

# Idealpos 8 Build 6 - Update History

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## EFTPOS

### IP-4818 – Idealpos Payments module

This function adds support for the Idealpos Payments module to Idealpos.

Idealpos payments is currently available in Australia on pilot.

If you are interested in joining our pilot program, please register here -

<https://webforms.pipedrive.com/f/ltmwAA1NNTGr7jObY4rH0Pydyp3UE3Ge6mV13AOU4QGgKP4CGJf1VL92xxRfJUT>

## Network Printers

### IP-4826 – Network Printers – Support for Idealpos BTP-S80

This function adds support for the Idealpos BTP-S80 thermal printer.

Refer to the printer drivers supplied with the printer for details on configuring the printer itself, interface/IP configuration, etc.

This printer model has been added to the Network Printers configuration function.

To configure the printer in Idealpos, go to: Back Office > Setup > Network Printers > Add.

**Type:** idealpos BTP-S80

**Connection:** Select the Connection Type being used (e.g. Ethernet, COM1, etc.)

**Baud Rate/IP Address:** [Enter either the Baud Rate or IP Address – the type of input this field accepts will change depending on the Connection Type selected above]

**Port/POS System:** [Enter either the Port Number or POS System – this field will also change depending on the Connection Type selected].

Configure any other settings as required

When selecting a Connection Type of None or COM#, the Baud Rate and POS System fields will appear as shown in the example below – If using a COM port connection, configure the settings according to the COM Port Number/Baud Rate and POS Terminal Number that the Printer is connected to:

The screenshot shows a configuration window titled "Network Printers" for a "network printer in Site 1". The window contains the following fields and settings:

- Printer Name: Printer
- Type: idealpos BTP-S80 (highlighted with a yellow arrow)
- Connection: None
- Baud Rate: 19200 (highlighted with a blue arrow)
- POS System: 200 (highlighted with a blue arrow)
- Characters per Line: 42
- Use in Backup Printer List:
- Redirect Printer: None

At the bottom left of the window, the text "POS 200 v8 Build 6" is visible.

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When selecting a Connection Type of Ethernet, the IP Address and Port fields will appear as shown in the example below – If using an Ethernet connection, configure the settings according to the Printer's IP Address and Port Number:

Network Printers network printer in Site 1

Printer Name Printer

Type idealpos BTP-S80 42 Characters per Line

Connection Ethernet

IP Address 192.168.15.

Port 9100

Use in Backup Printer List

Redirect Printer None

Save

POS 200  
v8 Build 6

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Once the printer has been configured, drag and drop the printer into each POS Terminal that you want the printer to be used by:

**Network Printers** Site 1

Name	POS Terminal	Printer Type	Connection	Settings	Redirect Printer
BTP-S80		idealpos BTP-S80	Ethernet	192.168.15.250,9100	None
Coffee DUMMY Printer		Epson TM-T88	Ethernet	192.168.15.73,9100,9100	None
		Epson TM-T88	Ethernet	192.168.15.73,9100	None

printers by pos drag-and-drop from above

POS	Description	Receipt Printer	KITCHEN	BAR	COFFEE	IKM	Kitchen Printer 5	Kitchen Prin
1	POS 1							
2	POS 2							
100	POS 100							
200	POS 200							

POS 200 v8 Build 6

The printer is now ready for use.

## IP-4827 – Network Printers – Support for Idealpos TP100

This function adds support for the Idealpos TP100 thermal printer.

Refer to the printer drivers supplied with the printer for details on configuring the printer itself, interface/IP configuration, etc.

This printer model has been added to the Network Printers configuration function.

To configure the printer in Idealpos, go to: Back Office > Setup > Network Printers > Add.

**Type:** idealpos TP100

**Connection:** Select the Connection Type being used (e.g. Ethernet, COM1, etc.)

**Baud Rate/IP Address:** [Enter either the Baud Rate or IP Address – the type of input this field accepts will change depending on the Connection Type selected above]

**Port/POS System:** [Enter either the Port Number or POS System – this field will also change depending on the Connection Type selected].

Configure any other settings as required

When selecting a Connection Type of None or COM#, the Baud Rate and POS System fields will appear as shown in the example below – If using a COM port connection, configure the settings according to the COM Port Number/Baud Rate and POS Terminal Number that the Printer is connected to:

The screenshot displays the 'Network Printers' configuration window for a printer named 'TP100' in 'Site 1'. The interface includes a 'Save' button on the left sidebar and a 'POS 200 v8 Build 6' version indicator at the bottom left. The main configuration area contains the following fields:

- Printer Name: TP100
- Type: idealpos TP100 (highlighted with a yellow arrow)
- Connection: None (highlighted with a blue arrow)
- Baud Rate: 19200
- POS System: 200 > POS 200
- Use in Backup Printer List:
- Redirect Printer: None

The 'Characters per Line' field is set to 42.

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When selecting a Connection Type of Ethernet, the IP Address and Port fields will appear as shown in the example below – If using an Ethernet connection, configure the settings according to the Printer's IP Address and Port Number:

Network Printers network printer in Site 1

Printer Name TP100

Type idealpos TP100 42 Characters per Line

Connection Ethernet

IP Address 192.168.15.

Port 9100

Use in Backup Printer List

Redirect Printer None

Save

POS 200  
v8 Build 6

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Once the printer has been configured, drag and drop the printer into each POS Terminal that you want the printer to be used by:

**Network Printers** Site 1

Name	POS Terminal	Printer Type	Connection	Settings	Redirect Printer
BTP-S80		idealpos BTP-S80	Ethernet	192.168.15.250,9100	None
Coffee		Epson TM-T88	Ethernet	192.168.15.73,9100	None
DUMMY		Epson TM-T88	Ethernet	,9100	None
Printer		Epson TM-T88	Ethernet	192.168.15.73,9100	None
TP100		idealpos TP100	Ethernet	192.168.15.251,9100	None

printers by pos drag-and-drop from above

POS	Description	Receipt Printer	KITCHEN	BAR	COFFEE	IKM	Kitchen Printer 5	Kitchen Prin
1	POS 1							
2	POS 2							
100	POS 100							
200	POS 200							

POS 200 v8 Build 6

The printer is now ready for use.

## Restaurant & Table Map

### IP-3965 – Table Details screen – Yes/No option to Group by Print Group

This function adds the ability to group the Stock Items shown in the in the Table Details by Print Group (e.g. Entrée, Main, Drinks, etc.).

Prior to this change, you could either Group by Order Time, or have no grouping.

If the existing Yes/No Option “Table Details – Group by Order Time” was disabled for ALL POS Terminals prior to upgrading to this build, this new Yes/No Option “Table Details – Group by Print Group” will be enabled by default.

In addition to setting the default grouping behaviour via the Yes/No Option, the Table Details screen now has a dedicated button to toggle the grouping method, so it can be toggled on-the-fly as you use the Table Details screen. Note that when the button on the Table Details screen is used to toggle the grouping, the Table Details screen will revert to the default grouping option the next time it is opened, as per the setting configured in the Yes/No Options.

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

In the Search field, enter “Group by”.

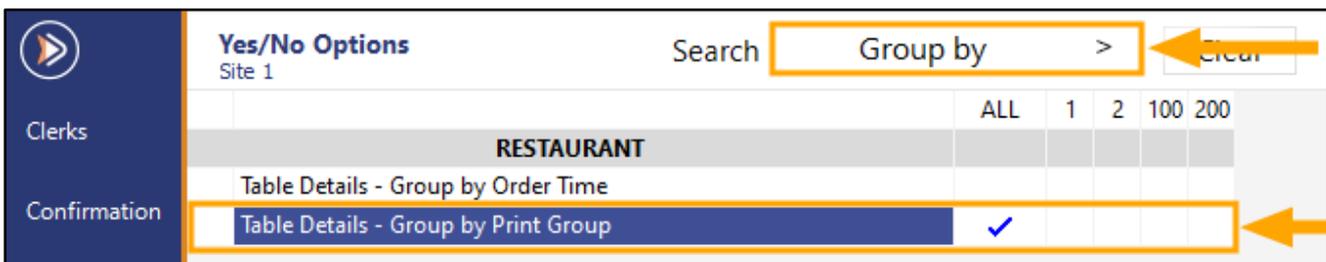
You have the option to either Group by Order Time, or you can Group by Print Group.

If you enable both options, the Group by Order Time will take priority.

For the purpose of demonstrating this function, the Y/N Options have been configured as follows:

Table Details – Group by Print Group - Enabled

Table Details – Group by Order Time - Disabled



Close the Yes/No Options window to save your changes.

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Go to: POS Screen.

Add items from one or more various Print Groups to the sale, then press the "Table Map" button to save the items to a Table.

15 Mar 15:45 Adult ID: 15-Mar-2004
X

CAPPUCCINO	1	3.50							
FLAT WHITE	1	3.50	RECEIPT	CLERK	7	8	9	CL	
SHORT BLACK	1	3.00							
PASTA	1	11.00	PRICE LEVEL	5% ST DISC	4	5	6	NO SALE	
BEEF	1	13.00	CUSTOMER	5% ITEM					
LAMB	1	12.00	BAR TAB	REFUND	1	2	3	X	
DUCK	1	14.00	PENDING	VOID SALE					
			TABLE MAP	VOID	0	.	ENTER		

7x
\$60.00

								
CAPPUCCINO	FLAT WHITE	LATTE	CHAI	SHORT BLACK	LONG BLACK	MOCHA	HOT CHOC	TEA
EXTRA HOT	SKINNY	DECAF	1 SUGAR	TAKEAWAY	SMALL	ICED DRINK	WATER	KEYBOARD
EXTRA CHOC	SOY	WEAK	2 SUGAR	MARSH MALLOW	MEDIUM	MILKSHAKE	JUICE	ORDER NUMBER
NO CHOC	ALMOND	DOUBLE SHOT	3 SUGAR	EQUAL	LARGE	SMOOTHIE	SOFTDRINK	REWARDS ENQUIRY
DRINKS	CAFE	TAP BEER	SPIRITS	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL	MANAGER
	RESTAURANT	BOTTLE BEER & RTD	WINE				SERVICES	ADMIN

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Select a Table within the Table Map to transfer the Sale to:

Restaurant

Transfer Sale to

If prompted, enter the number of covers, then press "OK".

Covers - Table 3

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

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Select the Table from the Table Map, then press the "Details" button on the bottom-left corner of the window.

The screenshot displays the Idealpos Table Map interface. The main area is a floor plan with various table layouts: a grid of rectangular tables (71-85) at the top left, a grid of diamond tables (61-65) in the center, a grid of rectangular tables (31-40) at the bottom left, and a bar area (1-7) on the right. A legend in the top right corner defines table statuses: Ready (grey), Seated (red), Ordered (blue), Served (green), Bill Printed (purple), To Clean (yellow), and Reserved (dark green). The bar area is labeled 'KITCHEN' and 'BAR'. A 'RECEPTION' area is also visible. The bottom navigation bar contains buttons for 'POS', 'ENTREE AWAY', 'MAINS AWAY', 'DESSERT AWAY', 'DRINKS AWAY', 'Pay All', 'Transfer', 'Reservations', 'Summary', and '>>>'. The 'Details' button is highlighted with a yellow arrow pointing to it from the right.

Legend:

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

KITCHEN

BAR

RECEPTION

POS

ENTREE AWAY

MAINS AWAY

DESSERT AWAY

DRINKS AWAY

Pay All

Transfer

Reservations

Summary

>>>

Details

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The Items saved to the Table will be grouped by Print Group, as shown in the example below:

When using any of the Grouping functions, you can click on the Group header (e.g. Entrée, Beverage or any other Print Group) and all the items from that Print Group will be selected.

TABLE 3		2 min		\$60.00							
2 Covers - Average \$30.00		Amount	Outstanding	Pay	Seat						
<b>ENTREE</b>										Jeremy	
PASTA		11.00	11.00							No Grouping	
BEEF		13.00	13.00							Reorder Items	
LAMB		12.00	12.00							Hide Paid Items	
DUCK		14.00	14.00							Transfer	
<b>BEVERAGE</b>										Jeremy	
CAPPUCCINO		3.50	3.50							Reprint Kitchen	
FLAT WHITE		3.50	3.50							Name	
SHORT BLACK		3.00	3.00							Delete	
		-----	-----							Covers	
		60.00	60.00							Pay 0.00	
Full	1/3	1/5	1/7	1/Covers	Amount					Print Bill	
1/2	1/4	1/6	1/8	Quantity	Fraction					Select All	

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The Grouping can be toggled by pressing the No Grouping/Group by Order Time/Group by Print Group button. The button label will vary, depending on the current Grouping method being used, as shown in the examples below.

The first example below shows the Table Details screen grouped by Print Group.

The toggle button shows "No Grouping".

Pressing this will toggle the Table Details screen to use no grouping as shown in the example on the following page.

TABLE 3		2 min		\$60.00						X	
2 Covers - Average \$30.00		Amount	Outstanding	Pay	Seat						
<b>ENTREE</b>										Jeremy	
PASTA		11.00	11.00								No Grouping
BEEF		13.00	13.00								Reorder Items
LAMB		12.00	12.00								Hide Paid Items
DUCK		14.00	14.00								Transfer
<b>BEVERAGE</b>										Jeremy	
CAPPUCCINO		3.50	3.50								Reprint Kitchen
FLAT WHITE		3.50	3.50								Name
SHORT BLACK		3.00	3.00								Delete
		-----	-----							Covers	
		60.00	60.00							Pay 0.00	
Full	1/3	1/5	1/7	1/Covers	Amount					Print Bill Select All	
1/2	1/4	1/6	1/8	Quantity	Fraction						

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The second example below shows the Table Details screen using No Grouping.

The toggle button shows "Group by Order Time".

Pressing this will toggle the Table Details screen to use Order Time Grouping as shown in the example on the following page.

TABLE 3		2 min	\$60.00				×
2 Covers - Average \$30.00		Amount	Outstanding	Pay	Seat		
CAPPUCCINO		3.50	3.50			Group by Order Time	
FLAT WHITE		3.50	3.50			Reorder Items	
SHORT BLACK		3.00	3.00			Hide Paid Items	
PASTA		11.00	11.00			Transfer	
BEEF		13.00	13.00			Reprint Kitchen	
LAMB		12.00	12.00			Name	
DUCK		14.00	14.00			Delete	
		-----	-----			Covers	
		60.00	60.00			Pay 0.00	

Full	1/3	1/5	1/7	1/Covers	Amount		
1/2	1/4	1/6	1/8	Quantity	Fraction	Print Bill	Select All

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The third example below shows the Table Details screen using Group by Order Time. The toggle button shows "Group by Print Group".

Pressing this will toggle the Table Details screen to Group by Print Group.

When the order is Grouped by Order Time, you can click on the ordered time and all items ordered at that time will be selected.

TABLE 3		2 min	\$60.00				×
2 Covers - Average \$30.00		Amount	Outstanding	Pay	Seat		
Ordered: 03:46pm				Jeremy		Group by Print Group	
CAPPUCCINO		3.50	3.50			Reorder Items	
FLAT WHITE		3.50	3.50			Hide Paid Items	
SHORT BLACK		3.00	3.00			Transfer	
PASTA		11.00	11.00			Reprint Kitchen	
BEEF		13.00	13.00			Name	
LAMB		12.00	12.00			Delete	
DUCK		14.00	14.00			Covers	
		-----	-----				
		60.00	60.00				
Full	1/3	1/5	1/7	1/Covers	Amount	Print Bill	Select All
1/2	1/4	1/6	1/8	Quantity	Fraction	Pay 0.00	

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## IP-4786 – Table Map 1920/1366 Resolutions – Ability to toggle Activity Feed

This function adds the ability to toggle the Activity Feed shown on the Table Map (when using POS Screen Resolutions of either 1920x1080 or 1366x768). The new behaviour will default the Activity Feed to a hidden state, and if required, the Table Activity Feed can be displayed by pressing the ">>>" button at the bottom of the Activity Feed section.

Provided that a POS Screen Resolution of either 1920x1080 or 1366x768, no other additional configuration is required.

Go to: Back Office > Setup > POS Terminals > Select a POS Terminal > Modify

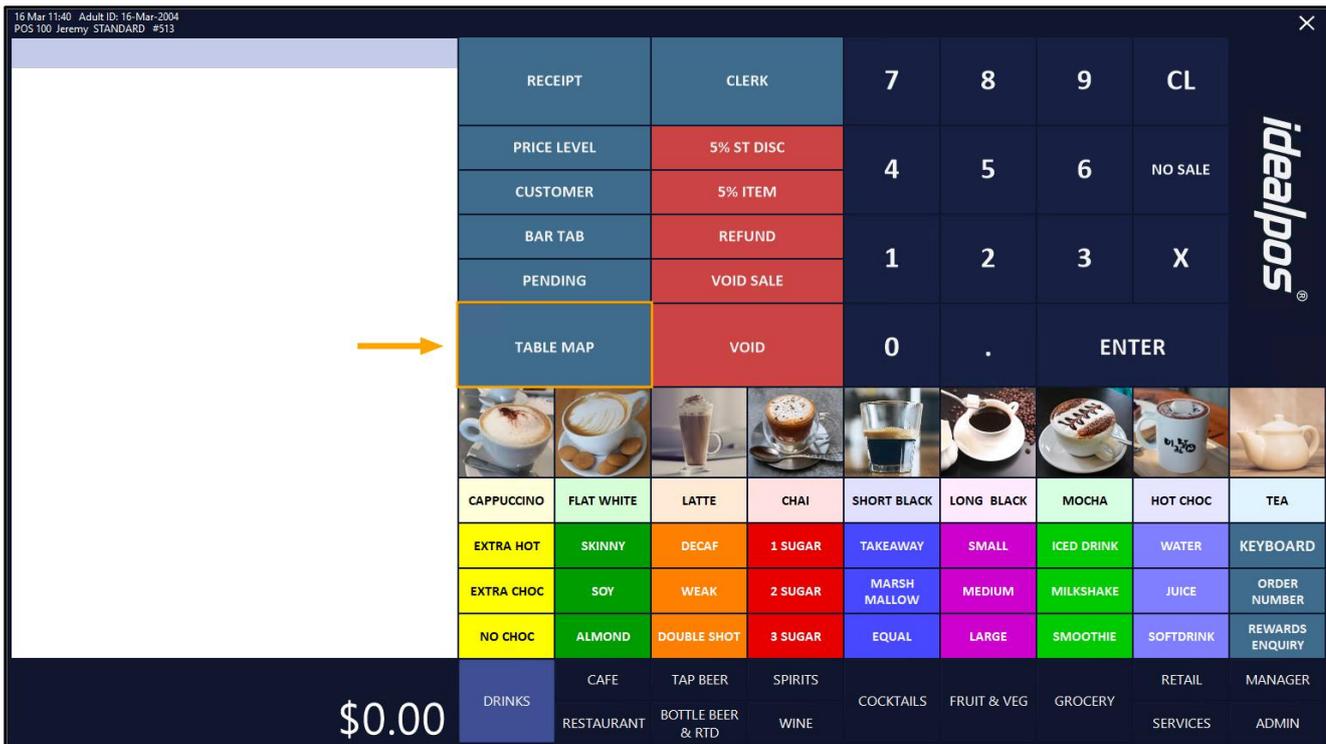
Within the POS Settings tab, ensure that the POS Screen Resolution is set to either 1920x1080 or 1366x768.

The screenshot shows the 'Pos Terminals' settings window with the 'POS Settings' tab selected. The 'POS Screen' section is expanded, showing a dropdown menu for 'Resolution'. The '1920 x 1080 (16:9)' option is highlighted in blue and enclosed in a yellow box, with a yellow arrow pointing to it from the right. Other options in the dropdown include '1024 x 768 (4:3)', '1024 x 600 (15.4:9)', '1280 x 800 (16:10)', '1366 x 768 (16:9)', and '1920 x 1080 (16:9) Retail'. The 'Price Level Mapping' section shows 12 price levels with dropdown menus. The 'POS Screen Tabs' section has a list of categories with radio buttons and a 'Default' column. The 'User-Defined Options' section has a table with 'Description' and 'Setting' columns and a 'Remove All' button.

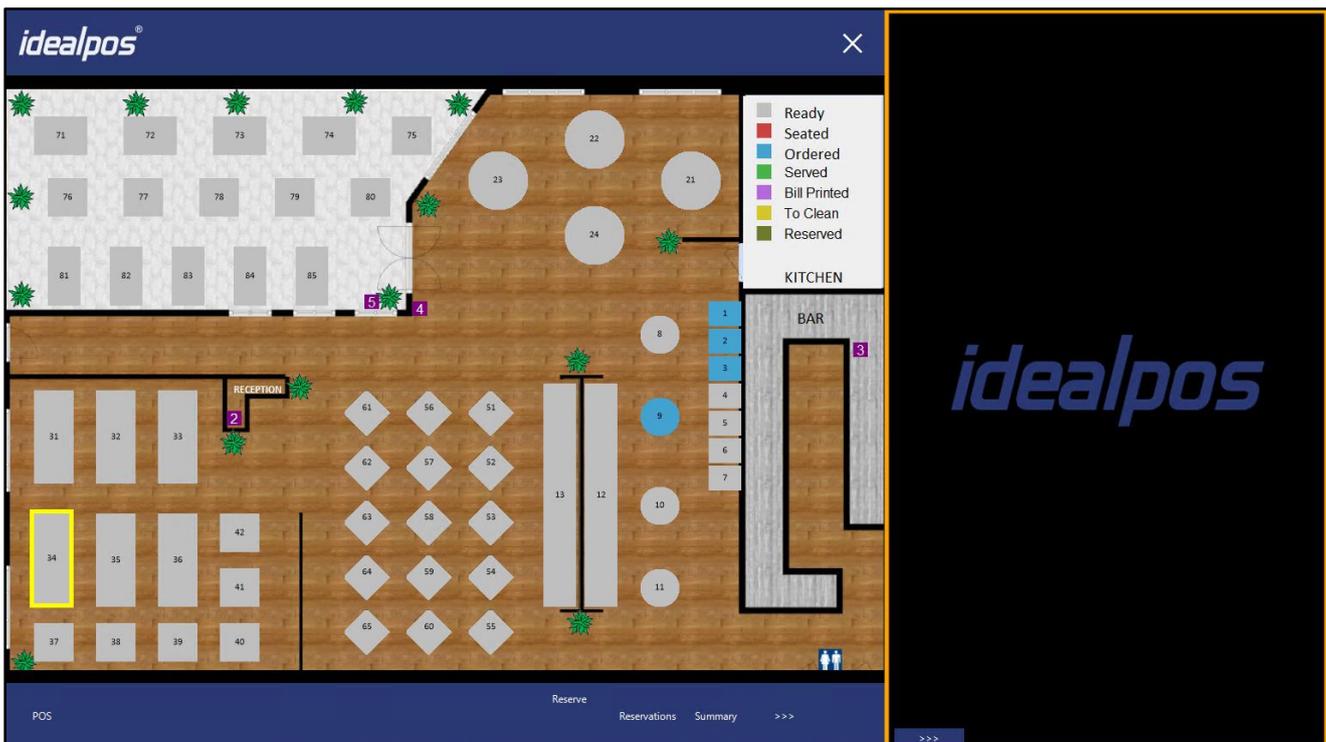
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Open the POS Screen, then press the Table Map button.



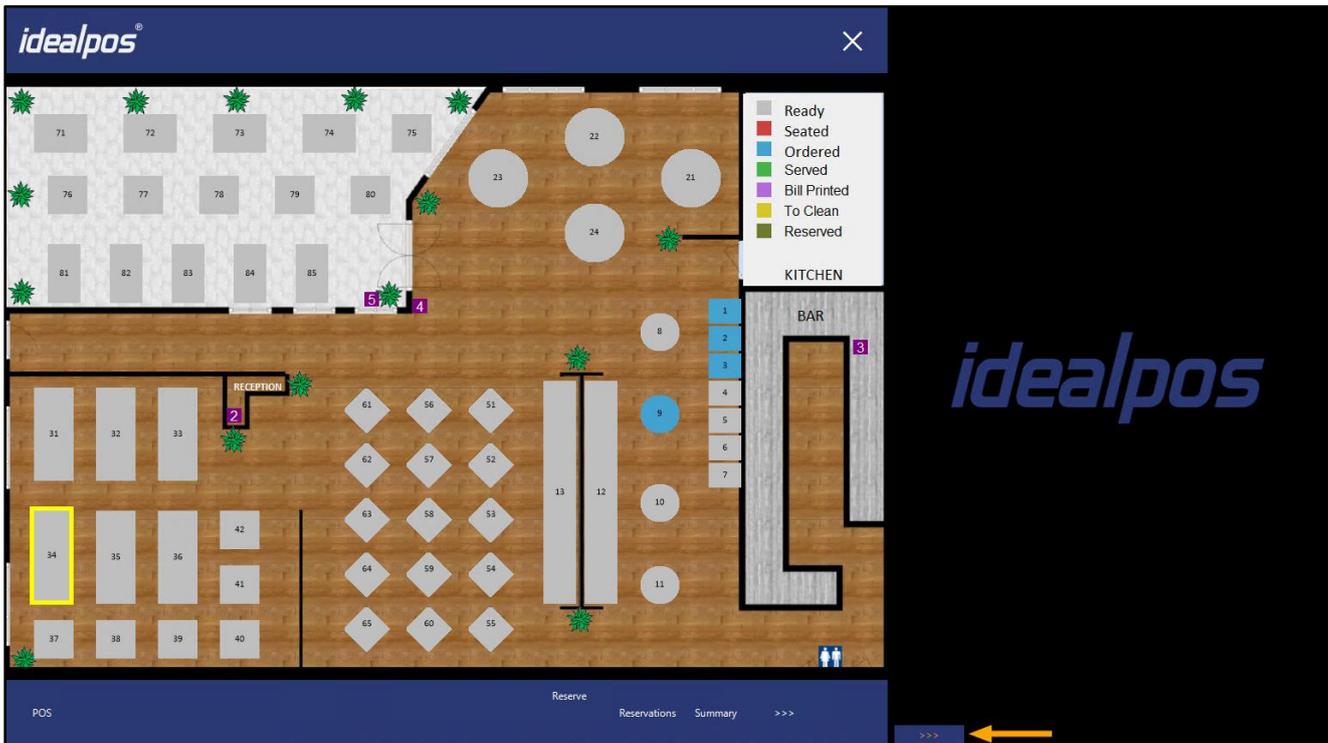
The Table Map will be displayed, with the Activity Feed hidden as shown below:



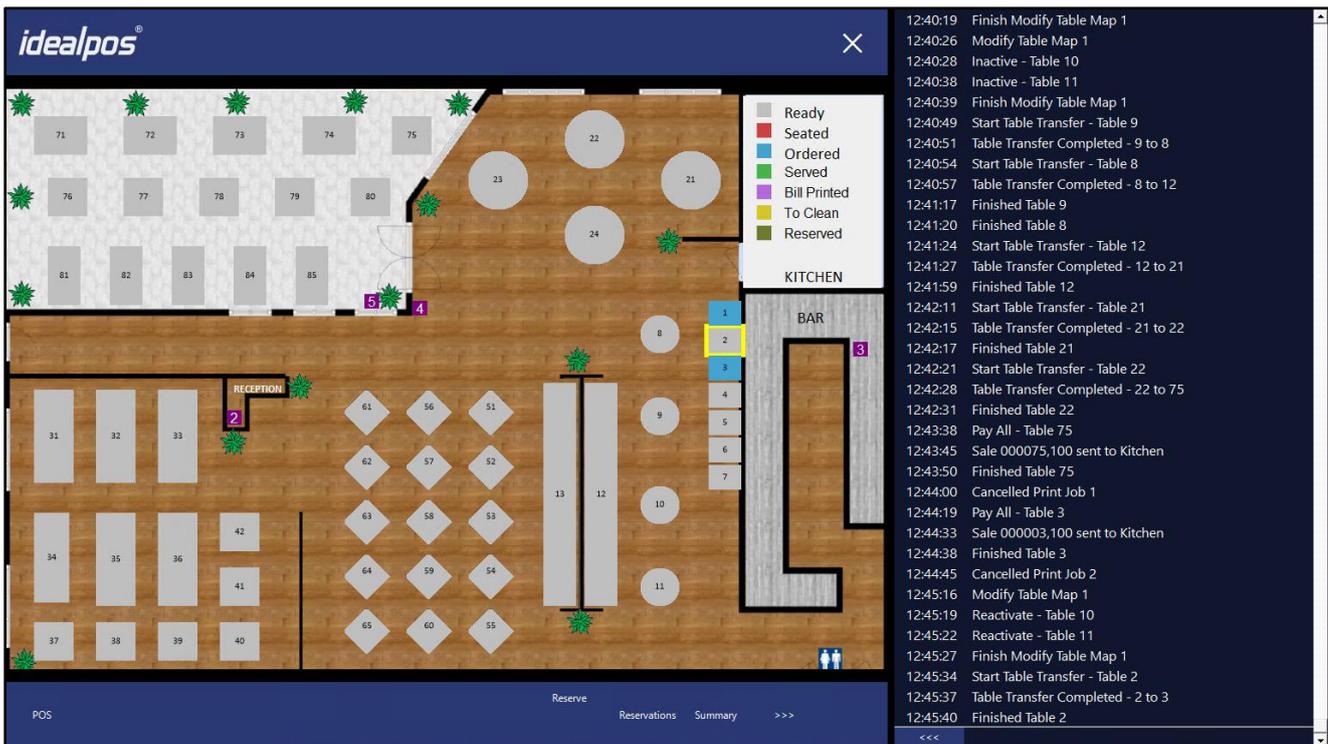
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To display the events within the Activity Feed, press the ">>>" toggle button towards the bottom-right corner of the window.



After pressing the ">>>" button, the Activity Feed is displayed as shown below.



Once the Activity Feed has been toggled to be visible (unless the Activity Feed is toggled to be hidden via the "<<<" button before closing the Table Map), it will remain visible each time the Table Map is opened during that session. Once Idealpos or the POS Terminal is restarted, the Activity Feed will default to hidden.

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## IP-4845 – Table Details Delete Items – Recorded as Transaction

This function will record any items that are deleted via the Restaurant - Table Details as a transaction.

Any items deleted in this manner can then be reported on via the following methods:

Journal History Enquiry – Using the Function dropdown box, "Table Item Delete" can be selected to filter the results and only show items that were deleted from a table.

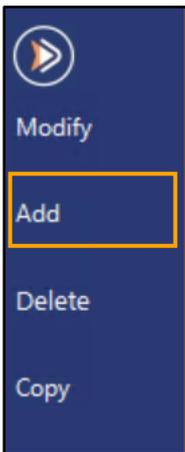
Alerts – An Alert can be created to write an event to the Alerts.Log file and/or Send an Email to an email address.

Financial Report – Items that are deleted from a Table will be included in the Voids total shown on the Financial Report.

To configure an Alert for this function, go to:

Back Office > Setup > Alerts

Press the "Add" button on the top-left corner of the window.



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In the create new Alert window, configure as follows:

**Alert Description:** Table Deletes

**If Function Type:** Table Item Delete

**Quantity reaches in:** Configure as required. This will trigger the alert to be written and/or emailed when the number of deletes reach the entered quantity within the entered number of minutes/days.

**Group by:** Clerk or POS terminal.

**POS Range:** Enter the POS Range that you want to Alert on. If this field is blank, Alerts for all POS Terminals will be reported.

**Clerk:** Enter the Clerk Code if you want to alert for specific clerks. Leaving this field as blank will trigger the Alert for all Clerks.

**Email/Log Message:** This is the message that will be emailed and/or written to the Alerts.Log file. You can also use the Message Formulas dropdown box/Add button to add formulas to the Email/Log Message field.

An example Email/Log Message has been included below.

There has been a Table Item Delete!

{STOCKITEMQUANTITY}

{SPENDAMOUNT}

CLERK = {CLERKNAME}

POS = {POSTERMINALDESCRIPTION}

**Write to Alerts.Log** – Enabling this checkbox will write the Alert using the message configured above.

**Send Email to** – Enabling this checkbox and entering an email address will trigger Idealpos to send an email to the entered email address. If the Send Email to function is used, ensure that the Email Settings have been configured in Back Office > Setup > Global Options > Other Options > Email Settings.

Alerts

Save

Alert Description Table Deletes

Alert Criteria

If Function Type Table Item Delete

Quantity reaches 1 in 1 Minutes

Group By Clerk

POS Range

Clerk

Alert Action

Write to Alerts.Log

Send Email to

Email / Log Message

There has been a Table Item Delete!  
{STOCKITEMQUANTITY}  
{SPENDAMOUNT}  
CLERK = {CLERKNAME}  
POS = {POSTERMINALDESCRIPTION}

Message Formulas

Add

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Press the "Save" button on the top-left corner of the window to save the Alert.  
A new Alert entry will appear in the Alerts window.

Description	Function	Parameter	Trigger	Time	Email To
No Sale Abuse	No Sales		6	60 minutes	
Void Sales	Void Entire Sales		3	60 minutes	
Table Deletes	Table Item Delete		1	1 minutes	

Close the Alert window to continue.

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So that Alerts are generated (and if required, emailed), you will need to perform additional configuration in the Global Options.

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

- **Output from POS #** - Enter the POS Terminal Number that you want to Output Alerts from.
- **Email Settings** - Enter the Email Settings (optional – this is only required if you want to utilise the Email functionality within Alerts).

The screenshot shows the 'Global Options' window for 'Site 1 (Site 1)'. The 'Other Options' tab is selected. The 'Alerts' section contains a field 'Output from POS # 200' which is highlighted with an orange box and has an arrow pointing to it from the right. Below it is the 'Mag Card Printing' section with 'Mag Card Format' set to 'Format 1' and 'Printer Connection' set to a dropdown. The 'FTP Details' section includes fields for 'Server Address', 'Server Port' (21), 'Folder', 'Username', and 'Password'. The 'Special Attribute Types' section has dropdowns for 'Stock Item Linking', 'Remove Tax', 'Transaction Event', and 'Special Item Subtotal'. The 'Attribute Column Headers' section has a table with 5 rows and 1 column. The 'Default Variant Types' section has dropdowns for 'Size' and 'Colour'. The 'Stock Item Descriptions' section has fields for 'Description 2 Kitchen Description' and 'Description 3 Long Description'. The 'Email Settings' section is highlighted with an orange box and has an arrow pointing to it from the right. It includes fields for 'SMTP Outgoing Email Server', 'Sending Email Address', 'SMTP Username', 'SMTP Password', 'SMTP Port', and a checked 'Enable SSL/TLS Protocol' checkbox. Below these are fields for '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', and 'Default Message when sending Customer Statements/Invoices'.

Close the Global Options window to save your changes.

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To use this function, go to: POS Screen.

Press the Table Map button and within the Table Map, select a Table and press "Details".

The screenshot displays the Idealpos Table Map interface. The main area shows a floor plan with various tables represented by different shapes and colors. A legend in the top right corner defines the colors: Ready (grey), Seated (red), Ordered (blue), Served (green), Bill Printed (purple), To Clean (yellow), and Reserved (dark green). The floor plan includes a grid of rectangular tables (71-85, 31-40), a grid of diamond-shaped tables (61-65), a grid of circular tables (21-24, 8-11), and a bar area (1-7). A reception area (2) is also visible. The bottom of the screen features a dark blue navigation bar with buttons for POS, ENTREE AWAY, MAINS AWAY, DESSERT AWAY, DRINKS AWAY, Pay All, Transfer, Reservations, Summary, and a close button (X). The 'Details' button is highlighted with a yellow box, and an orange arrow points to it from the 'Served' status in the legend.

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Within the Table Details screen, select the Items that you want to delete, then press the "Delete" button.

TABLE 1		14 min	\$60.00					
2 Covers - Average \$30.00		Amount	Outstanding	Pay	Seat			
<b>Ordered: 11:36am</b>							<b>Jeremy</b>	
CAPPUCCINO		3.50	3.50	3.50		Group by Print Group		
FLAT WHITE		3.50	3.50	3.50				
SHORT BLACK		3.00	3.00	3.00				
PASTA		11.00	11.00			Reorder Items		
BEEF		13.00	13.00					
LAMB		12.00	12.00			Hide Paid Items		
DUCK		14.00	14.00					
		-----	-----	-----				
		60.00	60.00	10.00				

×  
Group by Print Group  
Reorder Items  
Hide Paid Items  
Transfer  
Reprint Kitchen  
Name  
**Delete**  
Covers

Full	1/3	1/5	1/7	1/Covers	Amount	Print Bill	Select All	Pay 10.00
1/2	1/4	1/6	1/8	Quantity	Fraction			

Press "Yes" to confirm the deletion of the selected items.

Are you sure you wish to Delete these items from the Table?

Yes

No

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Select a refund reason.

refund reasons ×

Damaged
Changed Mind
Faulty
Product Recall
Expired
Other

The Table Details screen can now be closed.

Table Deletes can be reported on/viewed as follows:

- **Journal History Enquiry**

Go to: Back Office > Enquiry > Journal History

In the Function dropdown box, select "Table Item Delete".

The Journal Enquiry will be filtered to only show Table Item Deletes.

The screenshot shows the 'Journal History Enquiry' window with 1 record. The 'Function' dropdown is set to 'Table Item Delete'. The record details are as follows:

Audit	POS	Date	Customer
539	200	Thu 28 Apr 2022 11:58:59	Jeremy

The record details are expanded to show:

```

28 Apr 2022 11:58:59 Audit 539,200
* DELETE ITEMS TABLE 1 *
Reason: Changed Mind
CAPPUCCINO (VOID) 3.50
FLAT WHITE (VOID) 3.50
SHORT BLACK (VOID) 3.00
    
```

- **Alerts.Log/Email** (if Alerts were configured).

When using Alerts with the Table Deletes function, note that once an Alert is triggered, the Alert counter is reset. Examples of two scenarios using Quantity reaches 5 in 1 minute are outlined as follows:

**Example 1** – Delete 11 items from a table, then delete another 4 items from another table all within the same minute. Only a single alert for the 11 items deleted from the first table will be triggered.

**Example 2** – Delete 4 items from a table, then delete another item from another table within the same minute. A single alert for a total of the 5 items that were deleted across both tables within the same minute will be triggered.



## Room Interface

### IP-4771 – NewBook API Integration

This function adds the ability to connect Idealpos to NewBook via the API Integration.

The previously available NewBook Integration was done via a File method, whereas this new method utilises the API Interface. The File method is still available and can continue to be used.

Any sites that are currently utilising the NewBook File integration and want to upgrade to the API method will need to contact NewBook and request for their account to be upgraded to API.

Once NewBook have upgraded the account to API, the integration can be configured utilising the steps outlined as follows.

Before continuing with the below steps, ensure that the NewBook module has been enabled in the Licence Gateway on each POS Terminal that will utilise this integration. This can be confirmed by going to Back Office > Setup > Licence Gateway.

Ensure that Newbook appears in the Options column for each POS Terminal that will use this integration:

The screenshot shows the 'licence gateway' window with the following sections:

- Settings:** Connection Mode (Online Licence), Username (idealposuser), Password (masked), Computer Name, Computer Signature, and a Disconnect button.
- Registered Licence Information:** POS Number: 200, Company Name: Idealpos user, Trading Name: Idealpos user, Contact Name, ABN 34091801204, Phone Number, Address, and Australia.
- Table:** A table with columns: Product, Ver, Options, POS #, Scr#, Type, Expiry(D/M/Y). The table contains one row for product 'IPS' with version '8.0' and options including 'Newbook, S...'. A red arrow points to the 'Newbook, S...' text in the Options column.
- Legend:** A legend at the bottom right shows a green box for 'This terminal', a blue box for 'Other terminals', and a white box for 'Available'.
- Buttons:** Activate, Deactivate, Reload, and OK buttons are located at the bottom of the window.

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The following Function Descriptors will need to be configured for NewBook:

**Received Account** – Add Money – This is used for adding money to the NewBook Guest's eWallet.

**Tender** – Room Charge – This is used for charging sales to the NewBook Guest's Room.

**Tender** – Wallet – This is used for spending or redeeming value from the NewBook Guest's eWallet.

Go to: Back Office > Setup > Function Descriptors.

Select an unused Received Account function (unused Received Account Functions will show as "RA #", where # will show a number between 1 and 4), modify it and enter a Description "Add Money".

This Received Account will be used to add money to the eWallet for the NewBook Guest.

Press "Save" to close the Function Descriptor.

Function Descriptors  
Modify ADD MONEY

Save

Function RECEIVED ACCOUNT 4

Description ADD MONEY

GIFT VOUCHER  
 Credit Note  
 Allow % Tender Surcharges

POS 200  
v8 Build 6

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Select an unused Tender Function (similar to unused Received Account Functions, unused Tenders will have a description of "Tender #", where # will show a number between 1 and 18 (e.g. TENDER 13)).

Enter a Description of "ROOM CHARGE".

This Room Charge Tender will be used for charging against the Guest's Room.

When setting up the Tender, enable any checkboxes that you require (e.g. Show in Banking, Open Cash Drawer, etc.).

Press "Save" to save the changes.

**Function Descriptors**  
Modify ROOM CHARGE

Function **TENDER 13**

Description ROOM CHARGE

# of Receipts 1

Exchange Rate 0

Lower Limit 0.00

Upper Limit 99999.99

Scan Code

Scan Code Amount 0.00

Surcharge 0.00 %

Waive Surcharge Threshold 0.00 \$

- Rounding?
- Credit Function
- Allow Points per Dollar?
- Show in Banking
- Compulsory Amount
- Open Cash Drawer
- EFTPOS
- Account Tender
- Layby Tender
- Force Receipt
- GIFT VOUCHER Redemption
- Credit Note Tender
- Force Customer
- Force Reference
- Allow Overcharging To Tips
- Enable Customer Tipping

Override Receipt Footer

User-Defined Text

Save

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Select the next available unused Tender Function.

Enter a Description of "WALLET".

This Tender will be used for redeeming value from the NewBook Guest's eWallet.

When setting up the Tender, enable any checkboxes that you require (e.g. Show in Banking, Open Cash Drawer, etc.).

Press "Save" to save the changes.

**Function Descriptors**  
Modify WALLET

Function:

Description:

# of Receipts:

Exchange Rate:

Lower Limit:

Upper Limit:

Scan Code:

Scan Code Amount:

Surcharge:   %  \$

Waive Surcharge Threshold:

Rounding?  
 Credit Function  
 Allow Points per Dollar?  
 Show in Banking  
 Compulsory Amount  
 Open Cash Drawer  
 EFTPOS  
 Account Tender  
 Layby Tender  
 Force Receipt  
 GIFT VOUCHER Redemption  
 Credit Note Tender  
 Force Customer  
 Force Reference  
 Allow Overcharging To Tips  
 Enable Customer Tipping

Override Receipt Footer:

User-Defined Text:

Save

POS 200  
v8 Build 6

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

Remove the Inhibit checkbox for the Room Charge and Wallet Tenders so that they will be accessible from the Tender screen.

Yes/No Options		Search	>	Clear	S	X
Site 1		ALL	1	2	100	200
<b>TENDERS</b>						
1	Finalize Warning - CASH					
2	Finalize Warning - EFTPOS					
3	Finalize Warning - AMEX/DINERS					
4	Finalize Warning - POINTS					
5	Finalize Warning - TENDER 5					
6	Finalize Warning - LAYBY	✓				
7	Finalize Warning - GV REDEEM					
8	Finalize Warning - CREDIT NOTE					
9	Finalize Warning - CHEQUE					
10	Finalize Warning - TENDER 10					
11	Finalize Warning - TENDER 11					
12	Finalize Warning - ACCOUNT					
13	Finalize Warning - ROOM CHARGE					
14	Finalize Warning - WALLET					
15	Finalize Warning - TENDER 15					
16	Finalize Warning - TENDER 16					
17	Finalize Warning - TENDER 17					
18	Finalize Warning - ONLINE					
19	Inhibit CASH					
20	Inhibit EFTPOS					
21	Inhibit AMEX/DINERS					
22	Inhibit POINTS					
23	Inhibit TENDER 5	✓				
24	Inhibit LAYBY					
25	Inhibit GV REDEEM					
26	Inhibit CREDIT NOTE					
27	Inhibit CHEQUE	✓				
28	Inhibit TENDER 10	✓				
29	Inhibit TENDER 11	✓				
30	Inhibit ACCOUNT					
31	Inhibit ROOM CHARGE					
32	Inhibit WALLET					
33	Inhibit TENDER 15	✓				
34	Inhibit TENDER 16	✓				
35	Inhibit TENDER 17					

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One or more buttons need to be created for adding value to the eWallet.

Go to: Back Office > Setup > POS Screen > POS Screen Setup.

Select POS Screen Layout > Buttons.

Select a blank button on the POS Screen and configure as follows:

**Function:** Received on Account.

**Received on Account:** ADD MONEY [select the Received Account function configured above].

**Automatic Text:** This is optional. If left as blank, you will need to enter the value to add to the Wallet before pressing the button. If you enter a value into the Automatic Text field, the entered value will be used when pressing the button. If desired, multiple Add Money buttons can be created, each with a different amount entered into the Automatic Text field.

Received on Account

Automatic Text

Received on Account ADD MONEY

Button Appearance

Button Caption

Add Money

Back Colour Font

Text Colour A A

Double Width  Visible

Double Height

Graphic >

Format All Save Cancel

Received on Account

- Received on Account
- Refund
- Register Closed Msg
- Remote Assistance
- Repeat Item
- Replay Transaction
- Reservations
- Restriction Override
- Rewards Enquiry
- Reweigh
- Safe Drop
- Sale Reference
- Sale Type
- Scale On/Off
- Seat Number
- Send Message
- Stock Availability
- Stock Item
- Stock Item Edit
- Stock Item Sales
- Stock Item Search
- Stock Level Enquiry

An example showing the Received on Account with a pre-configured amount of \$10.00 in the Automatic Text Field:

Received on Account

Automatic Text 10.00

Received on Account ADD MONEY

Button Appearance

Button Caption

Add Money \$10.00

Back Colour Font

Text Colour A A

Double Width  Visible

Double Height

Graphic >

Format All Save Cancel

Received on Account

- Received on Account
- Refund
- Register Closed Msg
- Remote Assistance
- Repeat Item
- Replay Transaction
- Reservations
- Restriction Override
- Rewards Enquiry
- Reweigh
- Safe Drop
- Sale Reference
- Sale Type
- Scale On/Off
- Seat Number
- Send Message
- Stock Availability
- Stock Item
- Stock Item Edit
- Stock Item Sales
- Stock Item Search
- Stock Level Enquiry

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Create a Customer Type if one doesn't already exist which will be used for NewBook customers.

Go to: Back Office > File > Customers > Customer Types.

Press the "Add" button on the top-left corner of the window, create the Customer Type and enable any settings as required.

Further details about creating Customer Types can be found in the Customer Types topic of the User Guide by [clicking here](#).

The screenshot shows a software window titled "Customer Types" with a subtitle "Modify 2". The window contains the following configuration fields and options:

- Code: 2
- Description: MEMBERS
- Use Points System
- Point Multiplication Factor: 1
- Auto % Discount: [empty field]
- Auto Discount POS Range: [empty field] >
- Price Level: [empty field]
- Gaming Rating Grade: [empty field]
- Auto Populate Tender Spend Limit Credit (1): [empty field]
- Auto Populate Tender Spend Limit Credit (2): [empty field]
- Macro: [empty field]
- User-Defined Text: [empty field]
- New Customers Default to Bar Tab
- Print at Kitchen
- Prompt in POS
- Inhibit Manual Subtotal Discounts
- Prompt for Expected Date for Bar Tabs
- Fast Customers: [empty field]
- Back Colour: [empty field]
- Text Colour: [empty field]
- Preview: Idealpos Customer

At the bottom left of the window, the text "POS 200 v8 Build 6" is visible.

# idealpos Update History

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Go to: Back Office > Setup > Global Options > Interfaces.  
Select the Rooms option and configure as follows:

**Interface Type:** NewBook

**Version:** API

**Interface ID:** [Enter the Interface ID supplied by NewBook]

**Tender Type:** ROOM CHARGE [select the Room Charge Tender that was configured during the Function Descriptor configuration step].

**Customer Type:** MEMBERS [or select the Customer Type that was configured during the Customer Type configuration step].

**Add Money Function:** ADD MONEY [or select the Received Account Function that was configured during the Function Descriptor configuration step – this Function is used for adding money to the eWallet].

**Spend Money:** WALLET [or select the Tender that was configured during the Function Descriptor configuration step – this is used for tendering or redeeming the money from the NewBook Guest's eWallet]

**Wristband Membership Type:** 1

**Unmatched GL Code:** 6000

**Gratuity GL Code:** 6000

**Post Paid Transactions:** Enabled

**Default Client Account ID:** -1

**Global Options**  
Site 1 (Site 1)

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

**Interfaces**

- Allotrac
- BevCon
- Bookings
- Clipp
- Customers
- eCommerce
- ePay
- Fuel Console
- Gunnebo
- Pager
- Pay@Table
- PLBPOS
- Reservations
- Rooms** Newbook
- Slyp
- Tax Monitoring
- Web Reporting

**Room Interface**

Interface Type: Newbook Version: API

Instance Id: \_\_\_\_\_

Tender Type: ROOM CHARGE

Customer Type: MEMBERS

Add Money Function: ADD MONEY

Spend Money: WALLET

Wristband Membership Type: 1

Unmatched GL Code: 6000

Gratuity GL Code: 6000

Post Paid Transactions

Default Client Account ID: -1

Test

# idealpos Update History

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Once configured, press the "Test" button to establish and test the connection.

A connection should be established successfully, and this is reflected in a response next to the Test button, as shown in the example below:

The screenshot displays the 'Global Options' window for 'Site 1 (Site 1)'. The 'Interfaces' tab is active, showing a list of interface types on the left and configuration details for the 'Newbook' interface on the right. The 'Rooms' interface is selected in the list. The configuration for 'Newbook' includes: Interface Type (Newbook), Version (API), Instance Id (empty), Tender Type (ROOM CHARGE), Customer Type (MEMBERS), Add Money Function (ADD MONEY), Spend Money (WALLET), Wristband Membership Type (1), Unmatched GL Code (6000), Gratuity GL Code (6000), and a checked 'Post Paid Transactions' option. A 'Test' button is highlighted with a yellow box, and a yellow arrow points to the status text 'CONNECTED : IdealPOS Staging Database' next to it.

# idealpos Update History

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The NewBook API Integration supports the following functionality:

Further in-depth details are available in the Using NewBook API topic in the User Guide.

## Room Charge using Room Number

Add items to the sale, press ENTER to go to the Tender screen, then press the Room Charge button.

Idealpos will display a Room Number prompt – enter the room number which the Guest is staying in, then select the Guest Name from the list and confirm the prompt.

Post Transaction To Newbook

Room / Search 101

Joe Blow Joanne Blow

q w e r t y u i o p 7 8 9 / @  
a s d f g h j k l # 4 5 6 : !  
↑ z x c v b n m & % 1 2 3 Proceed  
CL \ ? 0 . -

Confirm the prompt to save the charge to the Guest's room.

Note that when there are multiple guests in a room, regardless of which guest is selected, the charge will be posted to the Room Account and not to the Guest eWallet Account.

Post Transaction To Newbook

Room / Search 101

Joe Blow Joanne Blow

Post to : Joe Blow  
Are you sure?

Yes No

q w e r t y u i o p 7 8 9 / @  
a s d f g h j k l # 4 5 6 : !  
↑ z x c v b n m & % 1 2 3 Proceed  
CL \ ? 0 . -

# idealpos Update History

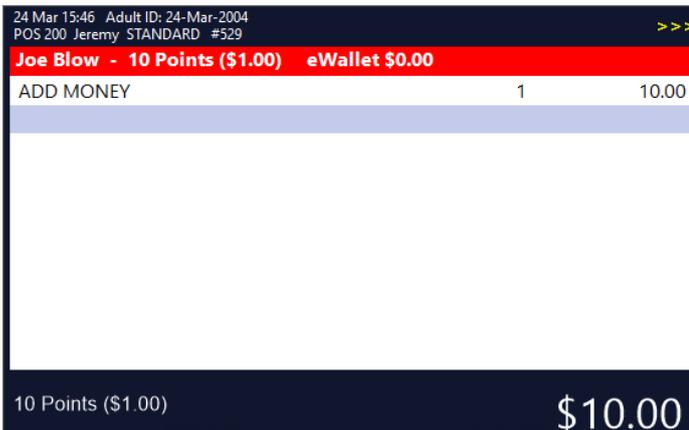
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## Add money to eWallet

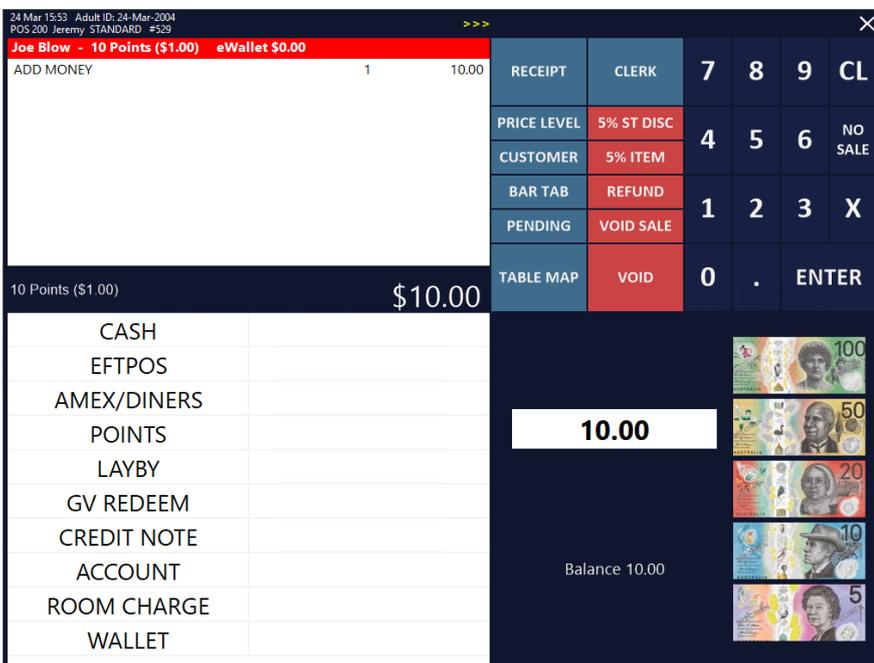
To add money to a NeBook Guest's eWallet, first, swipe the Guest's Wrist Strap.

The Guest's details will be displayed at the top of the POS Screen, along with the current eWallet balance.

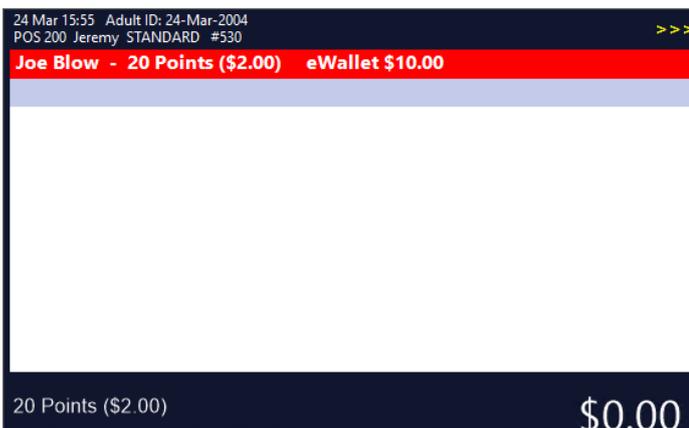
Press the "Add Money" button and you will see "ADD MONEY" within the sale window with the amount entered.



Press the ENTER button to go to the Tender screen and tender the sale using a standard tender (e.g. Cash) to add value to the eWallet.



Next time the guest's wrist strap is swiped, the eWallet value (top of the sale window) will show the updated amount.

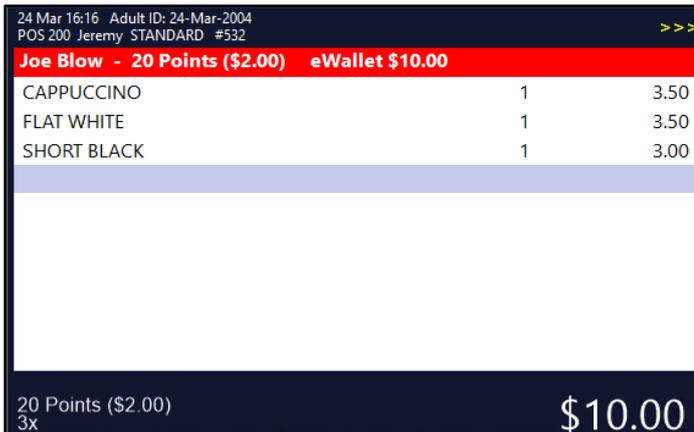


# idealpos Update History

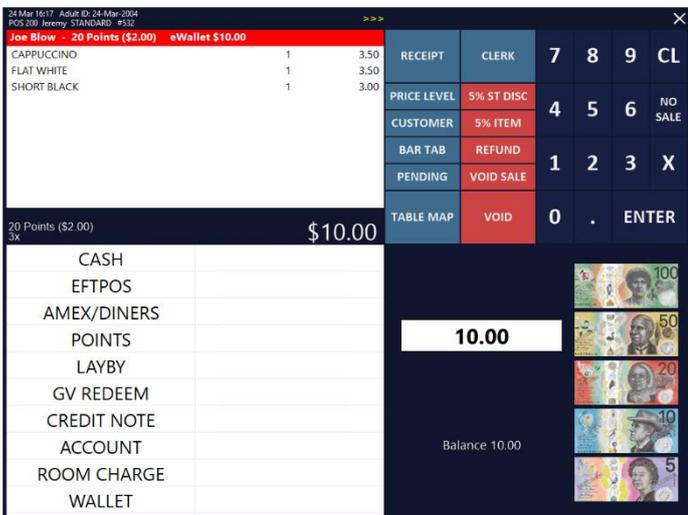
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## Spend money from eWallet

To spend money from the NewBook Guest's eWallet, swipe the NewBook Guest's Wrist Strap, then add the required items to the sale.

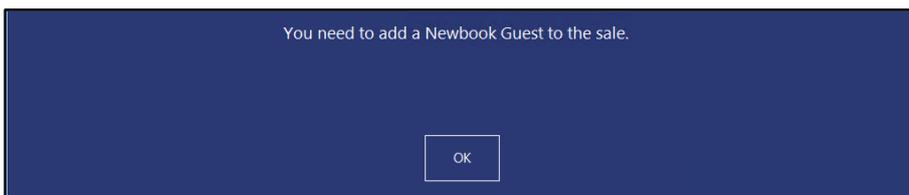


Press the ENTER button to go to the Tender Screen, then press the "Wallet" Tender button.

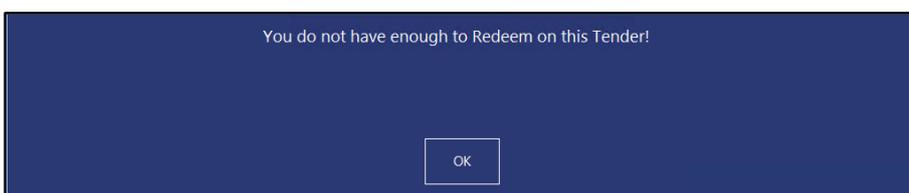


The amount of the sale will be deducted from the NewBook Guest's eWallet.

If the Wallet Tender is used when a NewBook Guest has not been added to the sale, Idealpos will display a prompt and you will be returned to the sale screen to select another tender (or add the NewBook Guest to the sale):



If the Guest's eWallet has insufficient funds, Idealpos will display the following prompt and you will be returned to the sale screen to select another tender:

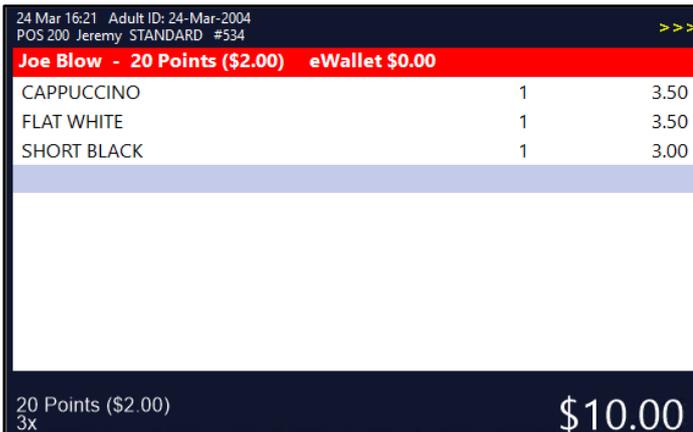


# idealpos Update History

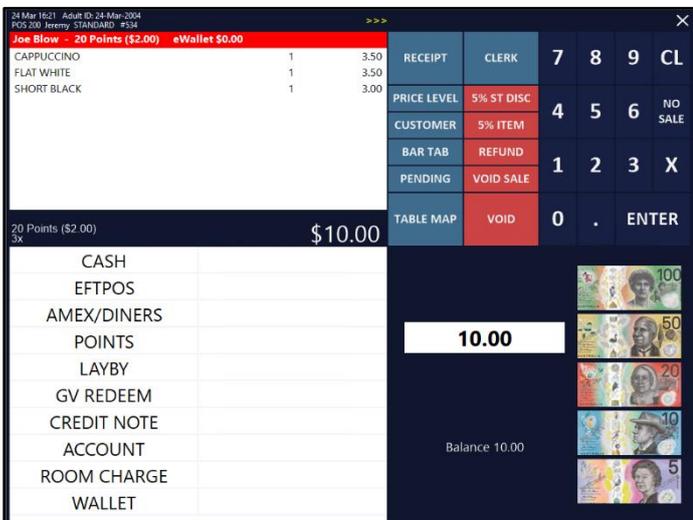
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## Room Charge using a Guest Wrist Strap

To perform a Room Charge using a Guest Wrist Strap, swipe the NewBook Guest's Wrist Strap, then add the required items to the sale.



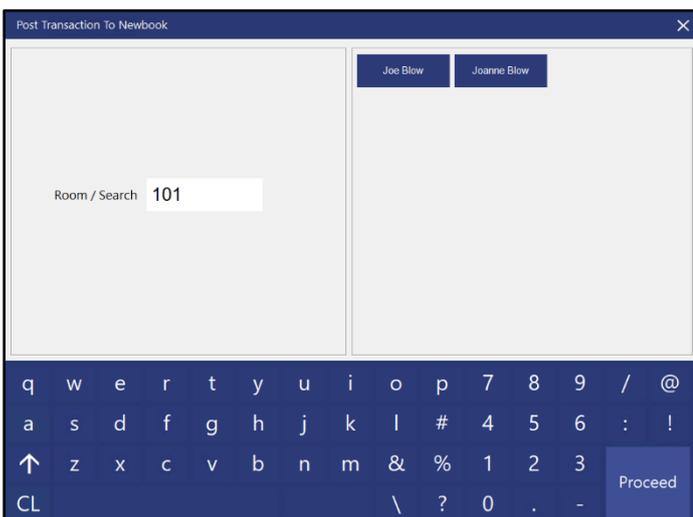
Press ENTER to go to the Tender screen, then press the Room Charge Tender button.



The sale will be finalised and the sale amount will be charged against the NewBook Guest's room.

As the Guest's Wrist Strap was scanned, the "Enter Room Number" prompt will not appear.

If the Guest's Wrist Strap was not scanned, the "Enter Room Number" prompt will appear and the clerk will need to enter the Guest's Room Number, then select their name from the list.



## Stock Items

### IP-4758 – Show Variant Options on Stock Search screen when linking existing items

This function will show the Variant Options at the top of the Stock Search screen when linking a Variant to an existing Stock Item. This change improves the linking process by reducing any confusion regarding which Variant Item you are linking to. In addition, this change also improves the linking process by pre-filling the Description Search field with that of the Parent Stock Item. Typically, the child item you are linking to will contain the Parent Item's description. E.g. The Parent Item will contain a description such as "Sport Shirt", with the Child Items containing descriptions such as "Sport Shirt Blue Small", "Sport Shirt Red Medium", etc. Therefore, it makes sense that the Link Variant screen should pre-fill the description search field with that of the Parent Item to simplify the linking process.

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

Modify a Parent Stock Item (an item that has the "Has Variants" option enabled/checked)

Within the Variants tab, enable any Variant Options that aren't ticked.

This will enable the "New Variants of [Item]" section.

Within the Stock Code field, press the "+" button.

**Stock Items**  
Modify 12

General Advanced **Variants**

Created 02 Feb 2022 14:53:10

Size  
Extra Large   
Large   
Medium   
Small

Colour  
Black   
Blue   
Brown   
Green   
Orange   
Purple   
Red   
White   
Yellow

Material  
Cotton   
Denim   
Leather   
Silk

Existing Variants of Shirt

Size	Colour	Material	Stock Code
Small			119

New Variants of Shirt

Inherit Prices from Parent

Size	Colour	Material	Stock Code	Scan Code	Create
Small	Blue	Cotton	[auto create]	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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Create New Variants

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The Variant Option that is being linked will be displayed at the top of the Link Variant window (in this example, the New Variant being linked is Shirt (Size=Small, Colour=Blue, Material=Cotton)).

The Parent Item Description will also be pre-filled in the Search field so that the list of available items are filtered, simplifying the process of finding the required item.

➤

Link Variant: Shirt (Size=Small, Colour=Blue, Material=Cotton)

Multi Select

✕

23 records

Code	Description	Kitchen	Department	Plu Code	Scan Code	Standard Cost	Average Cost
307004	BOYS SIZE 10 SHIRT	BOYS SIZE 10 SHIR	SCHOOL CLOTHING	0	9831550511064	16.85	16
307005	BOYS SIZE 12 SHIRT	BOYS SIZE 12 SHIR	SCHOOL CLOTHING	0	9855116343913	16.85	16
307006	BOYS SIZE 14 SHIRT	BOYS SIZE 14 SHIR	SCHOOL CLOTHING	0	9816669799985	16.85	16
307001	BOYS SIZE 4 SHIRT	BOYS SIZE 4 SHIRT	SCHOOL CLOTHING	0	9864369157239	16.85	16
307002	BOYS SIZE 6 SHIRT	BOYS SIZE 6 SHIRT	SCHOOL CLOTHING	0	9894221952702	16.85	16
307003	BOYS SIZE 8 SHIRT	BOYS SIZE 8 SHIRT	SCHOOL CLOTHING	0	9804531747981	16.85	16
307009	BOYS SIZE L SHIRT	BOYS SIZE L SHIRT	SCHOOL CLOTHING	0	9879630971254	18.35	18
307008	BOYS SIZE M SHIRT	BOYS SIZE M SHIRT	SCHOOL CLOTHING	0	9890825935349	18.35	18
307007	BOYS SIZE S SHIRT	BOYS SIZE S SHIRT	SCHOOL CLOTHING	0	9831759521079	18.35	18
307010	BOYS SIZE XL SHIRT	BOYS SIZE XL SHIR	SCHOOL CLOTHING	0	9861665990539	18.35	18
307011	BOYS SIZE XXL SHIRT	BOYS SIZE XXL SHI	SCHOOL CLOTHING	0	9832037209504	18.35	18
307054	GIRLS SIZE 10 SHIRT	GIRLS SIZE 10 SHIR	SCHOOL CLOTHING	0	9865198082112	16.85	16
307055	GIRLS SIZE 12 SHIRT	GIRLS SIZE 12 SHIR	SCHOOL CLOTHING	0	9861526194892	16.85	16
307056	GIRLS SIZE 14 SHIRT	GIRLS SIZE 14 SHIR	SCHOOL CLOTHING	0	9862113022567	18.35	18
307057	GIRLS SIZE 16 SHIRT	GIRLS SIZE 16 SHIR	SCHOOL CLOTHING	0	9892075717140	18.35	18
307058	GIRLS SIZE 18 SHIRT	GIRLS SIZE 18 SHIR	SCHOOL CLOTHING	0	9802385602227	18.35	18
307059	GIRLS SIZE 20 SHIRT	GIRLS SIZE 20 SHIR	SCHOOL CLOTHING	0	9811991517177	18.35	18
307051	GIRLS SIZE 4 SHIRT	GIRLS SIZE 4 SHIRT	SCHOOL CLOTHING	0	9807983659888	16.85	16
307052	GIRLS SIZE 6 SHIRT	GIRLS SIZE 6 SHIRT	SCHOOL CLOTHING	0	9888089825162	16.85	16
307053	GIRLS SIZE 8 SHIRT	GIRLS SIZE 8 SHIRT	SCHOOL CLOTHING	0	9886360858335	16.85	16
801001	MENS BUSINESS SHIRT	MENS BUSINESS SH	DRY CLEANING MEN	0		0.00	0
801003	MENS SHIRT	MENS SHIRT	DRY CLEANING MEN	0		0.00	0
182	Shirt Blue Small Cotton	Shirt Blue Small Cotti	SCHOOL CLOTHING	0		7.00	7

Enabled in Location  
Discontinued

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# idealpos Update History

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Select the Stock Item that you want to link from the list, then press "OK".

Link Variant: Shirt (Size=Small, Colour=Blue, Material=Cotton)							Multi Select	
Code	Description	Kitchen	Department	Plu Code	Scan Code	Standard Cost	Average Cost	
307004	BOYS SIZE 10 SHIRT	BOYS SIZE 10 SHIR	SCHOOL CLOTHING	0	9831550511064	16.85	16	
307005	BOYS SIZE 12 SHIRT	BOYS SIZE 12 SHIR	SCHOOL CLOTHING	0	9855116343913	16.85	16	
307006	BOYS SIZE 14 SHIRT	BOYS SIZE 14 SHIR	SCHOOL CLOTHING	0	9816669799985	16.85	16	
307001	BOYS SIZE 4 SHIRT	BOYS SIZE 4 SHIRT	SCHOOL CLOTHING	0	9864369157239	16.85	16	
307002	BOYS SIZE 6 SHIRT	BOYS SIZE 6 SHIRT	SCHOOL CLOTHING	0	9894221952702	16.85	16	
307003	BOYS SIZE 8 SHIRT	BOYS SIZE 8 SHIRT	SCHOOL CLOTHING	0	9804531747981	16.85	16	
307009	BOYS SIZE L SHIRT	BOYS SIZE L SHIRT	SCHOOL CLOTHING	0	9879630971254	18.35	18	
307008	BOYS SIZE M SHIRT	BOYS SIZE M SHIRT	SCHOOL CLOTHING	0	9890825935349	18.35	18	
307007	BOYS SIZE S SHIRT	BOYS SIZE S SHIRT	SCHOOL CLOTHING	0	9831759521079	18.35	18	
307010	BOYS SIZE XL SHIRT	BOYS SIZE XL SHIR	SCHOOL CLOTHING	0	9861665990539	18.35	18	
307011	BOYS SIZE XXL SHIRT	BOYS SIZE XXL SHI	SCHOOL CLOTHING	0	9832037209504	18.35	18	
307054	GIRLS SIZE 10 SHIRT	GIRLS SIZE 10 SHIR	SCHOOL CLOTHING	0	9865198082112	16.85	16	
307055	GIRLS SIZE 12 SHIRT	GIRLS SIZE 12 SHIR	SCHOOL CLOTHING	0	9861526194892	16.85	16	
307056	GIRLS SIZE 14 SHIRT	GIRLS SIZE 14 SHIR	SCHOOL CLOTHING	0	9862113022567	18.35	18	
307057	GIRLS SIZE 16 SHIRT	GIRLS SIZE 16 SHIR	SCHOOL CLOTHING	0	9892075717140	18.35	18	
307058	GIRLS SIZE 18 SHIRT	GIRLS SIZE 18 SHIR	SCHOOL CLOTHING	0	9802385602227	18.35	18	
307059	GIRLS SIZE 20 SHIRT	GIRLS SIZE 20 SHIR	SCHOOL CLOTHING	0	9811991517177	18.35	18	
307051	GIRLS SIZE 4 SHIRT	GIRLS SIZE 4 SHIRT	SCHOOL CLOTHING	0	9807983659888	16.85	16	
307052	GIRLS SIZE 6 SHIRT	GIRLS SIZE 6 SHIRT	SCHOOL CLOTHING	0	9888089825162	16.85	16	
307053	GIRLS SIZE 8 SHIRT	GIRLS SIZE 8 SHIRT	SCHOOL CLOTHING	0	9886360858335	16.85	16	
801001	MENS BUSINESS SHIRT	MENS BUSINESS SH	DRY CLEANING MEN	0		0.00	0	
801003	MENS SHIRT	MENS SHIRT	DRY CLEANING MEN	0		0.00	0	
182	Shirt Blue Small Cotton	Shirt Blue Small Cott	SCHOOL CLOTHING	0		7.00	7	

The Stock Item Code will appear in the Stock Code field.

New Variants of Shirt				Reset New Variants	
Size	Colour	Material	Stock Code	Scan Code	Create
Small	Blue	Cotton	[link to 182] +		<input checked="" type="checkbox"/>

You can also hover over the Stock Code field to display the Description of the Stock Item you are linking to.

New Variants of Shirt				Reset New Variants	
Size	Colour	Material	Stock Code	Scan Code	Create
Small	Blue	Cotton	Shirt Blue Small Cotton		<input checked="" type="checkbox"/>

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To link to the existing Item, press the "Create New Variants" button on the bottom-right corner of the window.

**Stock Items** Modify 12 Created 02 Feb 2022 14:53:10

General Advanced Indirect Item **Variants**

Size:  Extra Large  Large  Medium  Small

Colour:  Black  Blue  Brown  Green  Orange  Purple  Red  White  Yellow

Material:  Cotton  Denim  Leather  Silk

### Existing Variants of Shirt

Size	Colour	Material	Stock Code
Small			119

### New Variants of Shirt

Size	Colour	Material	Stock Code	Scan Code	Create
Small	Blue	Cotton	[link to 182]	<input type="text"/>	<input checked="" type="checkbox"/>

[Reset New Variants](#) [Create](#)

**Create New Variants**

Press "Yes" to proceed.

You are about to create 1 Variants of Shirt.

Are you sure you wish to proceed?

A prompt showing the number of Variants Created will be displayed. Press "OK" to continue.

1 Variants Created.

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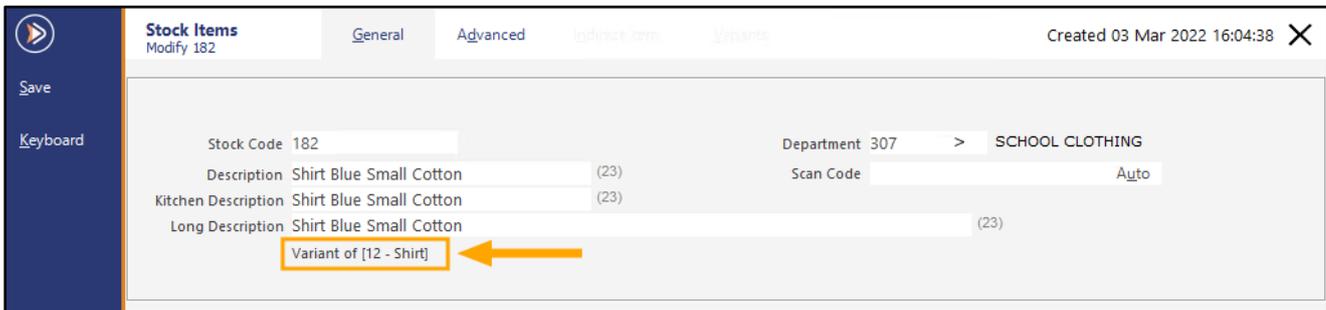
The Item will appear in the Existing Variants of [Item] list.



The screenshot shows the 'Stock Items' interface with the 'Variants' tab selected. On the left, there is a 'Size' dropdown menu with options: Extra Large, Large, Medium, and Small. The 'Existing Variants of Shirt' table is displayed with the following data:

Size	Colour	Material	Stock Code
Small			119
Small	Blue	Cotton	182

When modifying the linked item directly, it will show the Parent Item Code/Description.



The screenshot shows the 'Stock Items' interface with the 'General' tab selected. The 'Stock Code' is 182, and the 'Department' is 307 (SCHOOL CLOTHING). The 'Description' is 'Shirt Blue Small Cotton (23)'. The 'Long Description' is 'Shirt Blue Small Cotton (23)'. A text field contains 'Variant of [12 - Shirt]' with an orange arrow pointing to it.

## Stock Purchases

### IP-4034 – Stock Purchases – Support for Stock Item Long Descriptions

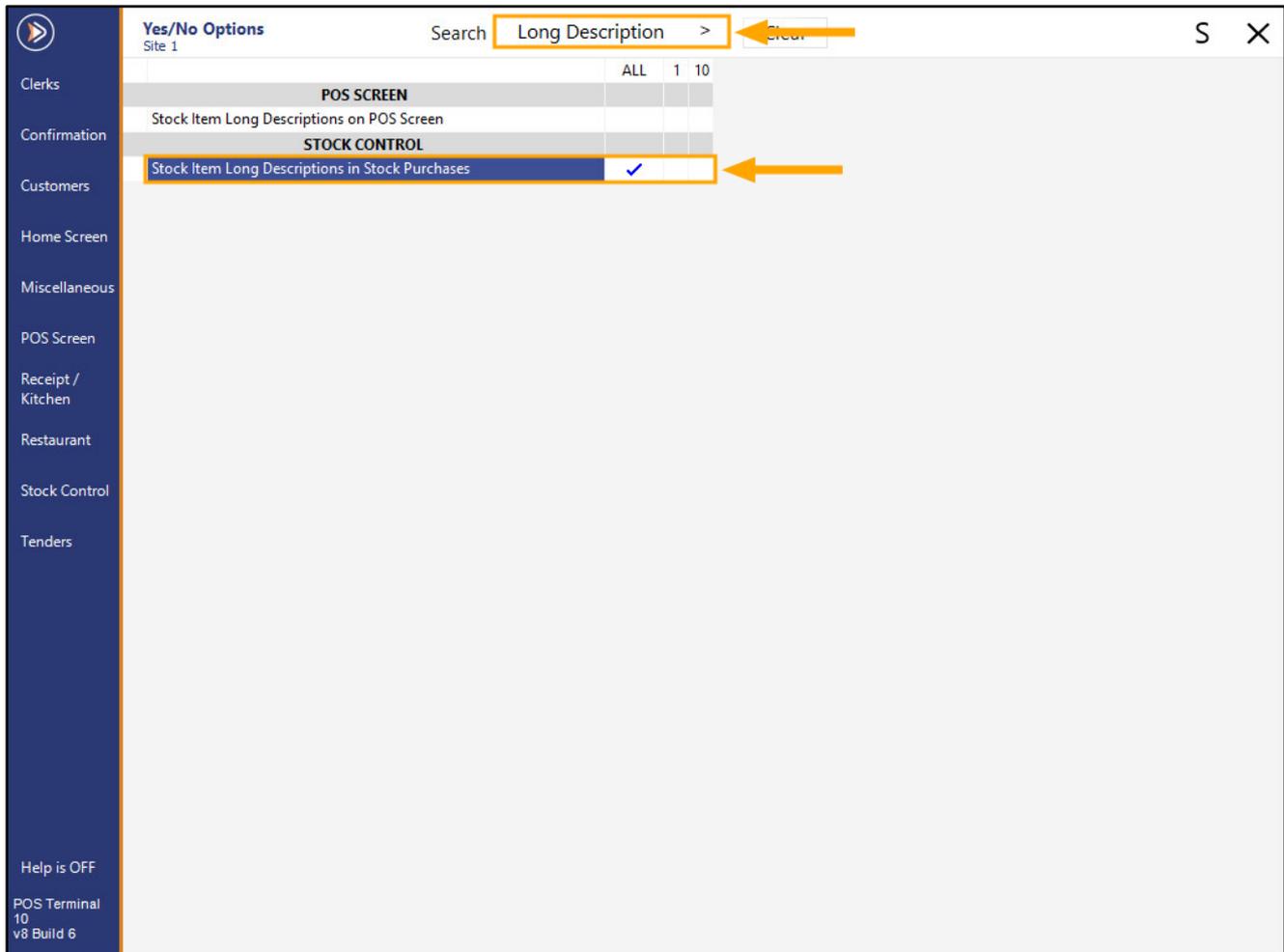
This function adds the ability to display a Stock Item's Long Description (Description 3) on the Stock Purchase/Order screens as well as the corresponding Reports.

By default, this function is disabled; if it is required, it will need to be enabled.

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

In the Search field, enter "Long Description".

Enable "Stock Item Long Descriptions in Stock Purchases".



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Close the Yes/No Options, then go to: Back Office > File > Stock Control > Stock Items.

Ensure that the Stock Items you are ordering in a Purchase Order contain a Long Description (ensure that Description 3 is populated with a long description similar to the below example).

**Stock Items**  
Modify 2

General   **Advanced**   Ignored Items   Options

Created 07 Mar 2022 11:55:46

Stock Code 2   Department 307 > SCHOOL CLOTHING

Description BOYS SIZE XL SHORTS WITH CUSTO (30)   Scan Code   Auto

Kitchen Description BOYS SIZE XL SHORTS WITH CUSTO (30)

**Long Description BOYS SIZE XL SHORTS WITH CUSTOM CARTOON CHARACTER DESIGN (56)**

---

**Selling Prices (inc Tax)**

		Profit	
		%	\$
STANDARD	25.00	45.01	10.23
STAFF	0.00		
EXTRAS	0.00		
BOTTLESHOP	0.00		
Price 5	0.00		
Price 6	0.00		
Price 7	0.00		
Price 8	0.00		
Price 9	0.00		
Price 10	0.00		
Price 11	0.00		
OWNERS	0.00		

Force Selling Price Entry

**Printer Settings**

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

**Purchasing**

Purchase Category 3 > RETAIL

Default Supplier 20 > Wriddles Uniforms

Default Supplier Stock Code BYSXLSHRTSCCD

**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	12.5000
Last Cost	12.5000
Average Cost	12.5000

**Tax Settings (Selling)**

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

**Attributes**


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If any changes were made, press "Save" to close the Stock Item and repeat the process as necessary.

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Go to: Back Office > Transactions > Stock Control > Stock Purchases

Select the Supplier as required, then add the Stock Item to the Purchase Order.

The Stock Item's Long Description (Description 3) will be displayed in the Description column.

**Purchase Order**
Purchase Type: 
Location: 
✕

Supplier:  **Wriddles Uniforms**

Purchase Order No:

Invoice No:

Details:

Order Date:

Stock Process Date:

Due Date:

>>>

Tax Inc

*	Stock Code	Supplier Code	Description	Quantity Ordered	Unit Cost	Disc %	Tax 1	Total	Last Cost
	2	BYSXLSHRTSCCD	BOYS SIZE XL SHORTS WITH CUSTOM CARTOON CHARACTER DESIGN			0.00	GST	12.50	<input checked="" type="checkbox"/>

Enquiry Prices

Sales Quantity:  Week:

Week 4:  Week 3:  Week 2:  Week 1:  This Week:

**Subtotal** 12.50

Auto-Allocate  GST  Freight  0.00

Auto-Allocate  GST  Admin Fee  0.00

Tax  1.25

**Invoice Total** 13.75

Generate by Reorder Levels
Generate by Supplier
Remove Zero Quantity Items
Save

# idealpos Update History

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If the Yes/No Option "Stock Item Long Descriptions in Stock Purchases" is disabled, the shorter Stock Item Description will be shown in Stock Purchases:

**Purchase Order**
Purchase Type 
Location 
✕

---

Supplier  >  
**Widdles Uniforms**

Purchase Order No

Invoice No

Details

Order Date

Stock Process Date

Due Date

>>>

Tax Inc

---

Stock Code	Supplier Code	Description	Quantity Ordered	Unit Cost	Disc %	Tax 1	Total	Last Cost
<input type="text" value="2"/>	BYSXLSHRTSCCD	BOYS SIZE XL SHORTS WITH CUSTO	1	12.5	0.00	GST	12.50	<input checked="" type="checkbox"/>
<input type="text" value="*"/>								<input type="checkbox"/>

---

Enquiry Prices

Sales Quantity  Week

Week 4  Week 3  Week 2  Week 1  This Week

**Subtotal** 12.50

Auto-Allocate  GST  Freight

Auto-Allocate  GST  Admin Fee

Tax  1.25

**Invoice Total** 13.75

---

Generate by Reorder Levels
Generate by Supplier
Remove Zero Quantity Items
Save