

Idealpos 7.1 Build 11 - Update History

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End of Shift

IP-3517 – USA Region – “Float” function renamed “Starting Bank”

The “Float” function has been renamed to “Starting Bank” for the USA Region.

This change will only be visible when the Idealpos Region is set to “USA” and is reflected throughout Idealpos where the Float descriptor is shown (i.e. Float Count Entry is now Starting Bank Entry, any Yes/No Options which contained the word “Float” have been replaced with the word “Starting Bank”, etc.).

As mentioned above, this change is only applicable for the USA Region (the Idealpos Region must be set to USA).

The region is set by going to:

Back-Office Dashboard, then selecting Setup > POS Terminals > Modify > Main Settings > Region.

Float and Starting Bank perform the same task and by renaming this function to “Starting Bank” for the USA Region, customers that reside in the USA will find it easier to locate and make use of this function.

This function is used to count the amount of money that is in the Starting Bank/Float before any sales take place.

Once the shift is finished, the amounts entered or counted from the Starting Bank/Float can be checked against the float from the beginning of the shift to ensure that the amount of money in the till balances correctly.

More information about using Starting Bank or Float is available in the User Guide under the End of Shift > Float Count Entry topic.

[Click here to view the End of Shift topic.](#)

[Click here](#) to view info about the Starting Bank/Float which is located within the above End of Shift topic.

Gift Vouchers

IP-3537 – Gift Vouchers – Recipient Name can be modified when using Customer

This function makes it possible to change the name of the Gift Voucher Recipient when purchasing a Gift Voucher while a Customer has been added to the sale. In addition to this change, the “Customer Name” field within the Gift Voucher Sale window has now been changed to “Recipient Name”.

Previous to this change, the Customer Name field in the Gift Voucher Sale window would be pre-filled using the name of the Customer which was added to the sale and it was not possible to modify the name.

The above changes have been made to simplify the process of selling Gift Vouchers. This change also makes logical sense as the majority of Gift Voucher sales are typically purchased to give to someone else, so it is appropriate that the Gift Voucher sale window should allow the Recipient Name to be recorded against the voucher, not the name of the Customer who is purchasing the Gift Voucher.

If Gift Vouchers have not been configured or if you want to find out more about using Gift Vouchers in Idealpos, [click here](#) to visit the Gift Voucher topic in the User Guide.

Before using this function, we recommend disabling the option “Gift Vouchers use Customer Code” (if you intend on allowing your Customers to purchase Gift Vouchers for other recipients).

Go to: Setup > Global Options > Credit Notes/Gift Vouchers.

Clear the Checkbox “Gift Vouchers use Customer Code”

The screenshot shows the 'Global Options' window for 'site 1 (Site 1)'. The 'Credit Notes/Gift Vouchers' tab is selected. The 'Gift Vouchers' section contains a table with 20 rows, each representing a different voucher type. The 'Expiry Days' column shows 365 for the first row and 90 for the others. The 'Receipt Printer Logo' and 'PDF Logo' columns contain file names like 'Gift Voucher Receipt.png' and 'Gift Voucher PDF.jpg'. To the right of the table, there are several settings: a 'Message' field with terms and conditions, a 'Company Logo' field with 'Idealpos_Gift_Voucher_Banner.jpg', and a 'Website' field with 'www.idealpos.com.au'. Below these are several checkboxes, including 'Print Vouchers on Receipt Printer', 'Only Print Voucher if No Email Address', 'Automatically create Gift Voucher codes', 'Gift Vouchers can be redeemed at any Site', 'Gift Vouchers use Customer Code' (highlighted with a yellow box and an arrow), 'Can Search Gift Vouchers by Name', 'Voucher details shown on Receipts', 'Inhibit ability to add value to existing Gift Vouchers', and 'Expire Gift Voucher after a Single Redemption'. At the bottom, there is a 'Credit Notes' section with a 'Receipt Message' field, a 'Customer Type' dropdown set to 'ACCOUNTS', and an 'Expiry Days' field set to '90'. There is also a table for 'Reason' codes with 5 rows and 2 columns.

Gift Voucher Type	Expiry Days	Receipt Printer Logo	PDF Logo
1 Gift Voucher	365	Gift Voucher Receipt.png	Gift Voucher PDF.jpg
2 Birthday Voucher	30	Gift Voucher Receipt.png	Gift Voucher BD PDF.jpg
3 Certificate	90	Gift Certificate Receipt.png	Gift Certificate PDF.jpg
4 Birthday Certificate	30	Gift Certificate Receipt.png	Gift Certificate BD PDF.jpg
5 Gift Voucher Type 5	90		
6 Gift Voucher Type 6	90		
7 Gift Voucher Type 7	90		
8 Gift Voucher Type 8	90		
9 Gift Voucher Type 9	90		
10 Gift Voucher Type 10	90		
11 Gift Voucher Type 11	90		
12 Gift Voucher Type 12	90		
13 Gift Voucher Type 13	90		
14 Gift Voucher Type 14	90		
15 Gift Voucher Type 15	90		
16 Gift Voucher Type 16	90		
17 Gift Voucher Type 17	90		
18 Gift Voucher Type 18	90		
19 Gift Voucher Type 19	90		
20 Gift Voucher Type 20	90		

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From the POS Screen, go to: Customers > Add Customer to Sale

31 Jul 12:22 Adult ID: 31-Jul-2002
Jeremy STANDARD

Sarah Charlton - 580 Points (\$58.00)

580 Points (\$58.00) \$0.00

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Press the GIFT VOUCHER button to sell a Gift Voucher.

The GIFT VOUCHER Sale window will appear.

The Customer Name field will now appear as Recipient Name.

The Recipient Name field will be pre-filled using the name of the Customer that has been added to the current sale.

If a Customer has not been added to the sale, the Recipient Name field will be blank.

The Recipient Name field can be modified to reflect the name of the intended recipient of the voucher.

Previously, this field would be pre-filled and greyed out if a Customer had been added to the sale.

The Email Address of the recipient can also be entered and a copy of the Gift Voucher will be emailed to them.

Note that in order for the Gift Voucher to be emailed to the recipient successfully, Email Settings must be configured in Setup > Global Options > Other Options > Email Settings.

The below example shows the GIFT VOUCHER Sale window pre-filled with the name of the Customer which has been added to the current sale.

The screenshot displays the 'GIFT VOUCHER Sale' window. The title bar is dark blue with a close button (X) on the right. The main area is light grey and contains the following fields:

- Scan or Enter Voucher Code:** A text input field containing '9831623158172'.
- Amount:** A text input field containing '0.00'.
- Recipient Name:** A text input field containing 'Sarah Charlton'.
- Email Address:** An empty text input field.
- GIFT VOUCHER Type:** A dropdown menu with 'Gift Voucher' selected.

At the bottom of the window, there is a dark grey keyboard overlay with the following keys:

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

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Enter the Gift Voucher Amount, Recipient Name and Email Address, then press "OK" to add the Gift Voucher to the sale:

GIFT VOUCHER Sale

Scan or Enter Voucher Code
9831623158172

Amount
100.00

Recipient Name
John Smith

Email Address
johnsmith@email.com

GIFT VOUCHER Type
Gift Voucher

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 & .com 1 2 3 OK
CL backspace \ ? 0 . -

The Gift Voucher is added to the sale similar to the below example:

31 Jul 14:17 Adult ID: 31-Jul-2002
Jeremy STANDARD >>>

Sarah Charlton - 580 Points (\$58.00)



GV PURCHASE : John Smith	1	100.00
--------------------------	---	--------

580 Points (\$58.00) \$100.00

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Tender the Sale by pressing the ENTER button, then choose an amount to finalise the sale.
The Gift Voucher is then emailed to the recipient's email address that was entered during the sale.
The Gift Voucher will be received as a PDF attachment:

	Current Balance: As at 31 Jul 2020	\$100.00
	Original Value:	\$100.00
	Issue Date:	31 Jul 2020 14:20:28
	Expiry Date:	31 Jul 2021 23:59:59
	Recipient:	John Smith
	<small>Terms and Conditions</small>	
	<ul style="list-style-type: none">• Vouchers redeemable up to and including the expiry date.• Vouchers can be redeemed at ANY one of our awesome stores.• Vouchers cannot be redeemed for cash or other services.	
		Powered by 

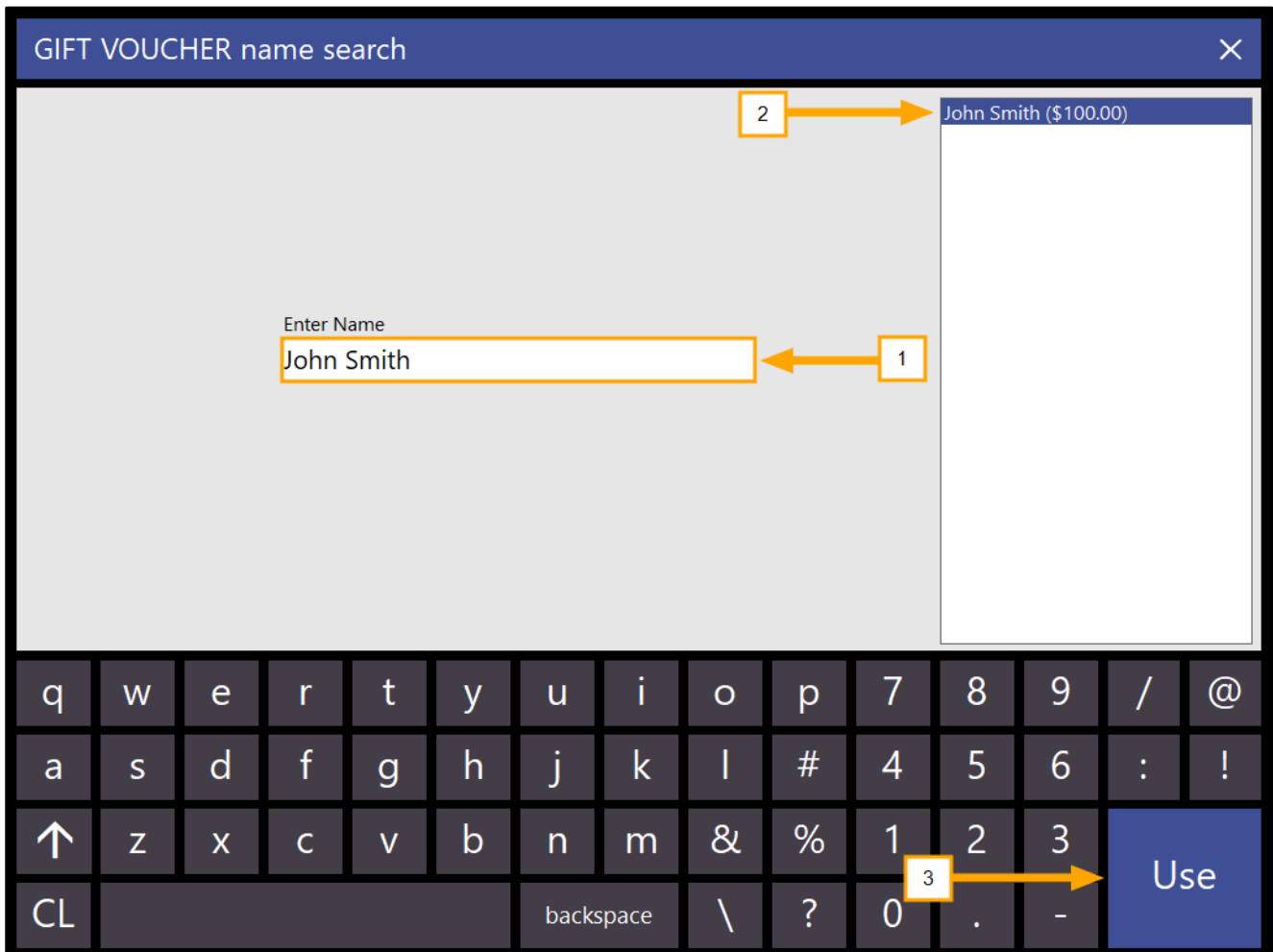
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If required, the Gift Voucher can be emailed to the recipient again (in case there are problems during the send email process or if they accidentally delete their email).

This can be done via the GIFT VOUCHER ENQUIRY button.

Press GIFT VOUCHER ENQUIRY from the POS Screen > Name Search > Enter the Recipient Name into the "Enter Name" field > Select the recipient name from the right-hand side > Use



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Press the "Email" button to Email the voucher.

GIFT VOUCHER Enquiry

Scan or Enter Voucher Code

9831623158172 > Name Search

Balance of Voucher 100.00

John Smith
Bought 03-Aug-2020 - \$100.00
Expires 03-Aug-2021

Print View History Edit OK Email

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

A confirmation prompt will appear.

Press "Yes" to continue to email the voucher.

It will be emailed to the same email address as was originally entered when the voucher was sold.

Alternatively, the Voucher can also be Printed if required via the "Print" button.

Are you sure you wish to Email this Gift Voucher to

[Blurred Email Address]

Yes No

Global Options

IP-3410 – Additional Sales Type Fields Added

This function enables the ability to configure additional Sales Types which can be used for Pending Sales.

Examples of Sale Types include Takeaway, Delivery, Pickup, etc.

Prior to this change, there were a maximum number of four sale types that could be configured.

With this change, this has now been increased to a maximum number of nine sale types that are now available.

More information about using Pending Sales is available in the User Guide by [clicking here](#).

To configure Sale Types, go to: Setup > Global Options > Sales > Sale Type Status

Enter the required Sale Types into the blank fields, then close the Global Options window to save your change:

The screenshot shows the 'global options' window for 'site 1 (Site 1)'. The 'Sales' tab is selected. The 'Sale Type Status' section is highlighted with a yellow box and contains a list of sale types: Takeaway, Delivery, Pickup, Cater, Uber Eats, Deliveroo, and Menulog. Below this, the 'Pending Sales' section has several checkboxes, with 'Auto Generate Pending Sale Codes' checked. An orange arrow points from the 'Sale Type Status' box to the 'Pending Sales' section.

Default	Description	Rate	Label
Rate 1	<input checked="" type="radio"/> GST	10.00	GST
Rate 2	<input type="radio"/> STT	6.000	FRE
Rate 3	<input type="radio"/> ECAL	10.00	F
Rate 4	<input type="radio"/> Not Defined	0.000	
Rate 5	<input type="radio"/> Not Defined	0.000	
Rate 6	<input type="radio"/> Not Defined	0.000	

Price	Description	Type	Text
Price 1	PRICE 1		
Price 2	PRICE 2		
Price 3	PRICE 3		
Price 4	PRICE 4		
Price 5	PRICE 5		
Price 6	PRICE 6		
Price 7	PRICE 7		
Price 8	PRICE 8		
Price 9	PRICE 9		
Price 10	PRICE 10		
Price 11	PRICE 11		
Price 12	PRICE 12		

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

Sale Type Status

- Takeaway
- Delivery
- Pickup
- Cater
- Uber Eats
- Deliveroo
- Menulog

Fast Add Stock Items

Fast Add Stock Items when not found

Default Department: 0 >

Stock Code
 Scan Code

Pending Sales

- Printed Pending Sales are sent to Receipt Printer
- Printed Pending Sales are sent to Windows Printer
- Auto Generate Pending Sale Codes
- Inhibit Amounts on A4 Windows Prints
- Print to Docket Printers
- Print to Windows Printer

Undistributed Links

Surcharges: 10011002 >

Discounts: 10011001 >

Food/Beverage Total Descriptors

Food: FOOD

Beverage: BEVERAGE

A4 Pending Sale Messages

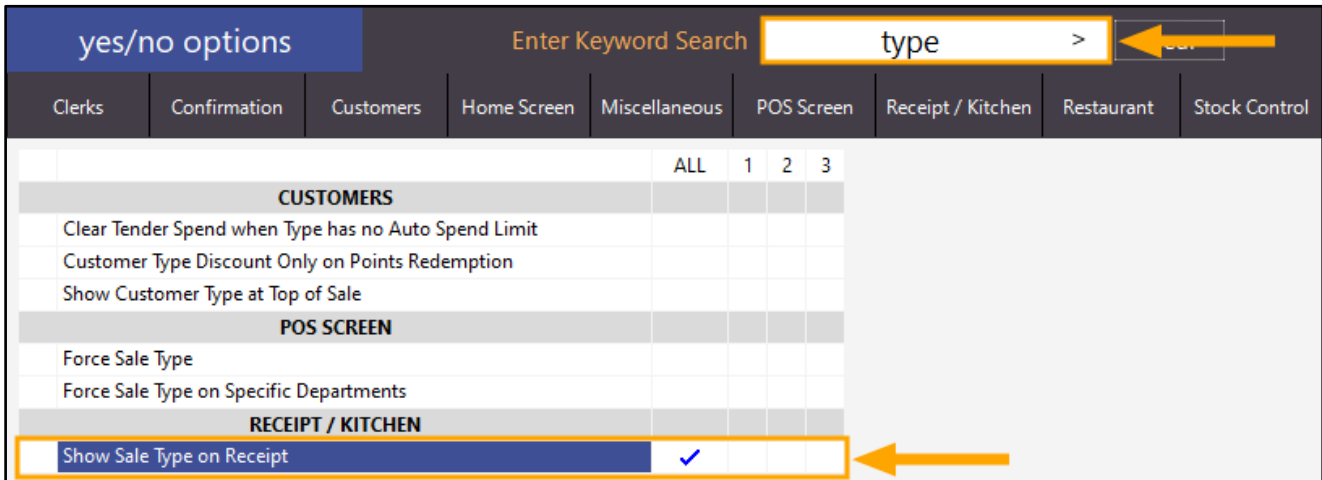
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Note that you also have the ability to control whether the Sale Type is printed on the receipt via the Yes/No Options. To control this function, go to:

Setup > Yes/No Options > Enter Keyword Search: type > Enable "Show Sale Type on Receipt"

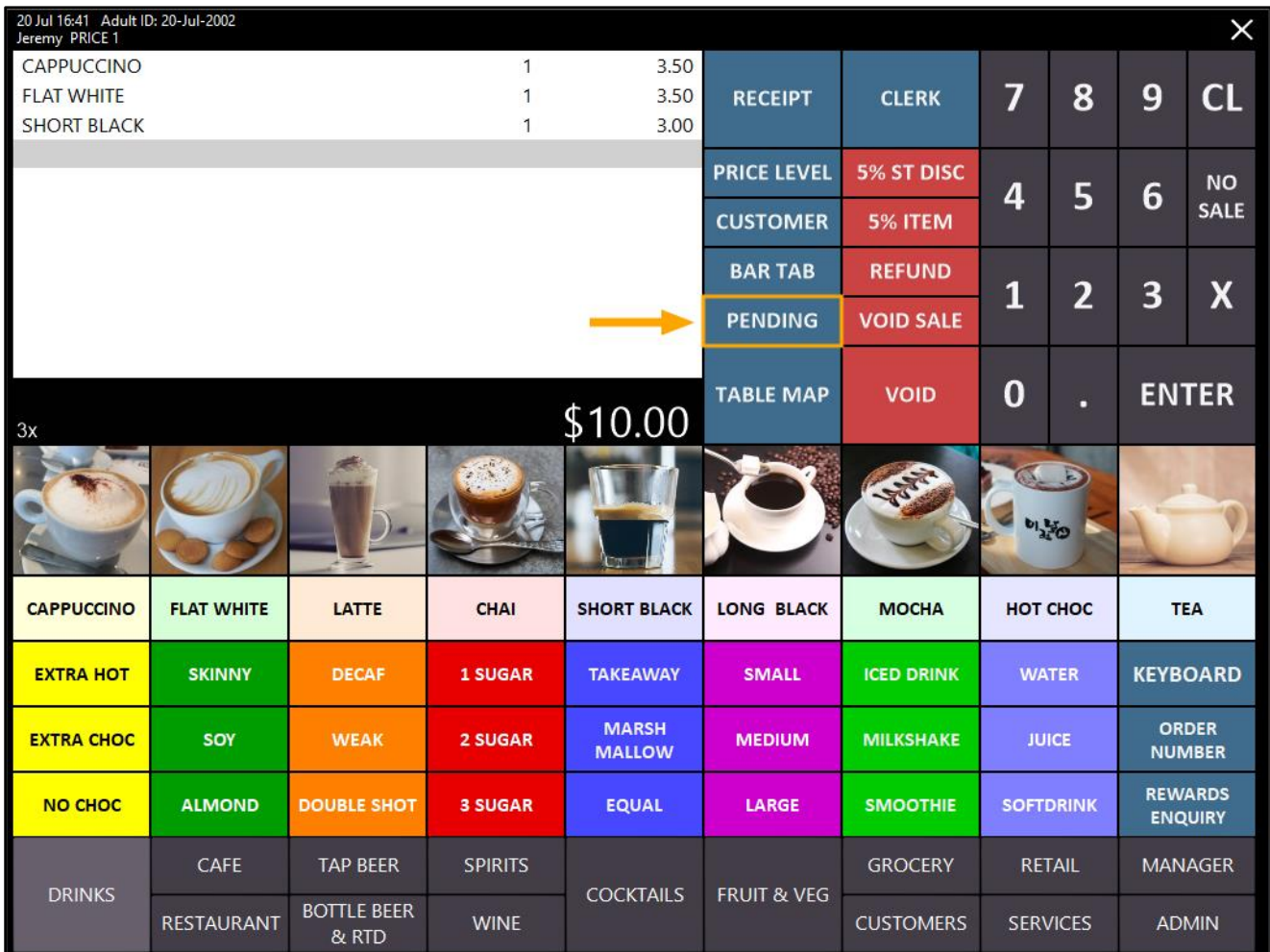
Note that the receipt must be forced for this option to work, as a reprint receipt will not show the sale type.



The Sale Type Statuses are available from the Pending Sales screen.

Go to the POS Screen, then add items to the Sale.

Finally, press the "Pending" button.



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Enter the Customer Name/Address, then select the Sale Type from the list as per the below example. Note that when all Sale Type slots have been configured in Global Options > Sales, all Sale Types will be shown with a radio button for each Sale Type which is used to select the desired Sale Type. The below example shows seven Sale Types as the remaining two Sale Type slots were left as blank in Global Options > Sales. Press "Save" to save the Pending Sale. The Sale Type will be recorded against the sale.

Save Pending Sale

Code

Name

Address

Suburb

State Post Code

None Uber Eats
 Takeaway Deliveroo
 Delivery Menulog
 Pickup
 Cater

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To retrieve the Pending Sale, press the "Pending" button, select the Pending Sale from the list, then press the "OK" button on the bottom-right corner of the screen.

Pending Sale

Search For: Code Clerk Name > Status: ALL

Code	Date	Clerk	Name	Address	Postcode	Status	Order Date	
120	30 Mar 20	Jeremy					30 Mar 20 10:22	CAPPUCCINO 3.50 FLAT WHITE 3.50 SHORT BLACK 3.00 ----- 10.00
127	30 Mar 20	Jeremy	John Smith	1/212 Curtin Ave West EAGLE FARM	4009		30 Mar 20 16:12	
143	11 Jun 20	Jeremy	John Smith	1/212 Curtin Ave West EAGLE FARM	4009		11 Jun 20 12:15	
144	11 Jun 20	Jeremy	John Smith	1/212 Curtin Ave West EAGLE FARM	4009		11 Jun 20 12:32	
145	16 Jun 20	Jeremy	John Smith	1/212 Curtin Ave West EAGLE FARM	4009		11 Jun 20 12:15	
173	20 Jul 20	Jeremy	John Smith	1/212 Curtin Ave West EAGLE FARM	4009	Uber Eats	20 Jul 20 16:43	
893	15 Jun 20	Hiroku						
894	15 Jun 20	Hiroku						

Buttons: Windows Print, Transfer to Table, Email, Reprint Kitchen, Modify, Delete, Enter, OK

The items from the sale will be displayed on the POS Sale Screen.

Tender the sale by pressing "ENTER", select a Tender from the list to pay off and finalise the sale.

If the Yes/No Option "Show Sale Type on Receipt" is enabled, the Sale Type will be printed on the Customer Receipt.

Journal Enquiry

IP-3246 – Journal History Enquiry – Filter by Safe Drop Function

This change adds the ability to filter the Journal History Enquiry screen by Safe Drop.

When selecting "Safe Drop" from the Function dropdown box, the Journal History Enquiry screen will only show transactions where a Safe Drop was performed. This function can be accessed either via the Back Office > Enquiry > Journal History, or it can also be accessed via a Journal Enquiry button on the POS Screen which you can configure to automatically select the "Safe Drop" function.

To use this function from the Back-Office, go to: Back Office Dashboard > Enquiry > Journal History

Select "Safe Drop" from the Function dropdown box.

The list of transactions shown in the enquiry below are updated to only display transactions that contain a "Safe Drop".

The screenshot shows the 'journal history enquiry' interface. At the top, there are search filters: 'Today' (dropdown), 'From' (07 Aug 2020 00:00:0), 'To' (07 Aug 2020 23:59:5), and 'Top 1000 records'. On the right, there are dropdowns for 'Customer', 'Clerk', 'POS', 'Price Level', 'Location', and 'Site'. A 'Function' dropdown is highlighted with an orange box and an arrow pointing to it, showing 'Safe Drop' selected. Other filters include 'Tender Type', 'Table', 'Audit', 'Stock Item', 'Department', and 'Sale Total'. A 'Filter Table/Bar Tabs' checkbox is also present. Below the filters is a table with columns: Audit, POS, Date, and Customer. The table contains two records:

Audit	POS	Date	Customer
521	1	Fri 07/08/2020 14:38:57	
515	1	Fri 07/08/2020 14:20:27	

Below the table, there is a summary of the selected record: '07 Aug 2020 14:38:57 Audit 521,1' with a total of 'Jeremy 5.00' and a 'Change' of '0.00'. At the bottom, there is a toolbar with buttons: 'View All', 'Docket Print', 'Tax Invoice', 'Email', 'Total', 'Stock Item Sales', 'Favourite', 'Add Text', and 'Keyboard'. The status bar at the bottom indicates '2 records'.

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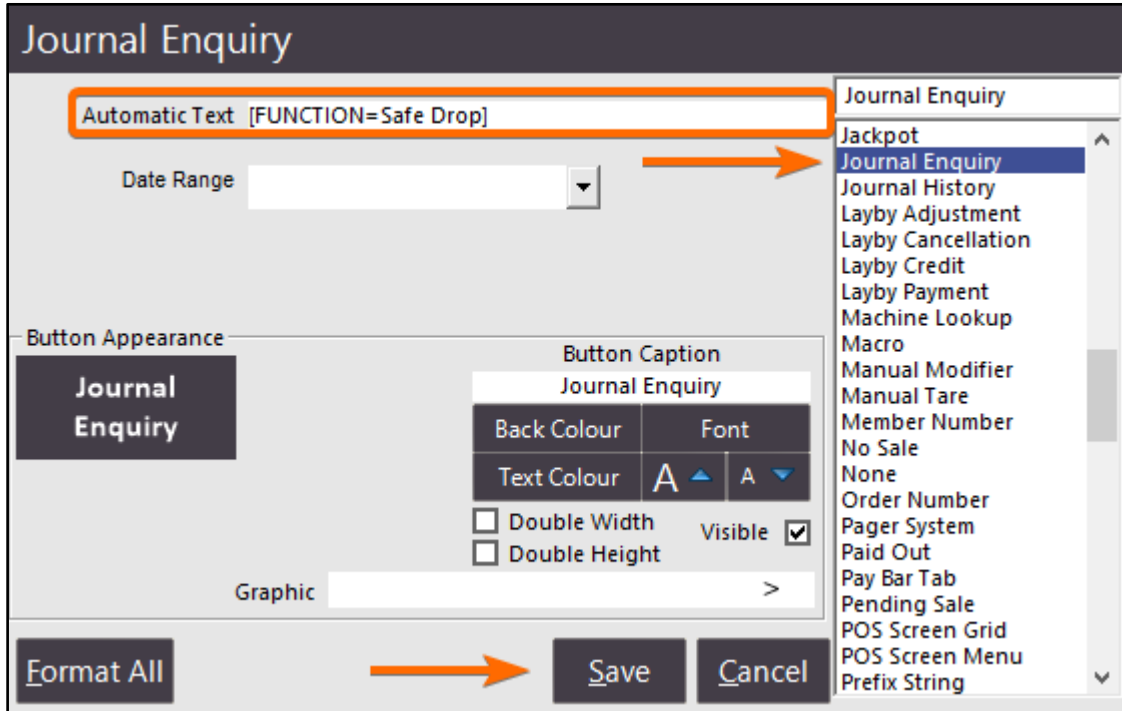
If you'd like to utilise this function via a button on the POS screen, this can be done so as follows:
Go to: Setup > POS Screen > POS Screen Setup > Select POS Screen Layout > Buttons

Locate a suitable tab on the POS Screen, then find a blank button and select it.

From the Function List, select "Journal Enquiry".

Within the Automatic Text field, enter [FUNCTION=Safe Drop].

Configure the other options on the button as required, then press "Save" to save the button.



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Close the POS Screen Layout windows, then open the POS Screen.

When pressing the button on the POS Screen, the Journal Enquiry function will be displayed, and the Safe Drop function will be pre-selected:

journal history enquiry

From: 07 Aug 2020 00:00:0
To: 07 Aug 2020 23:59:5
Top 1000 records

Customer: >
Clerk: >
POS: >
Price Level: >
Location: >
Site: >

Tender Type: >
Function: Safe Drop
Stock Item: >
Department: >
Sale Total: to

Table: >
Audit: >
 Filter Table/Bar Tabs
Select

Audit	POS	Date	Customer
521	1	Fri 07/08/2020 14:38:57	
515	1	Fri 07/08/2020 14:20:27	

07 Aug 2020 14:38:57 Audit 521,1 Jeremy
SAFE DROP 5.00
Change 0.00

2 records

View All Docket Print Tax Invoice Email Total Replay Stock Item Sales Favourite Add Text Keyboard

Order Numbers

IP-3433 – Support for Larger Order Numbers

This function increases the maximum digit length allowable for Order Numbers in Idealpos.

Prior to this change, the maximum length was 6 digits.

The maximum Order Number length has now been increased to 18 digits which will allow longer numbers such as Mobile Phone Numbers to be used as an Order Number.

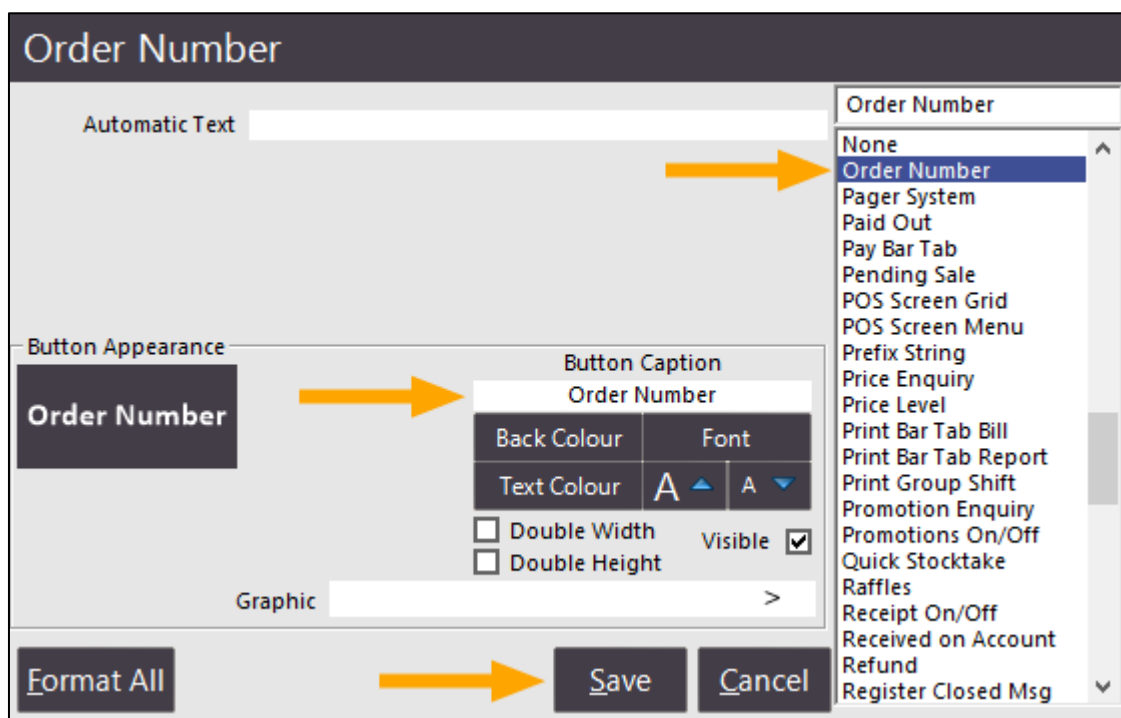
There is no additional configuration required to increase the maximum length as this has been updated in this build of Idealpos. Simply running Idealpos 7.1 Build 11 or higher will enable the ability to utilise larger Order Numbers.

In order to utilise the Order Numbers function, you will require an Order Number button on your POS Screen. If an Order Number button already exists on your POS Screen, you can skip the below step.

To create an Order Number button, go to:

Setup > POS Screen > POS Screen Setup > Select POS Screen Layout > Buttons

Click on the POS Screen tab where you'd like to create the button, then select an unused/blank button. Configure the button as follows, then press "Save" to save the button:



Once the button has been created, close the POS Screen layout windows.

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Go to the POS Screen > Add Items to the Order > Press the "Order Number" button.

You will be prompted to enter an Order Number.

A longer Order Number can be entered (such as the Customer's Phone Number), then press Enter.

The below example shows a generic Mobile Phone Number of 0412312312 being entered:

The screenshot displays the Idealpos POS interface. At the top left, it shows the date and time '30 Jul 14:34', the user 'Adult ID: 30-Jul-2002', and the name 'Jeremy STANDARD'. The order list contains three items: CAPPUCCINO (1, 3.50), FLAT WHITE (1, 3.50), and SHORT BLACK (1, 3.00). Below the order list, the text 'ENTER ORDER NUMBER' is displayed, followed by the entered number '0412312312'. A total of '\$10.00' is shown. The interface includes a numeric keypad (0-9, ., ENTER, CL, NO SALE, X) and various function buttons such as RECEIPT, CLERK, PRICE LEVEL, CUSTOMER, BAR TAB, PENDING, TABLE MAP, PAID IN, PAID OUT, TIPS IN, TIPS OUT, LAYBY CANCEL, ACCOUNT REFUND, BAR TAB PRE AUTH, 10% ITEM S'CHARGE, 10% ST S'CHARGE, AMOUNT, VOID MODE, REPLAY TRANS, TRANSFER MODE, UNLOCK PERMISSION, WASTE MODE, DRINKS, CAFE, TAP BEER, SPIRITS, COCKTAILS, FRUIT & VEG, GROCERY, RESTAURANT, BOTTLE BEER & RTD, WINE, RETAIL, MANAGER, SERVICES, and ADMIN.

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Once the Mobile Phone Number/longer Order Number has been entered, press the "ENTER" button to accept the entered number and proceed to the Tender screen.

Alternatively, you can press the Order Number button again (once the Order Number has been entered) and you will remain on the Sale Screen so you can continue to add other items to the sale.

You can also enter the Order Number first, then press the Order Number button and this will also leave you in the sale screen so additional items can continue to be added to the sale.

After the ENTER button has been pressed, Idealpos will show the Tender screen ready for payment.

The Order Number will be shown at the top of the POS Screen:

The screenshot displays the Idealpos POS interface. At the top, it shows the date and time (30 Jul 14:41), the user's name (Jeremy STANDARD), and the Order Number (O# 0412312312) with a yellow arrow pointing to it. The main area is divided into two sections. The left section lists items: CAPPUCCINO (1, 3.50), FLAT WHITE (1, 3.50), and SHORT BLACK (1, 3.00). The right section is a keypad with buttons for RECEIPT, CLERK, 7, 8, 9, CL, PRICE LEVEL, 5% ST DISC, 4, 5, 6, NO SALE, CUSTOMER, 5% ITEM, BAR TAB, REFUND, 1, 2, 3, X, PENDING, VOID SALE, TABLE MAP, VOID, 0, ., and ENTER. Below the items, the total amount is shown as 3x \$10.00. The bottom section is a tender screen with a list of payment options: CASH, EFTPOS, AMEX/DINERS, POINTS, LAYBY, GV REDEEM, CREDIT NOTE, and ACCOUNT. To the right of the tender screen, there is a display showing the amount 10.00 and the text 'Balance 10.00'. Below the display, there are images of Australian banknotes: 100, 50, 20, 10, and 5.

The entered Order Number/Phone Number will be printed on the Customer Receipt as well as any Kitchen Dockets that are printed.

IP-3509 – Order Number Range functionality only when Order Number function is used

This function enables the ability to configure Idealpos so that an Order Number is assigned to the sale only when required via the Order Number button. Previous to this change, an Order Number was always assigned to the sale if the Show Order Number was configured in the POS Terminal > Miscellaneous Settings.

This functionality is useful to users who run a venue that either sells items that can simply be picked up and purchased or items that require preparation. When the items being purchased do not require preparation, the Order Number function is not required; the customer simply pays and leaves immediately with their items.

If the items require preparation, an Order Number can be assigned to the sale via the Order Number button when the sale is completed. Once the order is ready, the Order Number is called out by the Clerk, allowing the customer to collect their order and leave the premises.

To configure and use this function, follow the below steps:

This function utilises Order Numbers which are automatically assigned to the Sale.

Therefore, depending on your environment and how you want to configure and use this function, you have the two following choices/options:

1. Have a Unique Order Number range/Order Number pool for each POS Terminal. If setting the system up this way, POSServer is not required and the Order Number range/pool is configured for each POS Terminal. It is recommended to have a unique number range/pool for each POS Terminal to prevent overlapping/clashing Order Numbers.
2. Have the same Order Number range/pool that is used across all POS Terminals. If setting the system up this way, POSServer is required and the Order Number range/pool is configured in POSServer. POSServer will then automatically assign an Order Number to the sale when a POS Terminal requests it. This ensures that each POS Terminal issues a unique Order Number to prevent any conflicting or clashing Order Numbers.

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If you want to assign a unique Order Number range for each POS Terminal, go to:
Setup > POS Terminals > Select POS Terminal > Modify > Miscellaneous Settings
Ensure that an Order Number range has been entered into the Show Order fields.

The screenshot shows the 'pos terminals' Miscellaneous Settings page. The 'Show Order' field is highlighted with an orange box and an arrow pointing to it. The field contains the text '1 to 679'. Other fields include 'Points per Dollar' (1), 'Point Redemption Value' (0.10), 'Delete Points when Customer Inactive for' (0 Months), 'Lock Price Level to', 'Default Table Map' (1), 'Default User' (Admin), 'Customer Codes From', 'Stock Item Codes From' (0 to), 'Pending Sales From' (1 to 999), 'Force Order Menu', 'Force Receipt Amount', 'Auto Expand Activity', 'Gaming Override Options', 'Price Level' (0), 'Remote POS', 'Ticket Threshold' (0), 'System ID' (0 2nd 0), 'Username', 'Password', 'Dashboard', 'Sales in Locations', 'Shortcut Bar Small Font', 'Handhelds', 'Force Food to Print', 'Force Drinks to Print', 'Force Bills Printer', 'Item Graphic Location', and 'Handheld Background'.

Enable	Description	Code	Points Per \$	Point Value
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

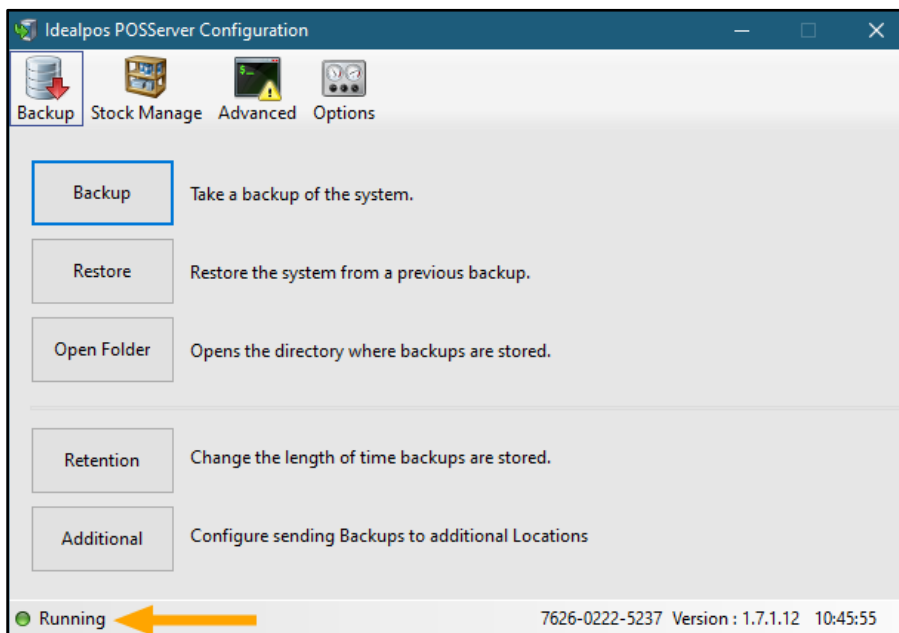
Repeat the above process for each POS Terminal that requires Order Number functionality.
It is recommended to assign a unique Order Number range for each POS Terminal.

idealpos Update History

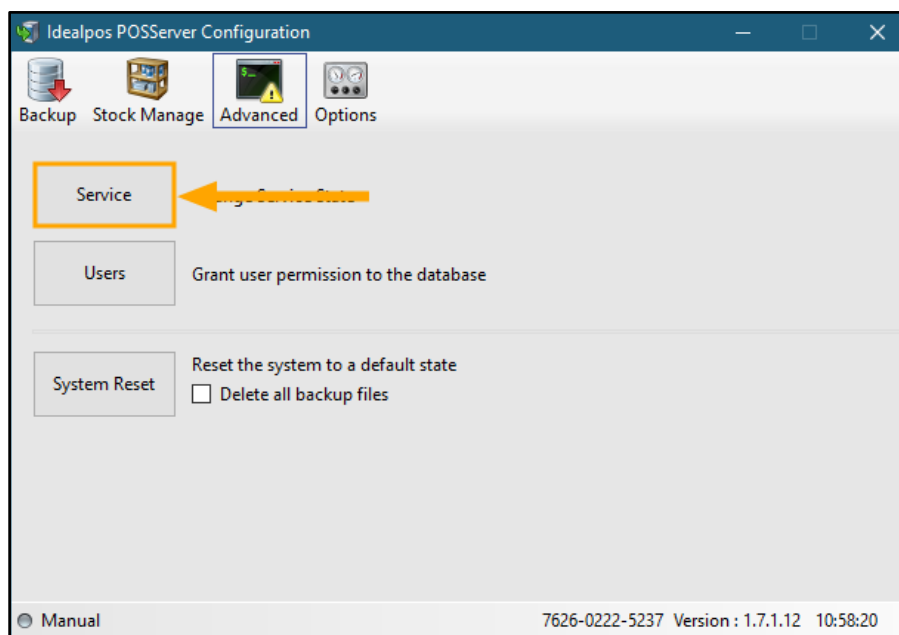
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If you prefer to assign a single number range across all POS Terminals, first ensure that POSServer is running. POSServer can be started either via the Start Menu > Idealpos > Idealpos POSServer, or by opening POSServer.exe (C:\Program Files\Idealpos Solutions\POSServer\POSServer.exe), then ensuring that it is started. POSServer only needs to be running on a single system (whether it is a dedicated POSServer PC, the main POS Terminal or Back-Office PC).

To ensure that POSServer is running, open the POSServer using one of the above methods (either via the Start Menu or by opening the POSServer.exe). Note that you may have to run the POSServer.exe as Administrator (right-click on the icon and select "Run as Administrator"). After opening POSServer, "Running" should appear on the bottom-left corner of the window.



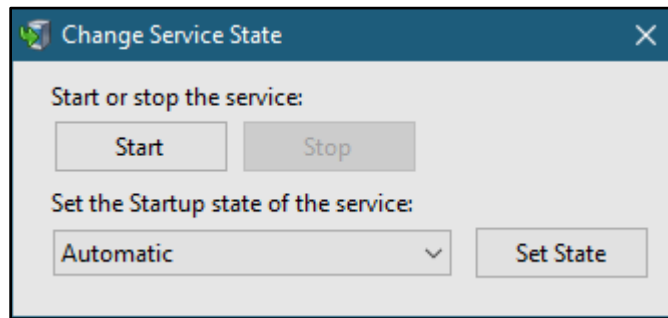
If "Running" does not appear on the bottom-left corner, select "Advanced", then press "Service".



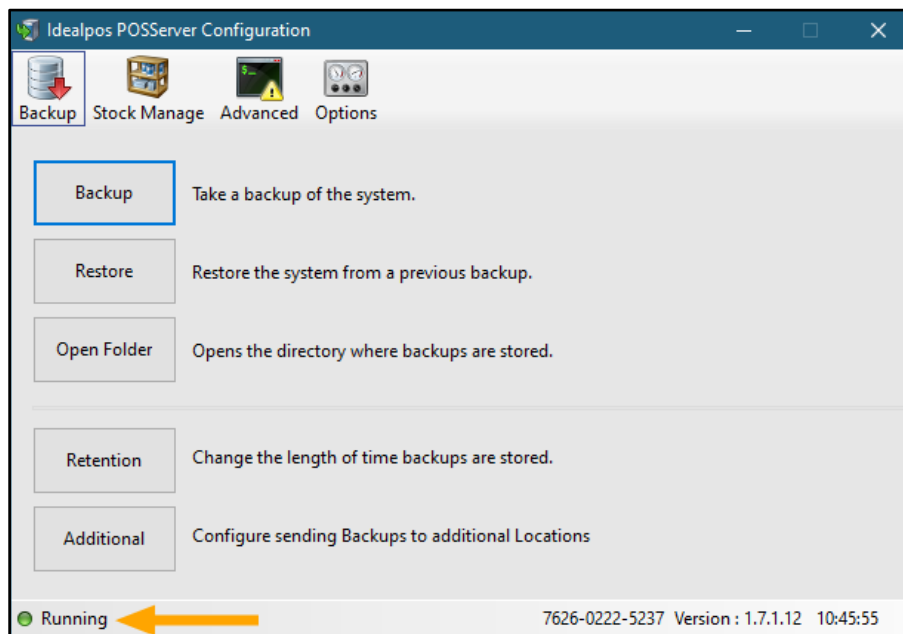
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Ensure that the Startup state is set to "Automatic", then press the "Set State" button to apply the change. Then press the "Start" button to start the service.



The Service should then appear as "Running" as per the below image:



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Then from the Idealpos Back-Office Dashboard, go to: Setup > Global Options > Miscellaneous > POSServer
Ensure that the "POSServer" checkbox is enabled, enter the IP address of the system which is running the POSServer, enable the "Order Numbers" checkbox.

Enter the Order Number range into the Order Number field and close the Global Options window to save your changes.

The screenshot shows the 'global options' window for 'site 1 (Site 1)'. The 'Miscellaneous' tab is selected. The 'POSServer' checkbox is checked. The IP Address field contains '10.1.1.196'. The 'Order Numbers' checkbox is checked, and the range '1 to 679' is entered. Other sections include 'Transfer', 'Clear Data', 'Dashboard', 'Packet Processing', 'Ideal Handheld', 'Promotional Tickets', 'Magstripe Settings', and 'Financial'.

A prompt may be displayed advising to restart all POS Terminals.

Before restarting Idealpos, the Yes/No option "Inhibit Automatic Order Number" should also be enabled and an Order Number button created.

Go to: Setup > Yes/No Options > Enter Keyword Search: "Inhibit auto"

Enable the "Inhibit Automatic Order Number" option as per the below example.

The screenshot shows the 'yes/no options' window. The search bar contains 'inhibit auto'. The 'POS SCREEN' section is expanded, and the 'Inhibit Automatic Order Number' option is checked.

POS SCREEN	ALL	1	2
Inhibit Automatic Order Number	✓		

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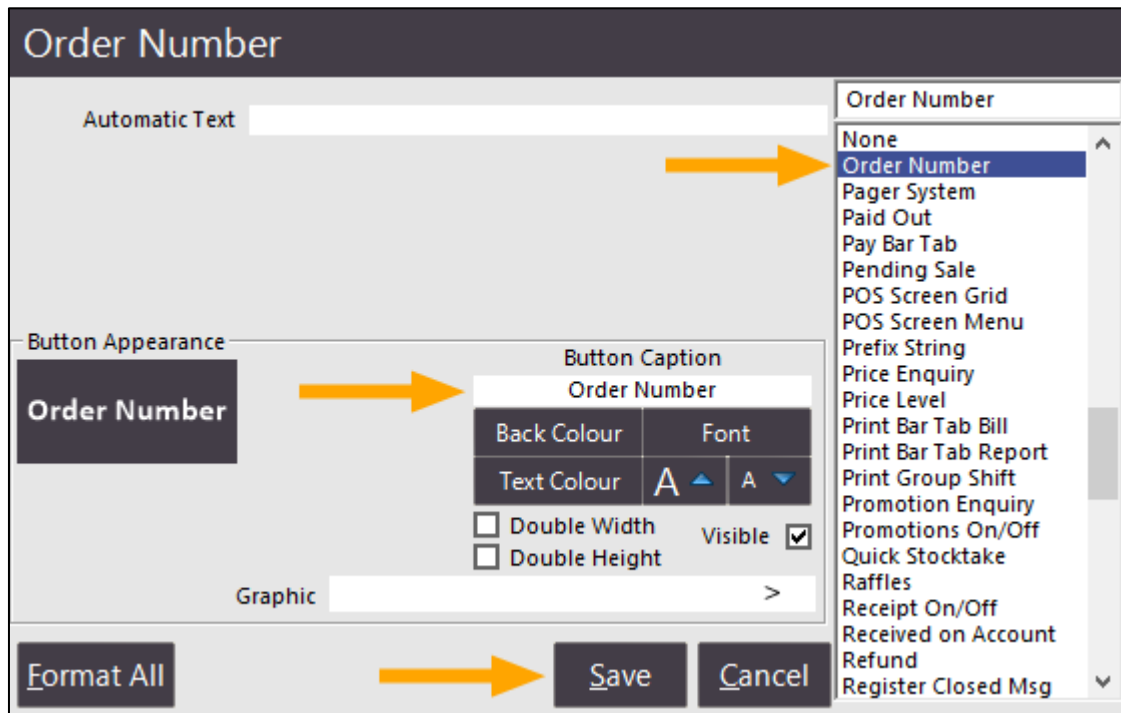
Close the Yes/No Options, then go to:

Setup > POS Screen > POS Screen Setup > Select POS Screen Layout > Buttons

Select a POS Screen tab, select a blank button and configure the POS Screen button as follows:

Ensure that the Automatic Text field is left as blank so that the Order Number can be auto-assigned when this button is used.

If a value is entered into the Automatic Text, the value in the Automatic Text field will be assigned as the Order Number each time this Order Number button is pressed.



To ensure that the above changes have applied across all POS Terminals, it is recommended that you restart Idealpos on each POS Terminal. This can either be done by going to Start > Idealpos > IPSUtils > Close.

Alternatively, the entire POS terminal can be restarted.

For more information about configuring POSServer, [click here](#).

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To use the Order Number functionality, simply add the required items to the sale.
 Press the Order Number button when an Order Number is required, then press the Enter button.
 An Order Number will be automatically assigned to the POS Terminal using either the Order Number Range configured for the POS Terminal or the Order Number range configured in the POS Server Configuration.
 The Order Number will appear at the top of the POS Screen and the POS will go to the Tender screen.

The screenshot displays the Idealpos POS interface. At the top left, it shows the date and time '30 Jul 11:55' and the user 'Jeremy STANDARD'. The order number 'O# 7' is highlighted with a yellow arrow. The order summary lists three items: CAPPUCCINO (1 unit, 3.50), FLAT WHITE (1 unit, 3.50), and SHORT BLACK (1 unit, 3.00). The total amount is \$10.00. The interface includes a keypad with buttons for RECEIPT, CLERK, and numeric digits 0-9, along with function keys like CL, NO SALE, X, and ENTER. The tender screen shows a balance of 10.00 and a stack of Australian currency notes (100, 50, 20, 10, and 5).

Item	Quantity	Price
CAPPUCCINO	1	3.50
FLAT WHITE	1	3.50
SHORT BLACK	1	3.00
Total		\$10.00

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

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

Balance 10.00

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The Order Number will appear on any Kitchen Dockets and will also appear on the Customer Receipt. If the Order Number button is not used during the sale, an Order Number will not be assigned to the sale and will not be printed on Kitchen Dockets or the Sale Receipt.

The below examples show a Kitchen Docket and Customer Receipt with an Order Number:

* O R D E R 7 *

* 5 3 0 *

1 1 : 5 7 a m 30-Jul-2020
J e r e m y

-----BEVERAGE-----
1 x C A P P U C C I N O
1 x F L A T W H I T E
1 x S H O R T B L A C K

IDEALPOS

1/212 Curtin Ave West
Eagle Farm QLD 4009
Australia

TAX INVOICE
123-456-789-11

#000530-1 Jeremy 30-Jul-2020 11:57:49

*** ORDER 7 ***

-----BEVERAGE-----
CAPPUCCINO* \$3.50
FLAT WHITE* \$3.50
SHORT BLACK* \$3.00

TOTAL \$10.00

GST Subtotal \$10.00
GST Amount \$0.91

CASH \$10.00

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

*indicates taxable supply

Powered by Idealpos

If you require an "Order Number Docket" to be printed in your venue, there is a Yes/No option "Print Order Number Dockets" which can be enabled to achieve this. This can be enabled by going to: Setup > Yes/No Options > Enter Keyword Search: "order number" > Enable "Print Order Number Dockets".

yes/no options		Enter Keyword Search	order number >
Clerks	Confirmation	Customers	Home Screen
Miscellaneous	POS Screen	Receipt / Kitchen	Restaurant
Stock Control			
		ALL	1 2
POS SCREEN			
Inhibit Automatic Order Number		✓	
Reset Centralized Order Number at End of Shift			
RECEIPT / KITCHEN			
Inhibit Order Number on Table Kitchen Prints			
Print Large Order Number			
Print Order Number Dockets		✓	
RESTAURANT			
Attach Order Numbers to matching Hold Print Orders		✓	

When a sale is completed that includes an Order Number, an Order Number docket will be printed. This can either be handed to the customer or used as part of your internal processes when preparing the order. Once the Order is ready, the Customer can present the Order Number Docket to collect their order.

Pending Sales

IP-3438 – Option to filter by Clerk Code on Pending Sales screen

This function adds the ability to filter by Clerk Code on the Pending Sales screen.

Previous to this change, the Pending Sales screen had the option to filter by Pending Sale Code, Clerk Name or Customer Name. After this change, the Pending Sale screen can now be filtered by Clerk Code.

Note that as part of this change, the descriptions of the existing Search For options have been adjusted to reduce ambiguity.

To use this function, go to: POS Screen > Press the “Pending” button to view the existing Pending Sales.

The new “Clerk Code” option will appear at the top of the window next to the “Search For” section as shown below:

The screenshot shows the 'Pending Sale' window with a search filter section at the top. The search filter has three radio button options: 'Code', 'Clerk Name', and 'Clerk Code'. The 'Clerk Code' option is selected and highlighted with an orange box. An orange arrow points to this option. To the right of the search filter is a 'Status' dropdown menu set to 'ALL'. Below the search filter is a table of pending sales with columns: Code, Date, Clerk, Name, Address, Postcode, Status, and Order Date. The table contains several rows of data. To the right of the table is a list of items with their prices: CAPPUCCINO (3.50), FLAT WHITE (3.50), and SHORT BLACK (3.00), with a total of 10.00. At the bottom of the screen is a navigation bar with buttons: Windows Print, Transfer to Table, Email, Reprint Kitchen, Modify, Delete, Print, and OK.

Code	Date	Clerk	Name	Address	Postcode	Status	Order Date
120	30 Mar 20	Jeremy					30 Mar 20 10:22
127	30 Mar 20	Jeremy	John Smith	1/212 Curtin Ave West EAGLE FARM	4009		30 Mar 20 16:12
143	11 Jun 20	Jeremy	John Smith	1/212 Curtin Ave West EAGLE FARM	4009		11 Jun 20 12:15
144	11 Jun 20	Jeremy	John Smith	1/212 Curtin Ave West EAGLE FARM	4009		11 Jun 20 12:32
145	16 Jun 20	Jeremy	John Smith	1/212 Curtin Ave West EAGLE FARM	4009		11 Jun 20 12:15
173	20 Jul 20	Jeremy	John Smith	1/212 Curtin Ave West EAGLE FARM	4009		20 Jul 20 16:43
893	15 Jun 20	Hiroku					
894	15 Jun 20	Hiroku					

CAPPUCCINO	3.50
FLAT WHITE	3.50
SHORT BLACK	3.00
	10.00

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Ensure that the Clerk Code Option is selected, then enter a Clerk Code.
The list of Pending Sales will be filtered by the entered Clerk Code number:

Pending Sale

Search For: Code Clerk Name Clerk Code Name

3 >

Status: ALL

Code	Date	Clerk	Name	Address	Postcode	Status	Order Date	
893	15 Jun 20	Hiroku						FLAT WHITE 3.50
894	15 Jun 20	Hiroku						FLAT WHITE 3.50
								7.00

Buttons: Windows Print, Transfer to Table, Email, Reprint Kitchen, Modify, Delete, Print, OK

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IP-3539 – Pending Sales – Option to send to Kitchen Printers at a future time

This function adds the ability to send Pending Sales to the Kitchen Printer(s) at a future time.

When saving a Pending Sale, Expected Date and Time fields are used to specify the date and time that the customer requires the order.

To support this functionality, a new field “Kitchen Print minutes before Expected Time” has been added to Global Options. This setting can be configured and enabled as required. When configured, new options will appear on the Save Pending Sale window. These new fields/options are “# minutes before Expected Time” and “Immediately”.

When a Clerk saves a Pending Sale, they can choose to send the order to the Kitchen using the number of minutes before Expected Time or the Clerk can opt to send the order to the Kitchen immediately.

The # minutes before Expected Time will be pre-filled using the value that has been configured in the Global Options, or the Clerk can choose to enter an alternate number of minutes before the Expected Time.

Depending on the selection made when the Pending Sale was saved, the order will either be sent to the Kitchen Docket Printer(s) the number of minutes before the Expected Time, or the order will be sent to the Kitchen Docket Printer(s) Immediately. It must be noted that in order for the Order to send to the Kitchen the number of minutes before the Expected Time, the POS Terminal must be on and Idealpos must be running the number of minutes before the Expected Time.

This function can be used when the Chef requires a specific amount of time to prepare the order. The number of minutes before Expected Time can be configured to match the average time it takes the Chef to prepare the order at the venue. This will ensure that the meal will be fresh/hot when the Customer arrives to collect their order.

To configure and use this function, go to: Setup > Global Options > Sales > Pending Sales

Enable the checkbox “Kitchen Print minutes before Expected Time” and enter the number of minutes you want to have the Kitchen Dockets print prior to the Expected Time.

Note that some checkbox descriptions for Pending Sales in Global Options > Sales have changed slightly from Idealpos 7.1 Build 11 and higher. [Refer to the Global Options > Sales topic in the User Guide for more details.](#)

The screenshot shows the 'global options' window for 'site 1 (Site 1)'. The 'Sales' tab is active. The 'Pending Sales' section contains the following options:

- Auto Generate Pending Sale Codes
- Print to Docket Printers
- Print as Bill to Receipt Printer
- Kitchen Print minutes before Expected Time 10
- Print to Windows Printer
- Inhibit Amounts on Windows Printer
- When printed from Table Map sent to Windows Printer

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It is also important to note that in order for this option to work, the following criteria must be met:

- "Print to Docket Printers" must be enabled In Setup > Global Options > Sales > Pending Sales
- Kitchen Docket Printers/Network Printers must be configured/enabled (Setup > Network Printers)
- Items that are saved to the Pending Sale must have the Kitchen Printer enabled

Close the Global Options window to save your change.

Go to the POS Screen, add items to the sale, ensuring that the items being added are enabled for Kitchen Printing (this can be configured by going to File > Stock Control > Stock Items > Open/Modify Item > Enable the Kitchen Printers).

Once items have been added to the sale, press the "PENDING" button to save the Pending Sale.

The Save Pending Sale window will appear. Note that the window title may differ depending on the Function Descriptor used for "Pending Sale".

If a Customer has not been added to the sale, enter the Customer's details.

If a Customer has been added to the sale, their details will be pre-filled.

Enter the Expected Date/Time when the customer requires the order to be ready.

The Send to Kitchen function will default to "# minutes before Expected Time", where # will show the number of minutes that were configured in Global Options for this particular function.

Select the minutes before Expected Time to delay printing to the Kitchen Docket printer until the specified time.

Alternatively, the "Immediately" option can be selected to print to the Kitchen Docket Printer(s) Immediately.

After the "Save" button is pressed, the selected action will be taken.

Note that if the option "Kitchen Print minutes before Expected Time" is not enabled in Global Options, the "Send to Kitchen" section shown below will not be visible on the "Save Pending Sale".

Save Pending Sale

Code 205

Name John Smith

Address 1/212 Curtin Ave West

Suburb EAGLE FARM

State QLD Post Code 4009

Expected 04 Aug 2020 16:00 +5 +10 +15

None
 Takeaway
 Delivery
 Pickup
 Cater

Send to Kitchen

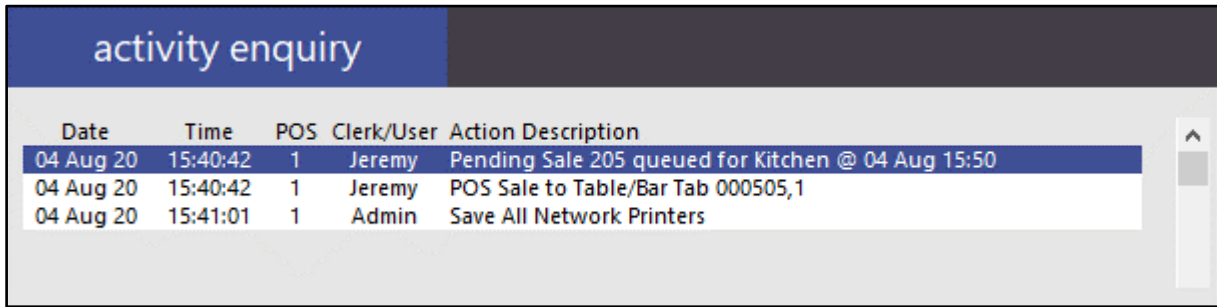
Immediately
10 minutes before Expected Time

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
CL backspace \ ? 0 . - Save

idealpos Update History

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After saving the Pending Sale, the Activity Log will show "Pending Sale queued for Kitchen @ DD MMM HH:MM as per the below example (The Activity Log can be accessed via the Back Office > Enquiry > Activity Log):



Date	Time	POS	Clerk/User	Action Description
04 Aug 20	15:40:42	1	Jeremy	Pending Sale 205 queued for Kitchen @ 04 Aug 15:50
04 Aug 20	15:40:42	1	Jeremy	POS Sale to Table/Bar Tab 000505,1
04 Aug 20	15:41:01	1	Admin	Save All Network Printers

When the Pending Sale Kitchen Docket is printed to the Kitchen Printer(s), the Date/Time shown at the top of the Kitchen Docket will reflect the Date/Time which the Pending Sale was saved.

The Date/Time shown above the Customer Name will reflect the Expected Date/Time.



```
* Pending Sale 205 *  
  
3:40pm    04-Aug-2020  
Jeremy  
  
* Pickup *  
  
04-Aug-2020 16:00  
  
John Smith  
  
1/212 Curtin Ave West  
EAGLE FARM QLD 4009  
  
-----BEVERAGE-----  
1x CAPPUCCINO  
1x FLAT WHITE  
1x SHORT BLACK
```


POS Screen Setup

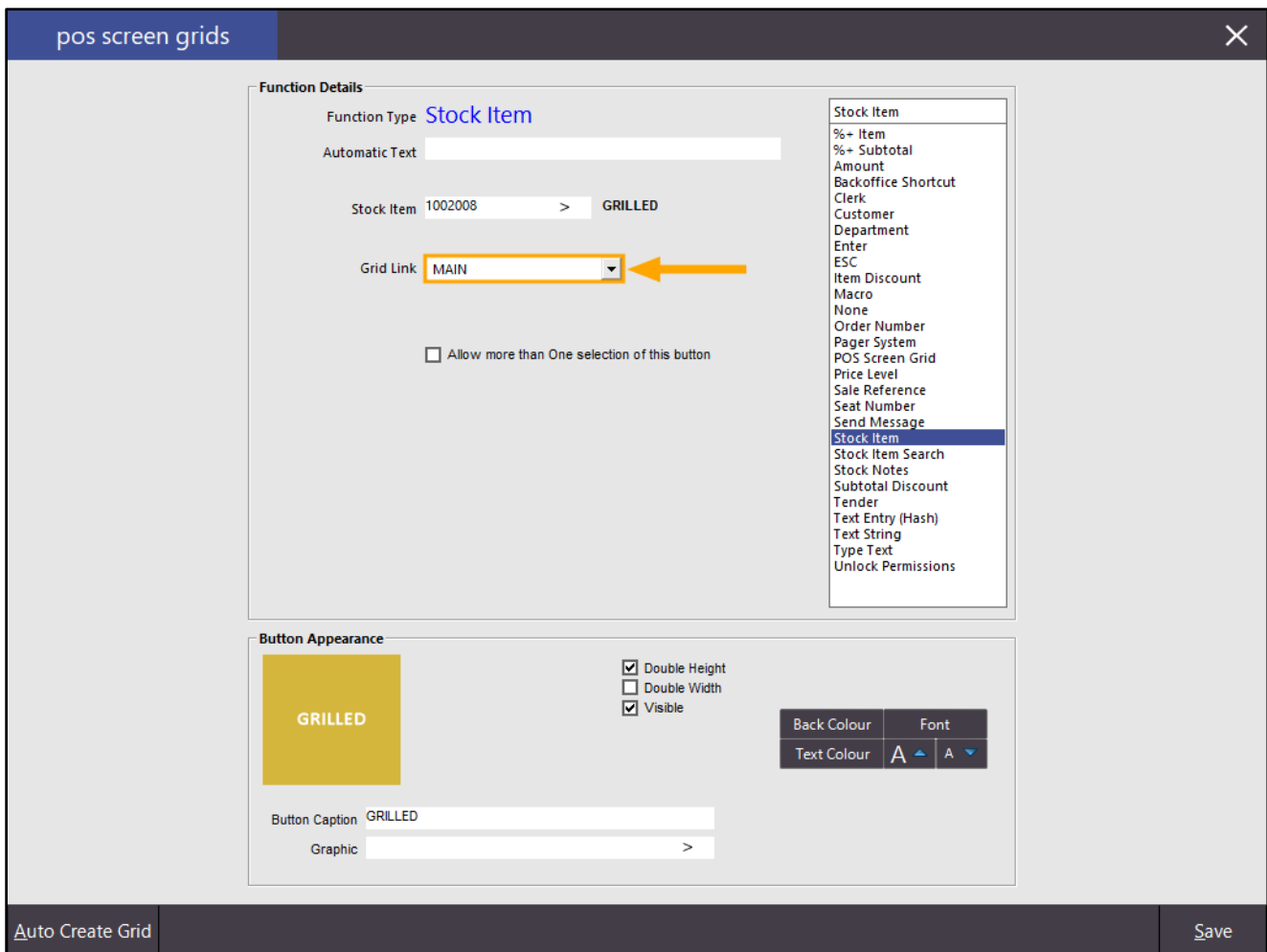
IP-3500 – POS Screen Grids – Stock Item Functions can link to previous Grid (BACK)

This function adds a [BACK] option to the Grid Link dropdown box within the POS Screen Grid setup. Previous to this change (during the POS Screen Grid programming process), if you wanted to program the POS Screen Grid to show the previous grid after adding an item, you had to know the name of the previous POS Screen Grid so that you could select it from the Grid Link dropdown box. This would involve closing the current POS Screen Grid Layout, navigating between different POS Screen Layouts to determine what the name of the previous layout so that it can then be selected during the programming process (which involved a lot of back and forth actions). With this change, you now have the ability to select [BACK] from the Grid Link list and this will achieve the same outcome, saving time when programming Stock Items on the POS Screen Grid. When an item on the POS Screen Grid is linked to the Grid Link [BACK], the previous POS Screen Grid will be displayed after that item has been added.

For the purpose of demonstrating this change, we will use the COOK TYPES FISH GRID in the Demo Database included with Idealpos.

To use this function, go to: Setup > POS Screen > Grids > Select "COOK TYPES FISH".

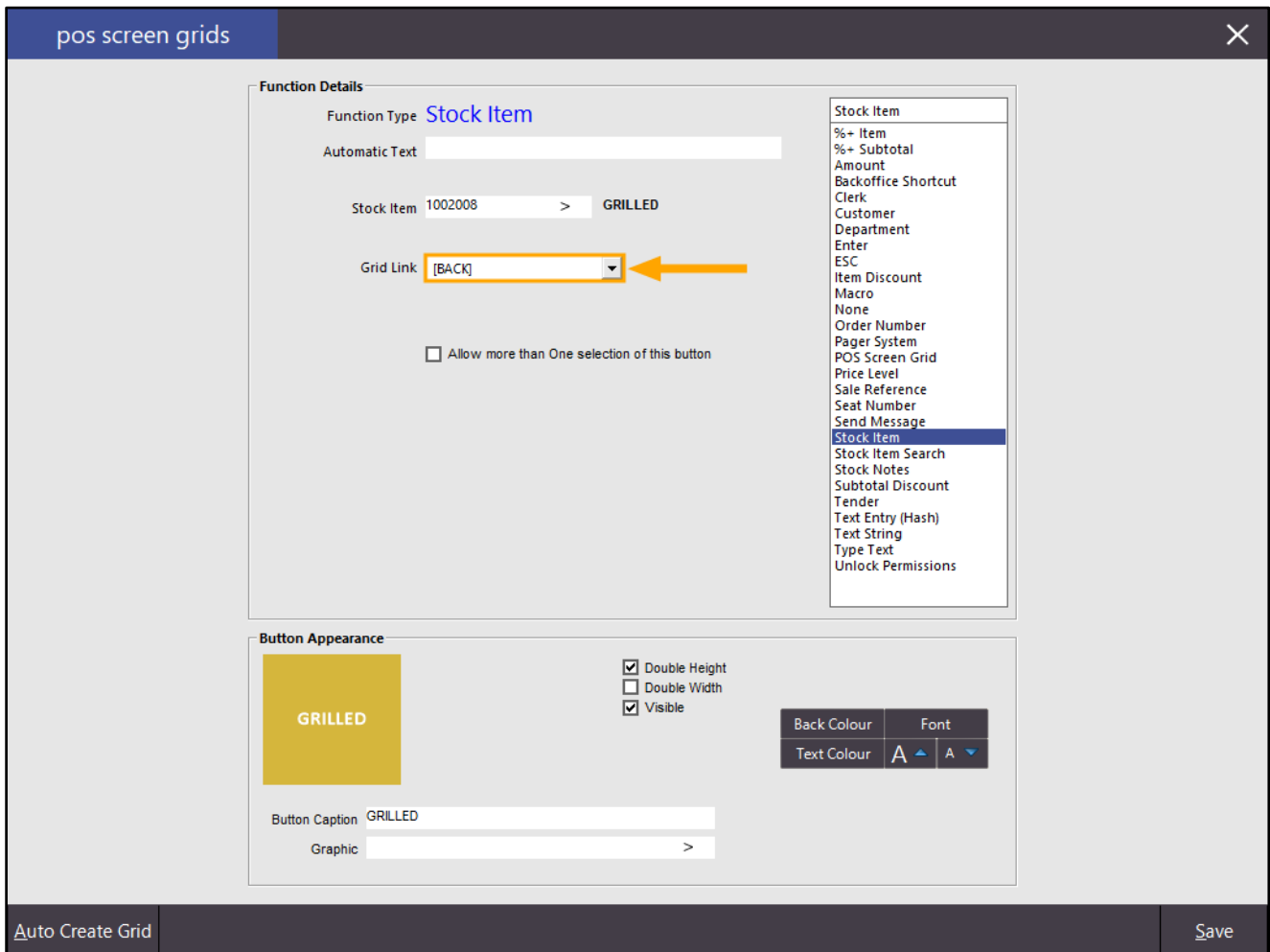
By default, the items shown on the COOK TYPES FISH Grid all link to Grid Link "MAIN" as per the below example:



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The new [BACK] option can now be used to display the previous Grid after the item is added to the sale:
Ensure that you press "Save" on the bottom-right corner of the window to save your change.



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After adjusting the Grid Link setting, go to the POS Screen and select RESTAURANT, then press "SEAFOOD".
The COOK TYPES FISH Grid is displayed.
Select "GRILLED"

The screenshot displays the Idealpos POS interface. At the top left, the date and time are 30 Jul 17:42, and the user is identified as Jeremy STANDARD. The main menu area shows 'SEAFOOD' with a quantity of 1 and a price of 16.00. Below this, a keyboard overlay is visible, featuring a grid of function and numeric keys. A yellow arrow points to the 'GRILLED' option in a row containing 'CRUMBED', 'BATTERED', and 'GRILLED'. The total amount of \$16.00 is displayed in the center, with a '1x' multiplier on the left. A 'KEYBOARD' button is located on the right side of the keyboard overlay. At the bottom of the screen, a dark grey bar contains the text 'Select 1 Item'.

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The POS Screen returns to the previous Grid, which in this case is the MAIN Grid:

30 Jul 17:45 Adult ID: 30-Jul-2002
Jeremy STANDARD

SEAFOOD 1 16.00 GRILLED	RECEIPT	CLERK	7	8	9	CL
	PRICE LEVEL	5% ST DISC	4	5	6	NO SALE
	CUSTOMER	5% ITEM				
	BAR TAB	REFUND	1	2	3	X
	PENDING	VOID SALE				
	TABLE MAP	VOID	0	.	ENTER	

1x \$16.00

GARLIC BREAD	PASTA	BEEF	SALMON	LAMB SHANKS 8	BUTTERED BEANS	DANISH	BLUE CHEESE	KEYBOARD
SCALLOPS	DUCK	LAMB	EYE FILLET	KANGAROO 9	CHATS POTATOES	PAVLOVA	CHEDDAR	
KOPTAS	SEAFOOD	VEGE DISH	PORTERHOUSE	MUSHROOM RISOTTO	TOMATO SALAD	ICE CREAM	GHOUDA	SEAT
COB LOAF	CAESAR SALAD	PORK	DUCK BREAST	BEEF STROGANOFF	CHEESE CAULIFLOWER	SORBETS	CAMEMBERT	ENTREE AS MAIN
SPECIALS						CHOC TART	CHEESE PLATTER 2	WITH
							CHEESE PLATTER 3	WITHOUT
DRINKS	CAFE	TAP BEER	SPIRITS	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL	MANAGER
	RESTAURANT	BOTTLE BEER & RTD	WINE				SERVICES	ADMIN

Reservations

IP-3498 – Reservations Docket printout includes Customer Comments fields

This function has enabled the Reservations Docket Printout to include the Customer Comments field. There is no additional configuration required to enable this function; simply entering Customer Comments when saving a reservation will result in those comments being shown on the Reservations Docket Printout.

Before using this function, you will need to have the Idealpos Reservations Interface enabled in your Licence Gateway. Note that the Idealpos Reservations Interface is used in conjunction with the Restaurant Module. More information about the Idealpos Reservations Interface can be found in the User Guide by [clicking here](#). More information about the Idealpos Restaurant Interface can be found in the User Guide by [clicking here](#).

To use this function, go to: Idealpos Back-Office > Reservations > Reservations.
Alternatively, you can press the RESERVATIONS button from the POS Screen or the Table Map

Select a day, time and table from the grid, then press the “Reserve” button on the bottom-right corner of the window.

The below example shows a selected reservation for Saturday 1st August 9:00AM – 10:30AM

Tables		Runsheets														Saturday, 1 August 2020		09:59					
Table	Covers	Area	Priority	6am	6:30	7am	7:30	8am	8:30	9am	9:30	10am	10:30	11am	11:30	12pm	12:30	1pm	1:30	2pm			
1	2	Bar Area	0																			ALL	6am
2	2	Bar Area	0																			1	6:30
3	2	Bar Area	0																			2	7am
4	2	Bar Area	0																			3	7:30
5	2	Bar Area	0																			4	8am
6	2	Bar Area	0																			5	8:30
7	2	Bar Area	0																			6	9am
8	4	Bar Area	0																			7	9:30
9	4	Bar Area	0																			8	10am
10	4	Bar Area	0																			9	10:30
11	4	Bar Area	0																			10	11am
12	8	Bar Area	0																			11+	11:30
13	8	Bar Area	0																				
21	7	Group Dining	0																				
22	7	Group Dining	0																				
23	7	Group Dining	0																				
24	7	Group Dining	0																				
31	8	Function Dining	0																				
32	8	Function Dining	0																				
33	8	Function Dining	0																				
34	8	Function Dining	0																				
35	8	Function Dining	0																				

Change Layout 9am 2 Covers Table 1 Reserve

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Enter the Customer's details as required. The Reservation Arrival/Duration can be adjusted if required. Two Comments fields are available as shown in the below example. Enter Comments as required, then press "Save" to save the Reservation.

Table 1 ✕

Covers 2

Arrival 9:00 am Duration 120 min Departure 11:00 am

Last Name Smith
First Name John
Email johnsmith@email.com
Phone 0412312312
DOB 01/02/1993 (dd/mm/yyyy)

VIP
 OB830
 NT
 BDAY

Comments 2x Bottles of Champagne
Birthday Balloons

Confirmed

That's 2 people at 9:00 am on Saturday 01 August

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	Save	
CL						backspace	\	?	0	.	-			

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The Reservation will be displayed on the Reservation grid similar to the below example.
Any other reservations will also be displayed:

Calendar		Brekky	Lunch	Dinner	Return to Today	ALL Areas																	
Tables		Runsheets																	Saturday, 1 August 2020		10:28		
Table	Covers	Area	Priority	6am	6:30	7am	7:30	8am	8:30	9am	9:30	10am	10:30	11am	11:30	12pm	12:30	1pm	1:30	2pm			
1	2	Bar Area	0							Smith 2 9am												ALL	6am
2	2	Bar Area	0																			1	6:30
3	2	Bar Area	0																			2	7am
4	2	Bar Area	0																			3	7:30
5	2	Bar Area	0																			4	8am
6	2	Bar Area	0																			5	8:30
7	2	Bar Area	0																			6	9am
8	4	Bar Area	0																			7	9:30
9	4	Bar Area	0																			8	10am
10	4	Bar Area	0																			9	10:30
11	4	Bar Area	0																			10	11am
12	8	Bar Area	0																			11+	11:30
13	8	Bar Area	0																				
21	7	Group Dining	0																				
22	7	Group Dining	0																				
23	7	Group Dining	0																				
24	7	Group Dining	0																				
31	8	Function Dining	0																				
32	8	Function Dining	0																				
33	8	Function Dining	0																				
34	8	Function Dining	0																				
35	8	Function Dining	0																				

Change Layout

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Towards the top of the window, click on the "Runsheets" text to view the runsheet.
The Runsheet is shown.
On the bottom-right corner of the window, press the "Print Docket" button.

Time	Name	Table	Status	Phone	Covers	Area	Confirmed
9:00am	Smith	1	Not Arrived	0412312312	2	Bar Area	1

The Docket is printed and includes the table details along with Comments that were entered when the Reservation was saved:

```
*****
*                               *
*   RESERVATION                 *
*                               *
*****

      TABLE 1

      TIME = 9:00am

      NAME = Smith

      COVERS = 2

COMMENTS:
- 2x Bottles of Champagne
- Birthday Balloons
```


Schedules

IP-3513 – Schedules – Email Dashboard Option

This function enables the ability to create a schedule to email the Back-Office Dashboard to your desired email address.

The Schedule will email an image of the dashboard at the time the schedule is run.

Note that in order for the schedule to run and email the dashboard to the specified email address, Idealpos must be logged in as a User which has access to view the dashboard.

If the logged-on User does not have access to view the Dashboard, the schedule will not email the dashboard.

It should also be noted that the terminal which runs the schedule needs to have the Back-Office module enabled in the Licence Gateway as this is required in order for the dashboard to be visible.

To configure and use this function, go to: Setup > Schedules > Add

From the "Type" dropdown box, select "Email Dashboard".

Then configure the Schedule as required and ensure that you enter a To address which the Dashboard will be emailed to. If required, you can also enter email addresses into the CC and BCC fields and enter a message to be included in the email.

Ensure that the terminal number entered into the "From POS" field has the Back-Office module enabled. If the terminal only has POS module enabled in the licence, the terminal will not send/generate the Email Dashboard.

The screenshot shows a web-based configuration window titled "schedules" with a close button (X) in the top right corner. The window contains the following fields and options:

- Description:** A text input field containing "Email Dashboard Report".
- Type:** A dropdown menu with "Email Dashboard" selected. An orange arrow points to this field.
- Run next at:** A date and time selector showing "22 Jul 2020 17:00".
- Repeat Every:** A dropdown menu set to "1" with "Days" selected.
- From:** Time range selectors set to "00:00" and "23:59".
- Days:** A grid of checkboxes for days of the week, all of which are checked: Mon, Tue, Wed, Thu, Fri, Sat, Sun. An orange arrow points to this section.
- From POS:** A text input field containing the number "1".
- Email Options:**
 - To:** A text input field with an email address, highlighted with an orange box and an orange arrow.
 - CC:** An empty text input field.
 - BCC:** An empty text input field.
 - Message:** A large empty text area for the email body.

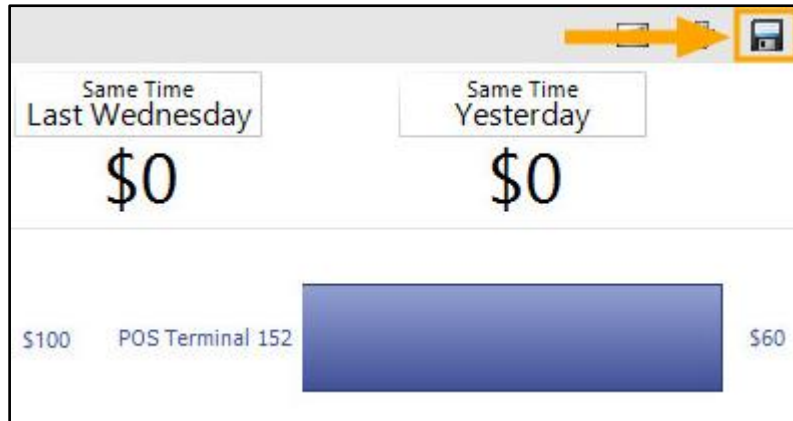
Once the configuration has been completed, press the "X" button on the top-right corner and a "Save Changes?" prompt will appear. Press "Yes" to confirm.

When the schedule is run by Idealpos, the current state of the Dashboard at the time the schedule is executed will be emailed to the email addresses entered into the Schedule Configuration as configured above. The dashboard will be included as a JPG image attachment.

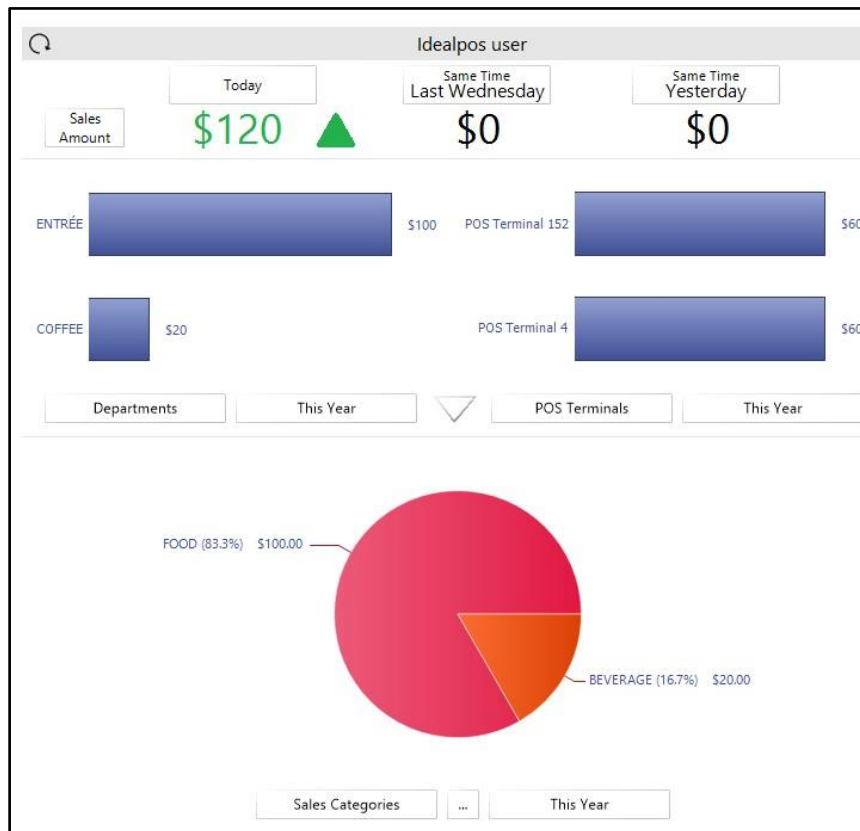
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When the schedule runs, it is essentially performing the same task as pressing the “Save” button on the top-right corner of the dashboard, except on a schedule and emailing the report to the specified email addresses within the Schedule.



An example of the emailed Dashboard is shown below:



Special Price Schedule

IP-3529 – Special Prices Screen – Search/Sort Functionality

This function adds Search and Sort functionality to the Special Prices Screen which allows the User to find Stock Items either by Description or by Stock Item Code. This is especially useful at venues or stores which have an extensive list of Stock Items that have a Special Price assigned to them.

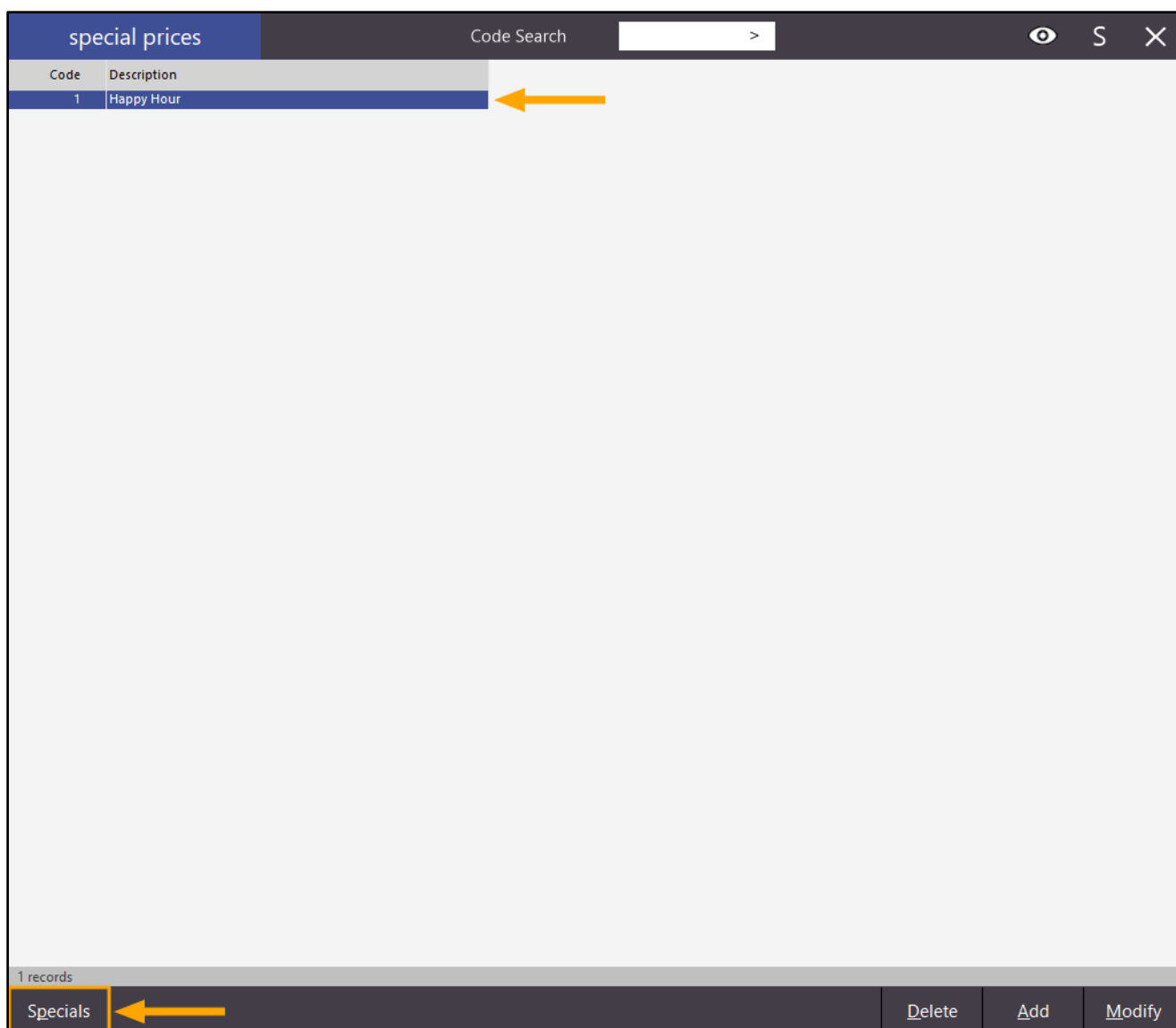
The Special Prices screen is used for assigning Special Prices to Stock Items. When the Special Price Schedule is active, any item which has a Special Price will be sold for that price whilst the Special Price Schedule is active.

There are no additional steps required to enable this functionality; simply opening the Special Prices screen will reveal the field that can now be used to search for Stock Items.

Go to: File > Sales > Promotions > Special Price Schedule.

Select a Special Price Schedule from the list, then press the “Specials” button on the bottom-left corner of the window.

Note that you must have at least one Special Price Schedule in the list. If there are no Special Price Schedules in the list, pressing the “Specials” will have no effect.



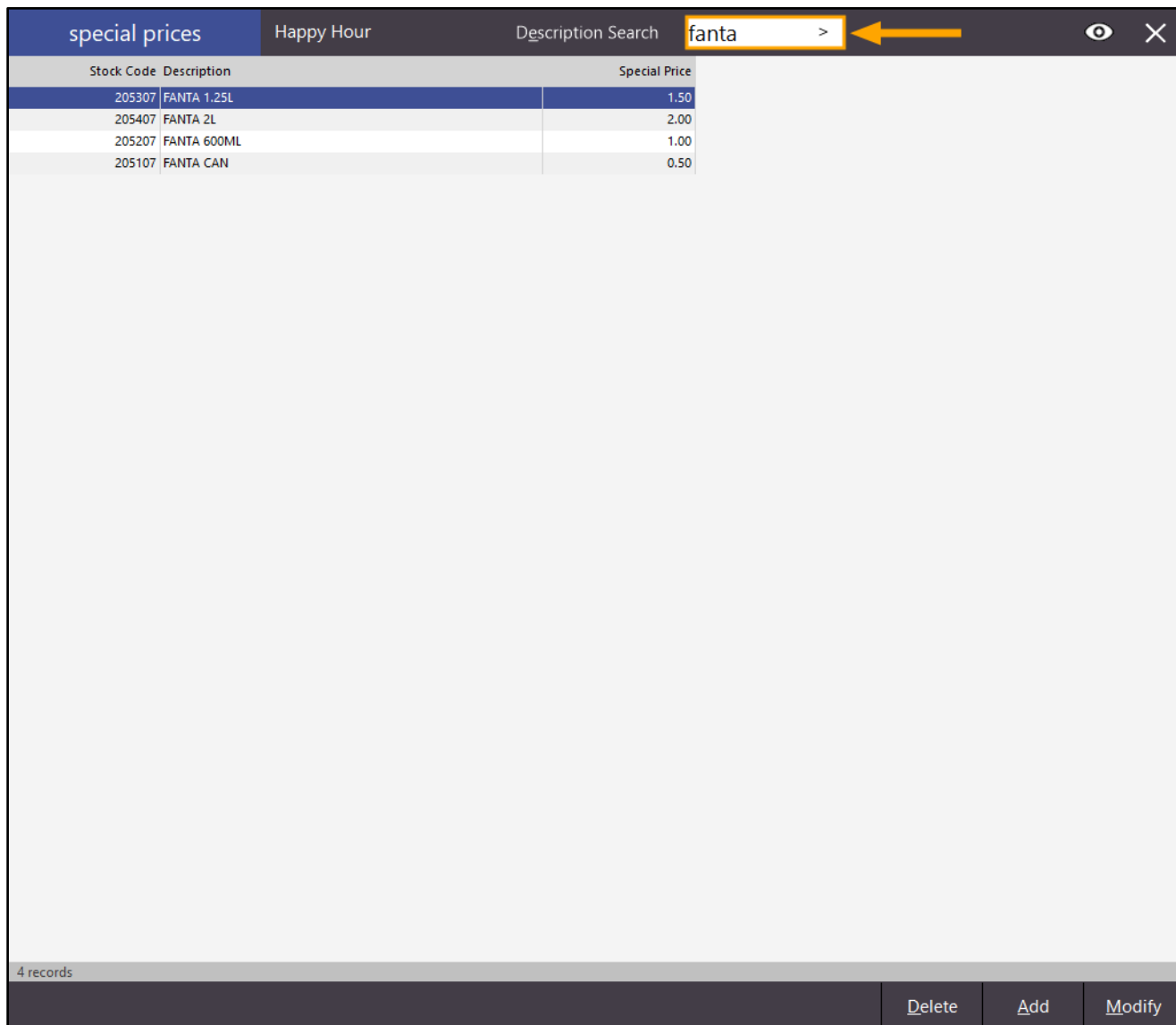
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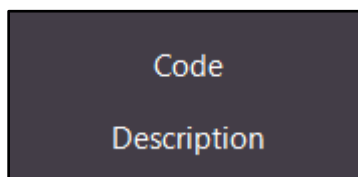
A list of Specials will be displayed.

If the Specials list is blank, the Special Price Schedule selected has only been configured to apply a specific Price Level during the schedule. You will need to have items added to the Specials list to use the search functionality. It should be noted that Handheld only supports setting a Price Level during a Special Price Schedule. Handheld does not currently support Specials/Special Prices for Stock Items which have been set via the Specials screen.

The Search function is available on the top-right corner of the window.



It is possible to search by Code or Description – press the “Description Search” or “Code Search” button, then select the preferred type of search. Any items that match the search term will be displayed:



Finally, you can also sort by Column Header (e.g. sort by Stock Code, Description or Special Price). Simply press the Column Header of the header you want to sort by and the Stock Items shown in the list will be sorted by the column.

Stock Items

IP-3555 – Stock Codes From option supports alpha codes

This function adds the ability to configure the POS Terminal so that alpha-numeric codes will be used when new Stock Items are created. Note that this function will only calculate the next numeric portion of the Stock Code. It will not calculate the next character sequence in the code.

E.g. If entering ABC into the From field, once the numeric portion after ABC has been exhausted, Idealpos will not increment the next character in the sequence (i.e. from ABC to ABD).

This function is configured via the POS Terminal Settings and is used when creating Stock Items via File > Stock Control > Stock Items > Add.

To configure and use this function, go to:

Setup > POS Terminals > Select POS Terminal > Modify > Miscellaneous Settings

Within the Stock Item Codes From field, enter the starting alpha-numeric code (e.g. ABC123) and in the to field, enter the last number sequence (e.g. ABC999).

The screenshot shows the 'Miscellaneous Settings' window for a POS terminal. The 'Stock Item Codes From' field is highlighted with an orange box and an arrow pointing to it, showing 'ABC123 to ABC999'. Other fields include 'Points per Dollar' (1), 'Point Redemption Value' (0.10), 'Delete Points when Customer Inactive for' (0 Months), 'Lock Price Level to', 'Default Table Map' (1), 'Default User' (Admin), 'Customer Codes From', 'Show Order', 'Pending Sales From' (1 to 999), 'Force Order Menu', 'Force Receipt Amount', 'Auto Expand Activity', 'Gaming Override Options' (Price Level 0, Remote POS, Ticket Threshold 0, System ID 0, 2nd 0, Username, Password), 'Dashboard' (Sales in Locations, Shortcut Bar Small Font), and 'Handhelds' (Force Food to Print, Force Drinks to Print, Force Bills Printer, Item Graphic Location, Handheld Background).

Close the POS Terminals window to save the change.

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Go to: File > Stock Control > Stock Items > Add

The Stock Code field will be populated using the range entered in the previous window:

The screenshot shows the 'stock items' form with the following details:

- Stock Code:** ABC123 (highlighted with an orange box and an arrow)
- Department:** 202 > COFFEE
- Scan Code:** Auto
- Description:** (0)
- Description 2:** (0)
- Description 3:** (0)

Selling Prices (inc Tax)

	PRICE	0.00	Profit%
PRICE 1	0.00		
PRICE 2	0.00		
PRICE 3	0.00		
PRICE 4	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		
PRICE 12	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: 2 > BEVERAGE

Default Supplier: >

Default Supplier Stock Code:

Other Options

- Stock Control
- Indirect Item
- Non-Accumulating
- Scale
- Indirect Components go to Kitchen Printers
- Can't Buy with GIFT VOUCHER
- Instruction
- Print Red
- Web Store
- Inhibit Discounts
- Inhibit Voids
- Manufactured Item

Cost Prices (ex Tax)

Standard Cost: 0.0000

Last Cost: 0.0000

Average Cost: 0.0000

Tax Settings (Selling)

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

Attributes

Attributes are listed in a grid of dropdown menus.

Keyboard | Save

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After the Stock Item has been saved, the Stock Code will be incremented to the next available code ready for you to create the next Stock Item:

The screenshot shows the 'stock items' form with the following sections:

- stock items** (tab) | **General** | **Advanced** | **Indirect Item** | **New Item** (close icon)
- Stock Code**: ABC124 (highlighted with an orange box and an arrow pointing to it)
- Description**: (0)
- Description 2**: (0)
- Description 3**: (0)
- Department**: 202 > COFFEE
- Scan Code**: Auto
- Selling Prices (inc Tax)**:

	PRICE	0.00	Profit%
PRICE 1	0.00		
PRICE 2	0.00		
PRICE 3	0.00		
PRICE 4	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		
PRICE 12	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**: 2 > BEVERAGE
 - Default Supplier**: >
 - Default Supplier Stock Code**:
- Other Options**:
 - Stock Control
 - Indirect Item
 - Non-Accumulating
 - Scale
 - Indirect Components go to Kitchen Printers
 - Can't Buy with GIFT VOUCHER
 - Instruction
 - Print Red
 - Web Store
 - Inhibit Discounts
 - Inhibit Voids
 - Manufactured Item
- Cost Prices (ex Tax)**:
 - Standard Cost**: 0.0000
 - Last Cost**: 0.0000
 - Average Cost**: 0.0000
- Tax Settings (Selling)**:
 - GST
 - GST-Free
 - Not Defined
 - Not Defined
 - Not Defined
 - Not Defined
- Attributes**:

Keyboard | **Save**

Stocktake

IP-3546 – Archived Stocktake Report – Include original Stock Level Valuation column

This function includes additional details on the Archived Stocktake Report and a few slight changes to make the Archived Stocktake Report easier to read.

When running the Archived Stocktake Report, the report will now display an original Stock Level Valuation column (which is represented by the column heading "Pre-Stocktake").

In addition to this change, the following changes have also been made:

- The Stock Level column header has been renamed to "Pre-Stocktake" to represent the Stock Level prior to the Stocktake.
- The Variance Quantity column has been moved next to the Stocktake count columns
- The Variance Value/Variance % columns are located below the Valuation section.

To use the Archived Stocktake Report, go to: Reports > Stock Control > Archived Stocktakes

Select the Archived Stocktake from the list and select the required criteria, then press "View" to run the report for the selected Stocktake:

archived stocktakes
S X

Audit	POS	Date	ALL	Location	Reference
4	1	19/08/2019 11:55:03		Location 2	
5	1	04/12/2019 23:59:59		Location 1	
6	1	05/12/2019 23:59:59		Location 1	
7	1	05/12/2019 23:59:59		Location 2	
8	1	05/12/2019 23:59:59		Location 2	

Sort Order

Code
 Description

Group by

Department

Selection Range

Code > to >

Description > to >

Department > to >

Options

Cost Price for Valuation
Standard Cost

Hide Items with Zero Quantity

Print

View

idealpos Update History

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The Archived Stocktake Report is displayed.

The additional column added to the report has been annotated in the below example.

		Quantity			Valuation				Std
		Pre-Stocktake	Stocktake	Variance	Pre-Stocktake	Stocktake	Variance	%	Cost
Location 2 Location 2									
124016	YOGHURT BERRY	3.0000	3.0000	0.0000	8.40	8.40	0.00	0.00	2.80
126007	COFFEE 1KG	3.0000	3.0000	0.0000	70.50	70.50	0.00	0.00	23.50
128008	DE CAF 1KG	3.0000	3.0000	0.0000	80.40	80.40	0.00	0.00	26.80
126009	HOT CHOC 500GM	3.0000	3.0000	0.0000	19.50	19.50	0.00	0.00	6.50
126011	SUGAR SACHET BOX 10	3.0000	3.0000	0.0000	55.95	55.95	0.00	0.00	18.65
128012	NAPKIN BOX 1000	3.0000	3.0000	0.0000	7.05	7.05	0.00	0.00	2.35
205401	COKE 2L	2.0000	5.0000	3.0000	1.62	4.05	2.43	50.00	0.81
208011	KILKENNY KEG	1.0000	1.0000	0.0000	275.00	275.00	0.00	0.00	275.00
303004	MICROWAVE	5.0000	5.0000	0.0000	356.00	356.00	0.00	0.00	71.20
308101	CALCULATOR	12.0000	12.0000	0.0000	42.00	42.00	0.00	0.00	3.50
308102	SCIENTIFIC CALCULATC	12.0000	12.0000	0.0000	78.00	78.00	0.00	0.00	6.50
308103	COMPASS SET	12.0000	12.0000	0.0000	108.00	108.00	0.00	0.00	9.00
308104	GEOMOTRY SET	12.0000	12.0000	0.0000	78.00	78.00	0.00	0.00	6.50
308105	PAINT SET	12.0000	12.0000	0.0000	138.00	138.00	0.00	0.00	11.50
402007	LEMON SPREAD	1.0000	1.0000	0.0000	3.20	3.20	0.00	0.00	3.20
402008	HONEY SQUEEZE	2.0000	2.0000	0.0000	11.20	11.20	0.00	0.00	5.60
402009	HONEY JAR	3.0000	3.0000	0.0000	15.60	15.60	0.00	0.00	5.20
402010	HONEY TUB 1KG	4.0000	4.0000	0.0000	35.20	35.20	0.00	0.00	8.80
404005	LEMON DISHWASHING I	15.0000	15.0000	0.0000	36.00	36.00	0.00	0.00	2.40
		111.0000	114.0000	3.0000	1,419.62	1,422.05	2.43	2.70	
		111.0000	114.0000	3.0000	1,419.62	1,422.05	2.43	2.70	

Previous to this change, the Archived Stocktake Report used to appear as per the below example:

		Stock Level	Stocktake	Avg Cost	Valuation	Variance		
Code	Description					Quantity	%	Value
Location 1 LOCATION 1								
10	CARLTON DRAUGHT KE	4.9656	6.0000	\$132.09	\$792.54	1.0344	20.83	\$136.83
17	CASCADE PREM LIGHT	5.0000	6.0000	\$98.77	\$580.83	1.0000	20.00	\$98.77
22	GUINNESS KEG	4.9570	6.0000	\$160.00	\$960.00	1.0430	21.04	\$166.88
5	BECKS KEG	4.9656	5.0000	\$172.57	\$862.85	0.0344	0.69	\$5.94
					\$3196.02			\$406.22
					\$3196.02			\$406.22

Tax Monitoring

IP-3512 – Tax Monitoring Fiscal Receipts – Retry functionality

This function enables the ability to create a button which can be used to retry the sending of Fiscal Receipts to the ESDC. This function is useful in cases where the connection between Idealpos and the ESDC is interrupted and you want to trigger Idealpos to reattempt sending Fiscal Receipts. Note that when using this function, any unsent or outstanding Fiscal Invoices will be sent. Fiscal Invoices that have already been sent successfully will not be sent again when this function is triggered or used.

To configure and use this function, a button will need to be created on your POS Screen which will be pressed when required.

Go to: Setup > POS Screen > POS Screen Setup > Select a Layout > Buttons

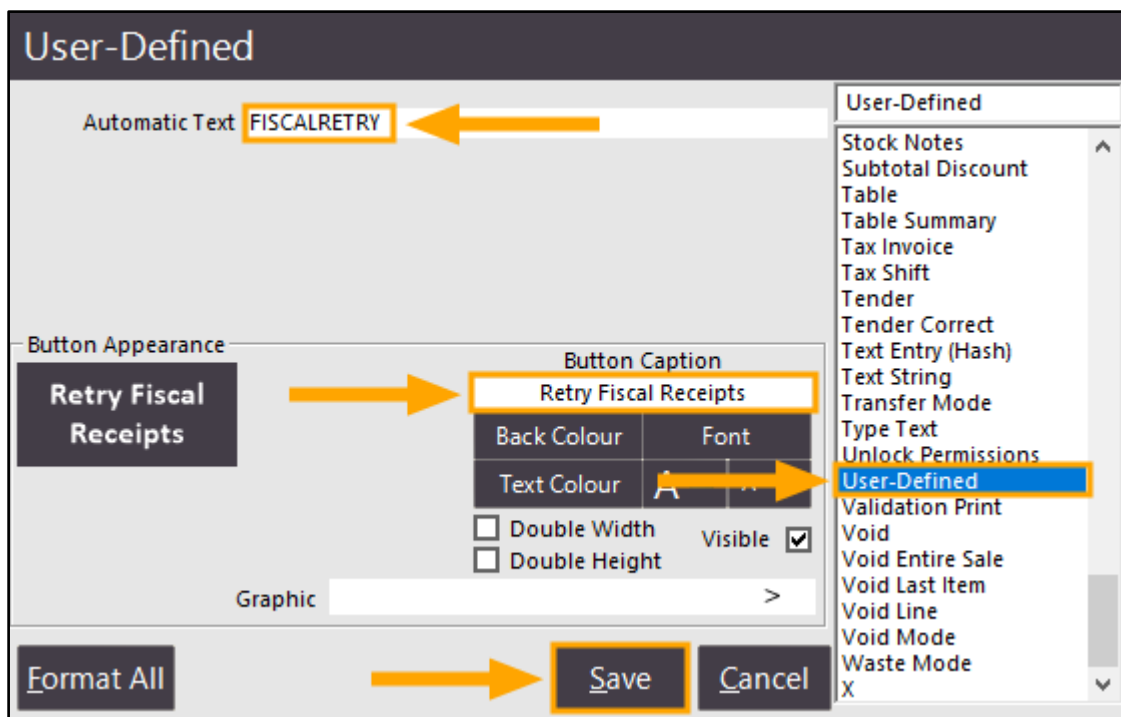
Find a suitable POS Screen tab at the bottom of the screen where you would like the "Retry Fiscal Receipts" button be located and click on it.

Then find a blank button within the tab to create the button.

Configure the button as follows:

Select the "User-Defined" option from the list of available functions, then enter "FISCALRETRY" into the Automatic Text Field.

Enter the desired button caption into the Button Caption field. The appearance can also be customised as required. Once the button has been configured, press "Save" to save the button:



Close the POS Screen Layout windows and return to the POS Screen via the "POS" button on the Back-Office Dashboard.

When there are any issues which prevent Idealpos from communicating with the ESDC, the "Retry Fiscal Receipts" button can be pressed which will trigger Idealpos to reattempt the sending of any unsent Fiscal Invoices to the ESDC. Note that pressing this button will not re-send Fiscal Invoices that have previously been sent successfully. Only unsent Fiscal Invoices will be sent when using this function.