

Idealpos 8 Build 9 - Update History

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Customers

IP-4768 – Customer Email – Increased field length to support multiple email addresses

This function increases the character length allowed in the Email Address field when modifying a Customer.

By increasing the Email address field length, it is possible to enter longer email addresses into this field, as well as the ability to enter multiple email addresses, each email address being separated by a semicolon (;).

All email address entered in the email field will receive Customer Statements and/or Invoices when they're emailed.

To configure and use this function, go to:

Back Office > Setup > Global Options > Other Options > Email Settings

Ensure that your Email Settings have been configured (so that emails can be sent to the email addresses entered in the next step).

You may need to source the required details from your Internet Service Provider or from the email service that you are utilising.

The screenshot displays the 'Global Options' configuration interface for 'Site 1 (Site 1)'. The 'Email Settings' section is highlighted with an orange border. Within this section, the following fields are visible:

- SMTP Outgoing Email Server
- Sending Email Address (highlighted with an orange arrow)
- SMTP Username
- SMTP Password
- SMTP Port
- Enable SSL/TLS Protocol (checkbox)
- Default CC Email Address
- Default BCC Email Address
- Default Subject for Invoices: Invoice from [UN] - [INV]
- Default Subject for Statements: This is the statement from [UN]
- Default Message when sending Reports (text area)
- Default Message when sending Customer Statements/Invoices (text area)

Other sections visible in the interface include:

- Home Screen: Home Screen Graphic (Homescreen Blue.jpg), Last Transaction Timeout (10), Slideshow Start Time (10), Seconds between images (30).
- Alerts: Output from POS # 1
- Mag Card Printing: Mag Card Format (Format 1), Printer Connection.
- FTP Details: Server Address, Server Port (21), Folder, Username, Password.
- Special Attribute Types: Stock Item Linking, Remove Tax, Transaction Event, Special Item Subtotal.
- Attribute Column Headers: A table with 5 rows and 1 column.
- Default Variant Types: Size, Colour.
- Stock Item Descriptions: Description 2 (Kitchen Description), Description 3 (Long Description).

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Close the Global Options window, then go to: Back Office > File > Customers > Customers

Select a Customer > Modify

In the Email field, enter the email addresses that you want included in the customer record, ensuring that each email address is separated by a semicolon. There is no limit to the number of email addresses that can be entered, but instead, you have a maximum limit of 255 characters in the Email field. Note too that the visible area of the Email field remains unchanged, so when reviewing the entered addresses, you will need to click into the field, then use your left/right arrow keys to scroll through all email addresses.

The below is an example of how to separate each email address entered in the Email field.

E.g. john@company.com; joe@company.com

Each email address that is entered will receive an email when Invoices or Customer Statements are emailed to this customer.

The screenshot shows the 'Customers Modify 2' form with the following fields and values:

- Code:** 2
- Last Name:** Charlton
- Given Names:** Sarah
- Title:** Miss
- Customer Type:** MEMBERS
- Scan Code:** 9850859357357
- Other Codes:** (empty)
- Address Details:**
 - Address:** 42 Wallaby Way
 - Suburb:** Hampden
 - State:** NSW
 - Postcode:** (empty)
- Delivery Address:**
 - Address:** Delivery Address same as Above
 - Suburb:** (empty)
 - State:** (empty)
 - Postcode:** (empty)
- Contact Details:**
 - Phone:** 0765536455
 - Mobile:** 0499754163
 - Fax:** (empty)
 - Email:** john@company.com; joe@company.com (highlighted with a yellow box and an arrow)
- Sales / Accounting:**
 - Auto % Discount:** 0
 - Price Level:** 1
 - Bar Tab:** (unchecked)
 - Account:** (checked)
 - Credit Limit:** 0.00
 - Aging Type:** 30-60-90 / Monthly
 - Master Account:** (empty)
- Miscellaneous:**
 - Company:** (empty)
 - ABN:** (empty)
 - Occupation:** (empty)
 - Next of Kin:** (empty)
 - Contact No:** (empty)
 - Birth Date:** 06/09/1987
 - Birth Date 2:** 02/03/2015
 - Password:** (empty)
 - Gender:** F
 - Marital Status:** (empty)
 - Mail Out:** (checked)
 - Discontinue:** (unchecked)
- Comments:** (empty)

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Press the 'Save' button on the top-left corner of the Modify Customer window to save your change.
To email Customer Statements, go to: Back Office > Reports > Customers > Customer Statement.

To Email Customer Statements to all Customers, adjust the report criteria to include the data you want included, then press the 'Email' button.

If you only want to email Customer Statements to one or more specific Customers, ensure that you specify the details of those Customers in the 'Selection Range'.

Then press the 'Email' button, and those Customers will be emailed.

In the case of the Customer which had multiple email addresses added in the previous step, each email address will receive the Customer Statement.

Customer Statements

View
Print
Email

Statement Type
 Account Activity
 Account Invoices
 Layby

Sort Order
 Code
 Last Name

Date Range
All Dates

Hide Aging
 Print if no Email Address

Selection Range

Code	2 >	to	2 >
Last Name	>	to	>
Customer Type	>	to	>
Company	>	to	>

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The Customer Statement for each customer in the Selection Range is emailed to the respective Customer's email address(es).



STATEMENT

Page 1 of 1

Sarah Charlton
42 Wallaby Way
Hampden NSW

Account # 2

From: 01/01/1901 To: 25/08/2022
Accumulated Points 902
Previous Balance **\$0.00**

DATE	REF. NO	DESCRIPTION	CHARGES	PAYMENTS	BALANCE
25/08/2022	669	Sale;	60.00		60.00
25/08/2022	670	Sale;	60.00		120.00

3 months+	2 months	1 month	Current
0.00	0.00	0.00	120.00

Account # 2

AMOUNT DUE: **120.00**

Amount Paid: \$

Send To:

Received From:

Sarah Charlton
42 Wallaby Way
Hampden NSW

Reports

IP-5087 – Stock Movement Report – Site Grouping/Selection Range

This function adds the ability to group the Stock Movement Report by Site.

It also adds the ability to select the Site(s) in the Selection Range so that the report only includes report data that matches the specified Site(s).

To use this function, go to: Back Office > Reports > Stock Control > Stock Movement.

To group by Site, enable the 'Site' checkbox in the Group by section.

The Group by 'Site' checkbox can be used in combination with the following Group by options:

- Department + Site
- Sales Categories + Site
- Supplier + Site

To report on specific Site(s), enter the Site(s) into the Site field.

Sites can be entered as a comma separated list (e.g. 1,2,3) or as a range (e.g. 1-3).

The screenshot shows the 'Stock Movement Report' configuration window. The interface includes a sidebar with 'View' and 'Print' options, and a main content area with the following sections:

- Standard Date Range** (selected) and **Stocktake Period Range** (unselected).
- Date Range**: Today (dropdown), From: 08 Sep 2022 00:00:00, To: 08 Sep 2022 23:59:59.
- Sort Order**: Code (selected), Description (unselected).
- Group by** (highlighted with an orange box):
 - Department (checkbox)
 - Sales Categories (checkbox)
 - Location (checkbox)
 - Stock Item (checkbox)
 - Site (checkbox, checked)
 - Supplier (checkbox)An orange arrow points from the 'Stock Value Summary by Location' section to the 'Group by' section.
- Options**:
 - Stock Value Summary by Location (checkbox)
 - Condensed Report (checkbox)
 - Include valuation at current average cost (checkbox)
 - Include stock items without movement within date range (checkbox)
 - Word Wrap Descriptions (checkbox)
 - Decimal Places on Quantities: 0 (dropdown)
- Selection Range**:
 - Stock Item: > to >
 - Supplier: > to >
 - Department: >
 - Location: >
 - Site: > (highlighted with an orange box)

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The report will be grouped by Site.

If any specific Sites were entered into the Selection Range, only the Stock Movement data that is relevant for those Sites will be displayed in the report (and if the Group by Site option was also enabled with the Sites Selection Range, those sites will be grouped).

Idealpos POS 2(200)		Stock Movement Report								Printed 08/09/202	
		08 Sep 2022 00:00:00 to 08 Sep 2022 23:59:59 Dpt 126 ALL Locations Stock Control Items Only No-Movement Items Excluded									
Code	Description	Opening	Purchases	Returns	Trans. In	Trans. Out	Sales Write Offs	Variance	Closing	Net Sales ex	Profit Marg
Site 1 Site 1											
128007	COFFEE 1KG	7.0680	0.0000	0.0000	0.0000	0.0000	0.1680	0.0000	0.0000	6.9000	\$46.04 \$42.09 91
128011	SUGAR SACHET BOX 1000	2.5680	0.0000	0.0000	0.0000	0.0000	0.0480	0.0000	0.0000	2.5400	\$10.44 \$9.54 91
128012	NAPKIN BOX 1000	6.1090	0.0000	0.0000	0.0000	0.0000	0.0240	0.0000	0.0000	6.0850	\$0.67 \$0.61 91
Location 1		15.7850	0.0000	0.0000	0.0000	0.0000	0.2400	0.0000	0.0000	15.5250	\$57.15 \$52.25 91
Site 2 Site 2											
128007	COFFEE 1KG	0.0000	10.0000	0.0000	0.0000	0.0000	0.0210	0.0000	0.0000	9.9790	\$5.76 \$5.26 91
128008	DE CAF 1KG	0.0000	10.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	10.0000	\$0.00 \$0.00 0
128009	HOT CHOC 500GM	0.0000	10.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	10.0000	\$0.00 \$0.00 0
128011	SUGAR SACHET BOX 1000	0.0000	10.0000	0.0000	0.0000	0.0000	0.0060	0.0000	0.0000	9.9940	\$1.31 \$1.19 91
128012	NAPKIN BOX 1000	0.0000	10.0000	0.0000	0.0000	0.0000	0.0030	0.0000	0.0000	9.9970	\$0.08 \$0.08 91
Location 20		0.0000	50.0000	0.0000	0.0000	0.0000	0.0300	0.0000	0.0000	49.9700	\$7.14 \$6.53 91
Totals		15.7850	50.0000	0.0000	0.0000	0.0000	0.2700	0.0000	0.0000	65.4950	\$64.30 \$58.78 91

IP-5088 – Stock Movement Report – Supplier Grouping/Selection Range

This function adds the ability to group the Stock Movement Report by Supplier.

It also adds the ability to select the Suppliers in the Selection Range so that the report only includes report data that matches the selected Supplier Range.

To use this function, go to: Back Office > Reports > Stock Control > Stock Movement.

To group by Supplier, enable the 'Supplier' checkbox in the Group by section.

The Group by 'Supplier' checkbox can be used in combination with the following Group by options:

- Location + Supplier
- Supplier + Site

To report on specific Suppliers, enter the Supplier Code range into the Supplier From/To fields.

The screenshot shows the 'Stock Movement Report' configuration window. The interface includes a sidebar with 'View' and 'Print' buttons, and a main content area with several sections:

- Standard Date Range** (Valuation from Average Cost) and **Stocktake Period Range** (Valuation calculated from Stocktakes).
- Date Range**: Today (dropdown), From: 08 Sep 2022 00:00:00, To: 08 Sep 2022 23:59:59.
- Sort Order**: Code, Description.
- Group by**: Department, Sales Categories, Location, Stock Item, Site, Supplier. An orange box highlights this section, and an orange arrow points to the 'Supplier' checkbox.
- Options**: Include valuation at current average cost, Include stock items without movement within date range, Word Wrap Descriptions. Decimal Places on Quantities: 0.
- Selection Range**: Stock Item, Supplier, Department, Location, Site. The 'Supplier' field is highlighted with an orange box.

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The report will be grouped by Supplier.

If any specific Supplier Codes were entered into the Selection Range, only the Stock Movement data that is relevant for those Suppliers will be displayed in the report (and if the Group by Suppliers option was also enabled with the Suppliers Selection Range, those Suppliers will be grouped).

Idealpos POS 2(200)											Printed 08/09/2022	
08 Sep 2022 00:00:00 to 08 Sep 2022 23:59:59 Supp 7 to 14 Dpt ALL Locations Stock Control Items Only No-Movement Items Excluded											Pa	
Code	Description	Opening	Purchases	Returns	Trans. In	Trans. Out	Sales	Write Offs	Variance	Closing	Net Sales ex	Profit Margi
7 KDS Supplies												
207001	2L FULL CREAM MILK	-2.7400	0.0000	0.0000	0.0000	0.0000	0.9600	0.0000	0.0000	-3.7000	\$15.57	\$14.13 90.7
7 KDS Supplies												
14 Campos Coffee												
126007	COFFEE 1KG	7.9680	0.0000	0.0000	0.0000	0.0000	0.1680	0.0000	0.0000	8.9000	\$46.04	\$42.09 91.4
126011	SUGAR SACHET BOX 1000	2.5980	0.0000	0.0000	0.0000	0.0000	0.0480	0.0000	0.0000	2.5400	\$10.44	\$9.54 91.4
126012	NAPKIN BOX 1000	6.1090	0.0000	0.0000	0.0000	0.0000	0.0240	0.0000	0.0000	6.0850	\$0.67	\$0.61 91.4
14 Campos Coffee												
Totals		13.0250	0.0000	0.0000	0.0000	0.0000	1.2000	0.0000	0.0000	11.8250	\$72.73	\$66.39 91.2

Stock Items

IP-3344 – Sell Prices automatically change based on Profit when Cost is modified

This function adds the ability to automatically change a Stock Item's Sell Prices when the Stock Item's Cost is modified, based on the Profit % or Profit \$ (the choice between using Profit % or Profit \$ is available in the Stock Items screen when modifying the Stock Item).

This function also introduces the ability to select which Cost (Standard Cost, Last Cost or Average Cost) Idealpos uses to calculate and display the amounts in the Profit % and Profit \$ fields.

Prior to this change, Idealpos was hard-coded to calculate Profit % and Profit \$ based on the Average Cost price. The Average Cost is set as the default, but this can now be changed to suit your requirements.

To specify which Cost Idealpos will use to calculate the Stock Item Profit %/Profit \$, go to:

Back Office > Setup > Global Options > Sales.

In the Miscellaneous section, set the 'Stock Item Profit Based On' to either Standard Cost, Last Cost or Average Cost.

Global Options
Site 1 (Site 1)

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

Tax Rates

Default	Description	Rate	Label
Rate 1 <input checked="" type="radio"/>	GST	10.00	GST
Rate 2 <input type="radio"/>	GST-Free	0.000	FRE
Rate 3 <input type="radio"/>	Not Defined	0.000	
Rate 4 <input type="radio"/>	Not Defined	0.000	
Rate 5 <input type="radio"/>	Not Defined	0.000	
Rate 6 <input type="radio"/>	Not Defined	0.000	

Programmable Barcodes

Use? Use Hardwired?

Prefix Position Length

Field 1 Stock Code 0 0

Field 2 Quantity 0 0

Decimal Point 0

Miscellaneous

Price Level Change Duration
 Continuous
 Until End of Sale
 One Item Only

Price Level Override 0

Non-Turnover Stock Items

Stock Item Profit Based On
 Average Cost
 Standard Cost
 Last Cost
 Average Cost

Selling Price Descriptors

Price	Description	Type	Text
Price 1	STANDARD		
Price 2	STAFF		
Price 3	EXTRAS		
Price 4	BOTTLESHOP		
Price 5	Price 5		
Price 6	Price 6		
Price 7	Price 7		
Price 8	Price 8		
Price 9	Price 9		
Price 10	Price 10		
Price 11	Price 11		
Price 12	OWNERS		

Refund Reasons

Reason	Type	Text
1	Damaged	
2	Changed Mind	
3	Faulty	
4	Product Recall	<input checked="" type="checkbox"/>
5	Expired	
6	Other	<input checked="" type="checkbox"/>
7		
8		
9		

Sale Type Status

Takeaway

Delivery

Pickup

Cater

Fast Add Stock Items

Fast Add Stock Items when not found

Default Department 402 > Stock Code Scan Code

Pending Sales

Auto Generate Pending Sale Codes

Print to Docket Printers

Print as Bill to Receipt Printer

Kitchen Print minutes before Expected Time

Print to Windows Printer

Inhibit Amounts on Windows Printer

When printed from Table Map send to Windows Printer

Food/Beverage Total Descriptors

Food FOOD

Beverage BEVERAGE

Undistributed Links

Surcharges 10011002 >

Discounts 10011001 >

A4 Pending Sale Messages

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Close the Global Options window then go to:

Back Office > File > Stock Control > Stock Items > Select Stock Item > Modify.

The Profit % and Profit \$ are calculated based on either the Standard Cost, Last Cost or Average Cost (based on the option that was selected in Global Options in the previous step listed above).

In the screenshot example shown below, the Stock Item Profit Based On setting was set as 'Average Cost'.

This is reflected in the Profit % and Profit \$ fields.

Stock Items
Modify 1
General **Advanced** Indirect Item Variants
Created 23 Jun 2022 11:48:15 ✕

Stock Code

Description (6)

Kitchen Description (6)

Long Description (6)

Department > MISCELLANEOUS

Scan Code

Selling Prices (inc Tax)

		Profit	
		%	\$
STANDARD	20.00	45.00	9.00
STAFF	30.00	63.33	19.00
EXTRAS	40.00	72.50	29.00
BOTTLESHOP	50.00	78.00	39.00
Price 5	60.00	81.67	49.00
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 > 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	10.0000
Last Cost	10.5000
Average Cost	11.0000

Recalculate Sell Prices

Don't Recalculate Sell Prices

Based on Profit %

Based on Profit \$

Tax Settings (Selling)

GST

GST-Free

Not Defined

Not Defined

Not Defined

Not Defined

Attributes

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In addition to the ability to control which Cost is used to calculate the Profit %/Profit \$, the ability to change the Sell Prices automatically when the Cost price is changed (based on Profit) is now possible.

Within the Cost Prices – Recalculate Sell Prices section of the Modify Stock Item screen, select one of the following options:

Don't Recalculate Sell Prices – Selecting this option will not recalculate the Sell Prices when the Cost Price is changed.

Based on Profit % - Selecting this option will recalculate the Sell Prices for each Price Level based on the percentage values in the Profit % fields when the Cost Price is changed.

Based on Profit \$ - Selecting this option will recalculate the Sell Prices for each Price Level based on the values in the Profit \$ fields when the Cost Price is changed.

Stock Items
Modify 1

General **Advanced** Indirect Item Variants

Created 23 Jun 2022 11:48:15 X

Save
Keyboard

Stock Code 1 Department 1001 > MISCELLANEOUS
Description ITEM A (6) Scan Code Auto
Kitchen Description ITEM A (6)
Long Description ITEM A (6)

Selling Prices (inc Tax)

		Profit	
		%	\$
STANDARD	20.00	45.00	9.00
STAFF	30.00	63.33	19.00
EXTRAS	40.00	72.50	29.00
BOTTLESHOP	50.00	78.00	39.00
Price 5	60.00	81.67	49.00
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 10.0000
Last Cost 10.5000
Average Cost 11.0000

Recalculate Sell Prices

- Don't Recalculate Sell Prices
- Based on Profit %
- Based on Profit \$

Tax Settings (Selling)

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

Attributes

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To use this function, select the desired Recalculate Sell Prices option.

Stock Items

General Advanced Indirect Item Variants

Created 23 Jun 2022 11:48:15 ✕

Stock Code

Description (6)

Kitchen Description (6)

Long Description (6)

Department > MISCELLANEOUS

Scan Code

Selling Prices (inc Tax)

		Profit	
		%	\$
STANDARD	20.00	45.00	9.00
STAFF	30.00	63.33	19.00
EXTRAS	40.00	72.50	29.00
BOTTLESHOP	50.00	78.00	39.00
Price 5	60.00	81.67	49.00
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 > 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

Last Cost

Average Cost

Recalculate Sell Prices

Don't Recalculate Sell Prices

Based on Profit %

Based on Profit \$

Tax Settings (Selling)

GST

GST-Free

Not Defined

Not Defined

Not Defined

Not Defined

Attributes

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Modify the Cost Price option that was selected in Global Options (e.g. Average Cost).

Stock Items

General Advanced Indirect Item Variants

Created 23 Jun 2022 11:48:15 ✕

Stock Code

Description (6)

Kitchen Description (6)

Long Description (6)

Department > MISCELLANEOUS

Scan Code

Selling Prices (inc Tax)

		Profit	
		%	\$
STANDARD	20.00	45.00	9.00
STAFF	30.00	63.33	19.00
EXTRAS	40.00	72.50	29.00
BOTTLESHOP	50.00	78.00	39.00
Price 5	60.00	81.67	49.00
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 > 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

Last Cost

Average Cost ←

Recalculate Sell Prices

Don't Recalculate Sell Prices

Based on Profit %

Based on Profit \$

Tax Settings (Selling)

GST

GST-Free

Not Defined

Not Defined

Not Defined

Not Defined

Attributes

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Click the cursor into another Cost field (e.g. Last Cost).

The Sell Prices in each Price Level will be recalculated based on the Recalculate Sell Prices option that was selected and the Cost Price that was entered.

Stock Items
Modify 1

General | Advanced | Indirect Item | Variants

Created 23 Jun 2022 11:48:15

Stock Code 1 | Department 1001 > MISCELLANEOUS

Description ITEM A (6) | Scan Code Auto

Kitchen Description ITEM A (6)

Long Description ITEM A (6)

	Selling Prices (inc Tax)		Profit	
			%	\$
STANDARD	21.00		42.86	9.00
STAFF	31.00		61.29	19.00
EXTRAS	41.00		70.73	29.00
BOTTLESHOP	51.00		76.47	39.00
Price 5	61.00		80.33	49.00
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

Cost Prices (ex Tax)

Standard Cost 10.0000

Last Cost 10.5000

Average Cost 12.0000

Recalculate Sell Prices

Don't Recalculate Sell Prices

Based on Profit %

Based on Profit \$

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

Instruction

Print Red

Web Store

Inhibit Discounts

Inhibit Voids

Manufactured Item

Non-Accumulating

Can't Buy with GIFT VOUCHER

Scale

Tags

Tax Settings (Selling)

GST

GST-Free

Not Defined

Not Defined

Not Defined

Not Defined

Attributes

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If any further changes are required to the Stock Item, change them as required. Once completed, press the 'Save' button to save the changes to the Sell Prices.

Stock Purchases

IP-5102 – Stock Purchasing – When adjusting Sell Prices, option to copy current Profit Margins

This function adds the ability to copy the current Profit Margins when adjusting Sell Prices in the Stock Purchases screen – available when using either Purchase Order or Stock Received.

When the Cost Price of a Stock Item in a Stock Purchase [New Cost Price] differs to the Current Cost Price, the Profit Margin % of the Stock Item will change after the Stock Purchase is processed (if the Sell Price is not adjusted accordingly).

If a Stock Item's Profit Margin % is required to be maintained at the same percentage after processing a Stock Receive/Purchase Order, the user will need to press the Prices button in the Stock Purchases screen, then they have to manually copy the Current Profit Margin % into the New Profit Margin % for each Price Level.

With this change, a new 'Copy Profit' button has been added to the Selling Prices screen, which will save the user from having to manually copy the Current Profit Margin % into the New Profit Margin %.

The 'Copy Profit' button will only appear in the Selling Prices screen when the Stock Item's Cost in the Stock Purchase varies to the Stock Item's Current Cost.

To use this function, go to: Back Office > Transactions > Stock Control > Stock Purchases.

Create a new Purchase Order or Stock Receive > Add Item to the Purchase Order/Stock Receive.

Alternatively, select an existing Purchase Order/Stock Receive > Modify.

Within the Stock Received/Purchase Order, select the line that contains the Stock Item that Sell Prices need to be reviewed, then press the 'Prices' button.

The screenshot displays the 'Stock Received' interface. At the top, it shows 'Purchase Type: Stock Received' and 'Location: Location 1'. Below this, there are fields for 'Supplier: Coca Cola', 'Purchase Order No: 20220909CKSR', 'Invoice No: 20220909CKSR', 'Date of Invoice: 09/09/2022', 'Stock Process Date: 09/09/2022', and 'Due Date: 23/09/2022'. A table lists the items, with the first row highlighted in orange: '205301' (COKE 1.25L) with a quantity of 1, unit price of 0.825, and a total of 0.82. At the bottom, there is a summary section for '1x COKE 1.25L (205301)' with a price of '\$0.825 each' and '1 on Order'. It includes a 'Sales Quantity' field and a 'Week' selector. A 'Prices' button is highlighted with an orange box and an arrow pointing to it. To the right of the 'Prices' button are fields for 'Subtotal: 0.75', 'Freight: 0.00', 'Admin Fee: 0.00', and 'Tax: 0.07'. The 'Invoice Total' is 0.82. A 'Save' button is located at the bottom right.

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The Selling Prices window will appear.

The Current Sell Prices/Current Profit Margin % will appear on the left-hand side, and the New Sell Prices/Profit Margin % will appear on the right-hand side.

The New Profit Margin % shown (after opening the Selling Prices screen and before any changes have been made) is calculated and displayed based on the Current Sell Prices for each Price Level.

In the example shown below, the 'Copy Profit' button is displayed as the Last Cost (0.75) differs to the New Cost (0.83).

Selling Prices ✕

205301
COKE 1.25L

	-----Current-----		-----New-----	
	Price	Profit Margin %	Price	Profit Margin %
STANDARD	2.00	58.79	<input type="text" value="2.00"/>	54.40
STAFF	1.00	17.58	<input type="text" value="1.00"/>	8.79
EXTRAS	0.00		<input type="text" value="0.00"/>	
BOTTLESHOP	1.50	44.85	<input type="text" value="1.50"/>	38.97
Price 5	0.00		<input type="text" value="0.00"/>	
Price 6	0.00		<input type="text" value="0.00"/>	
Price 7	0.00		<input type="text" value="0.00"/>	
Price 8	0.00		<input type="text" value="0.00"/>	
Price 9	0.00		<input type="text" value="0.00"/>	
Price 10	0.00		<input type="text" value="0.00"/>	
Price 11	0.00		<input type="text" value="0.00"/>	
Doshii	0.00		<input type="text" value="0.00"/>	

Standard Cost	0.75
Last Cost	0.75
Average Cost	0.75
New Cost	0.83

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Pressing the 'Copy Profit' button will copy each Price Level's Current Profit Margin % into the New Profit Margin % field. This in turn will calculate the New Sell Price for each Price Level as shown in the example below.

	-----Current-----		-----New-----	
	Profit Margin %		Profit Margin %	
STANDARD	2.00	58.79	2.20	58.79
STAFF	1.00	17.58	1.10	17.58
EXTRAS	0.00		0.00	
BOTTLESHOP	1.50	44.85	1.65	44.85
Price 5	0.00		0.00	
Price 6	0.00		0.00	
Price 7	0.00		0.00	
Price 8	0.00		0.00	
Price 9	0.00		0.00	
Price 10	0.00		0.00	
Price 11	0.00		0.00	
Doshii	0.00		0.00	
Standard Cost	0.75			
Last Cost	0.75			
Average Cost	0.75			
New Cost	0.83			

Standard Cost 0.75
Last Cost 0.75
Average Cost 0.75
New Cost 0.83

Copy Profit

Save

To save the new Sell Prices, press the 'Save' button.

To back out of the change and cancel without changing the Profit Margin % or Sell Prices, press the 'X' button on the top-right corner of the Selling Prices window.

Note that the Sell Prices will be changed immediately after the 'Save' button is pressed.

The above process can be repeated for each Stock Item in the Purchase Order/Stock Receive.

idealpos Update History

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When ready to finalise the processing of the Purchase Order/Stock Receive, select the Purchase Order/Stock Receive from the main Stock Purchases screen, then press the 'Process' button.

The screenshot displays the 'Stock Purchases' interface. At the top, there is a 'Location' dropdown menu. Below it is a table with the following data:

Code	Supplier Name	Date	Type	Order No.	Invoice No.	Details	Processed	Location	Total
3	Coca Cola	09/09/2022	Invoice	220909CKSR	20220909CKSR	20220909CKSR	No	Location 1	\$0.75

At the bottom of the screen, there are several checkboxes for filtering the view:

- Show Purchase Orders
- Show Stock Received
- Show Orders NOT Received
- Show Tax Inclusive
- Send to Label Printing

There is also a 'Items Only' button and a 'Process' button, which is highlighted with a yellow box and an arrow pointing to it.

If processing a Stock Receive/Invoice, the entry will be cleared from the Stock Purchases screen.

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If processing a Purchase Order, Idealpos will open the Purchase Order so that any final adjustments can be made, then press the 'Process' button to finalise the order.

Purchase Order Purchase Type Location

Supplier > **Coca Cola** Purchase Order No 20220909CKPO Date of Invoice 09/09/2022 >>>
Invoice No 20220909CKPO Stock Process Date 09/09/2022
Details 20220909CKPO Due Date 23/09/2022 Tax Inc

Stock Code	Supplier Code	Description	Quantity Ordered	Previously Received	Unit Cost	Disc %	Tax 1	Total	Cancel Rem.	Last Cost
205305	124KSS438	LIFT 1.25L	1	0	0.825	0.00	GST	0.82	<input type="checkbox"/>	<input checked="" type="checkbox"/>


Enquiry Prices

Sales Quantity Week All Locations

Week 4 Week 3 Week 2 Week 1 This Week

Subtotal 0.75
Freight 0.00
Admin Fee 0.00
Tax > 0.07
Invoice Total 0.82

Auto-Allocate GST
Auto-Allocate GST

Receive None  **Process**

A final prompt will be displayed to confirm that the Purchase Order was fully received. Select 'Yes' to delete the Purchase Order or select 'No' to retain the Purchase Order in the Stock Purchases screen. If 'No' is selected at this stage, the Purchase Order can be deleted at any time from the Stock Purchases screen.

This purchase order has been fully received. Would you like to delete this purchase order?

POS Screen

IP-5076 – Switch POS Layout Function

This function adds the ability to switch between POS Screen Layouts from within the POS Screen.

An example environment where this function may be utilised is outlined as follows.

A venue that has POS Terminals in the Bar area (Bar POS Screen Layout) and POS Terminals in the Café area (Café POS Screen Layout), with some POS terminals located in close proximity to both the Bar and Café area.

In this type of environment, Clerks may require the ability to toggle between the Café and Bar POS Screen Layout, depending on the area that the customer is wanting to purchase items from. With this function, this can now be achieved.

Note that this function can only be used when a sale is not currently in progress on the POS Terminal.

Before configuring this function, ensure that you have multiple POS Screen Layouts, as this function enables the ability to toggle between each POS Screen Layout.

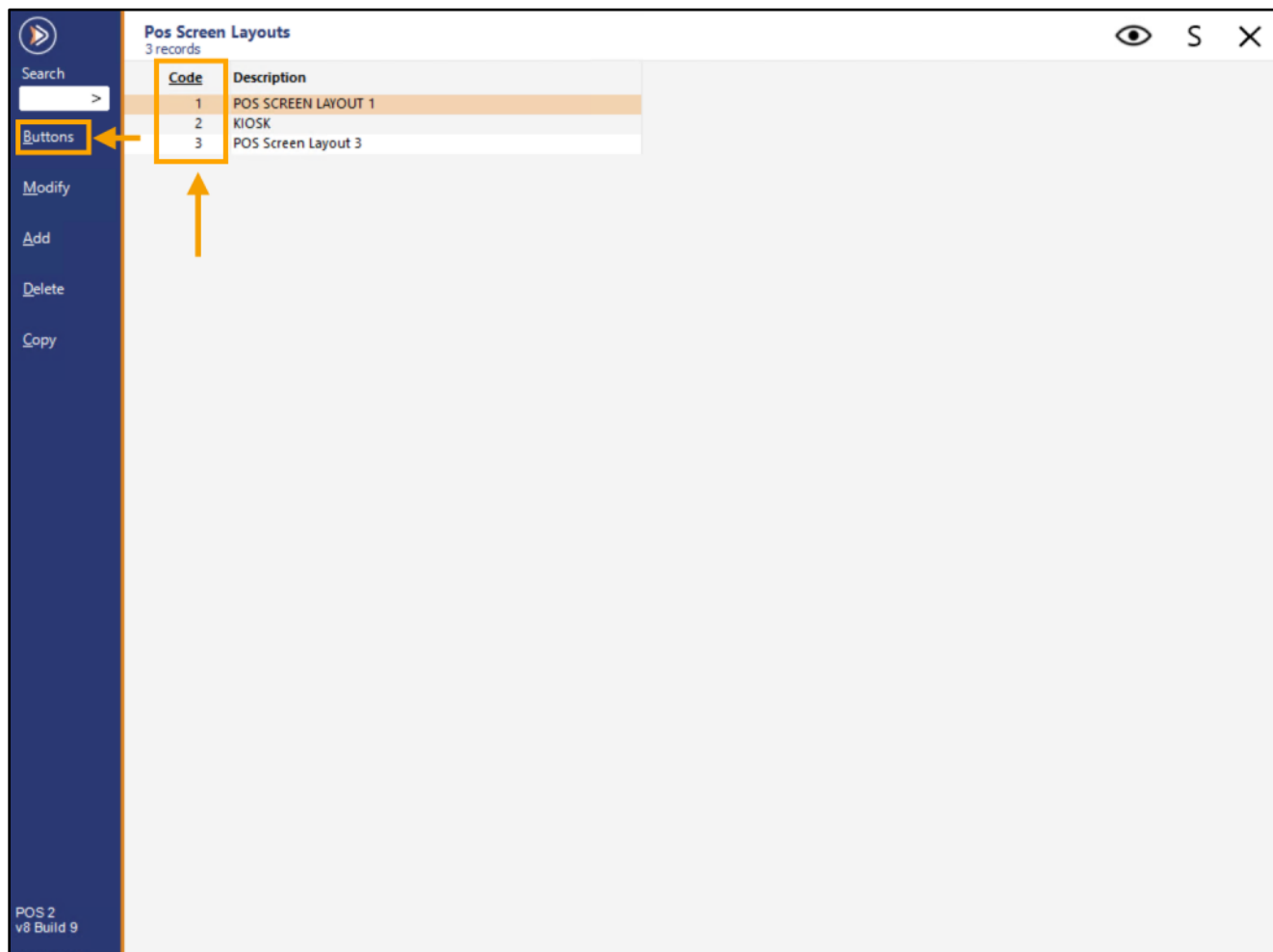
Refer to the [POS Screen Setup topic](#) in the User Guide for further details about creating POS Screen Layouts.

To configure this function, go to:

Back Office > Setup > POS Screen > POS Screen Setup.

Take note of the Code displayed next to each POS Screen Layout, as these Codes will be required when creating the Switch POS Screen Layout buttons within your layouts.

Select the POS Screen Layout which you want to create the Switch POS Layout button, then press 'Buttons'.



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Select a POS Screen Tab where you would like to create your Switch POS Screen Layout button.

When selecting a POS Screen tab to create the button, consideration should be made on whether you want all staff to have the ability to access the button or not. If only certain staff require access to this function, consider creating the button on a POS Screen tab that is secured via User Permissions for only specific staff to access.

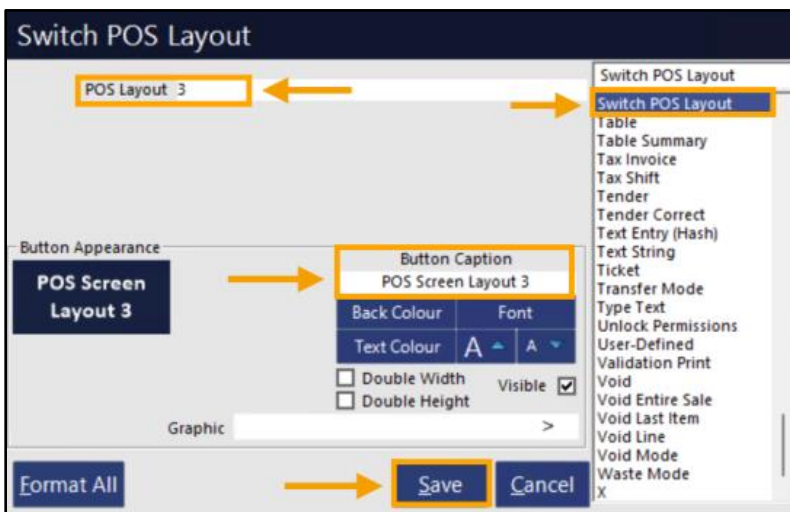
User Permissions to each POS Screen Tab can be configured via Back Office > Setup > Users > Select User > Modify > POS > Layers > Toggle the checkboxes for each Tab that the User should/should not have access to.

Select a blank/unused button within the desired POS Screen tab, and configure the button as follows:

Function: Switch POS Layout.

POS Layout: Enter the Code of the POS Layout that you want this button to switch to. Note that if you want your staff to manually enter the POS Layout Code, you can leave this field blank, however, the staff will need to be aware of the Codes that correspond to each POS Screen Layout that they will be switching to.

Button Caption: Enter the text label that you want to appear on the button (e.g. Café POS Screen, Bar POS Screen, etc.).



Save the button.

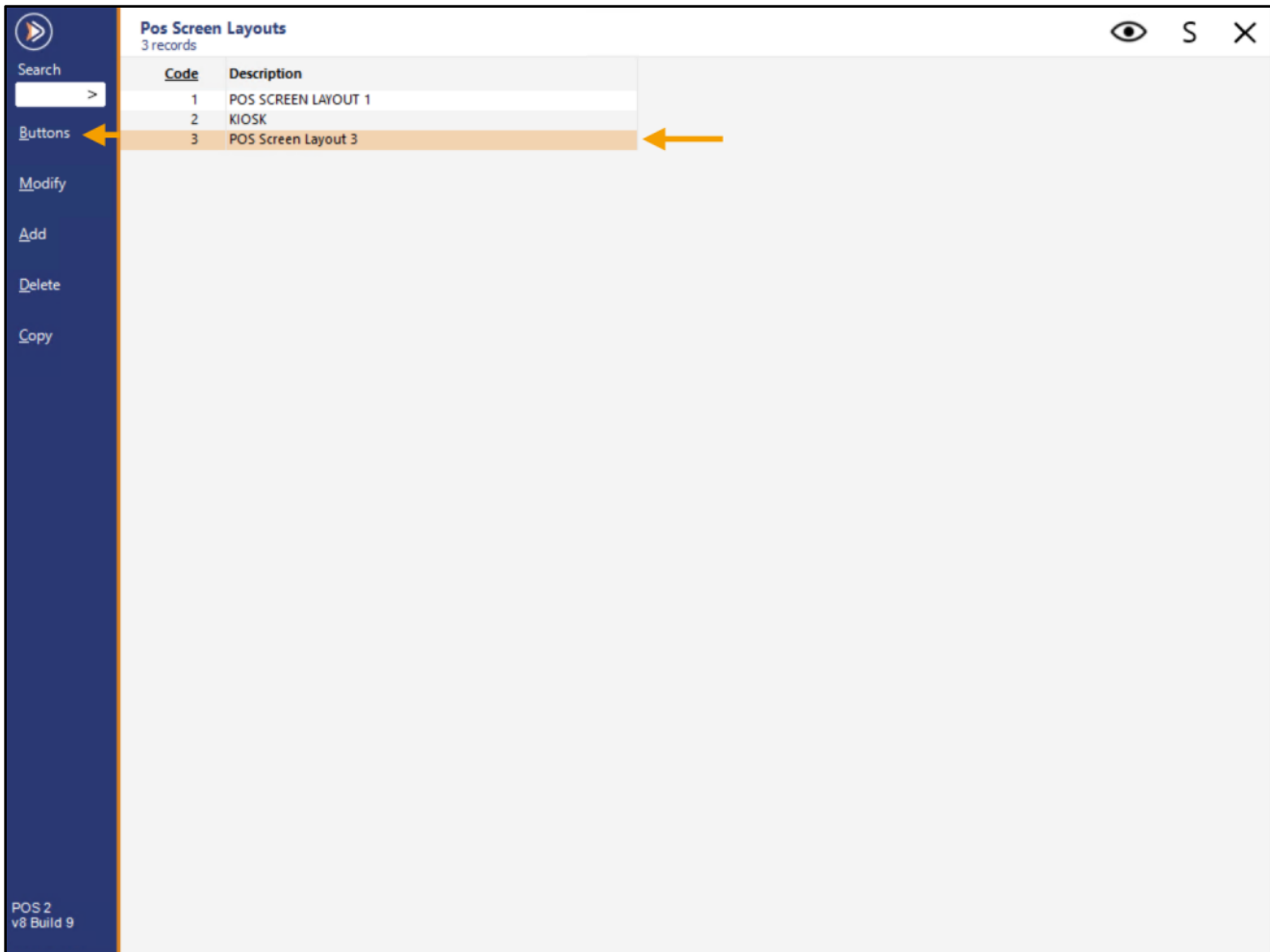
Multiple buttons can be created within the current POS Screen Layout if you have more than one POS Screen Layout that you want to be able to switch between.

idealpos Update History

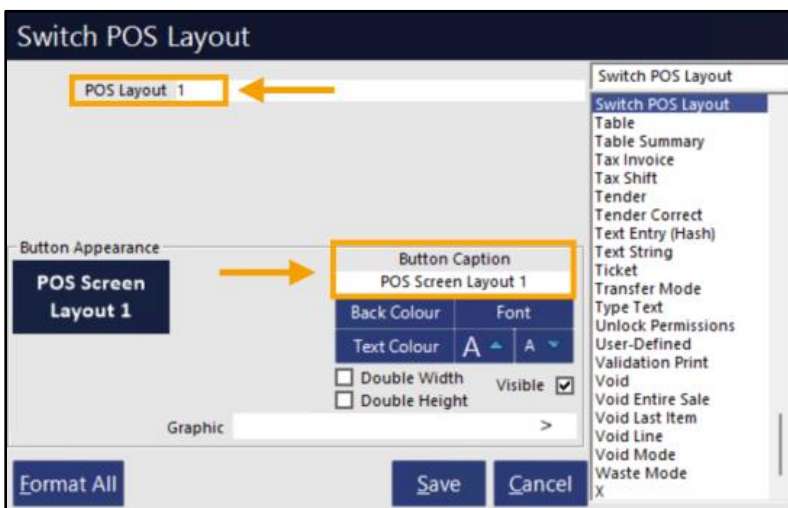
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Once the Switch POS Layout buttons have been created for the current POS Screen Layout, repeat the above process and create the Switch POS Layout button(s) within each POS Screen Layout (so that after a Clerk switches to a different POS Screen Layout, they can switch to the previous layout).

E.g. From the POS Screen Layouts window, select the other POS Screen Layout > Buttons.



Configure the button to switch to the opposite POS Screen Layout:

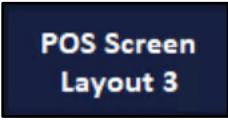


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Close the POS Screen Layout windows once the configuration has been completed.

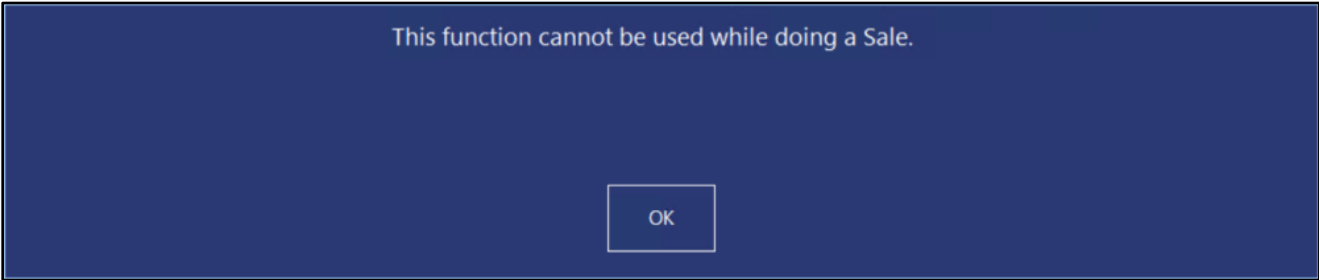
From the POS Screen, navigate to the POS Screen tab that contains the Switch POS Layout button and press it.

A dark blue rectangular button with white text. The text is arranged in two lines: "POS Screen" on the top line and "Layout 3" on the bottom line.

The POS Screen Layout will change.

Note that as described earlier, the ability to change POS Screen Layouts is only available when there is no active sale taking place (no items or customer added to the sale).

Attempting to change the POS Screen Layout while a sale is in progress will produce the following prompt (and the POS Screen Layout will not switch).

A dark blue rectangular dialog box with a thin white border. It contains a message and an "OK" button. The message text is centered at the top, and the button is centered below it.

This function cannot be used while doing a Sale.

OK

IP-5107 – Fast Add Stock Items – Ability to select Department

This function adds the ability to select the Department from a dropdown list when adding a Stock Item to the sale using the Fast Add Stock Items function. When the Stock Item is added to the database via the Fast Add Stock Items function, the item will be assigned to the Department that was chosen from the dropdown box in the Fast Add Stock Item screen.

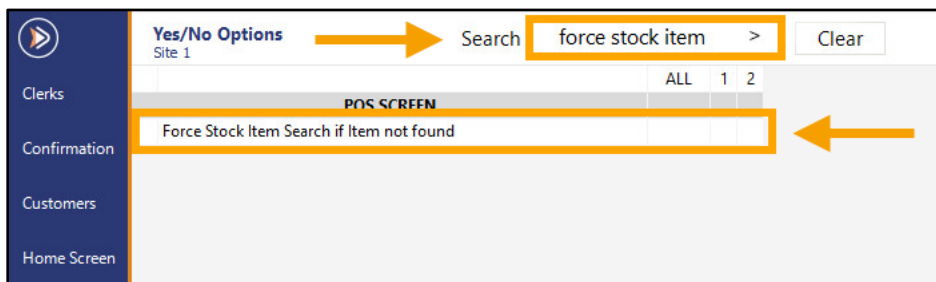
Previous to this change, all Stock Items that were added via the Fast Add Stock Items function were assigned to the Default Department configured in Global Options > Sales > Fast Add Stock Items function.

To configure and use the Fast Add Stock Items function, go to:

Back Office > Setup > Yes/No Options.

Enter Search: force stock item.

Disable 'Force Stock Item Search if Item not found' as this option is not compatible with the Fast Add Stock Items function.



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Go to: Back Office > Setup > Global Options > Sales.

Within the Fast Add Stock Items section, configure the following:

Fast Add Stock Items when not found – Enable checkbox

Default Department – Specify the Default Department that Stock Items should be added to. The Department specified here will be the default Department that appears in the Department dropdown box of the Fast Add Stock Item screen.

Stock Code/Scan Code – Select the field that the Scan Code/Barcode will be entered into.

Global Options
Site 1 (Site 1)

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

Tax Rates

Default	Description	Rate	Label
Rate 1	<input checked="" type="radio"/> GST	10.00	GST
Rate 2	<input type="radio"/> GST-Free	0.000	FRE
Rate 3	<input type="radio"/> Not Defined	0.000	
Rate 4	<input type="radio"/> Not Defined	0.000	
Rate 5	<input type="radio"/> Not Defined	0.000	
Rate 6	<input type="radio"/> Not Defined	0.000	

Programmable Barcodes

Use? Use Hardwired?

Prefix

Field	Position	Length
Field 1 Stock Code	0	0
Field 2 Quantity	0	0

Decimal Point 0

Miscellaneous

Price Level Change Duration
 Continuous
 Until End of Sale
 One Item Only

Price Level Override 0

Non-Turnover Stock Items

Stock Item Profit Based On
Average Cost

Selling Price Descriptors

Price 1	STANDARD
Price 2	STAFF
Price 3	EXTRAS
Price 4	BOTTLESHOP
Price 5	Price 5
Price 6	Price 6
Price 7	Price 7
Price 8	Price 8
Price 9	Price 9
Price 10	Price 10
Price 11	Price 11
Price 12	Doshii

Refund Reasons

	Type	Text
1 Damaged	<input type="checkbox"/>	
2 Changed Mind	<input type="checkbox"/>	
3 Faulty	<input type="checkbox"/>	
4 Product Recall	<input checked="" type="checkbox"/>	
5 Expired	<input type="checkbox"/>	
6 Other	<input checked="" type="checkbox"/>	
7	<input type="checkbox"/>	
8	<input type="checkbox"/>	
9	<input type="checkbox"/>	

Sale Type Status

Takeaway

Delivery

Pickup

Cater

Fast Add Stock Items

Fast Add Stock Items when not found

Default Department 1001 >

Stock Code
 Scan Code

Pending Sales

Auto Generate Pending Sale Codes

Print to Docket Printers

Print as Bill to Receipt Printer

Kitchen Print minutes before Expected Time

Print to Windows Printer

Inhibit Amounts on Windows Printer

When printed from Table Map send to Windows Printer

Undistributed Links

Surcharges 10011002 >

Discounts 10011001 >

Food/Beverage Total Descriptors

Food FOOD

Beverage BEVERAGE

A4 Pending Sale Messages

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Close the Global Options window.

Go to: POS Screen.

Within the POS Screen, scan or enter a Scan Code/Barcode that does not exist.

The POS Screen will display the Fast Add Stock Item window.

Scan Code 9314807018504

Description >

Price >

Department MISCELLANEOUS

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

Proceed

Description – Enter the Stock Item Description

Price – Enter the Sell Price of the Stock Item. The Price entered here will be entered into all Price Levels for this Stock Item.

Department – Select the desired Department to assign the Stock Item to.

GST Type – Enable the checkbox next to the GST/Tax Type that should apply to this item.

Press 'Proceed' to continue.

Scan Code 9314807018504

Description SORBOLENE MOISTURISER 1L >

Price 10.00 >

Department MISCELLANEOUS

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

Proceed

idealpos Update History










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The Stock Item will be added to the database as well as being added to the sale.

08 Sep 15:24 Adult ID: 08-Sep-2004
POS 1 Jeremy STANDARD #502

SORBOLENE MOISTURISER 1L 1 10.00		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	

1x
\$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 RESTAURANT	TAP BEER BOTTLE BEER & RTD	SPIRITS WINE	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL SERVICES	MANAGER ADMIN

If the Stock Item is scanned again on this POS terminal or any other networked POS Terminals in the venue, the Fast Add Stock Item window will not be displayed, and the Stock Item will be added to the sale.

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The Stock Item will be available via Back Office > File > Stock Control > Stock Items > Modify.

Stock Items

General
Advanced
Inventory Item
Options

Created 08 Sep 2022 15:24:34 ✕

Stock Code 2

Description SORBOLENE MOISTURISER 1L (24)

Kitchen Description SORBOLENE MOISTURISER 1L (24)

Long Description

Department 1001 > MISCELLANEOUS

Scan Code 9314807018504 Auto

Selling Prices (inc Tax)

		Profit	
		%	\$
STANDARD	10.00	100.00	9.09
STAFF	10.00	100.00	9.09
EXTRAS	10.00	100.00	9.09
BOTTLESHOP	10.00	100.00	9.09
Price 5	10.00	100.00	9.09
Price 6	10.00	100.00	9.09
Price 7	10.00	100.00	9.09
Price 8	10.00	100.00	9.09
Price 9	10.00	100.00	9.09
Price 10	10.00	100.00	9.09
Price 11	10.00	100.00	9.09
Doshii	10.00	100.00	9.09

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 1 > FOOD

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

Recalculate Sell Prices

- Don't Recalculate Sell Prices
- Based on Profit %
- Based on Profit \$

Tax Settings (Selling)

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

Attributes

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Quick Stocktake

IP-2941 – Quick Stocktake – Ability to Clear Stocktake and Exit

This function adds the ability to Clear Stocktake and exit from the Quick Stocktake screen.

Prior to this change, the 'Update Stock Levels' button had to be used, even if there were no changes made.

This introduced a level of risk if a Clerk accidentally entered the Quick Stocktake screen, performed an accidental button press on the numeric keypad, then had no way to cancel any changes and exit the Quick Stocktake screen.

This has been improved via the addition of a 'Clear Stocktake and Exit' button.

To configure and use this function, go to: Back Office > Setup > POS Screen > POS Screen Setup.

Select a POS Screen Layout > Buttons.

Select a suitable POS Screen Tab that contains unused/blank buttons, and create a 'Quick Stocktake' button as follows:

Function: Quick Stocktake

Department Range: Enter the Department Range to restrict the Quick Stocktake to. When this Quick Stocktake button is pressed on the POS Screen, it will only display Stock Items that fall within the entered Department Range. The example below shows a Department Range of 205 which is the Soft Drinks Department Code in the Idealpos Demo Database.

Print Stocktake on Receipt Printer: Toggle the checkbox to control whether the Stocktake will print to the Receipt Printer.

Button Caption: Enter a caption for the button (e.g. Quick Stocktake, Quick Stocktake – Soft Drink, etc.).

Close the POS Screen Layout windows.

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Go to: POS Screen.

Navigate to the POS Screen tab where the Quick Stocktake button was created and press the button to access the Quick Stocktake function.

The Quick Stocktake screen is displayed and is restricted to the Department/Department Range that was entered in the Department Range field of the button configuration.

The 'Clear Stocktake and Exit' button can be pressed to clear any accidental entries and to Exit the Quick Stocktake screen.

Stock Code	Description	Department	Stock Level	Stocktake
205001	COKE 250ML BTL	SOFT DRINK	35	
205002	DIET COKE 250ML BTL	SOFT DRINK	62	
205003	COKE ZERO 250ML BTL	SOFT DRINK	32	
205004	SPRITE 250ML BTL	SOFT DRINK	41	
205005	DRY GINGER 250ML BTL	SOFT DRINK	24	
205006	TONIC 250ML BTL	SOFT DRINK	29	
205101	COKE CAN	SOFT DRINK	61	
205102	DIET COKE CAN	SOFT DRINK	18	
205103	COKE ZERO CAN	SOFT DRINK	45	
205104	SPRITE CAN	SOFT DRINK	59	
205105	LIFT CAN	SOFT DRINK	85	
205106	DRY GINGER CAN	SOFT DRINK	32	
205107	FANTA CAN	SOFT DRINK	41	
205108	TONIC CAN	SOFT DRINK	24	
205201	COKE 600ML	SOFT DRINK	61	
205202	DIET COKE 600ML	SOFT DRINK	42	
205203	COKE ZERO 600ML	SOFT DRINK	21	
205204	SPRITE 600ML	SOFT DRINK	36	
205205	LIFT 600ML	SOFT DRINK	62	
205206	DRY GINGER 600ML	SOFT DRINK	32	
205207	FANTA 600ML	SOFT DRINK	41	
205208	TONIC 600ML	SOFT DRINK	24	
205301	COKE 1.25L	SOFT DRINK	14	
205302	DIET COKE 1.25L	SOFT DRINK	18	
205303	COKE ZERO 1.25L	SOFT DRINK	21	
205304	SPRITE 1.25L	SOFT DRINK	36	

The 'Stocktake has been Cleared' prompt will be displayed. Press 'OK' to close the prompt and return to the POS Screen.

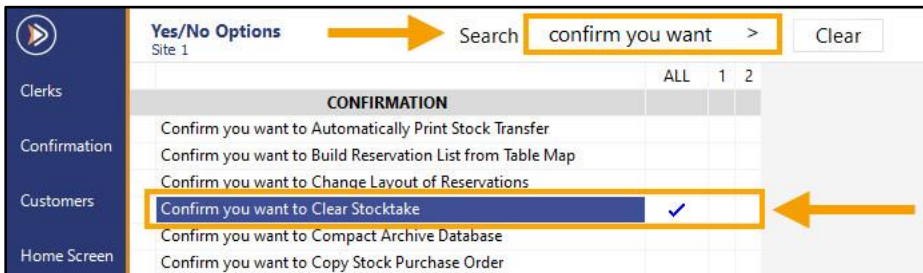
Stocktake has been Cleared.

OK

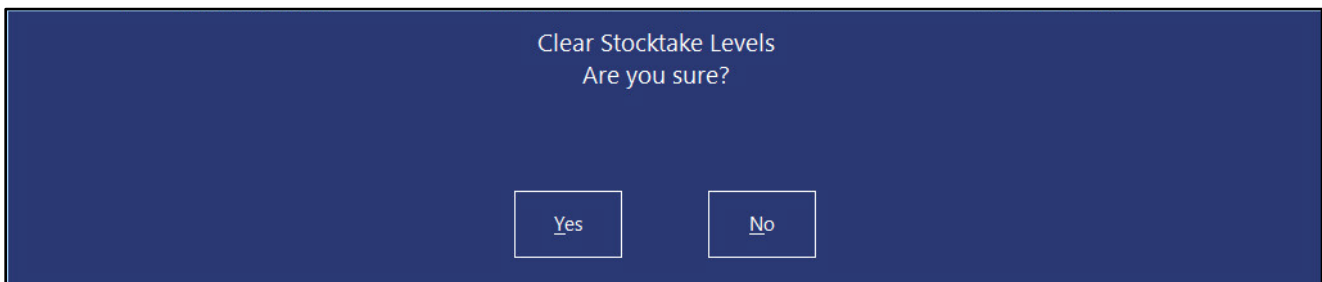
idealpos Update History

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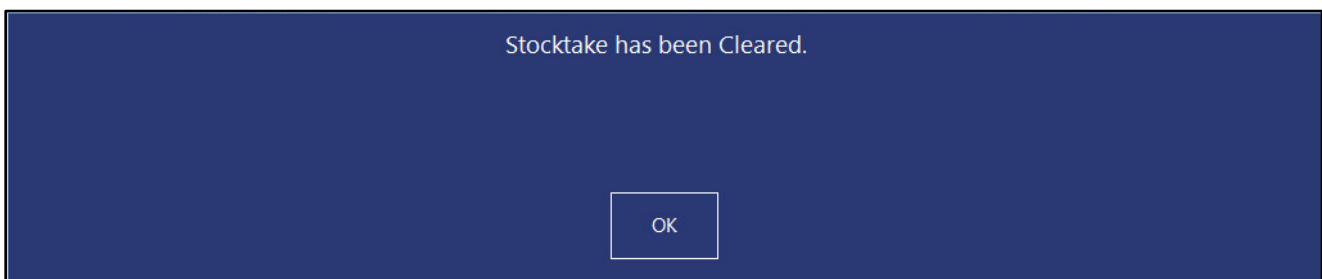
If the venue requires a confirmation prompt to Clear Stocktake and Exit (e.g. if the Clerk accidentally presses the 'Clear Stocktake and Exit' button instead of the 'Update Stock Levels'), this can be configured by going to: Back Office > Setup > Yes/No Options > Enter Search: 'confirm you want'. Enable the option 'Confirm you want to Clear Stocktake'.



When pressing the 'Clear Stocktake and Exit' button on the Quick Stocktake screen, the following prompt will be displayed, which can be used to prevent the accidental clearing of a Quick Stocktake.



Pressing 'Yes' will Clear the Quick Stocktake and display the 'Stocktake has been Cleared prompt'. Press 'OK' to close the prompt and return to the POS Screen.



Yes/No Options

IP-5092 – Yes/No Option – Force Receipt when Order Number is used

This function will force a receipt to be printed for the sale when an Order Number has been added to the sale, regardless of whether receipt printing is enabled or disabled.

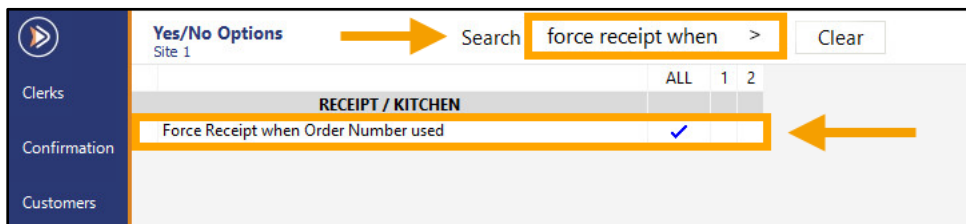
For this function to work, it requires the following options to be configured:

- Enable Yes/No Option 'Force Receipt when Order Number used'
- Receipt Printer configured for the POS Terminal
- Order Number POS Screen button
- Receipt On/Off POS Screen button

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

Enter Search: "force receipt when"

Enable Y/N Option 'Force Receipt when Order Number used'



Close the Yes/No Options window.

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Go to: Back Office > Setup > Network Printers.

Ensure that the POS Terminal(s) have Network Printer(s) configured.

If required, press the 'Add' button to add Network Printers, then drag and drop the Network Printers from the top-section of the Network Printers screen to the required printer slots for the POS Terminals listed at the bottom of the Network Printers window.

The screenshot shows the 'Network Printers' configuration window. At the top, there is a dropdown menu for 'Site 1'. Below it is a table of network printers:

Name	POS Terminal	Printer Type	Connection	Settings	Redirect Printer
DUMMY		Epson TM-T88	Ethernet	,9100	None

Below this table is a section titled 'printers by pos' with a sub-header 'drag-and-drop from above'. It contains a table of POS terminals:

POS	Description	Receipt Printer	KITCHEN	BAR	COFFEE	IKM	Kitchen Printer 5	Kitchen Printer 6
1	POS 1	DUMMY						
2	KIOSK							

An orange arrow points from the 'DUMMY' printer in the top table to the 'DUMMY' printer in the 'Receipt Printer' column of the POS terminal table.

Close the Network Printers window.

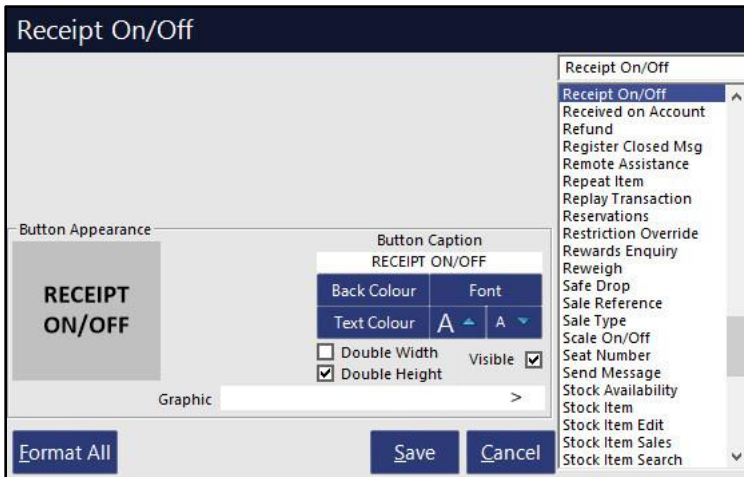
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Go to: Back Office > Setup > POS Screen > POS Screen Setup.
Select a POS Screen Layout > Buttons.

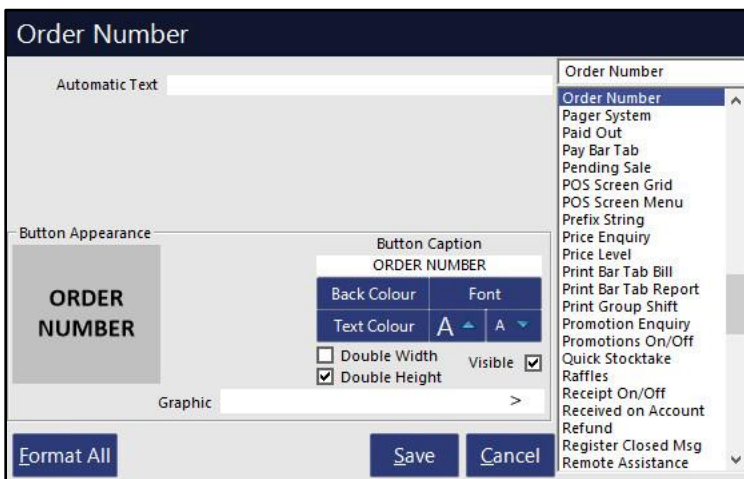
Ensure that a Receipt On/Off button exists within one of the POS Screen Tabs.

If a Receipt On/Off button does not exist, select an unused/blank button and configure as follows:



An Order Number Button also needs to exist within one of the POS Screen Tabs so that an Order Number can be assigned to a sale/order when required.

If an Order Number Button does not exist, select an unused/blank button and configure as follows:



Once the buttons have been configured as required, close the POS Screen Layout windows.

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Go to: POS Screen.

Navigate to the POS Screen tab that contains the 'Receipt On/Off' button.

Ensure that the button displays 'RECEIPT IS OFF'.

If the button shows 'RECEIPT IS ON', press the button which will act as a toggle to enable or disable receipt printing.

09 Sep 14:13 Adult ID: 09-Sep-2004
POS 1 Jeremy STANDARD #504

idealpos®

\$0.00

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				
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						
EFT POS CASHPUT	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		JOURNAL ENQUIRY	STOCK SALES REPORT
DRINKS	CAFE	TAP BEER	SPIRITS				RETAIL	MANAGER
	RESTAURANT	BOTTLE BEER & RTD	WINE	COCKTAILS	FRUIT & VEG	GROCERY	SERVICES	ADMIN

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Navigate to the POS Screen Tab that contains the 'Order Number' button and press the button.

09 Sep 14:17 Adult ID: 09-Sep-2004
POS 1 Jeremy STANDARD #504



\$0.00

X

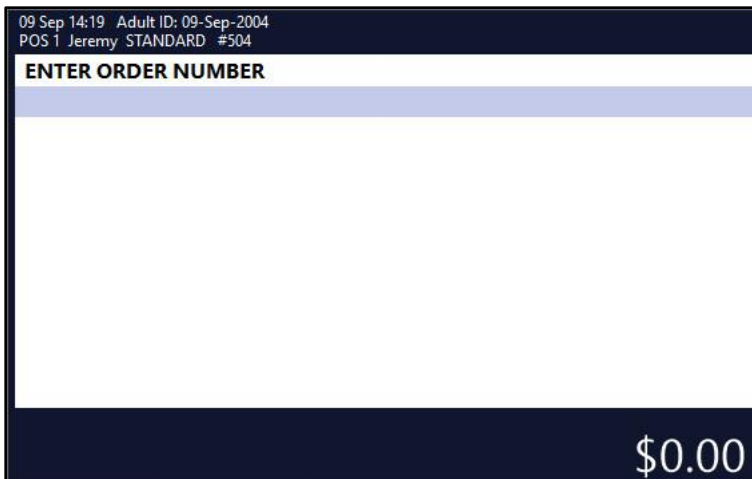
RECEIPT		CLERK		7	8	9	CL
PRICE LEVEL		5% ST DISC		4	5	6	NO SALE
CUSTOMER		5% ITEM		1	2	3	X
BAR TAB		REFUND		0	.	ENTER	
PENDING		VOID SALE					
TABLE MAP		VOID					

BACON & EGGS	PANCAKES	MUD CAKE SLICE	9	BEEF BAGEL	BEEF BURGER	LAMB & FETTA PIZZA	POTATO SALAD	KEYBOARD ↓ ORDER NUMBER
EGGS BENEDICT	CANADIAN PANCAKES	LEMON TEA CAKE SLICE		CHICKEN PANINI	WAGYU BURGER	SOME LIKE IT HOT PIZZA	PUMPKIN & FETTA	
EGGS ON TOAST	WAFFLES	VANILLA SLICE		MUSHROOM FOCCACIA	LAMB BURGER	MUSHROOM PIZZA	TOMATO & COUS COUS	ORDER NUMBER
JAM & TOAST	WAFFLES CHOCOLATE	CARROT CAKE SLICE		LAMB TURKISH	CHICKEN BURGER	ISLANDER PIZZA	CHILLI SEAFOOD	WITH
BAKED BEANS & TOAST	BIG BREAKFAST	BLACK FORREST CAKE SLICE		ROAST SANDWICH	TOFU BURGER	CHICKEN PIZZA	SMALL CHIPS	WITHOUT
AVOCADO ON TOAST		MANUFACTURED ITEMS		DESIGNER SANDWICH	DESIGNER BURGER	DESIGNER PIZZA	LARGE CHIPS	
DRINKS	CAFE	TAP BEER	SPIRITS	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL	MANAGER
	RESTAURANT	BOTTLE BEER & RTD	WINE				SERVICES	ADMIN

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ENTER ORDER NUMBER will be displayed in the sale window.

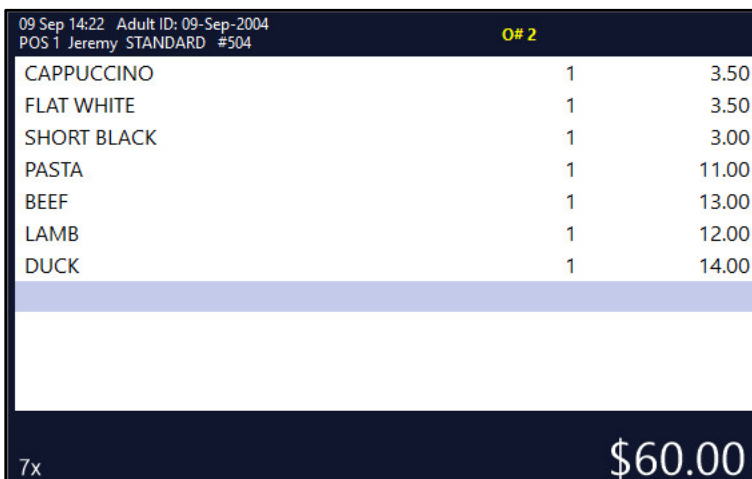


An Order Number can be entered manually, or the ENTER button can be pressed and an Order Number will be automatically entered.

The Order Number will appear above the sale window.



Add the required items to the sale.



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The Customer Receipt is forced as per the Yes/No Option 'Force Receipt when Order Number used'.
The Order Number is also printed towards the top of the receipt.

```

      I D E A L P O S

      1/212 Curtin Ave West
      Eagle Farm QLD 4009
      Australia

      TAX INVOICE
      123-456-789-11

#000504-1 Jeremy 09-Sep-2022 14:26:03

*** ORDER 2 ***

- - - - E N T R E E - - - -
PASTA*                $11.00
BEEF*                 $13.00
LAMB*                 $12.00
DUCK*                 $14.00

- - - - B E V E R A G E - - - -
CAPPUCCINO*           $3.50
FLAT WHITE*           $3.50
SHORT BLACK*          $3.00

T O T A L              $60.00
-----
GST Amount            $5.45

C A S H                $ 6 0 . 0 0

FOOD TOTAL            $50.00
BEVERAGE TOTAL       $10.00
Other Categories TOTAL $0.00

*indicates taxable supply

      Powered by Idealpos

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