

Ideal Handheld v2

Ideal Handheld (IH) enables a waiter to remotely take table orders on the go throughout the restaurant. This version has been updated to include a lot of new features which include a mode to allow guests to order from the device themselves.



IH uses an app installed on an iPod, iPhone or iPad through a host terminal. IH is an add-on module to Idealpos and needs relevant licensing on the host terminal. Idealpos and POSServer must both be running when using IH. POSServer does not need to be on the host terminal. There can be as many host terminals as required throughout the establishment.

Ideal Handheld v2 uses the POS Screen Tabs to connect to the database, but can also use Menus if they have already been setup. The benefit of using tabs is that you don't have to do any additional programming from your POS screen. Using an iPad you can also use the Table Map with table status indicators the same as on the POS screen.



Handheld Options v2

Global Options

Any terminal with the IH License is able to access and use additional settings from Idealpos. Any changes that are made in this area of the program will require the Handheld to exit and restart the Ideal Handheld software before the changes made will be visible.

Go to Setup > Global Options > Miscellaneous > Ideal Handheld.

The screenshot shows the 'Ideal Handheld' configuration window. It includes the following elements:

- Enable v7 Features:** Three checkboxes for 'Enable v7 Features', 'Menus in Code Order', and 'Use Price Level from Menu', all of which are currently unchecked.
- Price Level:** A text input field containing the value '1'.
- Tab Layer Colours:** A vertical list of 18 color swatches labeled 'Tab 1' through 'Tab 18'. Tabs 1-8 have distinct colors (yellow, red, blue, brown, pink, green, orange, purple), while tabs 9-18 are white.
- Notes:** A large, empty white text area for entering notes.
- Server Settings:** Fields for 'StarrSvr IP Address', 'StarrSvr Price Level' (set to 0), 'StarrSvr Points per Dollar', and 'Point Redemption Value' (set to 0).
- Print Group Shifts:** Two dropdown menus labeled 'Print Group Shift 1' and 'Print Group Shift 2'.

Enable v7 Features – This allows you to connect to the database and use the POS Screen Tabs to create the items on the handheld rather than menus.

Menus in Code Order – Menus are sorted by default in Alphabetical Order, you can change this setting by checking this box.

Price Level – You can set the default price level to be used by the handheld. If no price level is selected, Price Level 1 will be used.

Use Price Level from Menu – The price level will be selected from the menu that is being used at the current time.

Notes – This function is used to display the "Specials of the Day" etc. Use the tilde ~ special character to force the items onto a new line on the handheld.

Print Group Shift 1/2 – Once setup swipe the item onscreen to the right & it will display the print group shifts.

Tab Layer Colours – These colours represent the 18 different tabs you use at the bottom of the POS Screen layout. Only the tabs with stock items on them will display on the app.

POS Terminal Options

Other options are available for the handheld to use are direct from the terminal the handheld is licensed. The handheld will by default, use the printing options of the host pc. Under some circumstances the handheld can print to the kitchen and the terminal will not. This is setup per POS Terminal and uses Sales Categories linked to Sales Category Descriptors.

The Stock Item must be configured to not have an order printer selected, which disables printing from the POS Terminal.

Go to File > Stock Control > Stock Items > Modify > Printer Settings.

Printer Settings

- Receipt Printer
- Kitchen Printer
- Bar Printer
- Kitchen Printer 3
- Kitchen Printer 4
- Kitchen Printer 5
- Kitchen Printer 6
- Kitchen Printer 7
- Kitchen Printer 8
- Kitchen Printer 9
- Kitchen Printer 10
- Kitchen Printer 11
- Kitchen Printer 12

Check the Department Code the Stock Item is linked to.

Stock Code	1152	Department	45	>	COFFEE / TEA
Description	flat white	(10)	Scan Code		Auto
Description 2	flat white	(10)			

Go to File > Sales > Departments > Modify the Department the Stock Item was linked to (Coffee/Tea) > Ensure the Sales Category is linked to Beverage.

Code 45

Description COFFEE / TEA

Sales Category BEVERAGE

Print Group BEVERAGE

GL Code

 Sales Prompt / Inhibit Pre-paid Sales

Direct Department Sale

Price 0

Rate 0 per

- Non-Turnover
- Scale
- GST
- GST FREE
- Not Defined
- Not Defined
- Not Defined

Stock Item Points

- Inhibit Points Accrual
- Inhibit Purchase with Points
- Print Promotional Tickets

Promotional Group 0

Save

Go to File > Sales > Sales Categories > Modify the Sales Category the Department was linked to (Beverage) > Ensure it has been selected for 'Add to BEVERAGE Total'.

sales categories ✕

Code

Description

Add to FOOD Total

Add to BEVERAGE Total

Save

Go to Setup > POS Terminals > Modify the selected terminal > Miscellaneous > Handhelds.

Handhelds

Force Food to Print

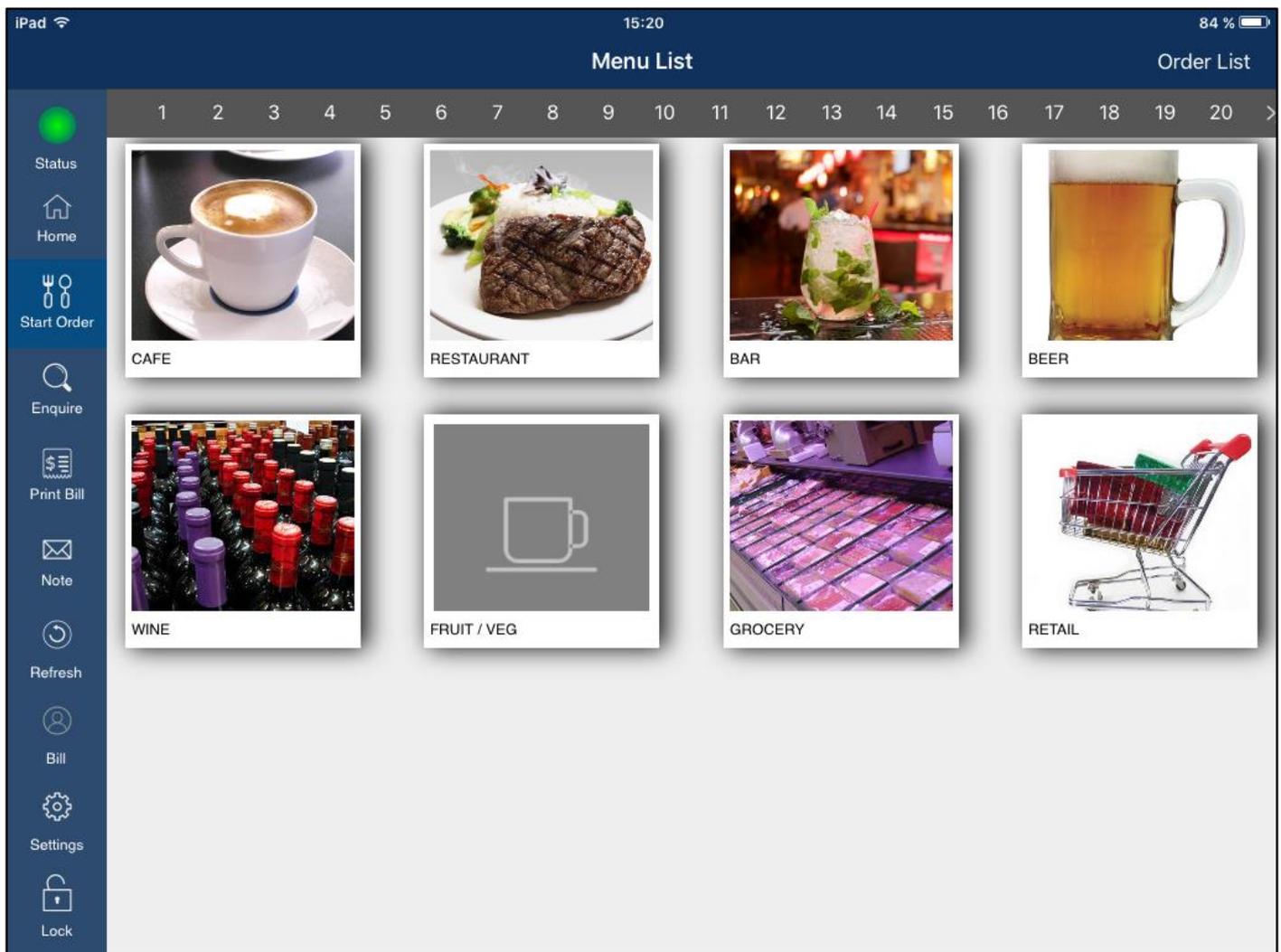
Force Drinks to Print

Item Graphic Location

Handheld Background

When a Flat White is ordered through the POS Terminal, no kitchen docket will print, however, when ordered through the handheld device, the docket will be printed automatically.

To use Item Graphics and Table Map (Handheld Background) images they need to be hosted on the web. Link to their locations so they can display on the iPad app using v7 features. Item Graphics will only display for POS Screen Tabs and Menus when the images are named the exact same as the Tab or Menu you want them to represent. Beer.jpg for Beer, etc.



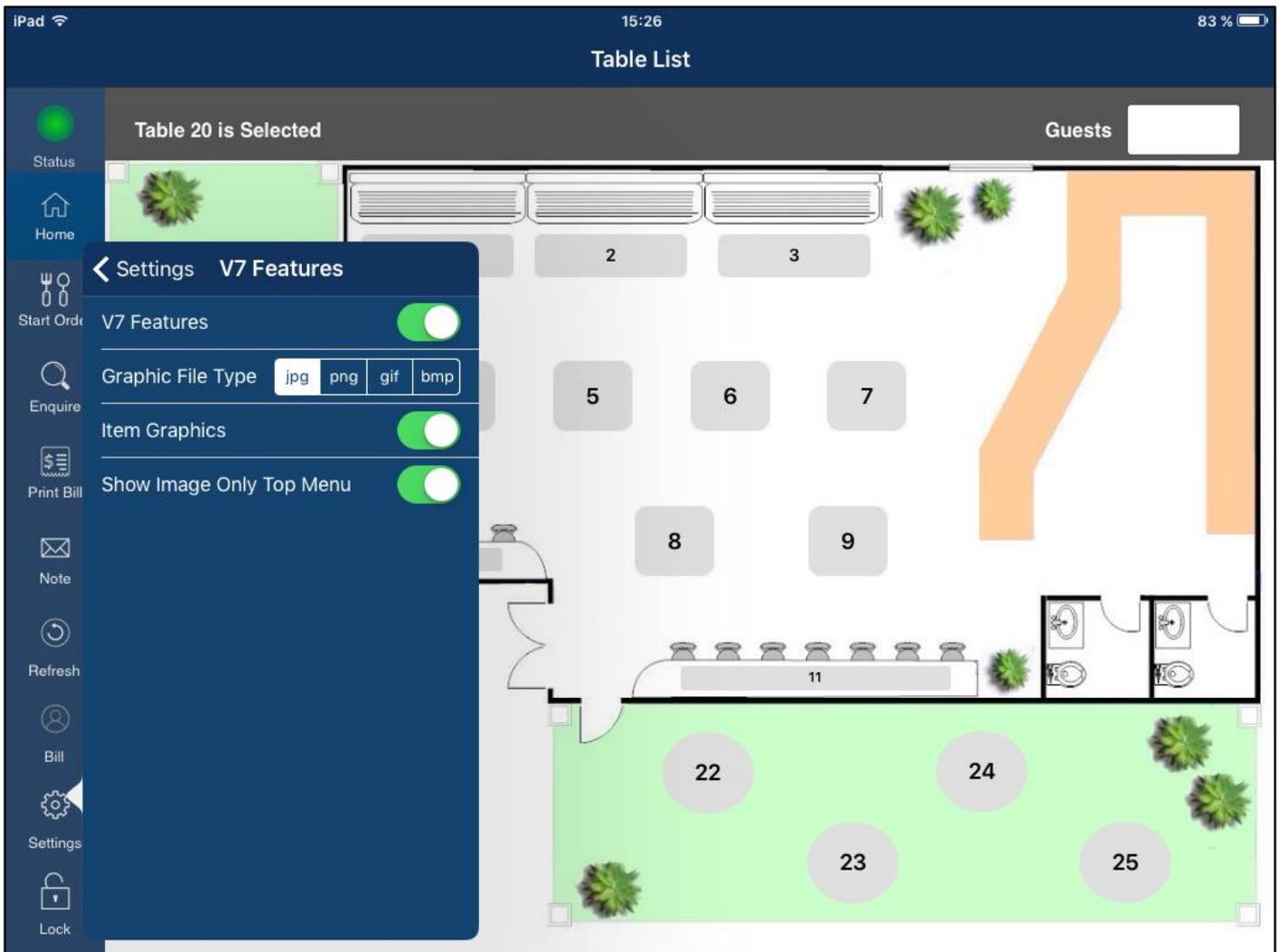
User Registration

The Ideal Handheld Module is used to define how many handheld devices will be connected to a terminal in the registration. The number of devices is indicated by the number next to the IH (IH1) in the registration options. It is a requirement of this module that Restaurant (RST) module is also installed. You will also need to ensure there is a table map with programmed tables. Ideal Handheld *will not* work without at least one table.

If you have a licence for 3 handhelds (IH3) in your venue, this means you can use any 3 devices with the app installed. If a staff member is using their own device, and leaves the venue without logging out of the app, their device will still be using one of the 3 licences available to you. To unlock devices and allow new devices to connect, restart the POS software on that terminal. All connections will drop and allow new devices to connect.

Handheld POS Screen Layout and Menus v2

Ideal Handheld v2 will use the POS Screen Layout stock items, grouped by the tabs used to save you programming menus. You need to select both Idealpos v7 Features in the app and in POS Terminal Settings for this to take place. Once you have done this, any stock item that is on a tab will display within the app the same as menus do, only better. All grids will step through the same way allowing staff to be familiar with the layout as soon as it is implemented.



Ideal Handheld can also use Menus, to display the items on the device. Any items that you want to display on the device should be grouped into corresponding menus. These menus then need to be linked to the default Menu 999. More information on Menus can be found in the POS Screen Setup Help Guide.

Add items to menus, and menus to the Waiter Pad menu by going to Setup > POS Screen > Menus > Add/Modify.

pos screen menus		Code Search	>	S	×
Code	Description				
42	Milk				
43	Grocery				
44	Confectionary				
45	Cigs				
46	Bread Products				
47	Frozen				
48	Drinks				
49	Stationery				
50	Chilled				
51	Chips				
52	Icecream				
53	Bread Choice				
54	Butter Choice				
55	1st Topping				
56	2nd Topping				
57	3rd Topping				
58	4th Topping				
59	More Toppings				
60	Meat choice 1				
61	Spreads 1				
62	Spreads 2				
63	Spreads 3				
64	Meat Choice 2				
65	Sandwich Options				
66	Salad				
67	Without				
68	Coffee Options				
69	Beer Stubby				
70	Beer 7oz				
71	Beer Middy				
72	Beer Schooner				
73	Beer Jug				
999	Handheld Menu				

74 records

Items Delete Add Modify

The menus that we want to be able to access through the handheld are the only ones that we have programmed to be visible here.

menu items			
Code	Description	Stock Item	Menu Link
1	Coffees		Coffees
2	Soft Drinks / Juices		Soft Drinks / Juices
3	Beer		Beer
4	Wine		Wine
5	Entree		Entree
6	Main Meals		Main Meals
7	Desserts		Desserts
8	Cheese		Cheese

Delete Add Modify

iPhone and iPod Screens v2

Main Screen

The main program screen provides you multiple choices on how to use the Ideal Handheld program. The screen will look different depending on if you are using an iPad or a smaller screen device. This section details the smaller screen devices.

Three Horizontal Lines – Opens the screen to perform advanced functions such as Settings, Change Password, About and Log out.

Clerk – Select the Clerks from the drop down menu provided.

Guests – This button will only display if selected in the Settings. This will allow you to enter the number of guests seated on the table.

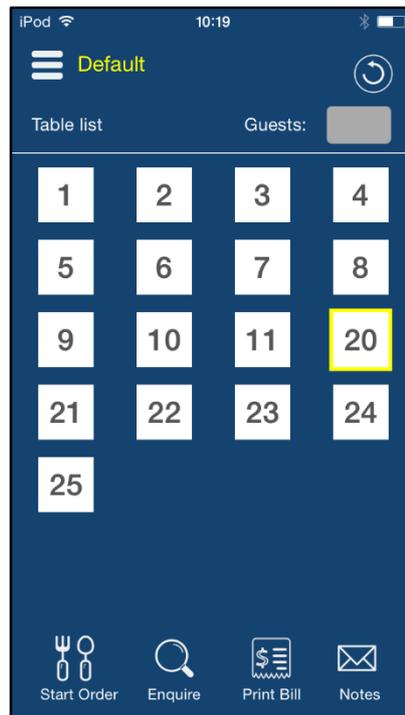
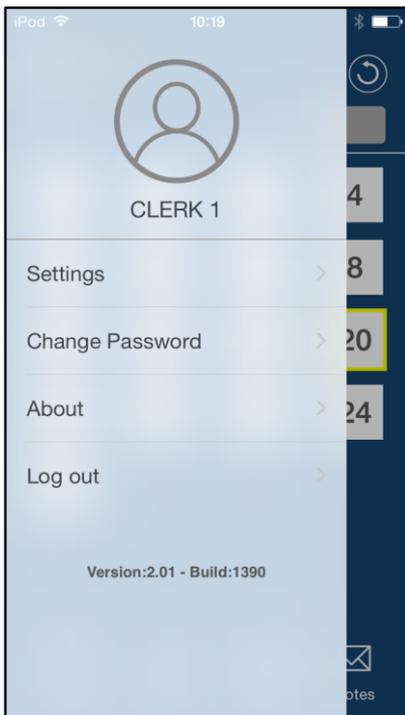
Table – Select the table from the grid selection.

Start Order – Will open the selected Table and allow items to be added.

Enquire – This button will open the table details of all items that have been placed on the table.

Print Bill – Select a table number and press this button to print a bill to the default receipt printer.

Notes – This button is where specials or other information can be displayed.



Setup Screen

Before you will be able to use Ideal Handheld you will need to set some options that enable you to connect to the host PC. Before you can access the settings you will need to enter a password. To do this, swipe your finger without lifting it from the device across 3 or more dots to make a pattern. This is your password.

Server IP

This field *must* contain the IP Address of the terminal that has the IH license.

Server Port

6983

Root Menu Code

Enter the Menu Code that corresponds to the Main Menu Code that you will be linking to in Idealpos. By default this is set to 999. If you are using V7 Features you do not need to have anything in this field as the items will be built from the POS Screen Layout.

Accumulate Items

Select if you want items to accumulate on the handheld.

Enable Connection

Allows you to use the app without any orders being sent to the kitchen.

Hide Guest Field

Select this option to enter the amount of guests that are seated at the table.

Hide Seat Selection

This option will not allow seat buttons to be displayed.

Menu in Code Order

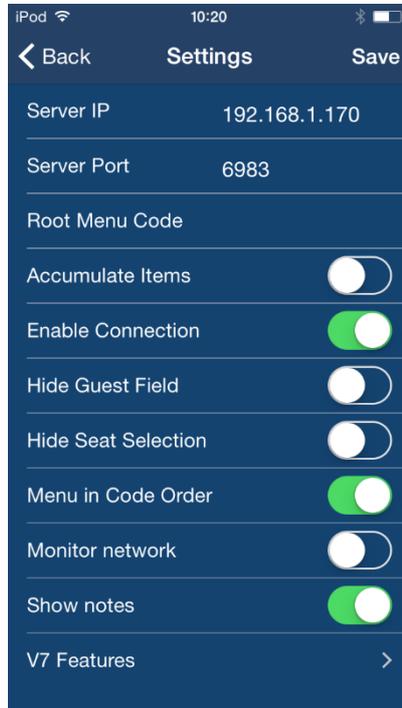
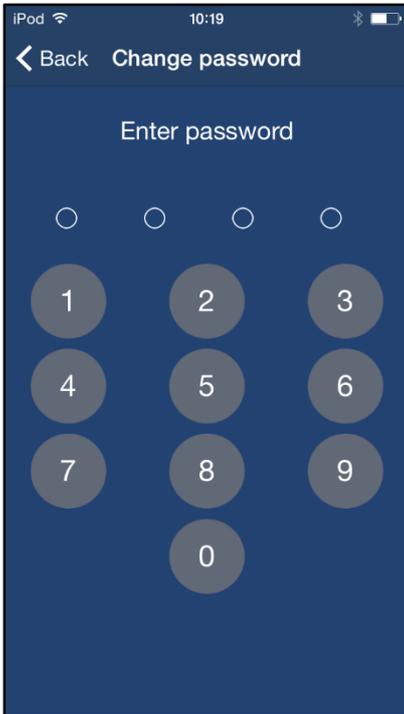
By default the menus will display in alphabetical order.

Monitor Network

Displays network status of the device if required.

Show Notes

This option will allow you to keep the specials on the device so staff have quick access.



V7 Features

This screen allows you to turn on advanced Idealpos Version 7 features that will build the items in the app from the POS Screen Layout tabs. This option needs to be selected in both the app and Idealpos 7.

V7 Features

Graphic File Type

This needs to be turned on if you want to link the app to Idealpos 7.

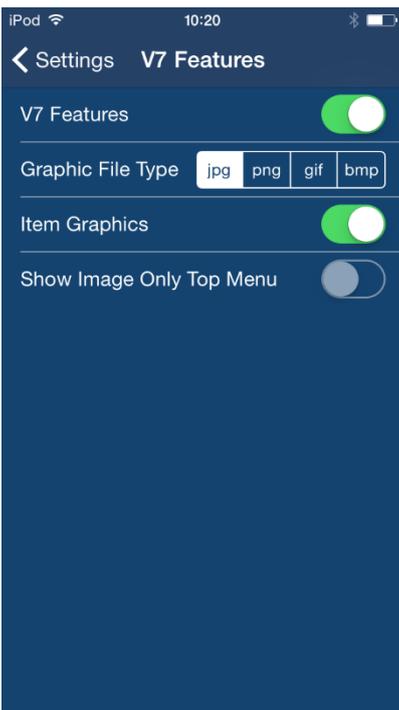
Select from .jpg, .png, .gif or .bmp for the item images.

Item Graphics

Select if you want to use images for the items.

Show Image Only Top Menu

This option will display images on the very top menu only if selected

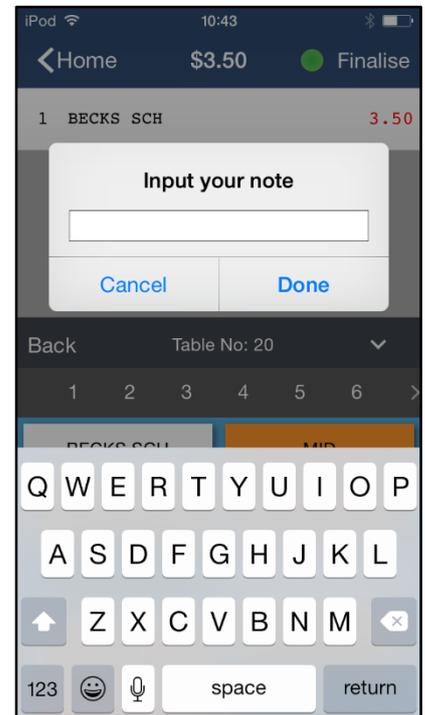
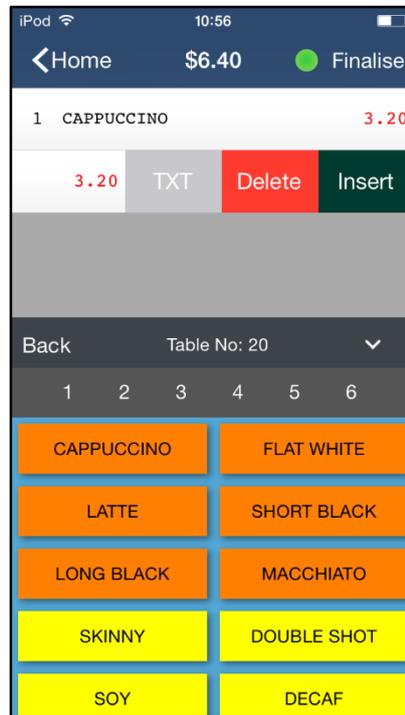
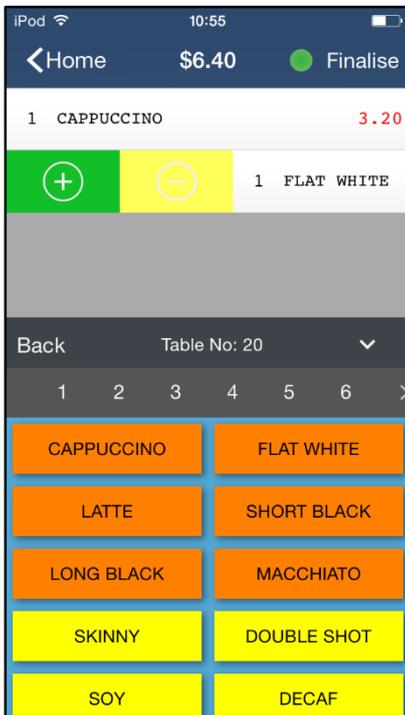


Order Screen

This screen allows you to enter items to the table and perform multiple actions.

Total Ordered This is the current total of all ordered items.

- Item Entry** This is the area that will display the items that are entered.
- Table Number** This is the number of the table placing the order.
- Back** Return you to the previous screen.
- + -** This allows you to add/subtract the quantity of items by multiples of 1. Swipe right to access.
- TXT** This button allows you to add text to the item. Swipe left to access.
- Delete** This allows you to delete the item from the table. Swipe left to access.
- Insert** This will allow you to insert an item that might print out of order.
- Finalize** This will finalize the sale to the table.
- Seat Numbers** This will allocate the selected item to a seat number.
- Menus** This will display the menus to select the items.



iPad and iPad Mini Screens v2

Main Screen

The main program screen provides you multiple choices on how to use the Ideal Handheld program. The screen will look different depending on if you are using an iPad or a smaller screen device. This section details the larger screen devices.

Home – This button returns you to the table map screen.

Start Order – This button will allow you to add items to a table. You need to select a table before you can start an order.

Enquire – This button will open the table details of all items that have been placed on the table.

Print Bill – Select a table number and press this button to print a bill to the default receipt printer.

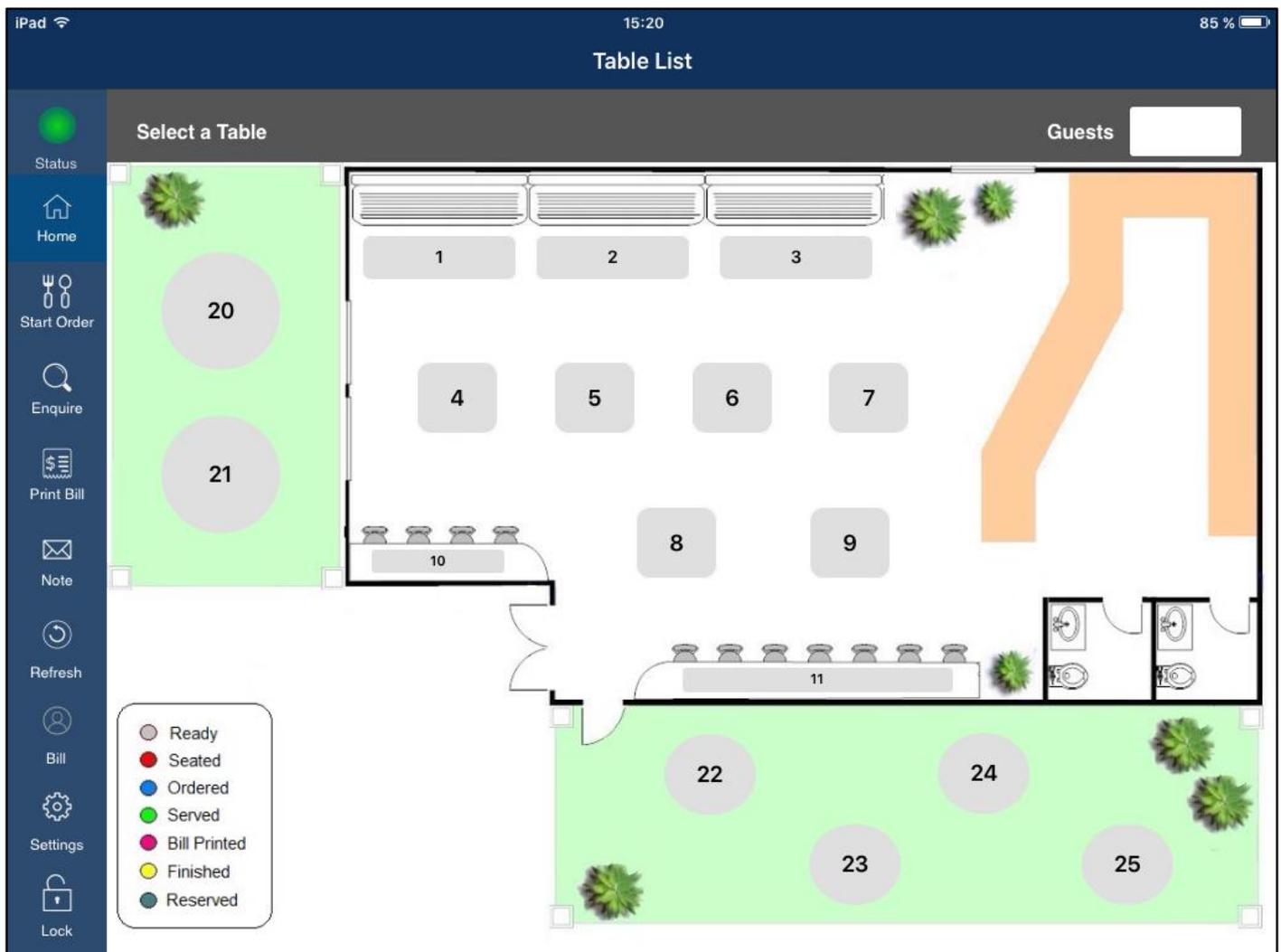
Note – This button is where specials or other information can be displayed.

Refresh – This button will refresh the screen to ensure that the tables are correctly displayed.

Clerk – Select the Clerks from the drop down menu provided. The button will be named the clerk that is currently logged in.

Settings – Opens the screen to perform advanced functions such as Settings, Change Password, About and Log out.

Lock – This button will lock the screen in a mode that allows orders to be entered onto a table, but cannot access other tables without the device's password being entered. This can be used to give to the customer to enter their own meals while the staff clear other tables.

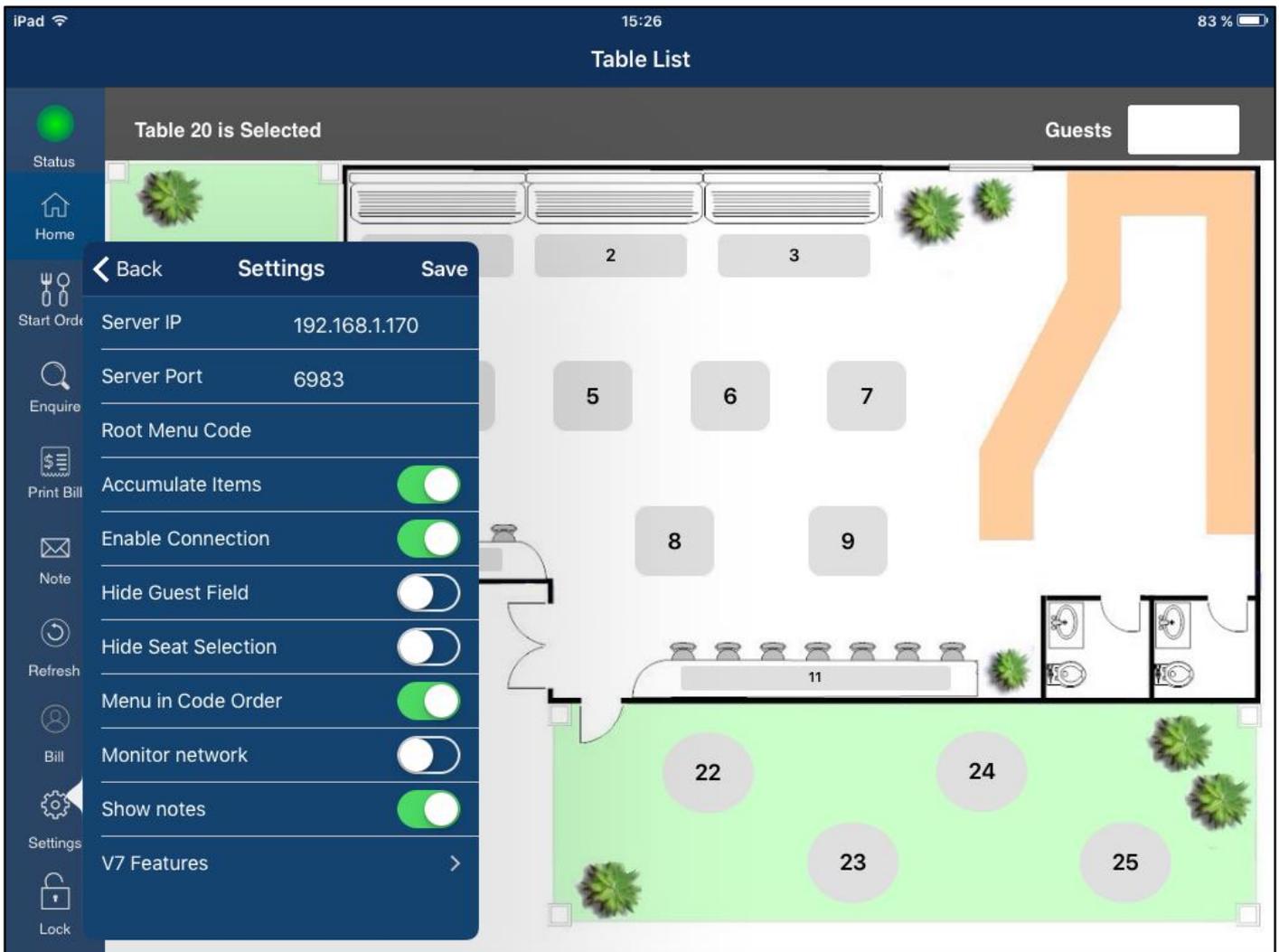


Settings Screen

Before you will be able to use Ideal Handheld you will need to set some options that enable you to connect to the host PC. Before you can access the settings you will need to enter a password. To do this, swipe your finger without lifting it from the device across 3 or more dots to make a pattern. This is your password.

Server IP	This field <i>must</i> contain the IP Address of the terminal that has the IH license.
Server Port	6983
Root Menu Code	If using menus, enter the Menu Code that corresponds to the Main Menu Code that you will be linking to in Idealpos. By default this is set to 999. If you are using V7 Features you do not need to have anything in this field as the items will be built from the POS Screen Layout.
Accumulate Items	Select if you want items to accumulate on the handheld.
Enable Connection	Allows you to use the app without any orders being sent to the kitchen.
Hide Guest Field	Select this option to enter the amount of guests that are seated at the table.
Hide Seat Selection	This option will not allow seat buttons to be displayed.
Menu in Code Order	By default the menus will display in alphabetical order.
Monitor Network	Displays network status of the device if required.
Show Notes	This option will allow you to keep the specials on the device so staff have quick access.
V7 Features	This will expand to another menu allowing you to make further options for use with Idealpos

version 7 software only.



V7 Features

This screen allows you to turn on advanced Idealpos Version 7 features that will build the items in the app from the POS Screen Layout tabs. This option needs to be selected in both the app and Idealpos 7.

V7 Features

Graphic File Type

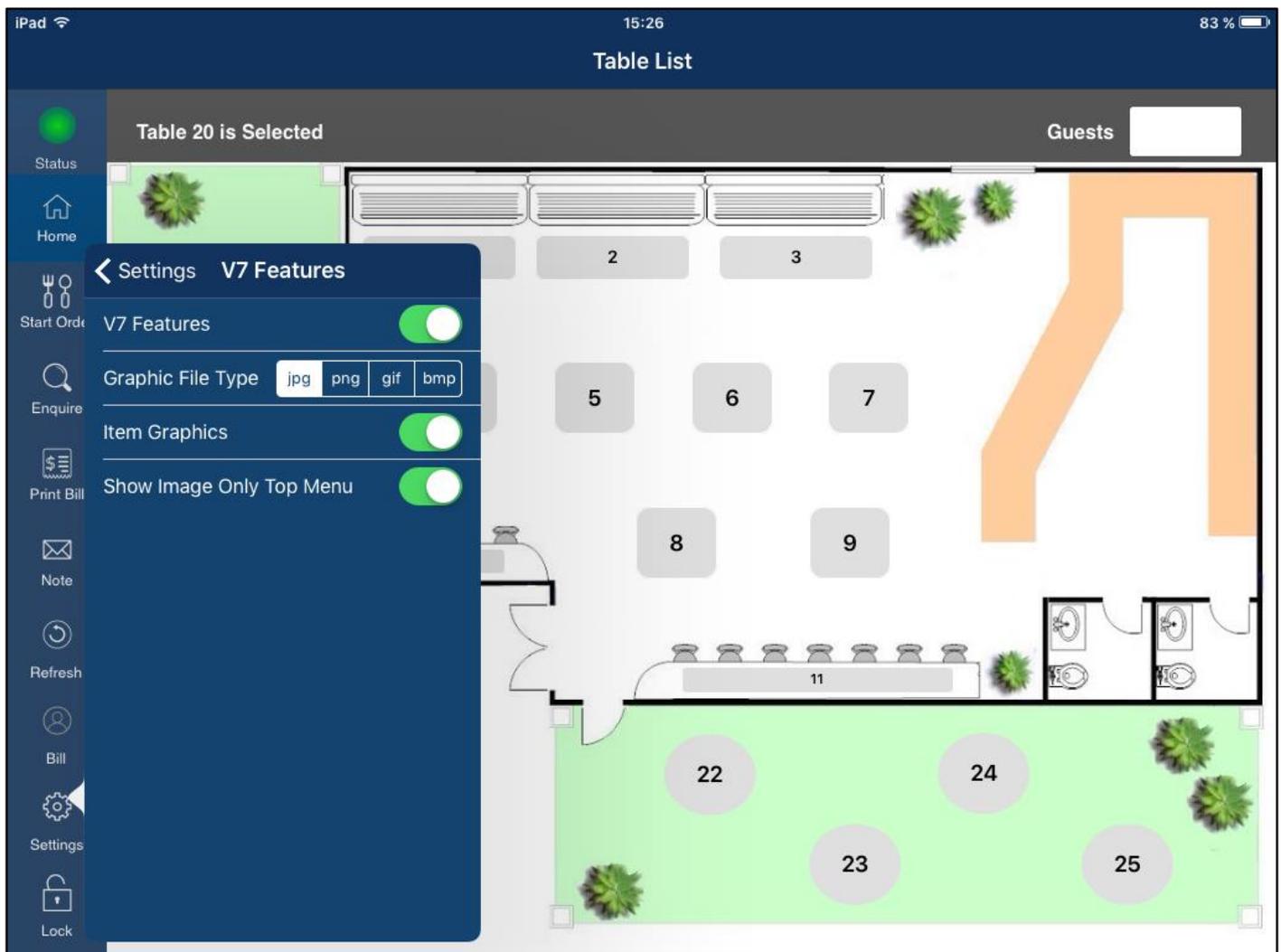
This needs to be turned on if you want to link the app to Idealpos 7.
Select from .jpg, .png, .gif or .bmp for the item images.

Item Graphics

Select if you want to use images for the items.

Show Image Only Top Menu

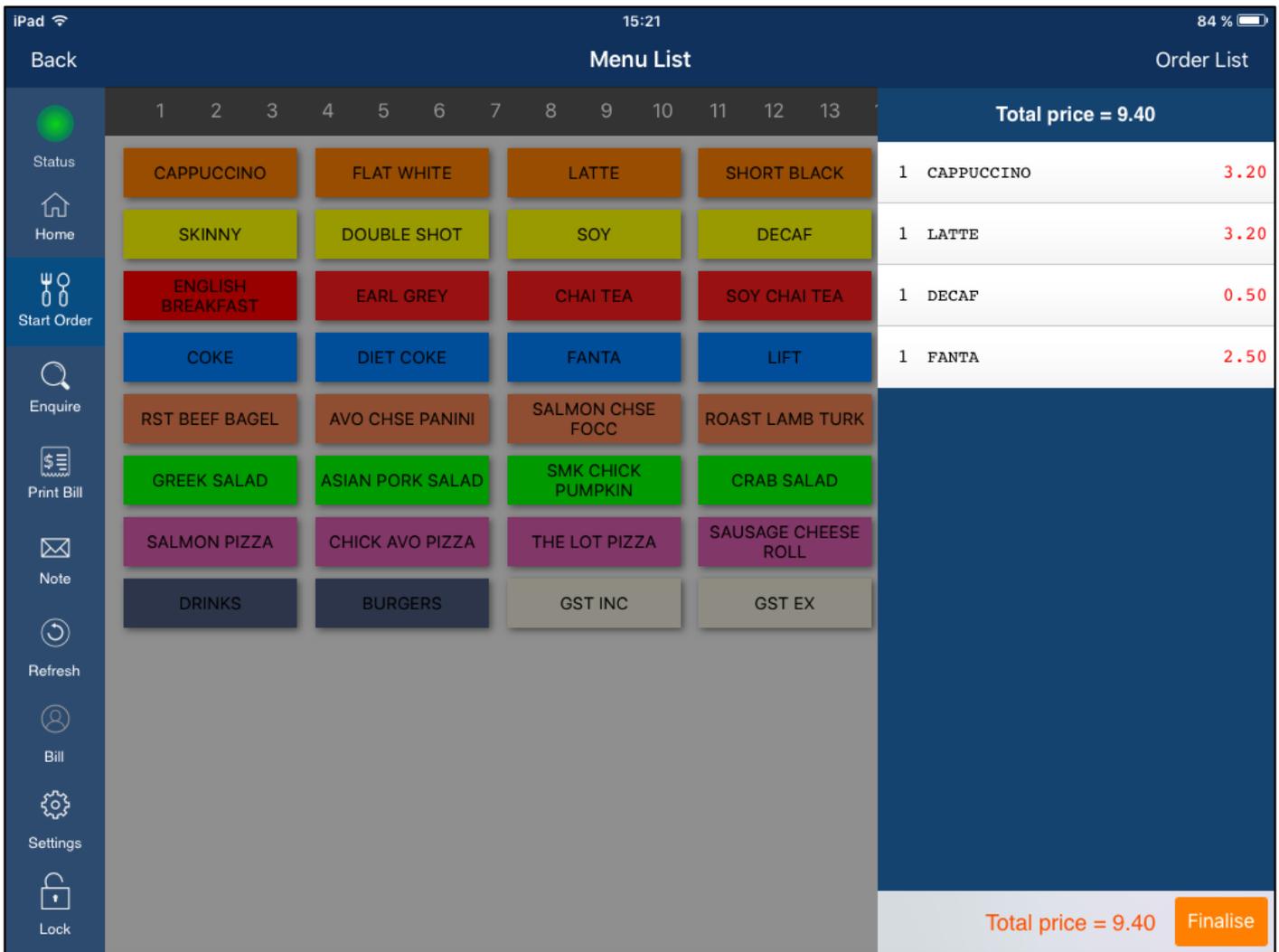
This option will display images on the very top menu only if selected



Order Screen

This screen allows you to enter items to the table and perform multiple actions.

- Total Price** This is the current total of all ordered items.
- Menu List** This will display the menus to select the items.
- Order List** This is the area that will display the items that are entered.
- Table Number** This is the number of the table placing the order.
- Back** Return you to the previous screen.
- + -** This allows you to add/subtract the quantity of items by multiples of 1. Swipe right on an item to access.
- TXT** This button allows you to add text to the item. Swipe left on an item to access.
- Delete** This allows you to delete the item from the table. Swipe left on an item to access.
- Insert** This will allow you to insert an item that might print out of order.
- Finalize** This will finalize the sale to the table.
- Seat Numbers** This will allocate the selected item to a seat number.



Using Ideal Handheld v2

To begin a sale, you can select a Clerk from the drop down menu or use the default clerk selected.

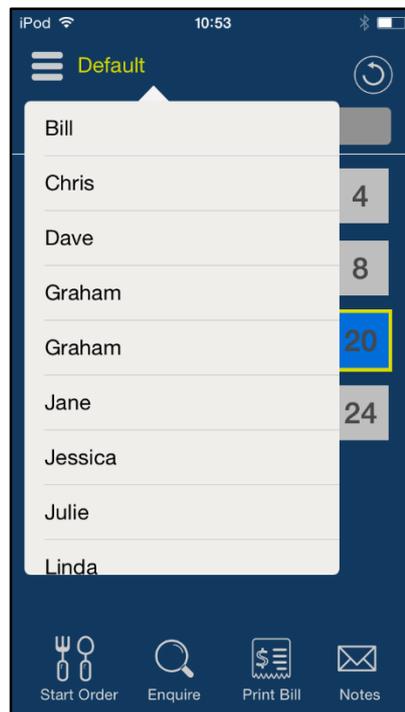
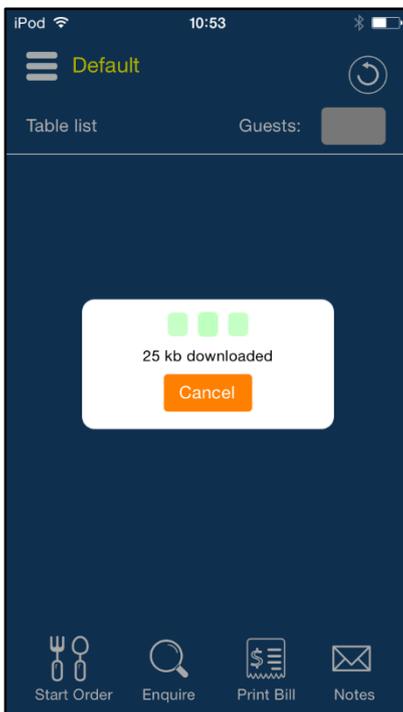
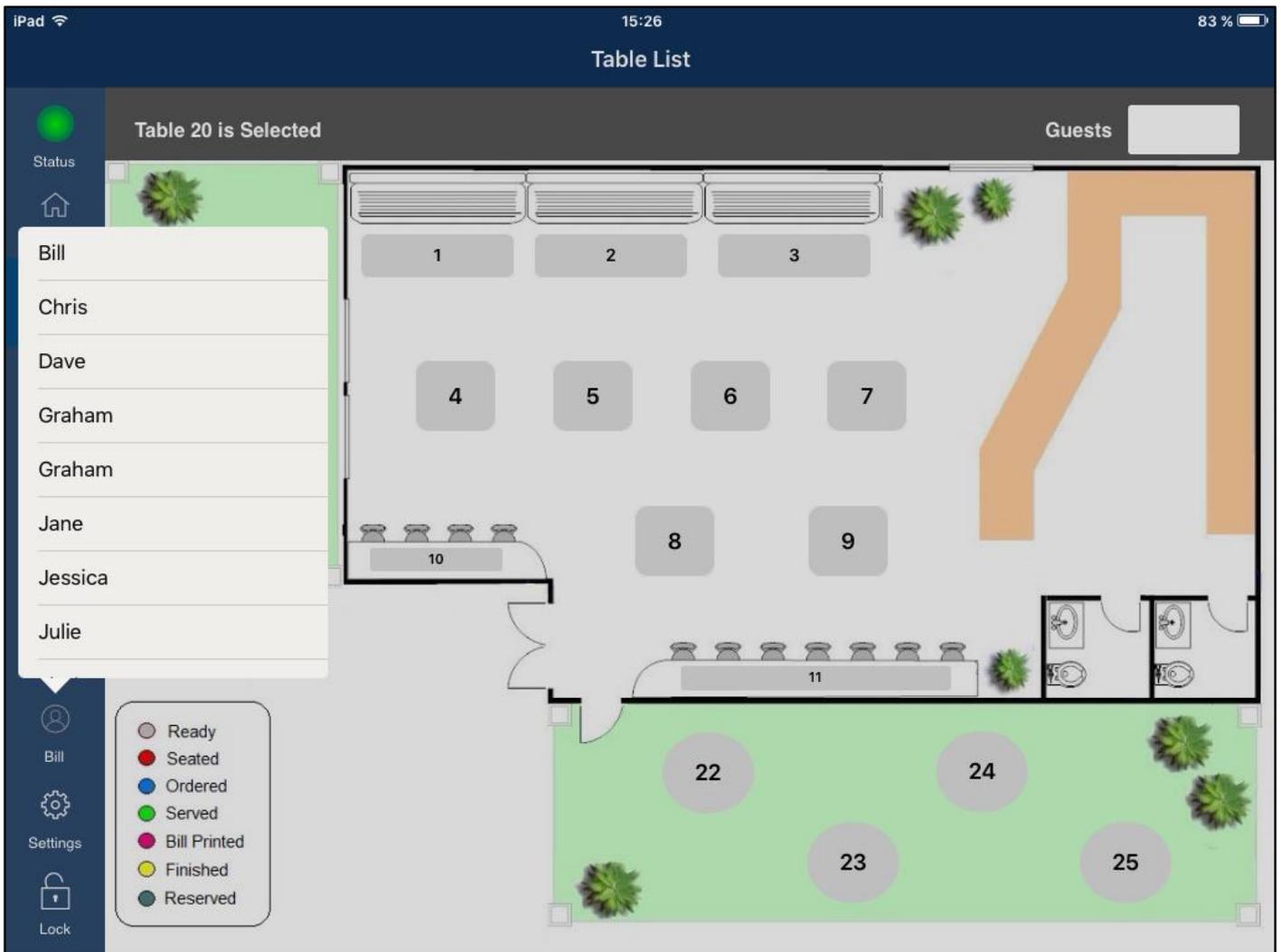


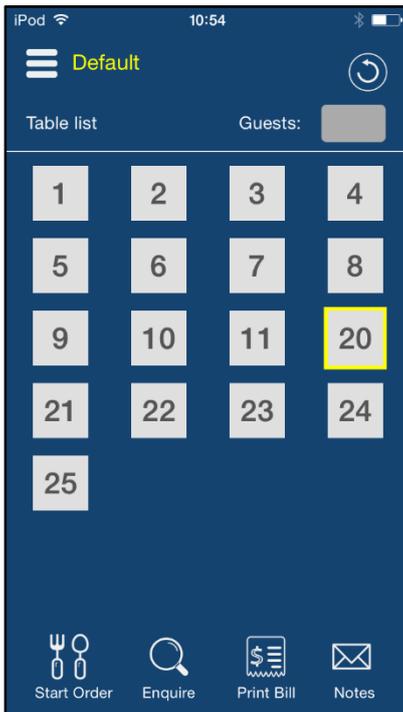
Table List

-  Status
-  Home
-  Start Order
-  Enquire
-  Print Bill
-  Note
-  Refresh
-  Bill
-  Settings
-  Lock


220 kb downloaded
[Cancel](#)

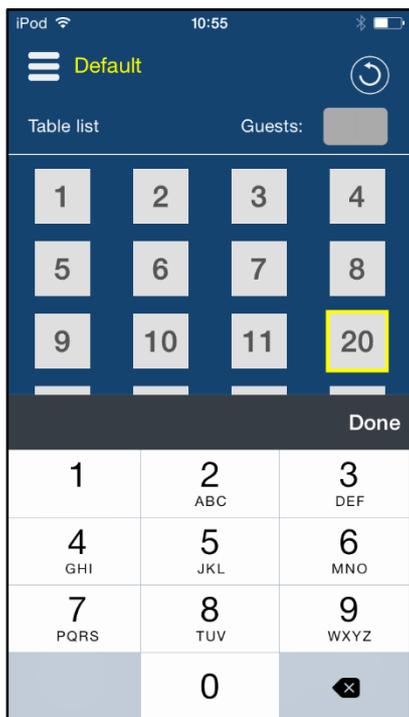


Select a table from the grid layout or table map.

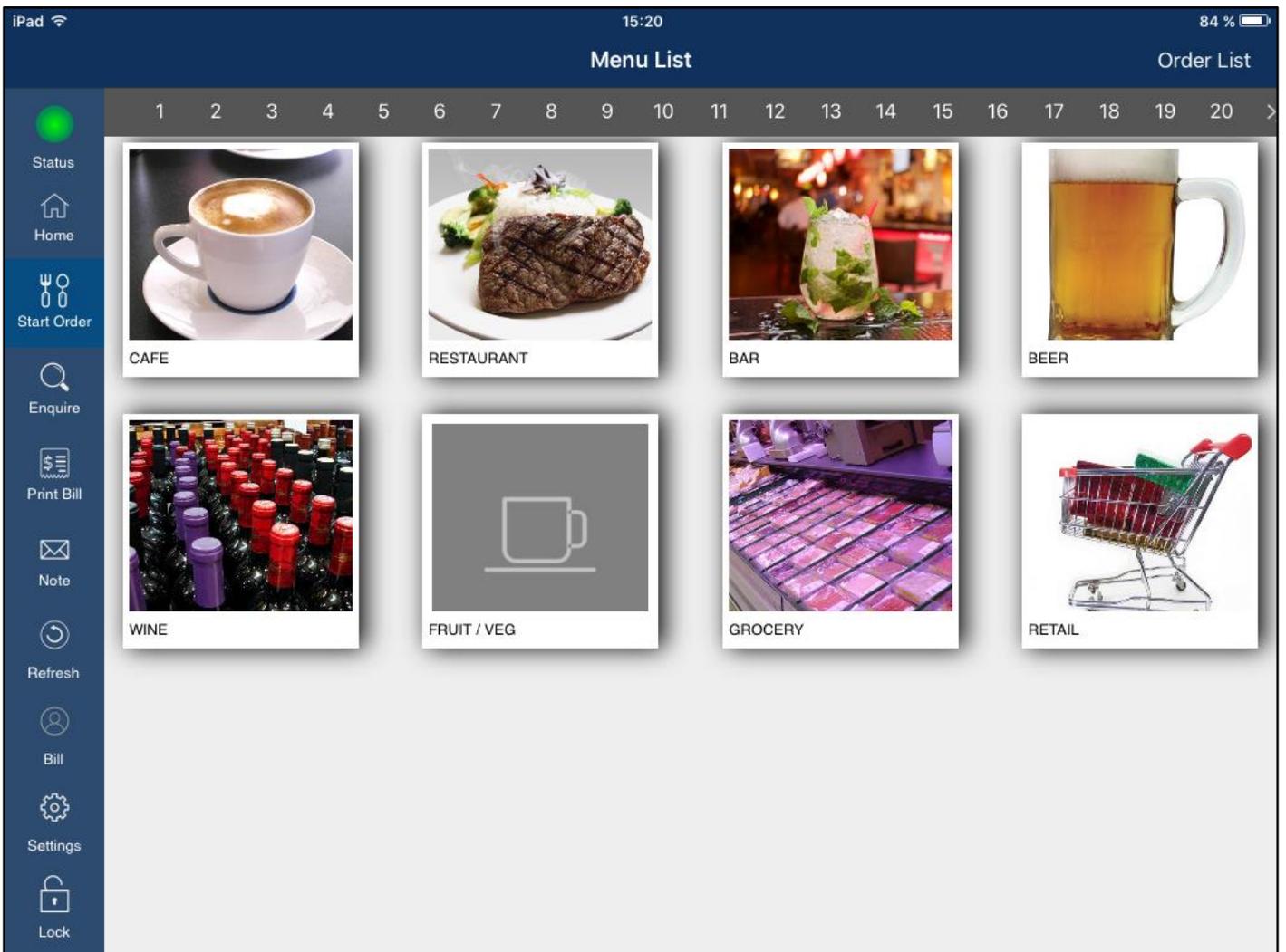
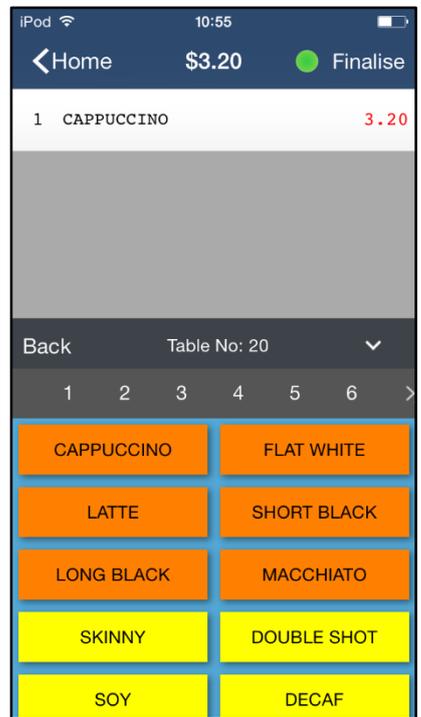
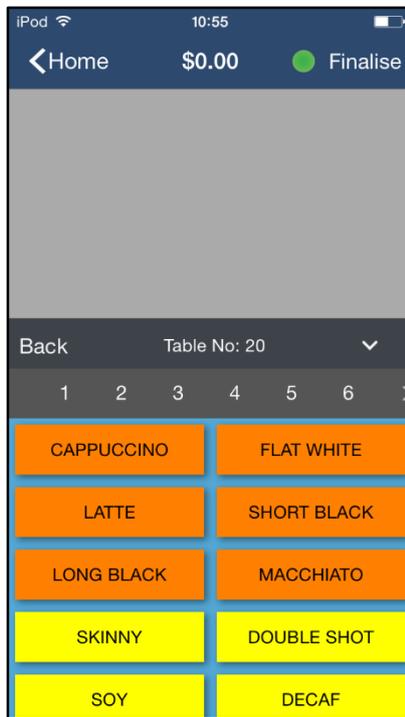
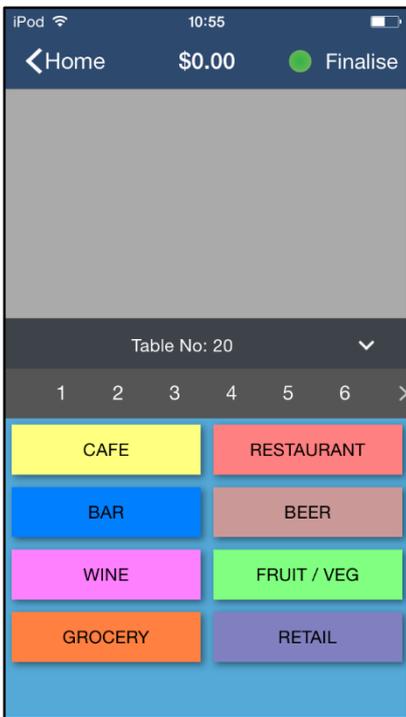


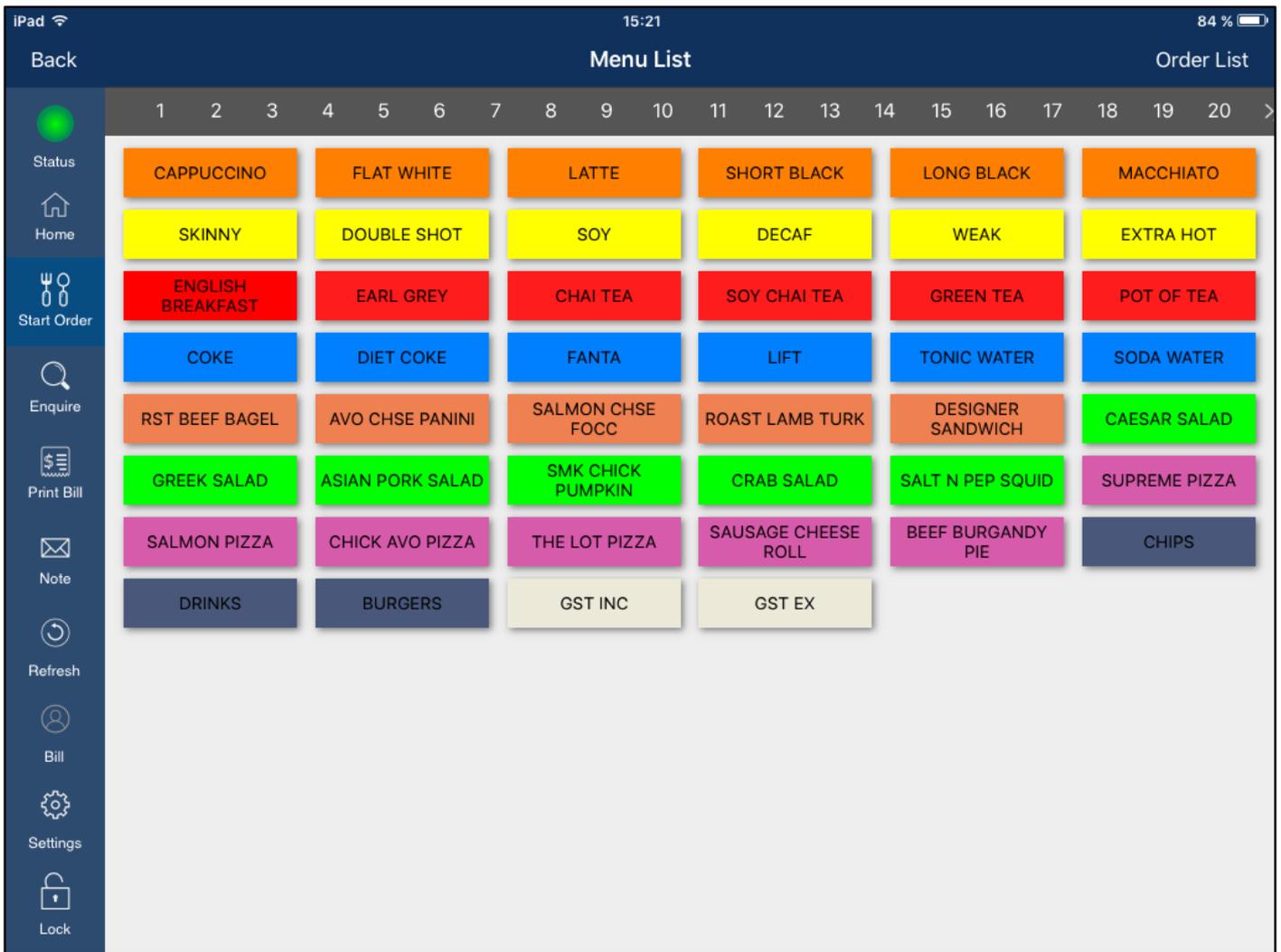


Enter the number of guests seated at the table if required and press OK. Press Start Sale to enter items.

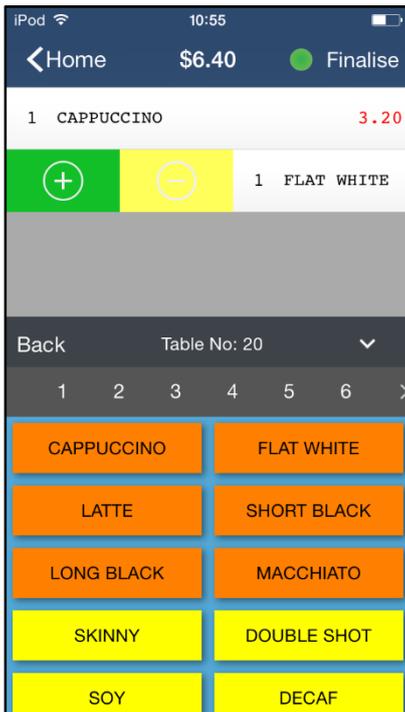


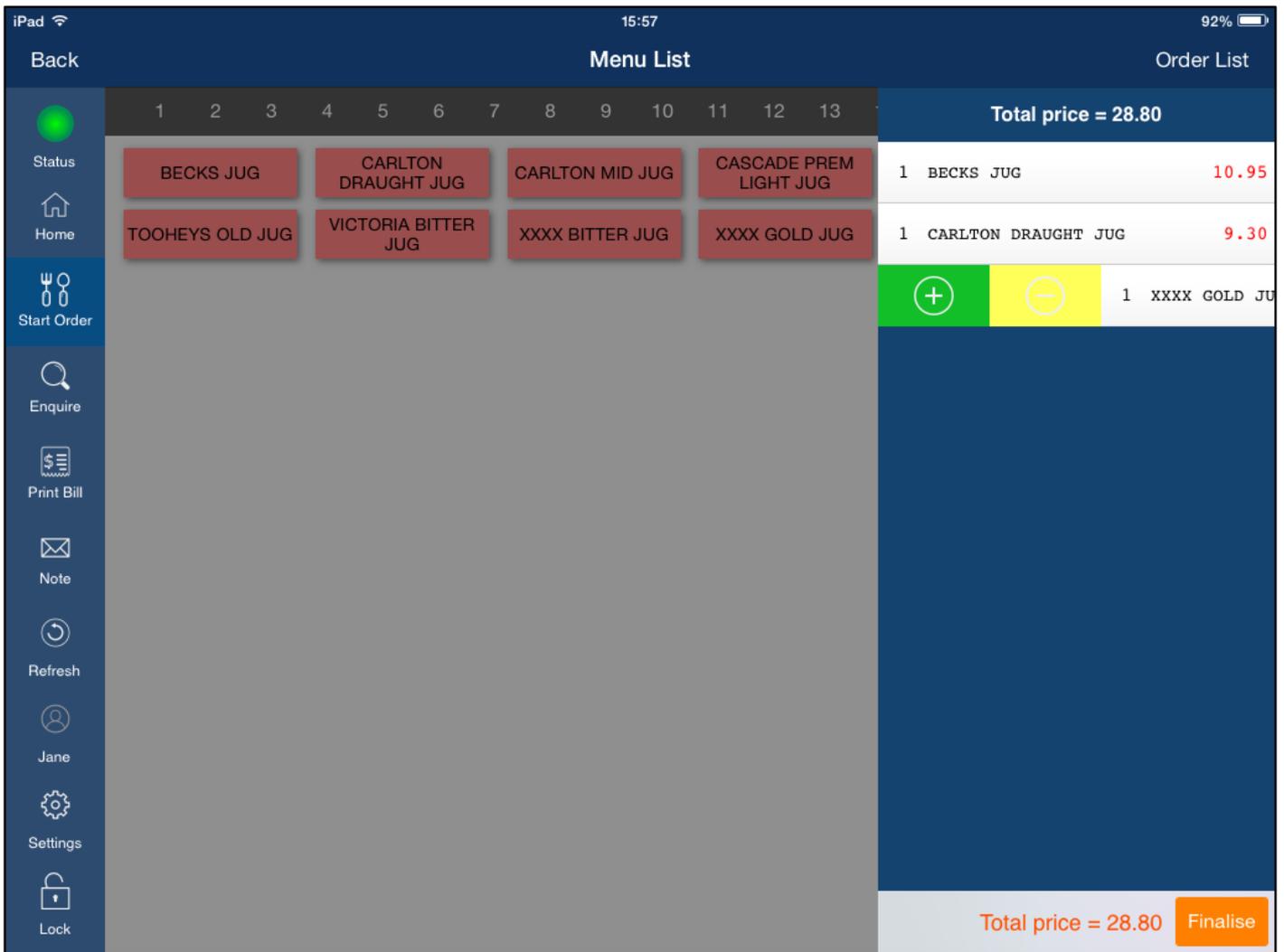
Navigate through the menus to select the items to add to the table.



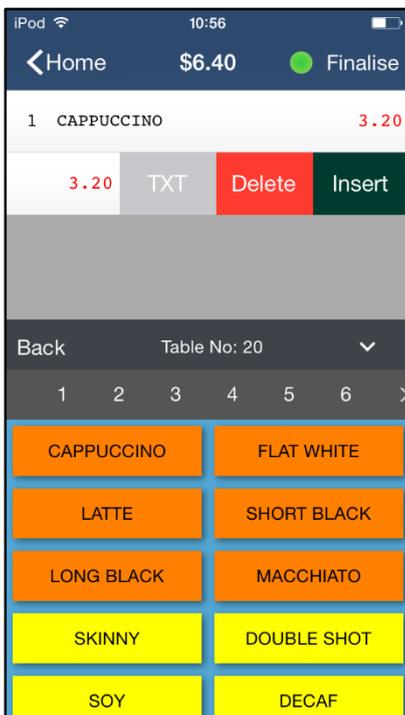


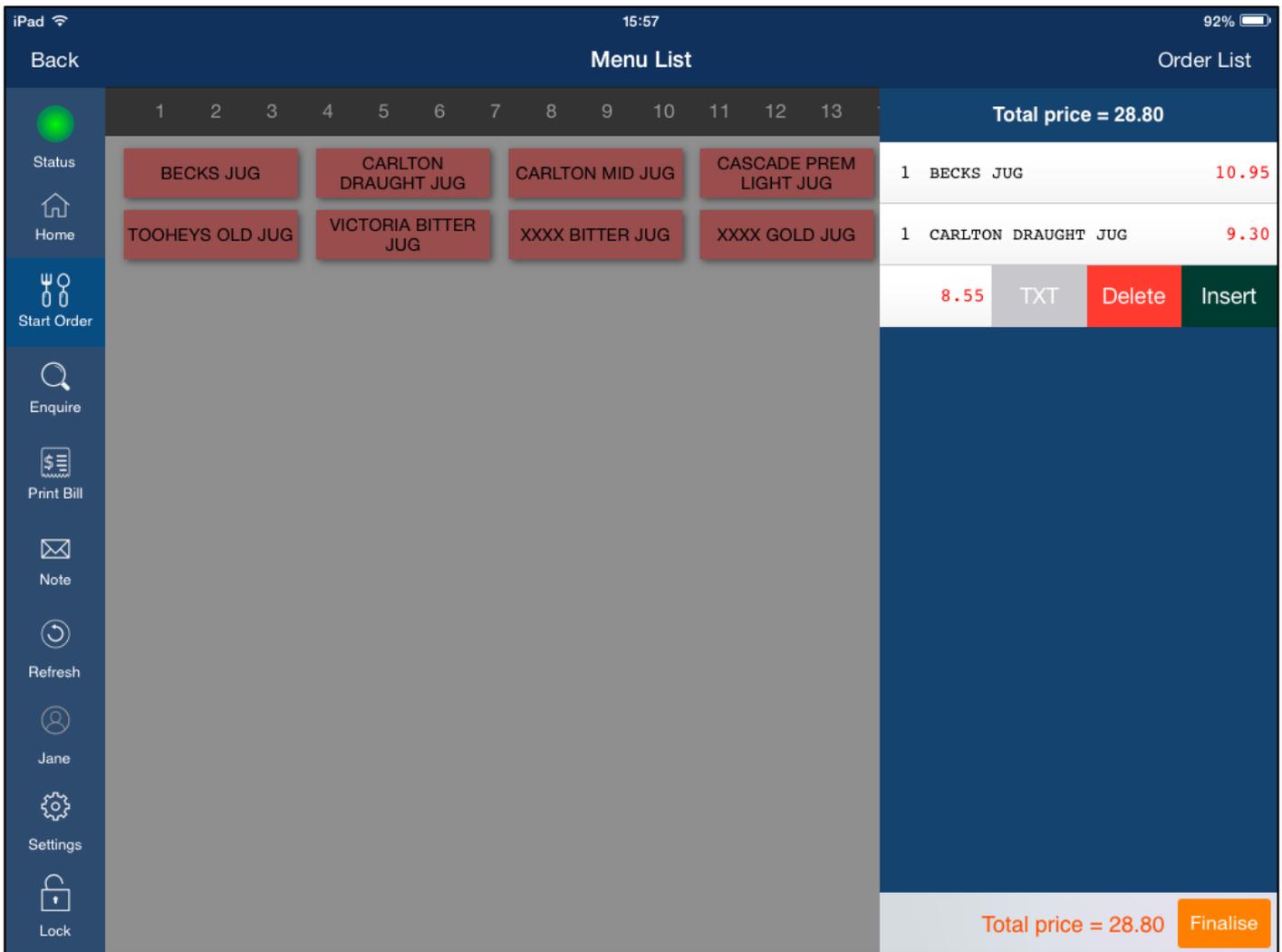
Swipe right on an item in the sale window to change the quantity.



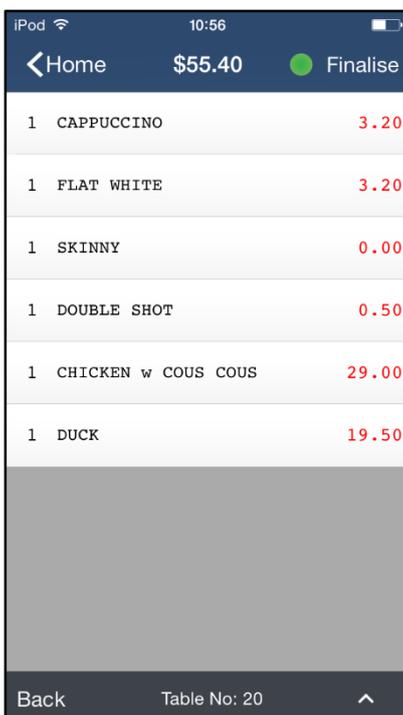


Swipe left on an item in the viewing area and press Delete to remove it from the order. You can also add some text to the item, or insert a new item if you have print lines for order of meal service enacted.

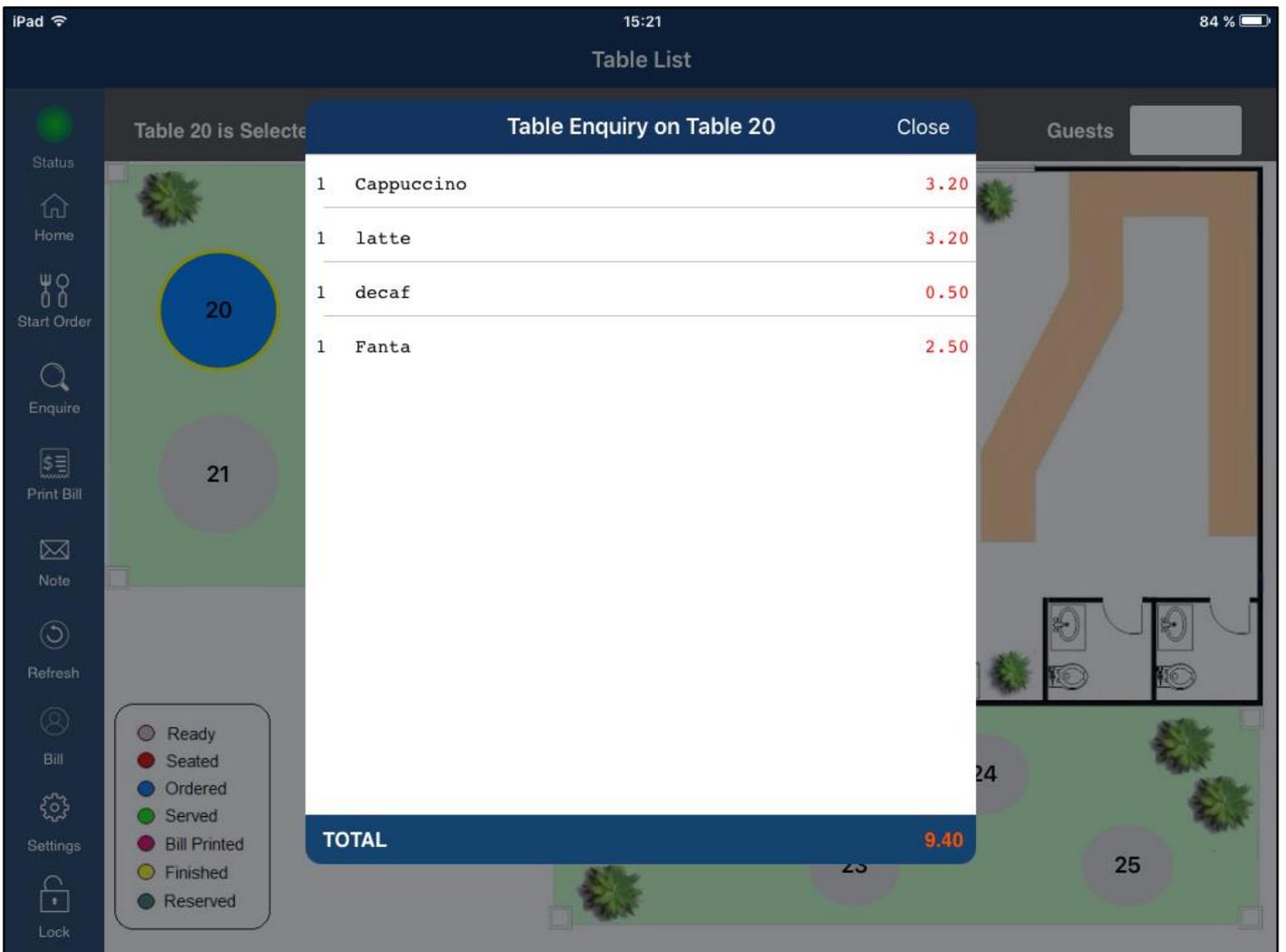




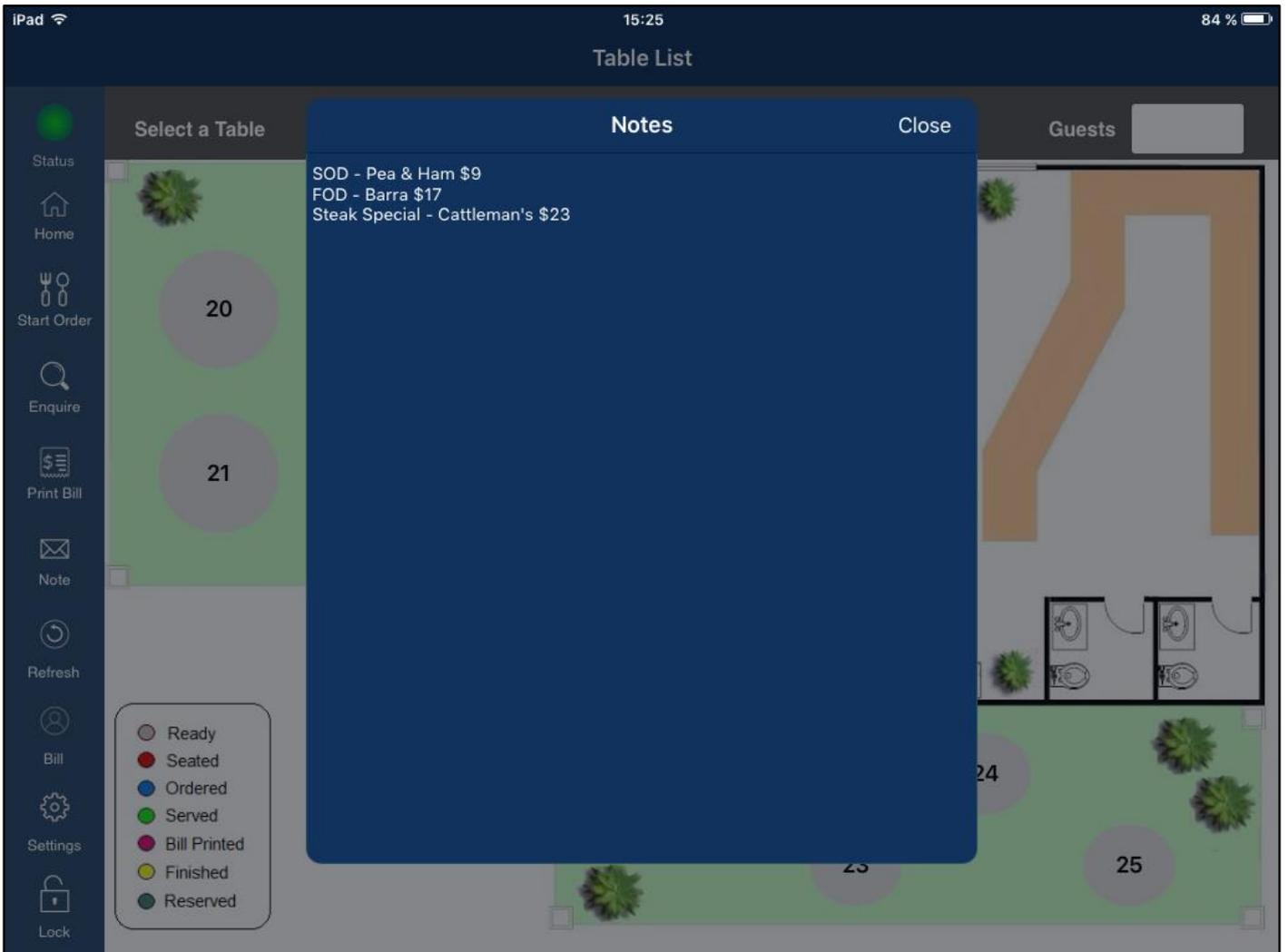
If there are a lot of items entered into the sale you can use the scroll bar to navigate through each item, or you can select v to expand the order display. Press ^ to return the menus.



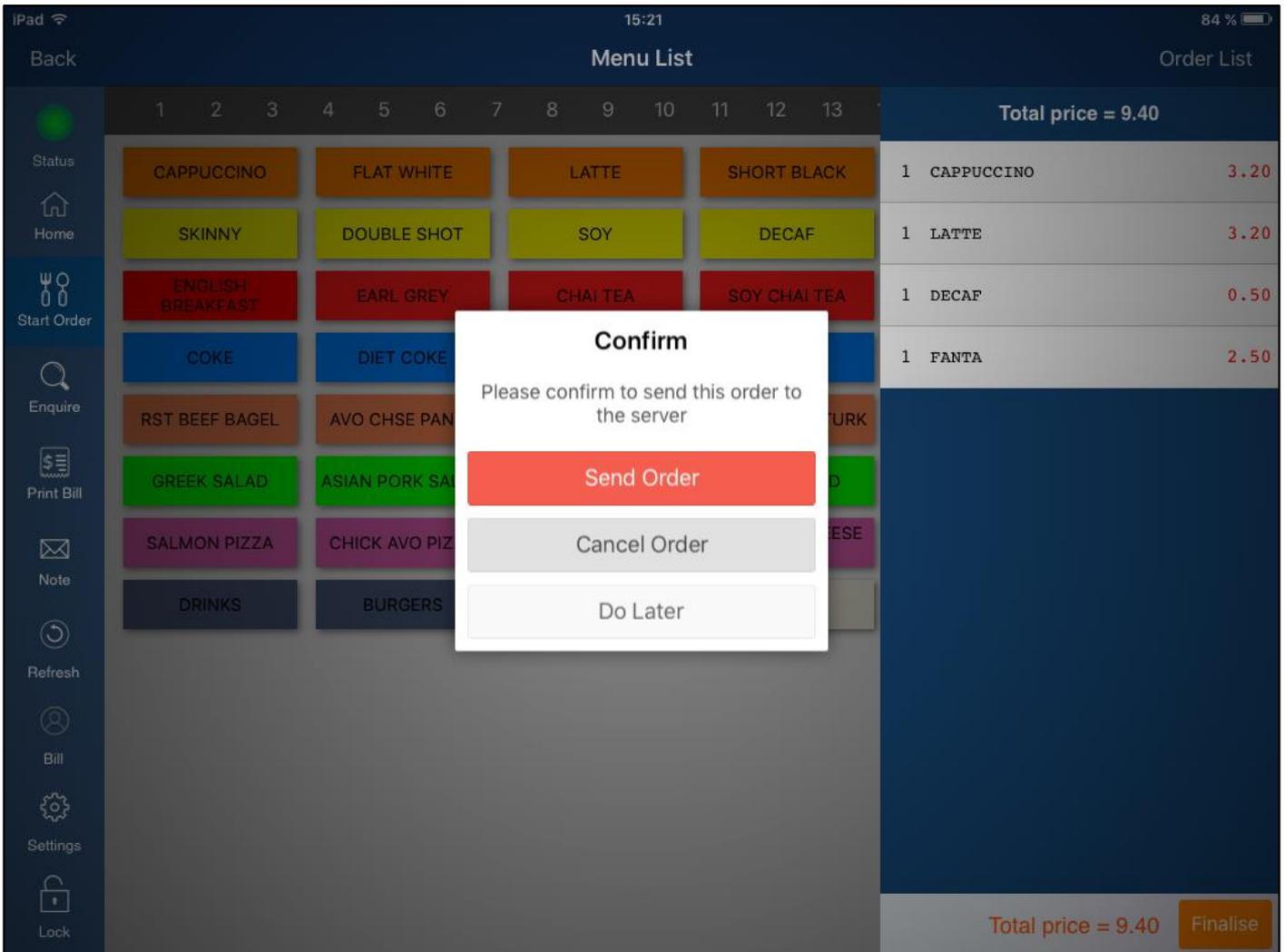
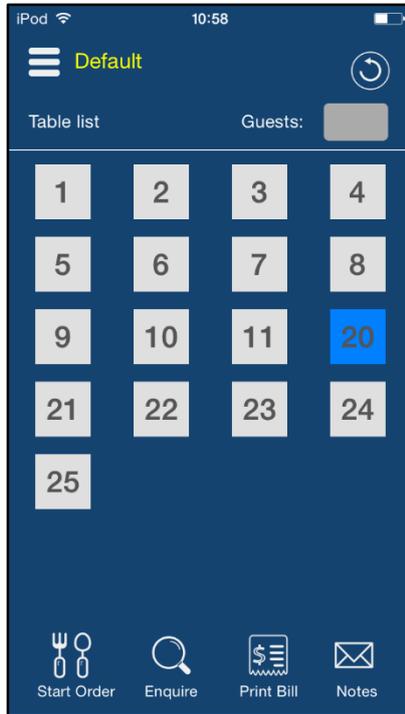
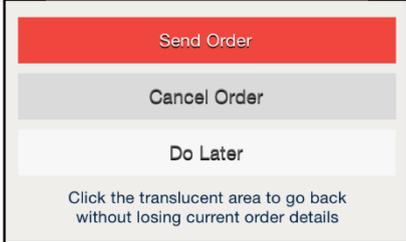
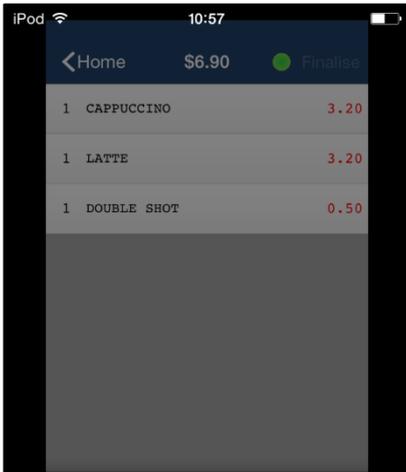
You can see the details of what is on the table already by pressing the table number and then press Enquire.

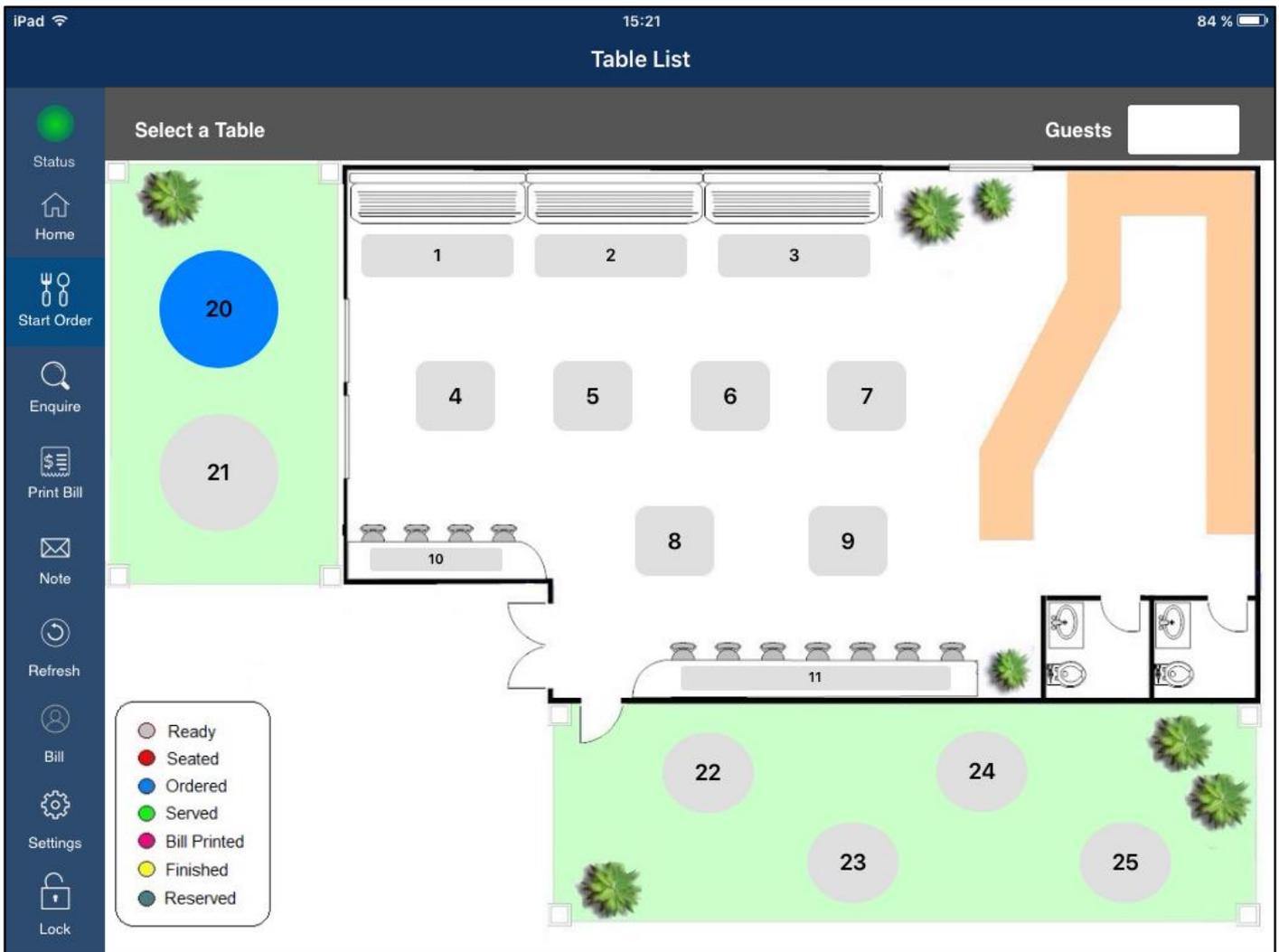


Press the Notes button to display any specials or instructions.

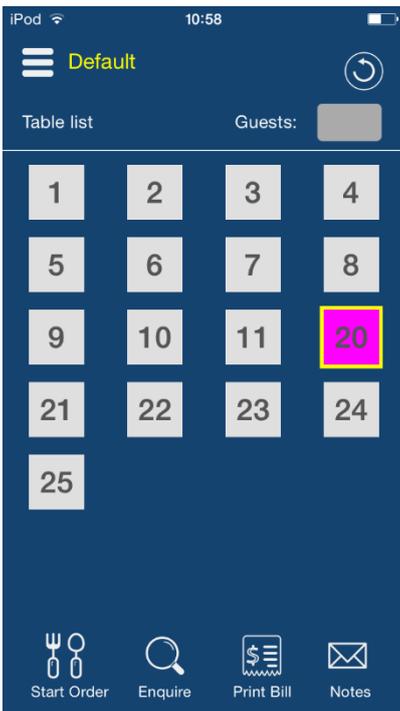


When you have added all the items you want to add, simply press Finalize to send it to the printer. The table status will change to show you the process the table is currently on. These will change throughout the dining experience for all the other status colours that you





You can select to print a bill from the app which will also be reflected on the table with live status display.

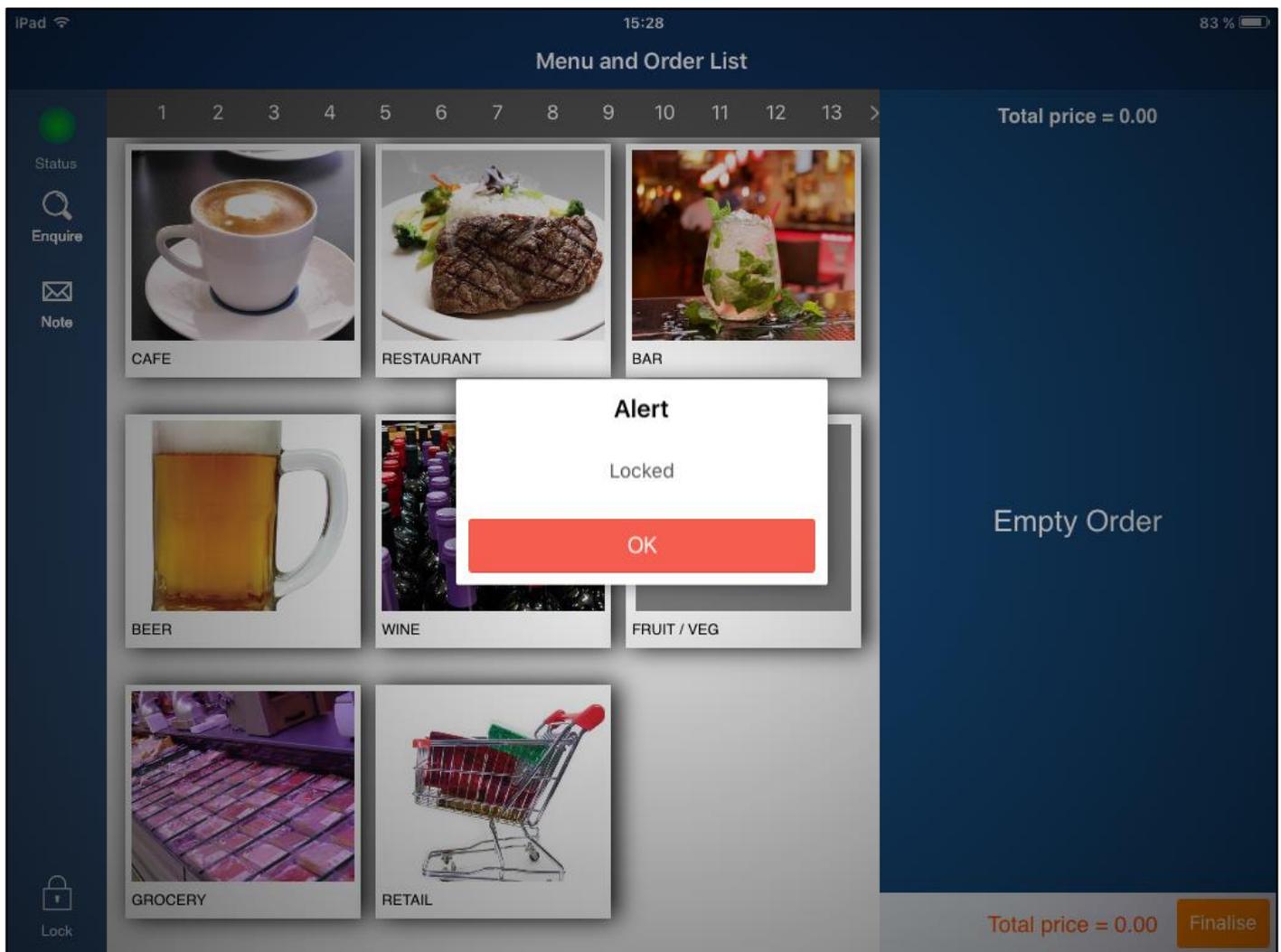




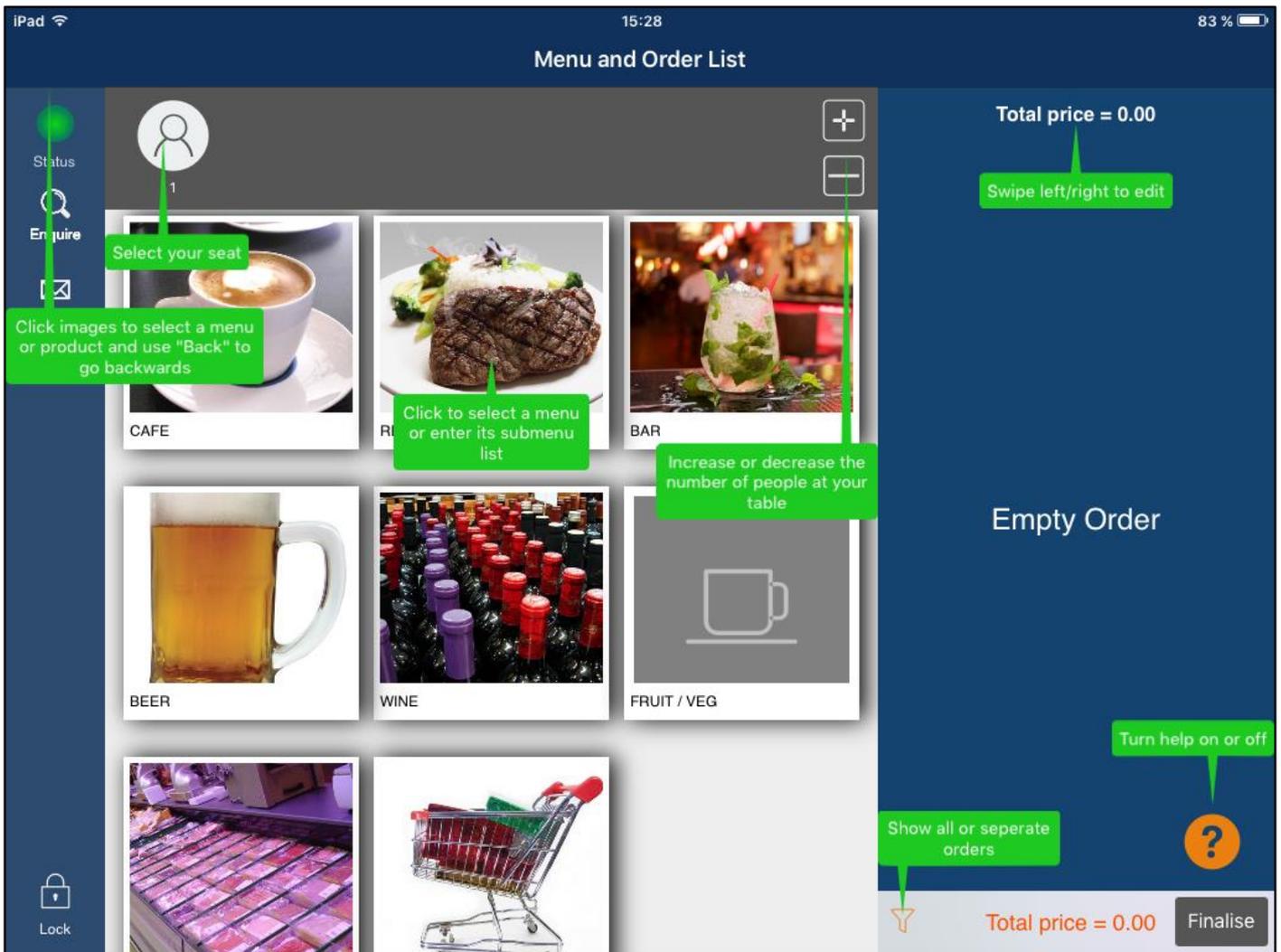
Idealpos V7 Features – iPad and iPad Mini Only

On larger screen devices you can lock the device and allow customers to enter their own meals. This is probably not a great idea in a fine dining restaurant with entrees and main as this can get complicated, but in a bistro environment, it can be extremely easy.

Before locking the device, ensure that you have selected the table the guests are seated at and pressed Start Order. Press the lock button on the bottom left of the screen.



Help tips will be displayed to show you and the customer how to order with the device. You can press the question mark in the bottom right corner to turn off the help tips.



Enter the items into the device as per normal. You have the option to select different seats.

iPad 15:28 83%

Back Menu and Order List

Status 1

Enquire

Note

Lock

CAPPUCCINO	FLAT WHITE	LATTE	SHORT BLACK
LONG BLACK	MACCHIATO	SKINNY	DOUBLE SHOT
SOY	DECAF	WEAK	EXTRA HOT
ENGLISH BREAKFAST	EARL GREY	CHAI TEA	SOY CHAI TEA
GREEN TEA	POT OF TEA	COKE	DIET COKE
FANTA	LIFT	TONIC WATER	SODA WATER
RST BEEF BAGEL	AVO CHSE PANINI	SALMON CHSE FOCC	ROAST LAMB TURK
DESIGNER SANDWICH	CAESAR SALAD	GREEK SALAD	ASIAN PORK SALAD
SMK CHICK PUMPKIN	CRAB SALAD	SALT N PEP SQUID	SUPREME PIZZA
SALMON PIZZA	CHICK AVO PIZZA	THE LOT PIZZA	SAUSAGE CHEESE ROLL
BEEF BURGANDY PIE	CHIPS	DRINKS	BURGERS
GST INC	GST EX		

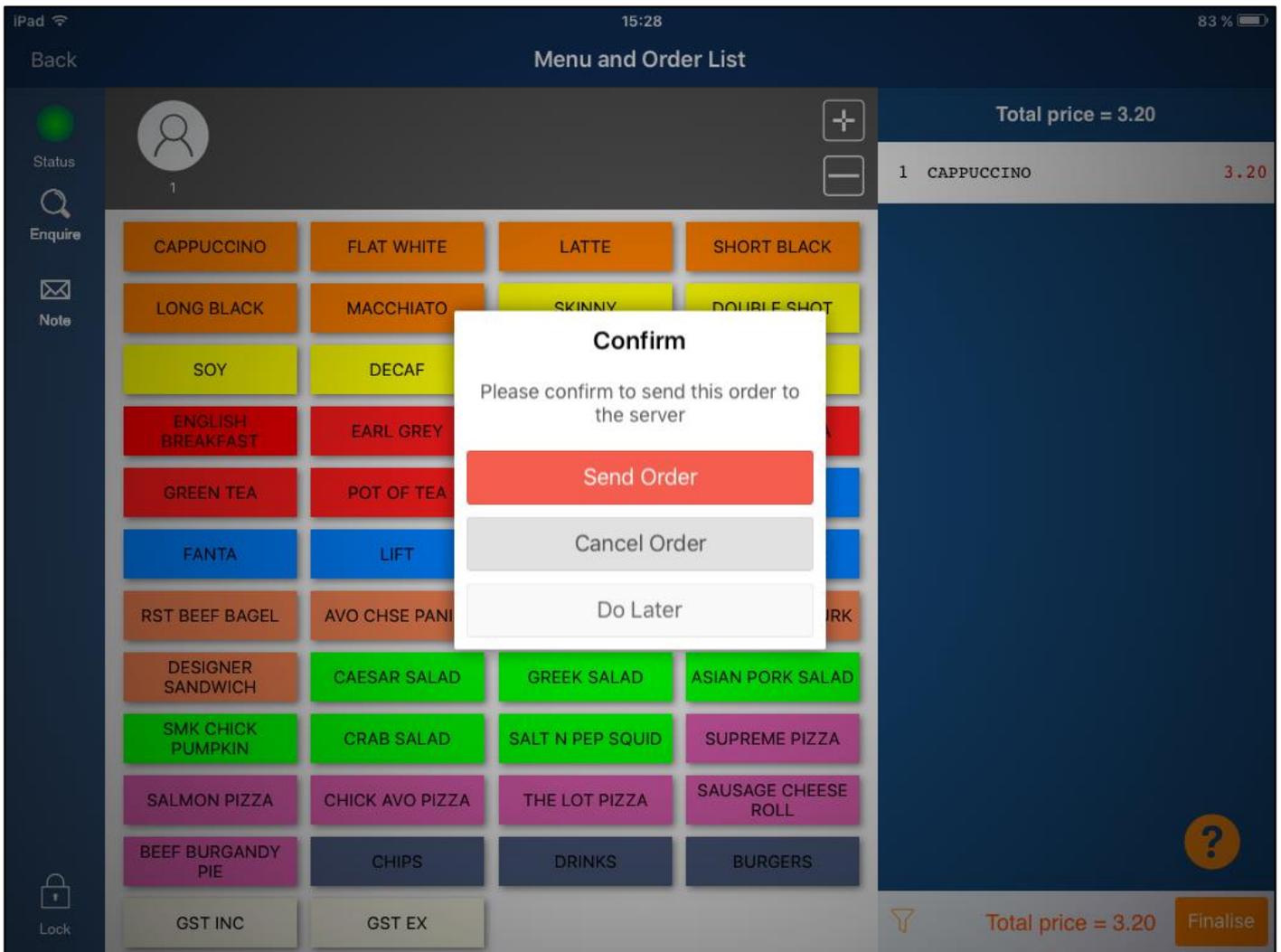
Total price = 3.20

1 CAPPUCCINO 3.20

?

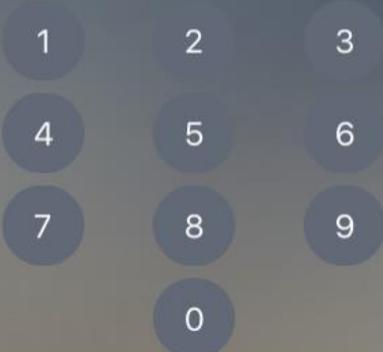
Total price = 3.20 Finalise

When finished, press Finalize to send it to the kitchen and bar printers.



Before you can have full access to the app again you will need to enter the password for the device. This does not lock the device, it will only lock the Ideal Handheld app.

Enter password to unlock



Try Later