

Build 45

Update Details:

** Enhancements

- * [IP-472] - POS Grids - Force Selection with Minimum and Maximum options
- * [IP-810] - Promotions Import supports POS/Location/Site/Customer Type/Price Level Headers
- * [IP-1005] - Yes/No Option - Don't send Refunds to Kitchen Printers
- * [IP-1011] - Stock Item Sales Report filtered by specific Refund Reason
- * [IP-1035] - CAA Affinity Interface (Canada)
- * [IP-1075] - Talkbox Voucher Integration
- * [IP-1083] - Zebra Label support for Kitchen Print Items
- * [IP-1090] - Deputy export: options to exclude RA accounts and to report on Ex-GST amounts
- * [IP-1091] - Multiple Coupon Redemptions in a \$ Discount Off Total Promotion
- * [IP-1101] - Ability to search Customers using single quote character
- * [IP-1139] - Permission for Adding Supplier Codes applied in Stock Purchases screen
- * [IP-1148] - Improved speed for Supplier Enquiry - View Report
- * [IP-1151] - Fast Add Stock Item - Warning if no Sell Price
- * [IP-1165] - IBA Promotions Import - Exclude Batch option

Coupons

Multiple Coupon Redemptions in a \$ Discount Off Total Promotion

This promotion is configured in such a way that if you redeem multiple discounted items within the one sale, and the coupon's value is worth more than the total of those discounted items, they will all be discounted only up to the value of those items.

Go to File > Sales > Promotions > Coupons > Add > Discount Type: \$ Discount off Total > Select: Multiple Redemptions per Sale.

coupon promotion 14
Promotion
Advanced
Coupon Design
✕

Description
\$30 Coupon Multi Redeem

Group
Promotions

POS >

Customer Type >

Multiple Trips

From 01/07/2017 00:00

to 01/07/2018 00:00

Continuous
 During Specific Times

Discount Type

\$ Discount off Total 30.00

Multiple Redemptions per Sale

Trip Conditions Set 1

Trip by Quantity Buy 1

Trip by Amount

of Anything
 of items below

1001104 \$30 Multi Coupon

Trip Conditions Set 2

Trip by Quantity And Buy 0

Trip by Amount

of items below

Serialized Tracking Print Only

Redeem at POS >

Redeem from 01 Jul 2017 00:00

to 01 Jul 2018 00:00

OR 0 Days from Print Date

Apply Discount to All Items
 Only Items Below

101008 WAFFLES

Delete Promotion Link Enquiry Add Department Add Stock Item

Delete Promotion Link Enquiry Add Department Add Stock Item

idealpos7 Update History

21 Jul 14:05 POS 1 Adult ID: 21/07/99 Jeremy STANDARD		
WAFFLES	5	45.00
CANADIAN PANCAKES	1	12.00
Discounts (+/-)		0.00
		\$57.00

6x

When coupons are redeemed for up to \$60, only \$45 worth of the coupons are within in the sale, so that is all that gets discounted.

21 Jul 14:05 POS 1 Adult ID: 21/07/99 Jeremy STANDARD		
WAFFLES	5	45.00
-45.00 \$30 Coupon Multi Redeem	2	
CANADIAN PANCAKES	1	12.00
COUPON: \$30 Coupon Multi Redeem		-30.00
COUPON: \$30 Coupon Multi Redeem		-15.00
\$30 Coupon Multi Redeem	2	-45.00
Discounts (+/-)		-45.00
		\$12.00

6x

The remaining value on the coupon if not spent is not re-issued or redeemable in another sale.

Customers

Ability to search Customers using single quote character

In previous versions of Idealpos we did not recognize apostrophes in Customer names, such as O'Doyle and McDonald. This has now been remedied and can be used.

Code	14	Customer Type	ACCOUNTS	Scan Code	Auto
Last Name	O'Doyle			Other Codes	
Given Names	Steven				
Title					

customer enquiry

Code	Last Name	First Name	Type
14	O'Doyle	Steven	ACCOUNTS

14
Steven O'Doyle

Phone:
Mobile:
Fax:
Email:

Points:
Password:
Price Level:
Dob:
Birth Date 2:
Company:

Type: ACCOUNTS
Credit Limit: 1000.00
ABN:

[Journal](#) [Modify](#)

Customer Code	>	to	>
Last Name	O'doyle	to	O'doyle >
Birth Date 2		to	

customers

Steven O'Doyle

idealpos 7 Update History

CAA Affinity Interface (Canada)

This is a Customer Membership Interface. For more information please visit <https://www.caa.ca/>.

You will need to have the CAA Licence in your Licence Gateway.

Global Options

Go to Setup > Global Options > Interfaces 2 > Customer Interface.

Interface Type: CAA Affinity

Username: Provided

Password: Provided

Location ID: Provided

Customer Interface

Interface Type

Username

Password

Location ID

idealpos 7 Update History

Promotions

Go to File > Sales > Promotions > Add.

promotions Promotion Advanced

Description: CAA Dollars
Group: Promotions
POS: >
Customer Type: >
 Multiple Trips
 Apply Over Trip Level

From: 01/07/2017 00:00
to: 31/08/2017 00:00
 Continuous
 During Specific Times

Discount Type: \$ Discount Each Item 0.03

Trip Conditions Set 1
 Trip by Quantity Buy 1 of items below
 Trip by Amount
501001 UNLEADED

Trip Conditions Set 2
 Trip by Quantity And Buy 0 of items below
 Trip by Amount

Trip Conditions Set 3
 Trip by Quantity And Buy 0 of items below
 Trip by Amount

Delete Promotion Link Enquiry Add Department Add Stock Item

Go to Advanced > User-Defined Text > [DONTAPPLYDISCOUNT].

User-Defined Text

[DONTAPPLYDISCOUNT]

idealpos7 Update History

Using POS with CAA

Swipe the member card and CAA Member will display at the top of the screen.

29 Jun 13:47 POS 1 Adult ID: 29/06/99 Jeremy STANDARD			CAA Member			
CHAI	1	4.00	RECEIPT	CLERK	7	
SHORT BLACK	1	3.00				
DIESEL	100	105.00	TABLE MAP	PRICE LEVEL	5% ST DISC	4
				CUSTOMER	5% ITEM	
				BAR TAB	REFUND	1
				PENDING	VOID SALE	
				TABLE MAP	VOID	0
Discounts (+/-) 0.00						
102x \$112.00						

Enter the sale including any items and the Fuel to trigger the promotion.

29 Jun 13:47 POS 1 Adult ID: 29/06/99 Jeremy STANDARD			CAA Member			
CHAI	1	4.00	RECEIPT	CLERK	7	
SHORT BLACK	1	3.00				
DIESEL	100	105.00	TABLE MAP	PRICE LEVEL	5% ST DISC	4
				CUSTOMER	5% ITEM	
				BAR TAB	REFUND	1
				PENDING	VOID SALE	
				TABLE MAP	VOID	0
Discounts (+/-) 0.00						
102x \$112.00						

idealpos7 Update History

Once you have finalized, the member number and CAA Dollar amount earned will be stamped into the sale and show on the Receipt.

29 Jun 13:48 POS 1 Adult ID: 29/06/99 Jeremy STANDARD			CAA Member					
DIESEL	100	105.00	RECEIPT	CLERK	7	8		
GST Subtotal		105.00			PRICE LEVEL	5% ST DISC	4	5
GST Amount		9.55			CUSTOMER	5% ITEM		
CAA Dollars 3.00 (620234xxxxxxx234)					BAR TAB	REFUND	1	2
					PENDING	VOID SALE		
			TABLE MAP	VOID	0	.		
100x			<div style="text-align: right;"> <p>Change</p> <h1>\$95.00</h1> </div>					
CASH	200.00							
EFTPOS								
POINTS								
ACCOUNT								

These details will be sent to the CAA Affinity Web Service in the background. If it fails for any reason other than internet connectivity, an error message will show.

Once a successful send occurs, the background process will go and attempt to resend any failed messages in the queue.

Deputy Export

Deputy export: options to exclude RA accounts and to report on Ex-GST amounts

Deputy uses the sales data to work out the wage cost as a percentage of revenue. Most businesses work out wage cost targets as a percentage of net revenue. So, it is the net revenue (Ex-GST) amount that needs to be reported to Deputy. Gratuity figures are currently included in the sales data. This makes the reported wage percentage inaccurate (especially for venues that generate larger gratuities). The option to not export RA will include Gift Voucher sales.

Two new options have been added when exporting to Deputy to allow you to select if these options get exported.

Go to Setup > POS Terminals > Modify > Import/Export > Automatic Export Settings > Export Sales Format: Deputy.

Automatic Export Settings

Export Folder >
 Delete files older than days

Export Stock Items ▾
Department Range
Export Daily at Or every minutes
Filename
 Append Date/Time to filename
 Append Site Name to filename
 Append Venue ID to filename
 Include Discontinued Items

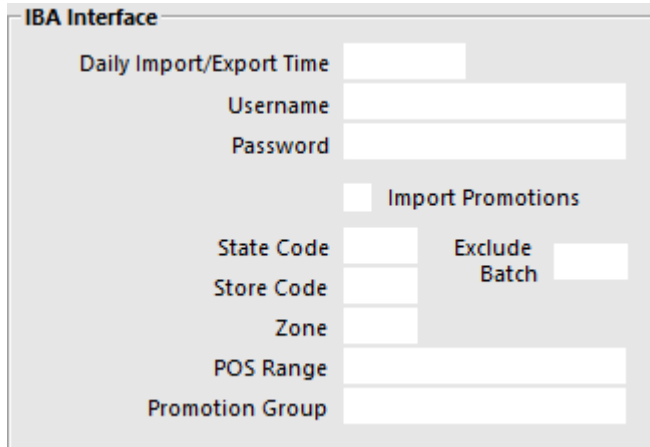
Export Sales Format ▾
Sales From ▾
Daily Export Time Export Sales as Ex-GST
 Do not Export RA Transactions

IBA Interface

IBA Promotions Import - Exclude Batch option

A new option has been added to allow you to exclude a specific zone area when importing promotion files from IBA. You need to add the 3 characters that designates which zone you want to exclude.

Go to Settings > POS Terminals > Import/Export > IBA Interface > Exclude Batch.



The screenshot shows a settings window titled "IBA Interface". It contains several input fields and a checkbox. The fields are: "Daily Import/Export Time" (a small text box), "Username" (a larger text box), "Password" (a text box with a mask), "State Code" (a small text box), "Store Code" (a small text box), "Zone" (a small text box), "POS Range" (a larger text box), and "Promotion Group" (a larger text box). There is a checkbox labeled "Import Promotions" which is currently unchecked. To the right of the "State Code", "Store Code", and "Zone" fields, there is a label "Exclude Batch" followed by a small text box for entering the zone code.

POS Screen Grids

POS Grids - Force Selection with Minimum and Maximum options

This feature allows you to configure the exact number of items the operator is expected to press before being allowed to move on.

Go to Setup > POS Screen > Grids > Add.

Go to the Grid list > Select your Grid in the list.

pos screen grids		Code Search <input type="text" value=""/>			
Code	Description	Width	Height	Minimum	Maximum
8	CAFE WITH	9	6		
9	CAFE WITHOUT	9	6		
10	Test 1	9	6	1	3
11	Ice Cream Flavours	9	6	3	3
21	BREAD CHOICE	9	6		

idealpos7 Update History

Press Items > Add all the required stock items in this grid, in this example, Ice Cream Flavours. It can also be used for Pizzas and Sandwiches where a maximum number of items are added for free.

Touch Screen Grid Link – This function will only work on the last item selected on the grid. If you require the operator to go to another grid after selecting the last item, you need to add the grid link to all items as you cannot know which one it will be.

Allow more than One selection of this button – This checkbox allows the operator to select multiple of a single item, if required. In the example of ice cream flavours, it's especially so, however this might not always be the case.

Items included in the grid can have a price allocated to them as per usual.

The screenshot shows a configuration window titled "pos screen grids" with a close button in the top right corner. The window is divided into two main sections: "Function Details" and "Button Appearance".

Function Details:

- Function Type: **Stock Item**
- Automatic Text: [Empty text field]
- Stock Item: 108207 > ENGLISH TOFFEE
- Touchscreen Grid Link: MAIN (dropdown menu)
- Allow more than One selection of this button

Function List (Right Panel):

- Stock Item
- %+ Item
- %+ Subtotal
- Amount
- Backoffice Shortcut
- Clerk
- Customer
- Department
- Enter
- ESC
- Item Discount
- Macro
- None
- Order Number
- Pager System
- POS Screen Grid
- Price Level
- Sale Reference
- Seat Number
- Send Message
- Stock Item** (highlighted)
- Stock Notes
- Subtotal Discount
- Tender
- Text Entry (Hash)
- Text String
- Type Text
- Unlock Permissions

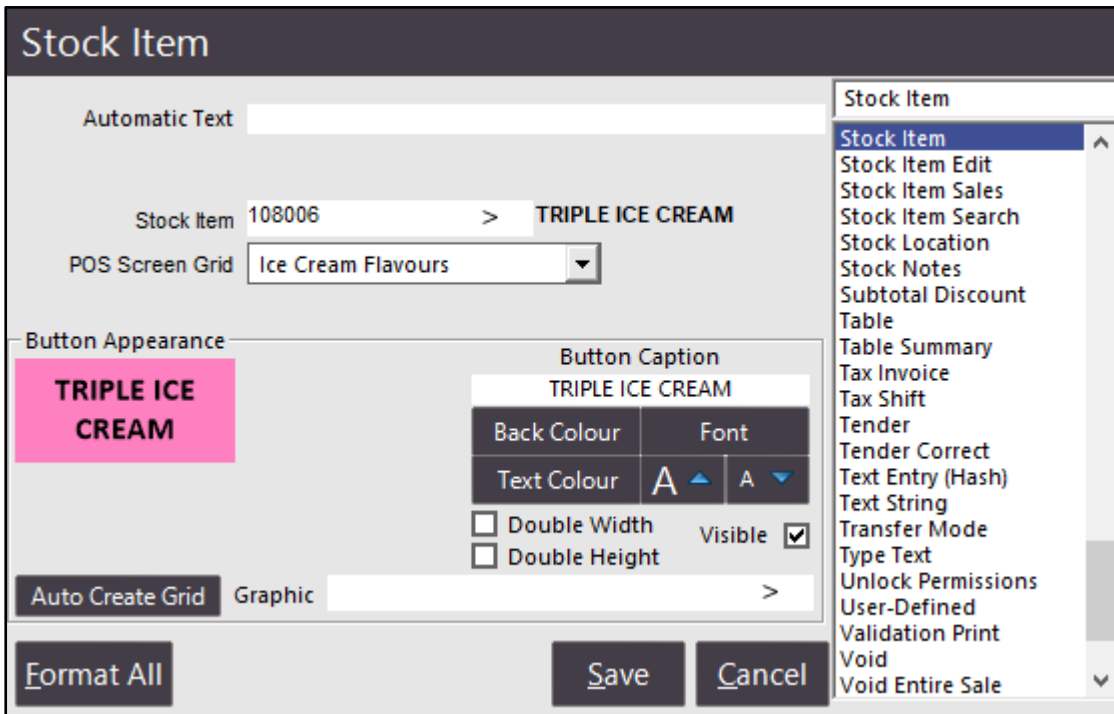
Button Appearance:

- Double Height:
- Double Width:
- Visible:
- Back Colour: [Color selection]
- Font: [Font selection]
- Text Colour: [Color selection]
- Button Caption: ENGLISH TOFFEE
- Graphic: [Image selection]

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

idealpos7 Update History

Link your Triple Ice Cream button to the Ice Cream Flavours Grid.



On the POS Screen press the Triple Ice Cream button. The item will be charged and the Ice Cream Flavours grid will open.

26 Jul 09:07 POS 1 Adult ID: 26/07/99
Jeremy STANDARD

TRIPLE ICE CREAM	1	7.50	RECEIPT	Employee Log	7	8	9	CL
			Bar Area					
			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
Discounts (+/-) 0.00
\$7.50

VANILLA	SALTED CARAMEL & MACADAMIA	ENGLISH TOFFEE
STRAWBERRY	DOUBLE CHOP CHIP	MOJITO MINT
LIME & COCONUT	BOYSENBERRY	PECAN

Select 3 Items

idealpos7 Update History

The bottom of the grid will tell you how many items you need to select, in this example, 3. Once an item is selected (English Toffee), a count will display on the button as to how many of that flavour has been selected. The bottom of the grid will show how many items are yet to be selected.

VANILLA	SALTED CARAMEL & MACADAMIA	ENGLISH TOFFEE	1
STRAWBERRY	DOUBLE CHOP CHIP	MOJITO MINT	
LIME & COCONUT	BOYSENBERRY	PECAN	

2 remaining

Select 3 Items

The second item will also show the count decreasing.

VANILLA	SALTED CARAMEL & MACADAMIA	ENGLISH TOFFEE	1
STRAWBERRY	DOUBLE CHOP CHIP	MOJITO MINT	
LIME & COCONUT	BOYSENBERRY	PECAN	1

1 remaining

Select 3 Items

idealpos7 Update History

As soon as the last choice is selected the grid will exit to the main screen or touchscreen grid you selected for the item to go to. You cannot access the grid again unless you have it on the POS screen, or re-select the main item. If you make a mistake, void the sale and start again.

26 Jul 09:37 POS 1 Adult ID: 26/07/99		
Jeremy STANDARD		
TRIPLE ICE CREAM	1	7.50
ENGLISH TOFFEE		
PECAN		
SALTED CARAMEL & MACADAMIA		
		Discounts (+/-) 0.00
1x		\$7.50

You cannot add multiple quantities of the main item as it will not select the same quantities of the choices available. If multiple of the same item is required, you have to do them one at a time.

Printers

Zebra Label support for Kitchen Printers

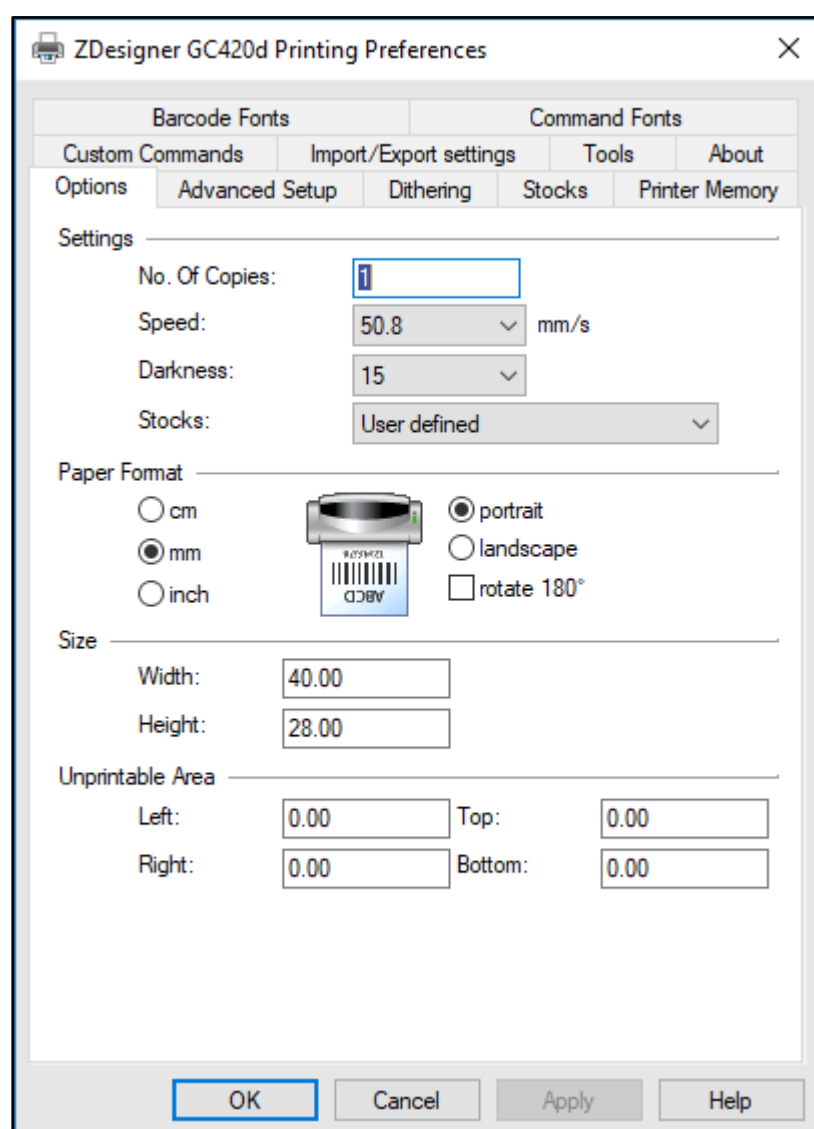
This feature allows you to print a label which can be placed on the product for the dispense to the correct customer. This will be beneficial mostly in fast food and convenience stores, where people order take-away that can take a few minutes to prepare. When you order a kebab, fish and chips or Chinese, your meals can have a sticker on them with the order details, so you can confirm that it is your order before you open it. The staff dispensing the meal to the customer might not be the one preparing it, so it allows for errors to be minimal.

Setup Zebra Printer

To be able to use this functionality, you will need to have a ZDesigner GC420d printer. The following label sizes have been configured to test with:

- 56 x 46
- 56 x 25
- 40 x 28

Once you have connected the printer, do a test print through Windows. You may need to calibrate the position of the information that gets printed to ensure all the information is visible.



idealpos 7 Update History

Configure Idealpos Settings for Zebra Printer

Go to Setup > Global Options > Printing > Kitchen Printer Names > ZEBRA LABELS.

Kitchen Printer Names	
KP 1	KITCHEN
KP 2	BAR
KP 3	COFFEE
KP 4	IKM
KP 5	ZEBRA LABELS
KP 6	Kitchen Printer 6
KP 7	Kitchen Printer 7
KP 8	Kitchen Printer 8
KP 9	Kitchen Printer 9
KP 10	Kitchen Printer 10
KP 11	Kitchen Printer 11
KP 12	Kitchen Printer 12

Go to Utilities > Range Programming > Stock Items > Select all required items to use Kitchen Printer ZEBRA LABELS. You can select individual items by going through File > Stock Control > Stock Items > Modify.

Field	Kitchen Printer 5 : ZEBRA LABELS	▼	=	✓
-------	----------------------------------	---	---	---

Printer Settings	
<input checked="" type="checkbox"/>	Receipt Printer
<input checked="" type="checkbox"/>	KITCHEN
<input type="checkbox"/>	BAR
<input type="checkbox"/>	COFFEE
<input checked="" type="checkbox"/>	IKM
<input checked="" type="checkbox"/>	ZEBRA LABELS
<input type="checkbox"/>	Kitchen Printer 6
<input type="checkbox"/>	Kitchen Printer 7
<input type="checkbox"/>	Kitchen Printer 8
<input type="checkbox"/>	Kitchen Printer 9
<input type="checkbox"/>	Kitchen Printer 10
<input type="checkbox"/>	Kitchen Printer 11
<input type="checkbox"/>	Kitchen Printer 12

idealpos7 Update History

Go to Setup > POS Terminals > Modify > Kitchen Printers > Kitchen Printer: ZEBRA LABELS > Zebra Labels: ZDesigner GC420d.

Kitchen Printer

KP 5 : ZEBRA LABELS

Type: None

Connection: None

Stock Items Print Double Width
 Stock Items Print Double Height
 Stock Items Print Bold

Expanded Printing
 Print Extra Copy
 Activate Beeper
 One Item per Docket

Zebra Labels: ZDesigner GC420d

idealpos 7 Update History

Using Zebra Labels for Kitchen

In Idealpos, sell an item that will print a label. A label will be printed with all the details that are included in the sale.

01 Aug 10:29 POS 1 Adult ID: 01/08/99 Jeremy STANDARD		
CAPPUCCINO	1	3.10
Discounts (+/-) 0.00		
1x		\$3.10

O# 22 AUDIT: 650-1 CAPPUCCINO	O# 456 Takeaway Audit 373-1 REF: LUKE CAPPUCCINO SKINNY MILK DOUBLE SHOT
AUDIT: 649-1 SALMON	
AUDIT: 658-1 EYE FILLET RARE ADD SAUCE ADD CAULIFLOWER ADD MUSHROOMS	

Promotions

Promotions Import supports POS/Location/Site/Customer Type/Price Level Headers

The new import fields need to be specified in the Header. They can be:

CUSTOMER_TYPE, CUSTOMERTYPE, CUSTOMERTYPERANGE, CUSTOMER_TYPE_RANGE, POS, POS_NUMBER, TERMINAL, POS_RANGE, LOCATION, LOCATION_RANGE, SITE, SITE_RANGE, PRICE_LEVEL

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

Please note: any fields with commas will need to have double quotes around them:

ie 1-10,15 will need to be "1-10,15"

Refunds

Stock Item Sales Report filtered by specific Refund Reason

Large retail venues can process a lot of refunds and need to be able to see a pattern of product returns to act quickly to remove those items from sale in the event of a larger issue.

Go to Reports > Sales > Stock Item Sales > Optional Grouping: Refund Reason (untick Totals Only) > Selection Range > Refund Reason.

stock item sales

S X

Date Range

Week to Date From 10/07/2017 00:00:00 To 12/07/2017 23:59:59

Optional Grouping

Group Field	Show Group Label	Totals Only	Totals with Group Label
Refund Reason	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Sort Order

Code

Description

Best Cost of Sales

Worst

Show Stock Items

Group by Sell Price

Unit Price is Price 1

Hide Unit Price/Tax

Portrait

Selection Range

Price Level: All Price Levels Refund Reason: All Reasons

Code: > to >

Description: > to >

Supplier: > to >

Department: >

Location: >

POS System: >

Attributes: > > +

Show Exclude X

Print
Save Defaults
View

idealpos user (pos1) Printed 12/07/2017 10:33:20

Stock Item Refunds Report
10 Jul 2017 00:00:00 to 12 Jul 2017 23:59:59 Page 1 of 1

	Unit Price inc	Unit Tax	Quantity	Sales				Cost of Sales		Gross Profit			
				Nett ex	Tax	Nett inc	Discounts	Gross inc	%	Amount	%	Amount	%
Changed Mind													
202003 LATTE	3.30	0.30	-1.0000	-3.00	-0.30	-3.30	0.00	-3.30	13.81	-0.29	9.81	-2.71	90.19
202004 SHORT BLACK	3.40	0.31	-2.0000	-6.18	-0.62	-6.80	0.00	-6.80	28.45	-0.41	6.61	-5.77	93.39
Product Recall													
202005 LONG BLACK	3.50	0.32	-1.0000	-3.18	-0.32	-3.50	0.00	-3.50	14.64	-0.20	6.42	-2.98	93.58
202002 FLAT WHITE	3.20	0.29	-1.0000	-2.91	-0.29	-3.20	0.00	-3.20	13.39	-0.29	10.10	-2.62	89.90
202001 CAPPUCCINO	3.10	0.28	-1.0000	-2.82	-0.28	-3.10	0.00	-3.10	12.97	-0.29	10.44	-2.52	89.56
Expired													
201006 CHAI	4.00	0.36	-1.0000	-3.64	-0.36	-4.00	0.00	-4.00	16.74	-0.17	4.66	-3.47	95.34
			-7.0000	-21.73	-2.17	-23.90	0.00	-23.90		-1.66	7.66	-20.07	92.34

TalkBox Voucher Integration

TalkBox is an online communication service for marketing to your customers by Impact Data. For more information, please visit <https://www.impactdata.com.au/talkbox.html>.

The TalkBox app

- It allows the creation of compelling **campaigns** simply made, with our powerful editing tool that's as straightforward as drag and drop
- Whether you use one **channel** or a sequence of email, SMS, social and web; TalkBox helps you connect to your audience
- The true power of TalkBox is realised with our **automated communications** that drive your business without you lifting a finger, delivering time back to you
- A well-structured **journey** to welcome, win back or build customer spend or a data driven branching path, is the key that drives increased value for your business
- The integration of **Net Promoter Score** to create a customer feedback channel is powerful but when combined with Enlight your customer feedback is related to observational data such as weather conditions to highlight operational improvement opportunities
- Our **reporting** drives understanding of engagement and return on investment.

TalkBox Settings

You will need to sign up to the application before you can log in. Once you have access, go to https://talkbox.impactapp.com.au/users/sign_in and log in with your details.



Email

Password

Remember me

LOGIN

[Help, I've forgotten my password](#)

Signed out successfully.

idealpos 7 Update History

Once you have logged in, go to Tools > Vouchers.

The screenshot shows the IdealPos 7 web interface. At the top, there is a blue header with the 'TALKBOX' logo on the left and 'IdealPos' with a help icon and a power icon on the right. Below the header is a navigation bar with buttons for 'Dashboard', 'Communicate', 'Calendar', 'Contacts', 'Tools', and 'My Account'. Underneath this is a sub-navigation bar with buttons for 'Forms', 'Vouchers' (which is highlighted in blue), 'Feedback Survey', 'Branding', and 'Developers'. The main content area features a 'Vouchers' section with a blue header and a 'New Voucher' button. Below this is a table with two rows of vouchers. Each row has a 'Name' column and three action buttons: 'Show Report', 'Edit', and 'Delete'.

Name	Show Report	Edit	Delete
\$30 voucher	Show Report	Edit	Delete
Free Coffee	Show Report	Edit	Delete

idealpos7 Update History

Select New Voucher from the menu and fill out all fields that you want to use. When you have finished, select Create Voucher.

Forms

Vouchers

Feedback Survey

Branding

Developers

Add Voucher

Name

Used in TalkBox and the validation app, this is not shown to customers

Description

Used in TalkBox and the validation app, this is not shown to customers

Expiry

Never expires

Expires after days

Valid from to

Expiry message

Set up a message to be sent after a voucher expires

[Add an expiry message](#)

Redemption message

Set up a message to be sent after a voucher is redeemed

[Add a redemption message](#)

Reminder messages

Set up a message to remind people about their unused vouchers

[Add a reminder message](#)

User Data

This data will be available via the API

Key	Value
<input type="text"/>	<input type="text"/>



[Go Back](#)

Create Voucher

The voucher will be added to your list of vouchers, either past or present.

Free Cake Slice

Show Report

Edit

Delete

idealpos 7 Update History

Idealpos Settings for TalkBox

Go to File > Sales > Promotions > Coupons > Add > Description: Must be the same as TalkBox and is case-sensitive.

The screenshot shows the 'add coupon promotion' dialog box with the 'Coupon Design' tab selected. The dialog is divided into several sections:

- Description:** 'Free Cake Slice', Group: 'Promotions', POS: '>', Customer Type: '>', and 'Multiple Trips' checked.
- From/To Dates:** From '01/07/2017 00:00' to '01/07/2018 00:00'. Options for 'Continuous' (selected) and 'During Specific Times' are present.
- Discount Type:** '% Discount off Items' set to '100', with 'One Item Only' checked.
- Redeem at POS:** '>', Redeem from '01 Jul 2017 00:00' to '01 Jul 2018 00:00', and 'Days from Print Date' set to 'OR'.
- Apply Discount to:** 'All Items' (selected) and 'Only Items Below'.
- Trip Conditions Set 1:** 'Trip by Quantity' (selected), 'Buy' '0', 'of Anything' (selected), and 'of items below' (unselected).
- Trip Conditions Set 2:** 'Trip by Quantity' (selected), 'And Buy' '0', and 'of items below' (unselected).
- Item List:** A list containing 'DPT 115 CAKES'.
- Buttons:** 'Delete', 'Promotion Link Enquiry', 'Add Department', and 'Add Stock Item'.

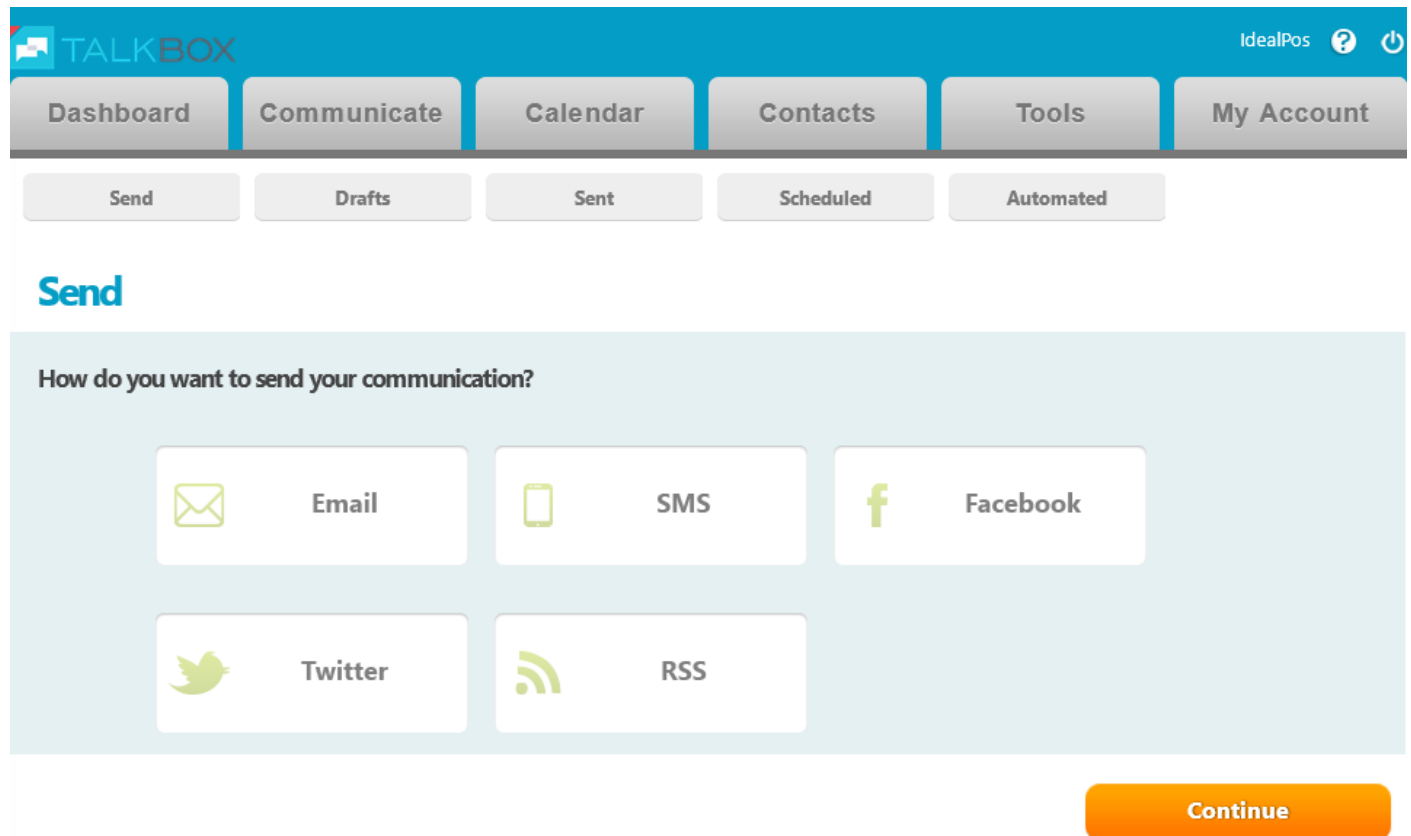
Go to Advanced tab > User-Defined Text: [TALKBOX].

The screenshot shows a 'User-Defined Text' field with the text '[TALKBOX]' entered.

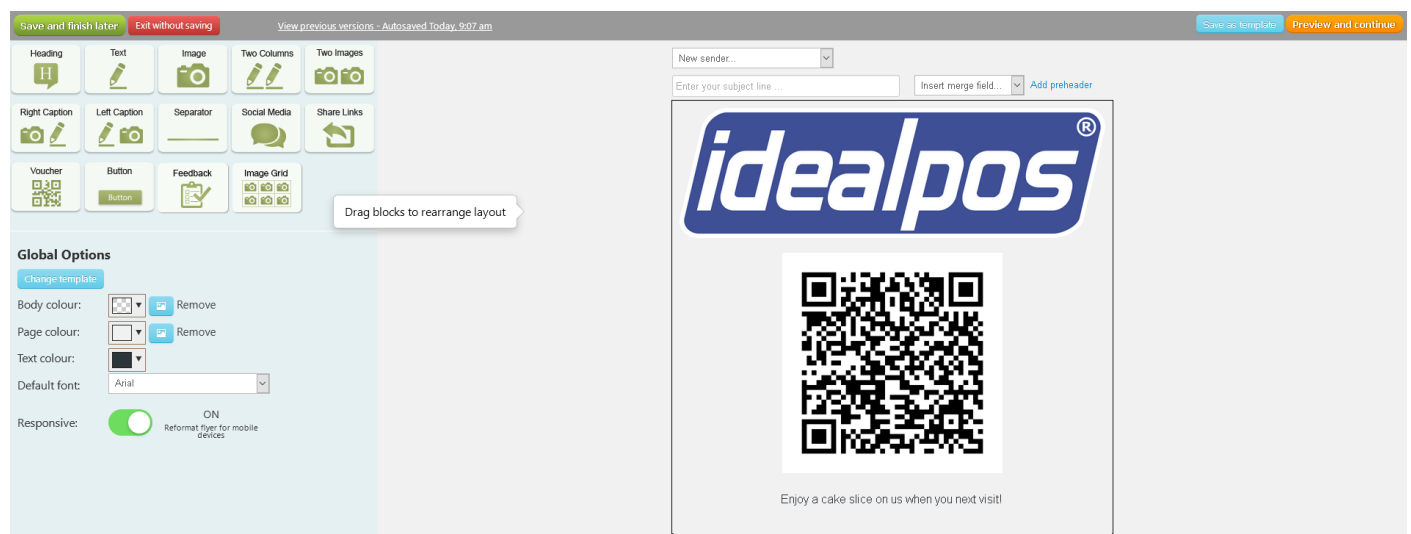
Send a TalkBox Coupon

Once you have created your coupon voucher in TalkBox and Idealpos, you need to send it out.

Go to TalkBox > Communicate > Select how you want to send the voucher.



Build your communication using one of the provided templates, or create your own.



When you are happy with the result, select to Preview and Continue.



idealpos7 Update History

View your email campaign in different device previews and press continue when you are happy.



idealpos7 Update History

Select which recipients will get your communication and select Continue.

TALKBOX IdealPos ?

Dashboard Communicate Calendar Contacts Tools My Account

Send Drafts Sent Scheduled Automated

Select recipients

Email Who When Confirm

Send this communication to:

All contacts

Selected contacts

ada|

All | None Showing 1 - 1 of 1 (filtered from 8) View 10 per page

	First Name	Last Name	Gender	Email Address	Mobile Number
<input type="checkbox"/>	Adam	Schell	Male	adam.schell@idealpos.com.au	

All | None Page 1 of 1

Filtered contacts

Paste in Email addresses and mobile numbers

A segment

Tags

This communication is being sent by **email**.
You will be sending: **8** emails

[Go back](#) [Save and finish later](#) [Continue](#)

idealpos 7 Update History

Select the time you want to send the communication, either Now, or choose the time in the future. Press continue once you are ready.

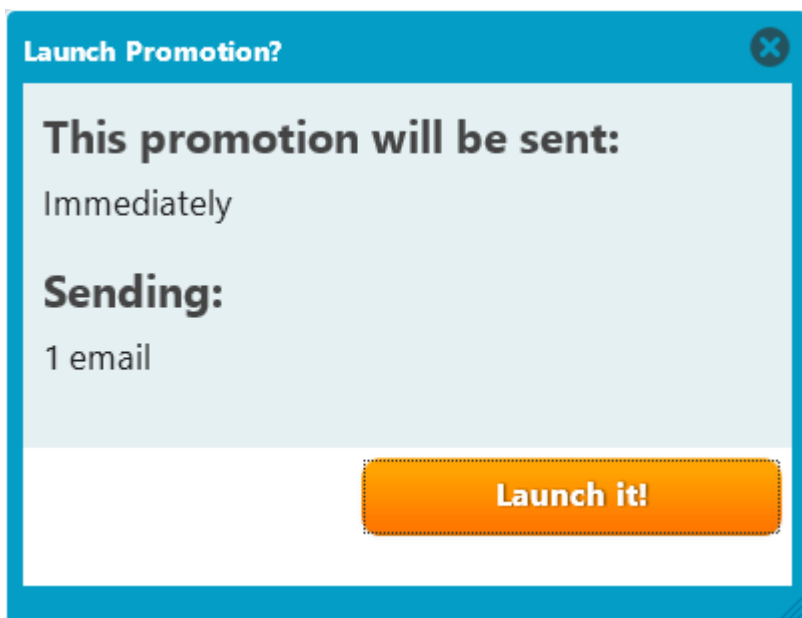
The screenshot shows the TALKBOX interface with a navigation bar at the top containing 'Dashboard', 'Communicate', 'Calendar', 'Contacts', 'Tools', and 'My Account'. Below the navigation bar are buttons for 'Send', 'Drafts', 'Sent', 'Scheduled', and 'Automated'. The main heading is 'Send time'. To the right of the heading are four buttons: 'Email' (green with a checkmark), 'Who' (green with a checkmark), 'When' (orange), and 'Confirm' (grey). Below this is a section titled 'When should this be sent?' with two radio button options: 'Now' (selected) and 'Later'. At the bottom left is a 'Go back' link and a 'Save and finish later' button. At the bottom right is a large orange 'Continue' button.

Confirm the details are correct and press Confirm to send.

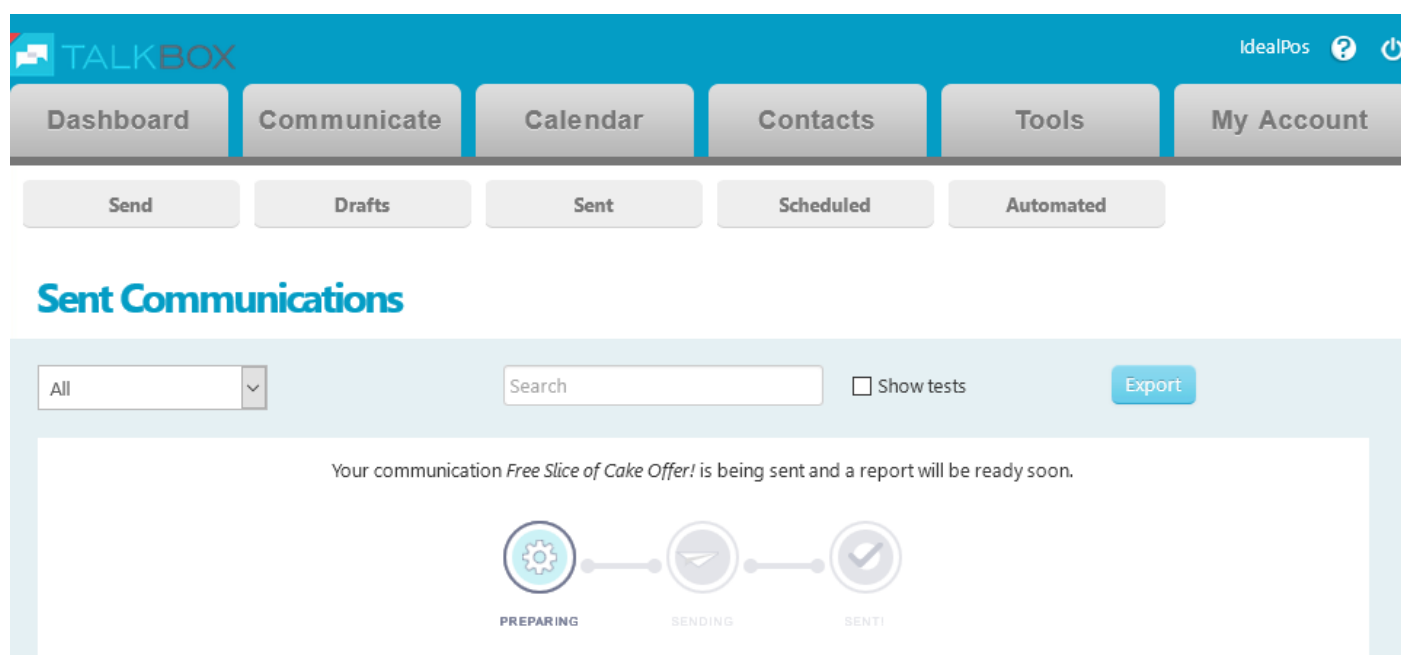
The screenshot shows the TALKBOX interface with the same navigation bar as the previous step. Below the navigation bar are buttons for 'Send', 'Drafts', 'Sent', 'Scheduled', and 'Automated'. The main heading is 'Confirm details'. To the right of the heading are four buttons: 'Email' (green with a checkmark), 'Who' (green with a checkmark), 'When' (green with a checkmark), and 'Confirm' (orange). Below this is a section titled 'You are sending to: All but 1 contacts, selected from database'. Underneath, it says '8 emails' and 'Remove'. There is a dropdown menu with 'Add a channel...' and a small arrow icon. Below that, it says 'This will be sent Immediately'. A large orange 'Confirm' button is centered. On the right side, there is a preview of a flyer titled 'Your flyer will look like this:'. The flyer features the 'idealpos' logo, a QR code, and the text 'Enjoy a cocktail on us when you're out!'. At the bottom of the flyer preview is a 'Send a test' button. At the bottom left of the entire interface is a 'Go back' link and a 'Save and finish later' button.

idealpos 7 Update History

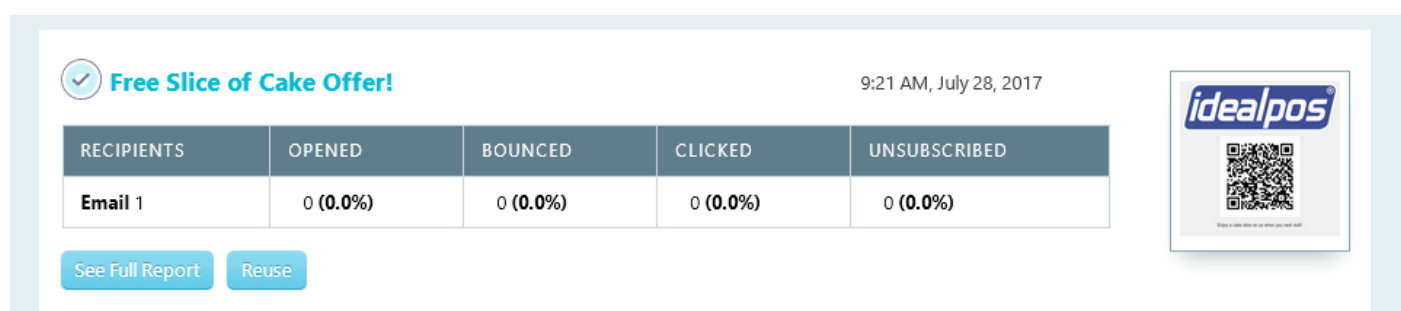
Select Launch It when you want to send.



The communication will be configured and sent.



Once sent, the details will display to show you the results.



Redeem a TalkBox Coupon

The customer will receive their voucher.



Enter a redeemable item into the sale and scan the voucher. The item will be discounted and voucher redeemed almost instantly.

LEMON TEA CAKE SLICE	1	7.50
-7.50 Free Cake Slice	1	
COUPON: Free Cake Slice		-7.50
Free Cake Slice	1	-7.50

idealpos 7 Update History

You can then go to TalkBox and check the reports on the redemptions.

The screenshot displays the TalkBox interface for an email campaign. At the top, there is a navigation bar with 'TALKBOX' and 'IdealPos' logos, and a menu with 'Dashboard', 'Communicate', 'Calendar', 'Contacts', 'Tools', and 'My Account'. Below this is a sub-menu with 'Send', 'Drafts', 'Sent', 'Scheduled', and 'Automated' options. The main section is titled 'Communication' and has a sub-tab for 'Email'. Under 'Email', there are four tabs: 'Overview', 'Recipients', 'Links', and 'Devices'. The 'Overview' tab is active, showing the subject 'Free Slice of Cake Offer!' and the status 'Email sent to 1 contact (all but 8 contacts, selected from database)'. A summary table shows: 1 (100.0%) Opened, 1 (100.0%) Clicked, 0 (0.0%) Bounced, and 0 (0.0%) Unsubscribed. To the right is a preview of the email content, featuring the 'idealpos' logo and a QR code with the text 'Enjoy a cake slice on us when you next visit!'. At the bottom, a bar chart titled 'Email Opens per 5 Minute Block' shows three bars at the 1.0 mark for the time blocks 09:20, 09:25, and 10:05.

Subject: Free Slice of Cake Offer!

Email sent to **1** contact (all but 8 contacts, selected from database)

1 (100.0%) Opened	100%
1 (100.0%) Clicked	100%
0 (0.0%) Bounced	0%
0 (0.0%) Unsubscribed	0%

Email Opens per 5 Minute Block

Time Block	Opens
09:20	1
09:25	1
09:30	0
09:35	0
09:40	0
09:45	0
09:50	0
09:55	0
10:00	0
10:05	1

Users

Permission for Adding Supplier Codes applied in Stock Purchases screen

The File > Stock Control > Stock Items > Supplier Codes User Permission is now being applied to Stock Purchases - when you browse Supplier Stock Codes it hides the "New" button.

The screenshot displays the 'users' management interface. On the left, the user 'MANAGER' is selected, with a 'Change Password' button and fields for 'Password' and 'Confirm'. Below this, there is an 'Override Permissions from Other User' dropdown set to 'Own Permissions'. The central area features a hierarchical tree of permissions. The 'File' category is expanded to show 'Stock Control', which is further expanded to 'Stock Items'. Under 'Stock Items', the 'Supplier Codes' permission is checked and highlighted in blue. Other permissions under 'Stock Control' include 'Locations', 'Add', 'Delete', 'Enquiry', 'Modify', 'Alternate Codes', 'Edit Mode', 'Locations', 'Cost Prices', 'Write-Off Categories', and 'Stock Items by Location'. The 'Sales' category includes 'Purchases', 'Customers', 'Suppliers', 'Price Book', and 'Backup Database'. The 'Enquiry' category includes 'Transactions', which is expanded to show 'Stock Control' with sub-permissions: 'Stock Received', 'Mod Date', 'Process', 'Email', 'View', 'Export', 'Stock Write-Offs', 'Stock Transfers', and 'Manufacture Items'. A search bar is located on the right side of the interface. At the bottom, there are buttons for 'Collapse All', 'Print', and 'Save'.

Yes/No Options

Don't send Refunds to Kitchen Printers

When using a Kitchen Monitor or whenever the kitchen just doesn't need to know there has been a refund of a product, you can toggle this to happen.

Go to Setup > Yes/No Options > Receipt/Kitchen > Don't Send Refunds to Kitchen Printers.

Don't Send Refunds to Kitchen Printers