00		
	225005 CUCUMBER & THYME MARTINI		16.00		
	225006 ESPRESSO MARTINI		16.00		
	225007 LEMON & BASIL MARTINI		16.00		
09/08/2022 11:45:07	100 000504 Jeremy				
	210002 HAHN LIGHT SCH		5.50		
	210003 CARLTON MID SCH		6.00		
	210004 XXXX GOLD SCH		6.00		
	210006 CARLTON DRAUGHT SCH		7.00		
	210012 XXXX BITTER SCH		7.00		
	210007 TOOHEYS NEW SCH		7.00		
	210002 HAHN LIGHT SCH		5.50		
	210025 NEWSTEAD PALE ALE SCH		7.50		
	210002 HAHN LIGHT SCH		5.50		
	210013 150 LASHES SCH		7.50		
	210018 HOP THIEF SCH		7.50		
	210013 150 LASHES SCH		7.50		
	210010 GUINNESS SCH		7.50		
	210011 KILKENNY SCH		7.50		
	210035 TWO BIRDS SUNSET SCH		7.50		
	210002 HAHN LIGHT SCH		5.50		
	210013 150 LASHES SCH		7.50		
09/08/2022 11:49:05	100 000507 Jeremy				
	202001 CAPPUCCINO		3.50		
	202002 FLAT WHITE		3.50		
	202004 SHORT BLACK		3.00		
	106007 PASTA		11.00		
	106002 BEEF		13.00		
	106003 LAMB		12.00		
	106001 DUCK		14.00		
	101002 BACON & EGGS		10.00		
	1002002 SCRAMBLED		0.00		
09/08/2022 11:51:15	100 000508 Jeremy				
	101002 BACON & EGGS		10.00		
	1002002 SCRAMBLED		0.00		
	115003 VANILLA SLICE		7.50		
	115003 VANILLA SLICE		7.50		

idealpos Update History

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Running the Report with the 'Hide Voids' option unticked will include all Voids that were performed.

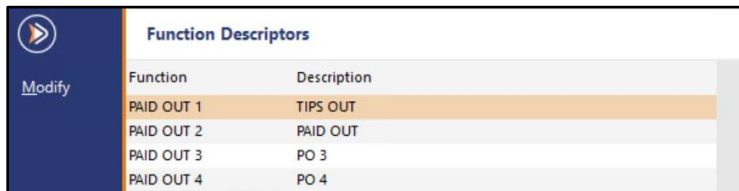
idealpos		Journal History		Printed 09/08/2022 15:22:51	
Idealpos POS 2(200)		09 Aug 2022 00:00:00 to 09 Aug 2022 23:59:59		Page 1 of 1	
09/08/2022 11:43:53	100 000501 Jeremy				
	202001 CAPPUCCINO		3.50		
	202002 FLAT WHITE		3.50		
	202004 SHORT BLACK		3.00		
09/08/2022 11:44:01	100 000502 Jeremy				
	106007 PASTA		11.00		
	106002 BEEF		13.00		
	106003 LAMB		12.00		
	106001 DUCK		14.00		
09/08/2022 11:44:28	100 000503 Jeremy				
	225003 DRY GIN MARTINI		16.00		
	225004 DRY VODKA MARTINI		16.00		
	225005 CUCUMBER & THYME MARTINI		16.00		
	225006 ESPRESSO MARTINI		16.00		
	225007 LEMON & BASIL MARTINI		16.00		
09/08/2022 11:45:07	100 000504 Jeremy				
	210002 HAHN LIGHT SCH		5.50		
	210003 CARLTON MID SCH		6.00		
	210004 XXXX GOLD SCH		6.00		
	210006 CARLTON DRAUGHT SCH		7.00		
	210012 XXXX BITTER SCH		7.00		
	210007 TOOHEYS NEW SCH		7.00		
	210002 HAHN LIGHT SCH		5.50		
	210025 NEWSTEAD PALE ALE SCH		7.50		
	210002 HAHN LIGHT SCH		5.50		
	210013 150 LASHES SCH		7.50		
	210018 HOP THIEF SCH		7.50		
	210013 150 LASHES SCH		7.50		
	210010 GUINNESS SCH		7.50		
	210011 KILKENNY SCH		7.50		
	210035 TWO BIRDS SUNSET SCH		7.50		
	210002 HAHN LIGHT SCH		5.50		
	210013 150 LASHES SCH		7.50		
09/08/2022 11:48:40	100 000505 Jeremy				
	VOID ENTIRE SALE		50.00		
	VOID 106007 PASTA		11.00		
	VOID 106002 BEEF		13.00		
	VOID 106003 LAMB		12.00		
	VOID 106001 DUCK		14.00		
09/08/2022 11:48:47	100 000506 Jeremy				
	VOID ENTIRE SALE		10.00		
	VOID 202001 CAPPUCCINO		3.50		
	VOID 202002 FLAT WHITE		3.50		
	VOID 202004 SHORT BLACK		3.00		
09/08/2022 11:49:09	100 000507 Jeremy				
	202001 CAPPUCCINO		3.50		
	202002 FLAT WHITE		3.50		
	202004 SHORT BLACK		3.00		
	106007 PASTA		11.00		
	106002 BEEF		13.00		
	106003 LAMB		12.00		
	106001 DUCK		14.00		
	101002 BACON & EGGS		10.00		
	1002002 SCRAMBLED		0.00		
09/08/2022 11:51:16	100 000508 Jeremy				
	101002 BACON & EGGS		10.00		
	1002002 SCRAMBLED		0.00		
	115003 VANILLA SLICE		7.50		
	115003 VANILLA SLICE		7.50		

IP-5016 – Financial Summary Report – Support for Paid Out Functions

This function adds the ability to include Paid Out Functions (Paid Out 1 to Paid Out 4) in the selection criteria of the Financial Summary Report.

Paid Out Functions can be configured by going to: Back Office > Setup > Function Descriptors.

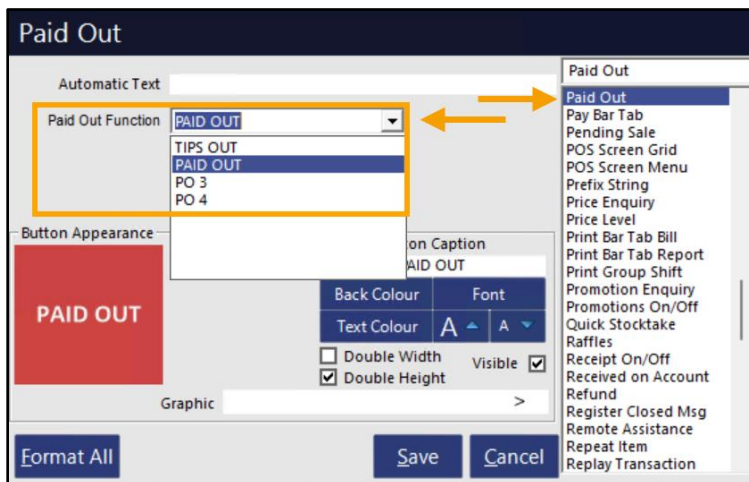
Paid Out 1 to Paid Out 4 are listed at the top of the Function Descriptors window, and their descriptors can be configured as required.



Function	Description
PAID OUT 1	TIPS OUT
PAID OUT 2	PAID OUT
PAID OUT 3	PO 3
PAID OUT 4	PO 4

Paid Out Functions are configured on the POS Screen via Back Office > Setup > POS Screen > POS Screen Setup > Select POS Screen Layout > Buttons.

A button can be added to the POS Screen, linking to the required Paid Out Function.



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The Paid Out function is utilised on the POS Screen by entering the Paid Out amount, then pressing the Paid Out button.



The Paid Out type and amount will appear in the sale window.



Press ENTER, then select a Tender Type to finalise the Paid Out.

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The Paid Out amount can then be included on the Financial Summary Report

Go to: Back Office > Reports > Financial > Financial Summary.

The Paid Out Functions (Paid Out Amount/Paid Out Quantity) for each of the Paid Out 1 to 4 types are available at the bottom of the list of Functions:

Financial Summary Report

Date Range
Today | From 12 Aug 2022 00:00:00 | To 12 Aug 2022 23:59:59

Report Options

- Tendered on 10 [TENDER 10]
- Tendered on 11 [TENDER 11]
- Tendered on 12 [ACCOUNT]
- Tendered on 13 [TENDER 13]
- Tendered on 14 [TENDER 14]
- Tendered on 15 [TENDER 15]
- Tendered on 16 [TENDER 16]
- Tendered on 17 [TENDER 17]
- Tendered on 18 [ONLINE]
- Promotion Amount
- Account Payments
- Cashout Amount
- RA1 Amount [TIPS IN]
- RA1 Quantity [TIPS IN]
- RA2 Amount [PAID IN]
- RA2 Quantity [PAID IN]
- RA3 Amount [GV PURCHASE]
- RA3 Quantity [GV PURCHASE]
- RA4 Amount [RA 4]
- RA4 Quantity [RA 4]
- PO1 Amount [TIPS OUT]**
- PO1 Quantity [TIPS OUT]**
- PO2 Amount [PAID OUT]**
- PO2 Quantity [PAID OUT]**
- PO3 Amount [PO 3]**
- PO3 Quantity [PO 3]**
- PO4 Amount [PO 4]**
- PO4 Quantity [PO 4]**

Selected Fields (max 12)

Group: DateTime | Date Filter: Session

Sub Groups (max 2): Location, POS, Clerk

Condensed format: One page per group:

Selection Range

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

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Select the required Paid Out options (maximum of twelve) and press the '>' button to move them into the Selected Fields.

Press the 'View' button on the top-left corner of the Financial Summary Report.

The Financial Summary Report is displayed, and contains a listing of the Paid Out amounts and the Paid Out quantities:

		PAID OUT Amount	PAID OUT Qty
(10:00 - 15:00) Lunch			
1: Location 1	100: POS 1	0.00	0.00
	200: POS 2	0.00	0.00
	Subtotal:	0.00	0.00
Total		0.00	0.00
(15:00 - 23:00) Dinner			
1: Location 1	200: POS 2	5.00	1.00
	Subtotal:	5.00	1.00
Total		5.00	1.00
		5.00	1.00

Stock Item Link Tables

IP-1715 – Stock Item Link Tables – Increased support for up to 30 items

This function enhances the Stock Item Link Tables function by increasing the maximum number of Stock Items in a Link Table from 12 (previous limit) up to 30 items (new limit).

The Stock Item Link Tables function is typically used for selling items such as Gift Baskets, where you add one Stock Item to the sale, then all Stock Items linked to that item will also be added to the sale automatically.

There is no additional configuration required to enable the new limit – simply create or modify a Stock Item Link Table and the Create/Modify screen will display a total of 30 Stock Item slots where you can add the required Stock Items.

To use this function, go to: Back Office > File > Sales > Stock Item Link Tables > Add.

Enter a Description for the Link Table (e.g. Gift Basket, Soft Drink Crate, etc.).

Populate up to 30 Stock Item Slots with the Stock Items you want to include in the Link Table.

It is not necessary to populate all 30 Stock Item slots – this is simply the maximum limit.

The Quantity and Unit Amount entered in the Link Tables screen will be used to sell the item when they're added to a sale using the Link Tables function.

E.g. If an item is added to a Link Table, with the Quantity set to 2 and the Unit Amount set to \$2.00, the item will be added to the sale at a price of \$4.00 ($\$2.00 \times QTY2 = \4.00).

Press the 'Save' button on the top-left corner to save your Link Table, then close the Link Tables windows.

	Stock Item	Quantity	Unit Amount
1	205201 > COKE 600ML	1	5.00
2	205202 > DIET COKE 600ML	1	5.00
3	205203 > COKE ZERO 600ML	1	5.00
4	205204 > SPRITE 600ML	1	5.00
5	205205 > LIFT 600ML	1	5.00
6	205206 > DRY GINGER 600ML	1	5.00
7	205207 > FANTA 600ML	1	5.00
8	205208 > TONIC 600ML	1	5.00
9	205001 > COKE 250ML BTL	1	3.50
10	205002 > DIET COKE 250ML BTL	1	3.50
11	205003 > COKE ZERO 250ML BTL	1	3.50
12	205004 > SPRITE 250ML BTL	1	3.50
13	205005 > DRY GINGER 250ML BTL	1	3.50
14	205006 > TONIC 250ML BTL	1	3.50
15	205301 > COKE 1.25L	1	2.00
16	205302 > DIET COKE 1.25L	1	2.00
17	205303 > COKE ZERO 1.25L	1	2.00
18	205304 > SPRITE 1.25L	1	2.00
19	205305 > LIFT 1.25L	1	2.00
20	205306 > DRY GINGER 1.25L	1	2.00
21	205307 > FANTA 1.25L	1	2.00
22	205308 > TONIC 1.25L	1	2.00
23	205309 > SODA WATER 1.25L	1	1.00
24	205401 > COKE 2L	1	2.50
25	205402 > DIET COKE 2L	1	2.50
26	205403 > COKE ZERO 2L	1	2.50
27	205404 > SPRITE 2L	1	2.50
28	205405 > LIFT 2L	1	2.50
29	205406 > DRY GINGER 2L	1	2.50
30	205407 > FANTA 2L	1	2.50

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Alternatively, you can select an existing Stock Item Link Table and press 'Modify' to add any additional items, up to a maximum of 30 Stock Items.

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You will need to link the Link Table to a Stock Item (e.g. the Drink Crate Stock Item or Gift Basket Stock Item), so that when that Stock Item is added to a sale, the Link Table will be triggered and all items from the Link Table will be added to the sale.

Go to: Back Office > File > Stock Control > Stock Items.

Either select an existing Stock Item, or create a new Stock Item.

This Stock Item will be the trigger item, so when this item is added to a sale, it will trigger all the Stock Items in the Link Table to be added to the sale.

The Sell Price of the trigger item will be added to the Sell Price of all the Stock Items included in the Link Table.

Create/Modify the Stock Item as required.

Stock Items
Add New

Save
Keyboard

Stock Code: 68
Description: Drink Crate (11)
Kitchen Description: Drink Crate (11)
Long Description: Drink Crate

Department: 1001 > MISCELLANEOUS
Scan Code: Auto

Selling Prices (inc Tax)

	Price	Profit %	Profit \$
STANDARD	0.00		
STAFF	0.00		
EXTRAS	0.00		
BOTTLESHOP	0.00		
Price 5	0.00		
Price 6	0.00		
Price 7	0.00		
Price 8	0.00		
Price 9	0.00		
Price 10	0.00		
Price 11	0.00		
OWNERS	0.00		

Force Selling Price Entry

Printer Settings

- Receipt Printer
- KITCHEN
- BAR
- COFFEE
- IKM
- Kitchen Printer 5
- Kitchen Printer 6
- Kitchen Printer 7
- Kitchen Printer 8
- Kitchen Printer 9
- Kitchen Printer 10
- Kitchen Printer 11
- Kitchen Printer 12

Purchasing

Purchase Category: 10 > MISCELLANEOUS
Default Supplier: >
Default Supplier Stock Code:

Other Options

- Stock Control
- Has Variants
- Indirect Item
- Non-Accumulating
- Can't Buy with GIFT VOUCHER
- Scale
- Instruction
- Print Red
- Web Store
- Inhibit Discounts
- Inhibit Voids
- Manufactured Item

Tags

Cost Prices (ex Tax)

Standard Cost: 0.0000
Last Cost: 0.0000
Average Cost: 0.0000

Tax Settings (Selling)

- GST
- GST-Free
- Not Defined
- Not Defined
- Not Defined
- Not Defined

Attributes

Attributes: [Dropdown] [Dropdown] [Dropdown] [Dropdown] [Dropdown] [Dropdown]

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Go to the Advanced tab, then click on the '>' button within the Link Table field.

This will trigger a drop-down menu to appear from where you can select your Link Table that was created earlier.

The screenshot shows the 'Stock Items' window in the 'Advanced' tab. The 'Link Table' field is highlighted with an orange box, and a dropdown menu is open showing 'Soft Drink Crate' selected. An orange arrow points to the dropdown arrow. Other fields include 'Link to Menu 0', 'Modifier Grids', 'Amount Override Limits', 'Location 1', 'Points by Price Level', 'Points Settings', and 'Miscellaneous'.

Once the Link Table has been selected, the Link Table Code will be displayed in the Link Table field, and the drop-down box will appear populated, similar to the below example:

The close-up screenshot shows the 'Link Table' field highlighted with an orange box. The dropdown menu is open, showing 'Soft Drink Crate' selected. An orange arrow points to the dropdown arrow.

Press the 'Save' button on the top-left corner of the window to continue, then close the Stock Item windows.

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Go to the POS Screen and enter the Stock Item Code of the Stock Item linked to the Link Table.



Press ENTER > The main Stock Item is added to the sale, then all Stock Items from the Link Table are added automatically. The number of items added to the sale will be reflected on the bottom-left corner of the sale window (including the item which triggered the Link Table Items – a total of 30 items, plus the trigger item which is a total of 31x items).



Stock Items

IP-4990 – Alternate Codes – Ability to Set as Default

This function adds the ability to set an Alternate Code as the Default Code (i.e. set the Alternate Code as the 'Scan Code') via a new 'Set as Default' button which has been added to the Alternate Codes screen.

The function works as follows:

- When a Stock Item only contains Alternate Codes (the Scan Code field is blank) and the 'Set as Default' button is pressed, the Alternate Code that is highlighted (at the time the 'Set as Default' button is pressed) will be moved from the Alternate Codes list and into the Scan Code field of that Stock Item.
- When a Stock Item already contains a Code in the Scan Code field and an Alternate Code is 'Set as Default', the existing Scan Code will be moved into the Alternate Codes list, and the selected Alternate Code will be set as the new Scan Code.

To use this function, go to: Back Office > File > Stock Control > Stock Items.

Select a Stock Item > Alternate Codes

The screenshot displays the 'Stock Items' interface. On the left, a vertical navigation menu contains several options: Search, Modify, Add, Discontinue, Enquiry, Locations, Promotion, Alternate Codes (highlighted with a yellow box), Copy, Supplier Codes, Variants, Enabled in Location, and Discontinued. A yellow arrow points from the 'Alternate Codes' menu item to the 'Code' field in the table below. The table has columns for Code, Description, Kitchen, Department, Plu Code, Scan Code, Standard Cost, and Average Cost. One record is visible with the following data:

Code	Description	Kitchen	Department	Plu Code	Scan Code	Standard Cost	Average Cost
125001	CADBURY FAMILY BLOCK	CADBURY FAMILY E CONFECTIONARY		0	9811889748850	4.00	4

At the bottom left of the interface, the text 'POS 2 v8 Build 8' is visible.

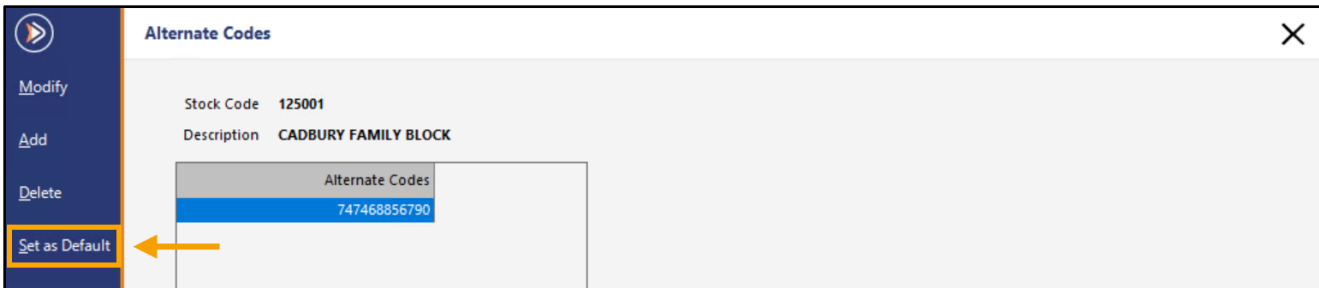
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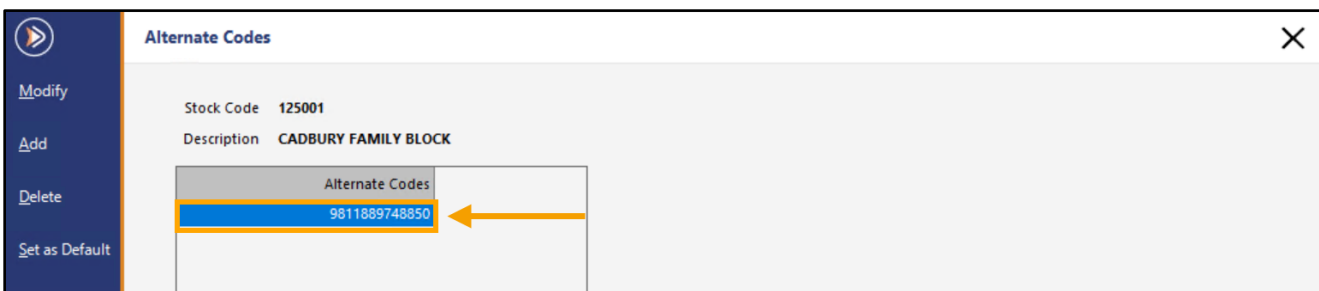
The Alternate Codes screen will be displayed.

Select the desired Alternate Code from the list of Alternate Codes, then press the 'Set as Default' button.

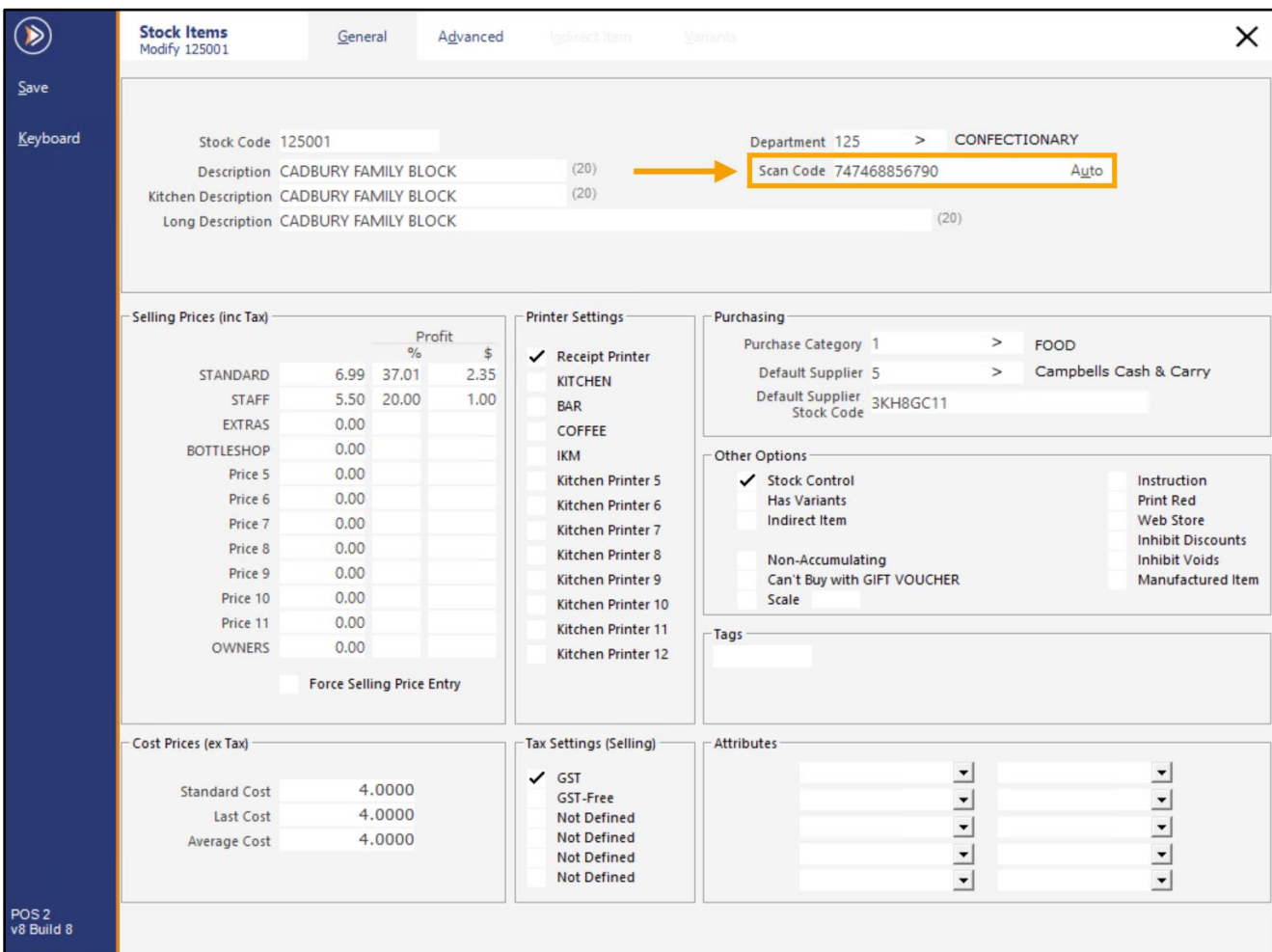
Note that if there are no Alternate Codes in the list, this button will be greyed out.



After setting an Alternate Code as Default, the Alternate Code will be switched with the code that currently occupies the Scan Code field (the Scan Code will be moved into the Alternate Codes list).



Modifying the Stock Item will show that the Alternate Code now occupies the Scan Code field.



Stocktake

IP-4036 – Enter Stocktake – Code and Description Filters

This function adds the ability to filter the Enter Stocktake screen by the Stock Code and/or Description fields. Prior to this change, it was only possible to filter the Enter Stocktake screen by the Department.

To use this function, you will need to have a Stocktake started in one of your locations.

If you don't already have an active Stocktake, go to: Back Office > Stocktake > Start Stocktake.

Click into the 'Click to Start Stocktake' column next to one or more Locations, then press 'Start Stocktake' on the top-left corner.

Start Stocktake

Start Stocktake

Stocktake Procedure

Step 1 : Choose Location(s) and Click 'Start Stocktake'
Step 2 : Print Stocktake Forms
Step 3 : Physically count stock recording quantities on stocktake forms
Step 4 : Enter the stocktake into Idealpos
Step 5 : Print Stocktake Variance Report
Step 6 : Print Stocktake Valuation Report
Step 7 : Update Stock Levels

It is essential that you DO NOT sell a stock item between Step 1 (Starting the stocktake) and Step 3 (Physically counting that stock item)

Once an item has been physically counted and recorded on the stocktake form, sales of that stock item can resume.

Print Stocktake Procedure

This Stocktake will be posted to **12 Aug 2022 15:16:43**

Location	Stocktake Started?	Click to Start Stocktake
1 Location 1	No	START
2 Location 2	No	
3 Location 3	No	
4 Location 4	No	
5 Location 5	No	
20 Location 20	No	

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Dismiss the confirmation prompt.



Go to: Back Office > Stocktake > Enter Stocktake.

The Filter fields will be displayed at the top of the Enter Stocktake grid as shown in the below example:

S

X

	Stock Code	Description	Department	Stock Level	Stocktake
	110005	CHUNKY FRIES	SIDES	0	
	110006	CLASSIC FRIES	SIDES	-3	
	110007	SWEET POTATO FRIES	SIDES	0	
	110008	SHOESTRING FRIES	SIDES	-1	
	110009	ONION RINGS	SIDES	0	
	112007	FISH BURGER	BURGERS	0	
	112008	PARMIGIANA BURGER	BURGERS	0	
	115006	BISCOTTI	CAKES	0	
	117001	APPLES	FRUIT	32.2	
	117002	APRICOT	FRUIT	21.9	
	117003	AVOCADO	FRUIT	23.7	
	117004	BANANA	FRUIT	25.626	
	117005	BLACKBERRIES	FRUIT	5.6	
	117006	BLUEBERRIES	FRUIT	5.21	
	117007	COCONUT	FRUIT	9.54	
	117008	FIGS	FRUIT	12.3	
	117009	GRAPES AUTUMN ROYAL	FRUIT	15.7	
	117010	GRAPES CRIMSON	FRUIT	16.9	
	117011	GRAPES GREEN	FRUIT	12.836	
	117012	KIWI	FRUIT	4.52	
	117013	LEMON	FRUIT	6.4	
	117014	LIME	FRUIT	0.845	
	117015	MANDARIN	FRUIT	9.82	
	117016	MANGO	FRUIT	12.37	
	117017	NECTARINE	FRUIT	8.7	
	117018	ORANGE	FRUIT	5.252	
	117019	PAPAYA	FRUIT	6.54	
	117020	PASSIONFRUIT	FRUIT	2.275	
	117021	PAW PAW	FRUIT	11.57	
	117022	PEACH	FRUIT	12.3	
	117023	PEAR	FRUIT	16.2	
	117024	PERSIMMON	FRUIT	3.87	
	117025	PINEAPPLE	FRUIT	14.6	
	117026	PLUM	FRUIT	9.32	
	117027	POMEGRANATE	FRUIT	11.37	
	117028	RASPBERRIES	FRUIT	4.914	
	117029	TOMATO	FRUIT	18.5	
	117030	TOMATO CHERRY	FRUIT	12.3	
	117031	STRAWBERRIES	FRUIT	16.43	
	117032	WATERMELON	FRUIT	24.8	
	117033	DRAGON FRUIT	FRUIT	3.272	
	118001	ALFALFA	VEGETABLES	3.75	
	118002	ARTICHOKE	VEGETABLES	6.87	
	118003	BEETROOT	VEGETABLES	9.25	
	118004	BROCCOLI	VEGETABLES	14.65	
	118005	BROCCOLINI	VEGETABLES	9.6	
	118006	BOK CHOY	VEGETABLES	11.4	
	118007	CABBAGE GREEN	VEGETABLES	13.2	
	118008	CABBAGE RED	VEGETABLES	11.6	

Filter Criteria

Location: 1 - Location 1

Department: >

Sort Order:

- Stgck Code
- Description
- Department/Stock Code
- Department/Description
- Supplier/Stock Code

Show Counted Items Only

Direct Stock Item Entry

Search Code: >

Quantity: >

Automatically Add One to Stocktake with each Scan

7
8
9

4
5
6

1
2
3

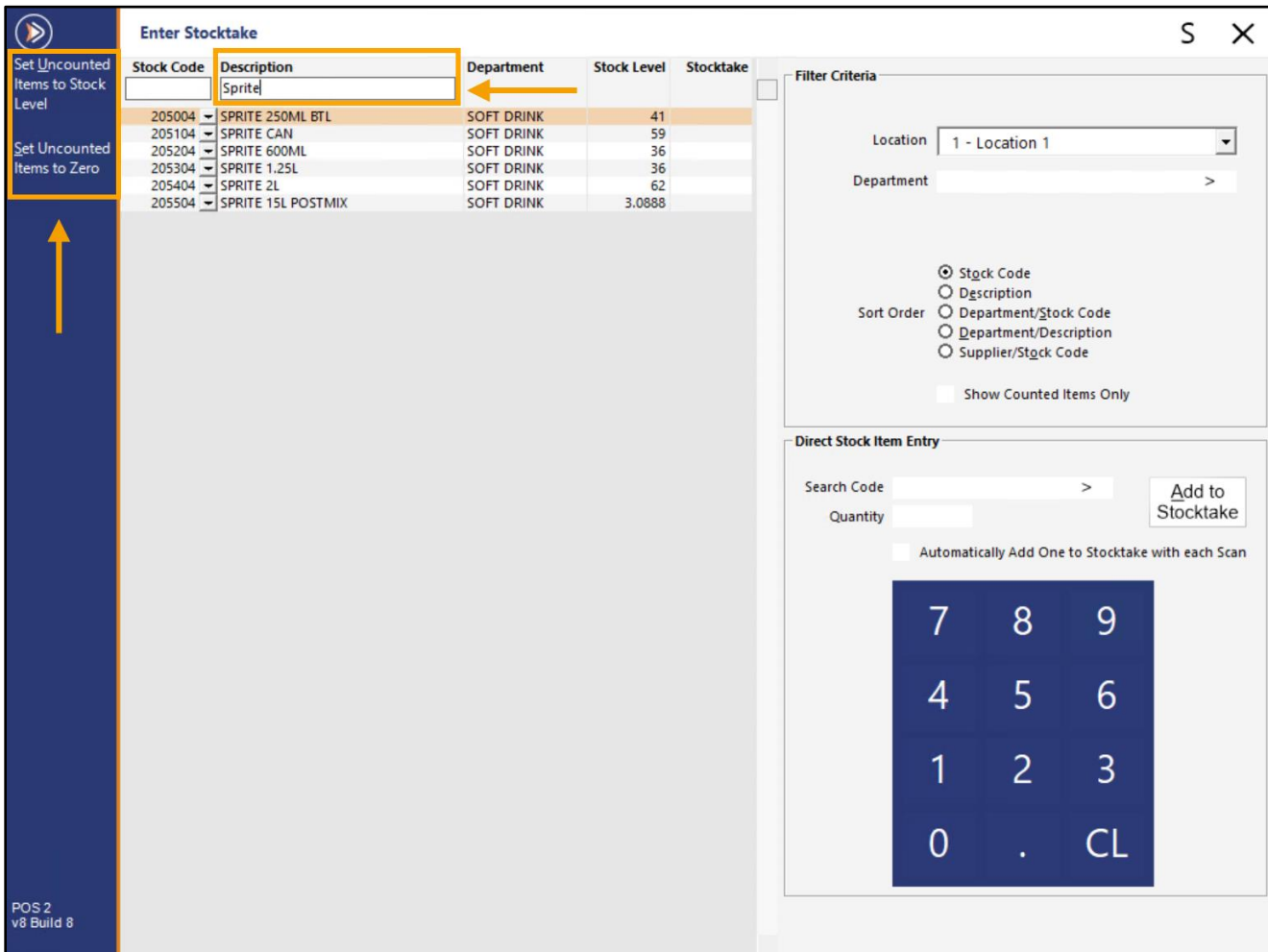
0
.
CL

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Entering a Stock Code or Description will filter the Enter Stocktake by the entered value and any items which match the filter will be displayed.

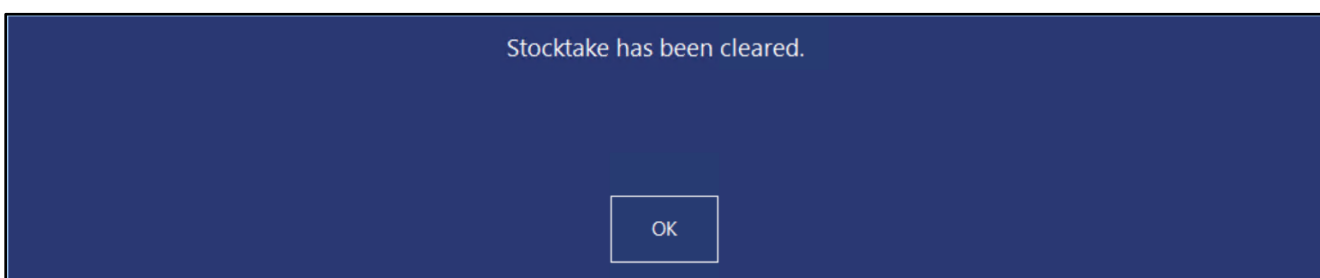
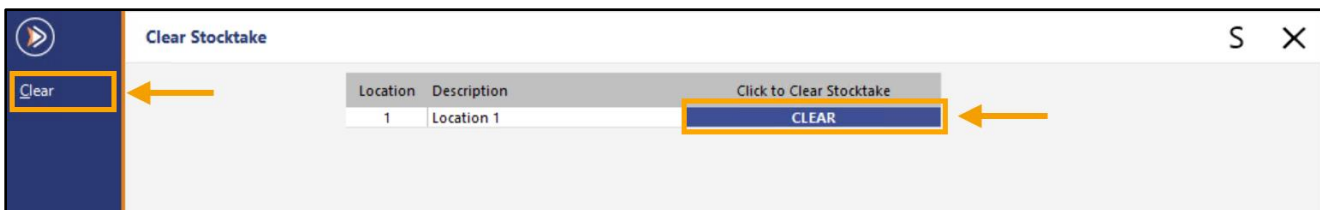
While a Filter is active, pressing the 'Set Uncounted Items to Stock Level' or 'Set Uncounted Items to Zero' will apply the selected action to only the items that are currently being displayed by the filter.



After you have sampled this function, we strongly recommend that you Clear the Stocktake to prevent accidental changes to your Stock Levels (unless you are genuinely performing a Stocktake and require the Stocktake to remain active).

The Stocktake can be cancelled by going to: Back Office > Stocktake > Clear Stocktake.

Click to Clear Stocktake, then press the 'Clear' button on the top-left corner of the window.



Users

IP-4933 – Dashboard – User Security settings to limit various Dashboard Groupings

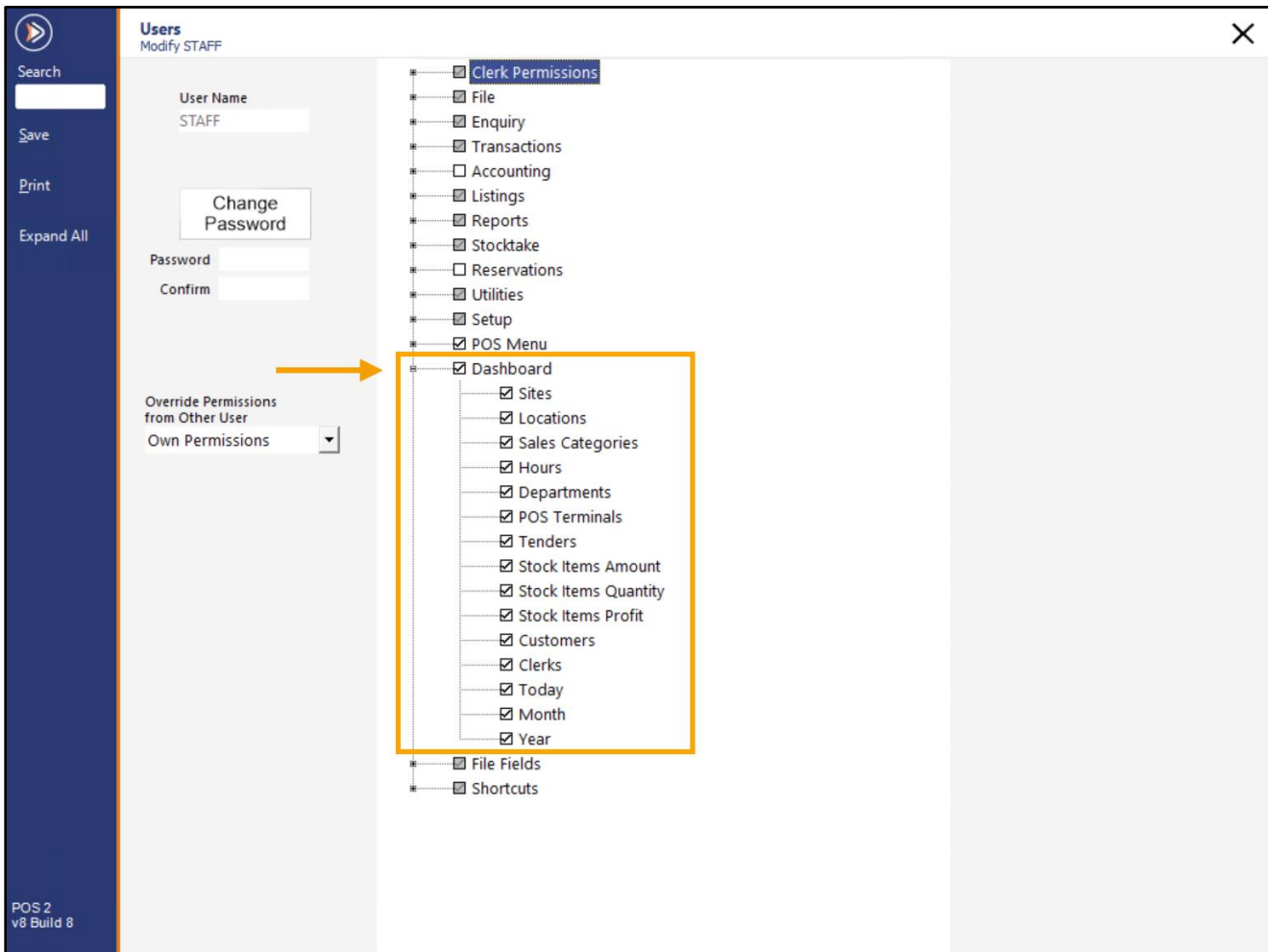
This function adds the ability to restrict a User's ability to view various groupings within the Back Office Dashboard.

To configure this function, go to: Back Office > Setup > Users > Select User > Modify

Each Dashboard Grouping can be toggled as required.

Enable the Groupings that you want the user to access and disable the Groupings that you require to be hidden.

Once your changes have been configured as required, press the 'Save' button on the top-left corner.



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The below Dashboard example shows the Clerks option as being Visible (when Clerks is enabled in User Permissions):

The screenshot displays the Idealpos v8 Build 8 DevRev 84 interface for Site 1 - POS 2(200). The dashboard includes a sidebar with navigation options such as Functions, Favourite Reports, and Other Reports. The main content area features a sales summary with 'Today' sales at \$40 (up from \$0 last Friday and \$30 yesterday), a horizontal bar chart for stock items (FLAT WHITE, CAPPUCCINO, SHORT BLACK), a vertical bar chart for top-selling items (PASTA, FLAT WHITE, CAPPUCCINO, BEEF, DUCK, LAMB, SHORT BLACK, 150 LASHES SCH, HAHN LIGHT SCH, BACON & EGGS), and a donut chart showing 17:00 (50.0%) and 11:00 (50.0%) segments. A dropdown menu is open over the donut chart, listing options: Sites, Locations, Sales Categories, Hours (highlighted), Departments, POS Terminals, Tenders, and Clerks. An orange arrow points to the 'Clerks' option in the menu. The footer includes the Idealpos logo and a note about integration with Mr Yum.

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The below Dashboard example shows the Clerks option as being hidden (when Clerks is disabled in User Permissions):

The screenshot displays the Idealpos POS interface. The top navigation bar includes 'File', 'Enquiry', 'Transactions', 'Listings', 'Reports', 'Stocktake', 'Stock Manage', 'Utilities', 'Setup', and 'Help'. The main dashboard shows sales data for 'Today' (\$40), 'Same Time Last Friday' (\$0), and 'Same Time Yesterday' (\$30). A 'COFFEE' category is highlighted with a value of \$40 for Site 1, and a total of \$961 is shown. A dropdown menu is open, listing 'Sales Categories', 'Hours', 'Departments', 'POS Terminals', and 'Tenders'. The 'Sales Categories' option is selected. The bottom of the screen features the Idealpos logo and a note about integration with Mr Yum.

17:11:05 Audit 625 POS 200 Jeremy
CAPPUCCINO 3.50
FLAT WHITE 3.50
SHORT BLACK 3.00

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Idealpos integrates with Mr Yum for Table Ordering, Pickup & Delivery. Click here for a Special Offer!

Yes/No Options

IP-4965 – Yes/No Option – Inhibit Auto-Login on POS Screen Startup for Non-Compulsory Clerks

Note that this function is only applicable when Compulsory Clerk is turned off.

When Compulsory Clerks is turned off, a clerk is not necessary to be entered into POS on startup.

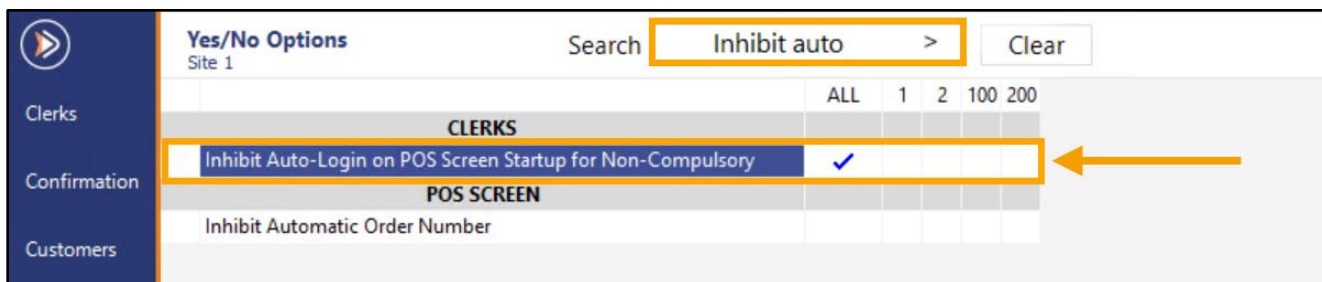
This option stops the auto-login of clerks on the startup of the POS screen, forcing a clerk to be logged in when the POS is opened.

To configure this function, go to: Back Office > Setup > Yes/No Options.

Enter Keyword search: Inhibit auto

Next to the Y/N Option "Inhibit Auto-Login on POS Screen Startup for Non-Compulsory Clerks", enable the checkbox in the All column to apply this option to all POS Terminals.

Alternatively, enable the checkbox for each POS Terminal that you want this option to apply to.



Close the Yes/No Options window, then restart Idealpos to see the change take effect.

When Idealpos starts and the POS Screen is opened, the ENTER CLERK line will be displayed in the Sale window.



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Enter a Clerk then press ENTER to login.

A blank sale line will appear, ready for adding items to the sale.



After each sale is finalised, the Clerk will remain logged in.



Closing the POS Screen and re-opening it again will return to the ENTER CLERK login prompt.

