

# Idealpos 7.1 Build 15 - Update History

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## Back Office

### IP – 3157 – Import Promotions – Support for Discount Type, Trip Group, Trip Amount, Bonus Item Fields

This function adds the ability to specify additional options when importing promotions from a text file.

Previous to this change, these promotion options could only be configured via the Create or Modify Promotions interface. With this change, these promotion options can now be set via the promotion import text file.

The newly added options that can now be included in a text file when importing promotions are as follows:

- **Discount Type Field** – The Discount Type specifies the way the promotion will behave such as \$ Discount off items, % Discount off items, Bonus Item, Cheapest Item % Discount, etc.
- **Trip Group Field** – This option allows you to specify which Trip Group the items in the promotion import file should be created in.  
In the create/modify promotion User Interface screen, the Trip Group setting refers to the “Trip Conditions Set 1/2/3”. Trip Groups/Condition Sets are used when you want a promotion to trigger only when the customer purchases items from multiple Trip Condition Sets. E.g. You may want to offer customers a bonus promotion item when they purchase a meal, drink and a confectionery item. In this type of promotion, you would list all the Meal Stock Items in the Condition Set 1, all the drink stock items in the Condition Set 2 and all the confectionery items in the Condition Set 3. You will also need to specify the number of items that the customer has to purchase for each Trip Group/Condition Set in order to receive the Promotion. If they don’t purchase the required number of items from each Trip Group/Condition Set, they will be ineligible for the promotion.
- **Trip Amount Field** – This field can be used to set the Trip Amount required to trip the promotion (e.g. Spend \$5.00 on items to trigger the Promotion). In a Promotion Import File, you can have headers for both the Trip Quantity and Trip Amount, however, you can’t specify a value for both the Trip Quantity and Trip Amount for a Promotion. Should this occur, Trip Amount will take precedence over Trip Quantity. Also note that when creating a Promotion Import File, you may want to have multiple items in a Trip Group/Trip Condition Set. Each item that you want to include in a Trip Group/Trip Condition Set will need to be included as a separate line within the Promotion Import File. Therefore, the first item of the Trip Group will need to have the Trip Quantity or Trip Amount defined, then concurrent items in the Trip Group can have the Trip Quantity/Trip Amount left as blank. Concurrent items in the Trip Group/Trip Condition Set will inherit the Trip value set by the first item in the Promo Import File for that Trip Group. Finally, if the Trip Value in the Import File differs for each item within the same Trip Group, the last or final Trip Value amount that Idealpos processes from the Import File will be used as the Trip Value.
- **Bonus Item Field** – The Bonus Item Field is only used in combination with the Discount Type “Bonus Stock Item”.  
When using a Discount Type “Bonus Stock Item”, the Bonus Item Field can then be included and used to specify which bonus item the customer will receive when the promotion is triggered.

The usage of the above fields in the Promotion Import file are outlined in further detail below:

- **Discount Type** – To define a Discount Type in the import file, ensure that you include a header of “DISCOUNT\_TYPE”.  
Each Discount Type has a unique integer code which is outlined below:
  - 1 - \$ Discount off items
  - 2 - % Discount off items
  - 3 – Fixed Price for items
  - 4 – Bonus Stock Item (when using this integer code, add another header called “BONUS\_ITEM” and specify the Stock Item Code within the BONUS\_ITEM field; the entered Stock Item Code will be added to a sale when the Bonus Stock Item promotion is triggered)
  - 5 – Cheapest Item % Discount
  - 6 – Unit Price Each
  - 7 - \$ Discount off total
  - 8 – Expensive Item % Discount
  - 9 - \$ Discount Each Item
- **Trip Group** – To specify which Trip Group the items in Promotion will be added to, include a “TRIP\_GROUP” header in the import file. The values that can be specified for the TRIP\_GROUP field are 1, 2 or 3. This TRIP\_GROUP header is optional and when not specified in the import file, it will default to the first Trip Group/Trip Condition Set.
- **Trip Amount** – To specify the Trip Amount (e.g. spend \$5.00 on items), include a “TRIP\_AMOUNT” header in the import file. Then specify the Trip Amount value for the Trip Amount field. Either a whole number can be entered (e.g. 5) which will set the “And Spend on items below” field to 5.00, or a decimal number can be entered (e.g. 5.50) which will set the “And Spend on items below” field to 5.50.  
If a TRIP\_GROUP header with a value between 1 to 3 has not been included in the Promo Import file, the Trip Amount will be set against the Trip Group 1/Trip Condition Set 1 by default.  
Note that you can specify both “TRIP\_AMOUNT” and “TRIP\_QUANTITY” in a Promotion import file. When using Trip Amount and Trip Quantity in an import file, you should only populate one of the two options for each Trip Group/Trip Condition Set within a Promotion. Also note that it isn’t necessary to populate the TRIP\_QUANTITY or TRIP\_AMOUNT field for every item in a Trip Group. Populating this field for the first item within a Trip Group/Trip Condition Set will result in all consecutive items in that Trip Group inheriting the same Trip value. It should also be noted that if the Trip Value differs for each item in a Trip Group/Trip Condition set, the last item in the Trip Group which contains a Trip Value will be set as either the Trip Quantity or Trip Amount.
- **Bonus Item** – The “BONUS\_ITEM” field is used to specify a Stock Item Code that will be given to the customer as a bonus item when using the Bonus Stock Item Discount Type. Refer to the Discount Type 4 (Bonus Stock Item) above.

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To demonstrate various types of promotions within an import text file that utilise the newly added fields, please see the below example which will import three promotions.

Each promotion is listed in a different colour to distinguish each promotion in the below example:

```
ZONE,DESCRIPTION,TRIP_QUANTITY,TRIP_AMOUNT,PROMO_PRICE,DISCOUNT_TYPE,BONUS_ITEM,TRIP_GROUP,START_DATE,END_DATE,ITEM_CODE
1,BUY-3-COKE600ML-GET-BNS-COKE2L,3,,,4,205401,1,01 Jan 2021,31 Jan 2021,205201
1,BUY-MEAL-DRINK-SNACK-BONUS-ITM,2,,,4,305004,1,01 Jan 2021,31 Jan 2021,112001
1,BUY-MEAL-DRINK-SNACK-BONUS-ITM,,,,4,305004,1,01 Jan 2021,31 Jan 2021,101002
1,BUY-MEAL-DRINK-SNACK-BONUS-ITM,2,,,4,305004,2,01 Jan 2021,31 Jan 2021,205201
1,BUY-MEAL-DRINK-SNACK-BONUS-ITM,,,,4,305004,2,01 Jan 2021,31 Jan 2021,205202
1,BUY-MEAL-DRINK-SNACK-BONUS-ITM,,,,4,305004,2,01 Jan 2021,31 Jan 2021,205203
1,BUY-MEAL-DRINK-SNACK-BONUS-ITM,,,,4,305004,2,01 Jan 2021,31 Jan 2021,205204
1,BUY-MEAL-DRINK-SNACK-BONUS-ITM,,,,4,305004,2,01 Jan 2021,31 Jan 2021,205205
1,BUY-MEAL-DRINK-SNACK-BONUS-ITM,,,,4,305004,2,01 Jan 2021,31 Jan 2021,205207
1,BUY-MEAL-DRINK-SNACK-BONUS-ITM,,,5,4,305004,3,01 Jan 2021,31 Jan 2021,125008
1,BUY-MEAL-DRINK-SNACK-BONUS-ITM,,,,4,305004,3,01 Jan 2021,31 Jan 2021,125009
1,BUY-MEAL-DRINK-SNACK-BONUS-ITM,,,,4,305004,3,01 Jan 2021,31 Jan 2021,125010
1,BUY-MEAL-DRINK-SNACK-BONUS-ITM,,,,4,305004,3,01 Jan 2021,31 Jan 2021,125011
1,BUY-3XFANTA2L-FOR-$3.50,3,,3.50,3,,,01 Jan 2021,31 Jan 2021,205407
```

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To import the promotions from a promotion text file, go to: File > Sales > Promotions > Promotions  
Press the "Import" button towards the bottom-right corner of the Promotions window.

promotions
All Promotions
>
--Expiring--
 Hide Expired
S
X

Code	Description	Group	Discount	Date Range	Time Range	Days	Selection Range	Cust Type Range	Priority
2	Meat Raffle Ticket 10	Promotions	\$5.00 off Total	01 Oct 16 - 01 Jan 25	All Day	Every Day			1
1	Meat Raffle Ticket 5	Promotions	\$2.00 off Total	01 Oct 16 - 01 Jan 25	All Day	Every Day			2
3	Burger Meal Deal Small	Promotions	\$16.50 Price	01 Oct 16 - 01 Jan 25	All Day	Every Day			3
4	Burger Meal Deal Large	Promotions	\$18.50 Price	01 Oct 16 - 01 Jan 25	All Day	Every Day			4
5	Salad Deal \$1.50 Off	Promotions	\$1.50 off	01 Oct 16 - 01 Jan 25	All Day	Every Day			5
6	10% off RTD Singles	Promotions	10% off	01 Oct 16 - 01 Jan 25	All Day	Every Day	4		6
7	Corona Bucket Stubby Cooler	Promotions	Bonus Item	01 Oct 16 - 01 Jan 25	All Day	Every Day			7
22	Daily Specials \$4 Off	Promotions	\$4.00 off	Expired	All Day	Every Day			8
8	Main Meal Buy 1 Get 1 Free	Promotions	100% off cheapest	Expired	All Day	Every Day			9
9	Sides Only \$3	Promotions	\$3.00 Each	01 Oct 16 - 01 Jan 25	All Day	Every Day			10
10	20% Off Most Exp. Dessert	Promotions	20% off expensive	01 Oct 16 - 01 Jan 25	17:00 - 23:59	Every Day			11
11	2 School Outfits Bonus Cap	Promotions	Bonus Item	01 Oct 16 - 01 Jan 25	All Day	Every Day			12
12	Cocktail Happy Hour \$3 Off	Promotions	\$3.00 off Each	01 Oct 16 - 01 Jan 25	17:30 - 19:00	Every Day			13
13	Wine & Cheese 50% Off	Promotions	50% off cheapest	01 Oct 16 - 01 Jan 25	All Day	Every Day			14
14	5KG Bulk Buy 10% Discount	Promotions	10% off	01 Oct 16 - 01 Jan 25	All Day	Every Day			15
15	Milk & Bread for \$3	Promotions	\$3.00 Price	01 Oct 16 - 01 Jan 25	All Day	Every Day			16
16	Buy 2 Milk for \$3	Promotions	\$3.00 Price	01 Oct 16 - 01 Jan 25	All Day	Every Day			17
17	20% Off Bananas After 1pm	Promotions	20% off	01 Oct 16 - 01 Jan 25	13:00 - 14:59	Every Day			18
18	35% Off Bananas After 3pm	Promotions	35% off	01 Oct 16 - 01 Jan 25	15:00 - 23:59	Every Day			19
19	Snack Pack Small	Promotions	\$2.00 off Total	Expired	All Day	Every Day			20
20	Snack Pack Large	Promotions	\$3.00 off Total	Expired	All Day	Every Day			21
21	2 Flat Whites 25% Off	Promotions	25% off	01 Jan 17 - 01 Jan 25	All Day	Every Day			22
23	Bonus Hat Promo	Promotions	Bonus Item	Expired	All Day	Every Day			23
24	Stella Ctn Promo - Free Glass	Promotions	Bonus Item	Expired	All Day	Every Day			24
25	LYNX OFFER	Promotions	\$1.00 off	Expired	All Day	Every Day			25
26	20210107-PROMO-TEST	ImportPromo20210107_B	Bonus Item	01 Jan 21 - 31 Jan 21	All Day	Every Day			26

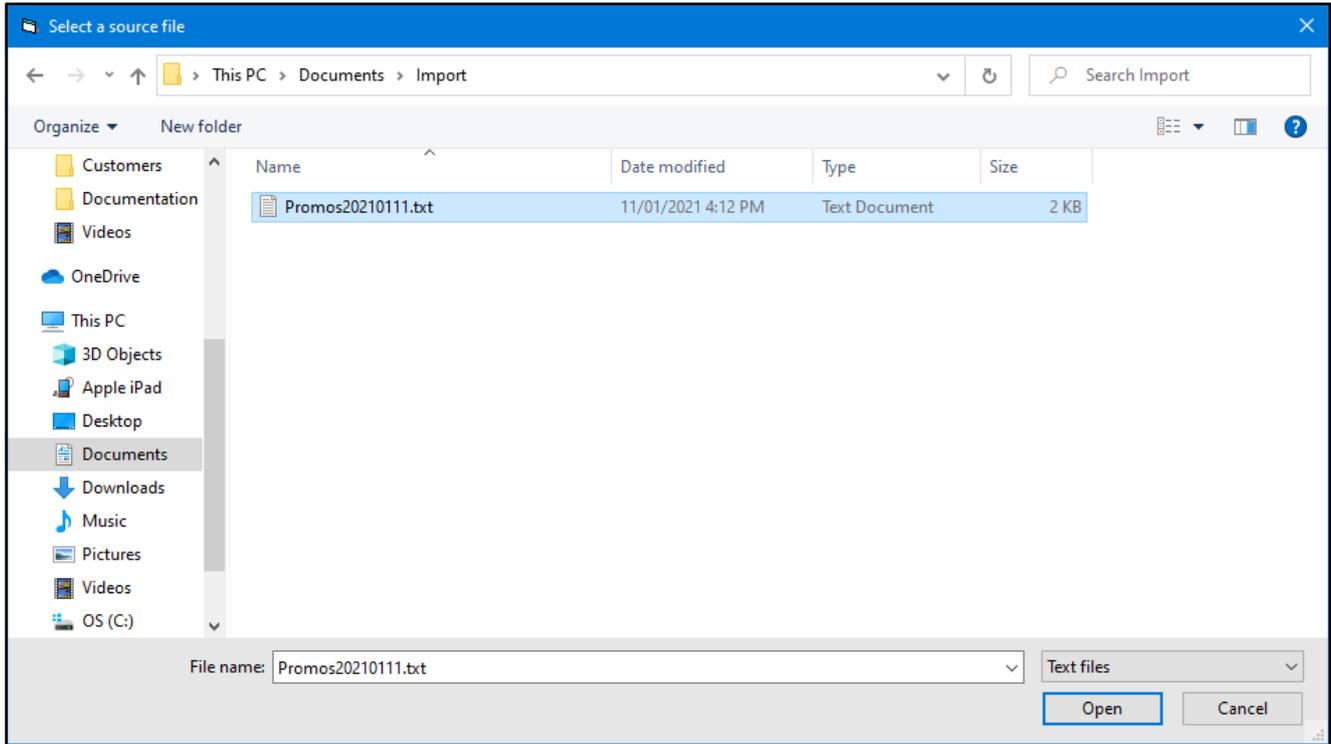
26 records

Change Priority
→
Import
Copy
Delete
Add
Modify

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Browse to the folder that contains the import file, select it, then press “Open” as shown in the below example:



If you don't have a promotion file, you can copy the example promotion shown further above and paste into a text file, then import it.

When used with the Idealpos Demo Database, it will create promotions using the following Stock Items:

- 205201 - Coke 600ml
- 205202 - Diet Coke 600ml
- 205203 - Coke Zero 600ml
- 205204 - Sprite 600ml
- 205205 - Lift 600ml
- 205207 - Fanta 600ml
- 112001 - Beef Burger
- 101002 - Bacon & Eggs
- 125008 - Mars Bar
- 125009 - Snickers
- 125010 - Violet Crumble
- 125011 - Crunchie

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After the promotions have been imported from the file, they will appear below the existing promotions in the list:

promotions		All Promotions	>	--Expiring--	<input type="checkbox"/> Hide Expired	S	X		
Code	Description	Group	Discount	Date Range	Time Range	Days	Selection Range	Cust Type Range	Priority
2	Meat Raffle Ticket 10	Promotions	\$5.00 off Total	01 Oct 16 - 01 Jan 25	All Day	Every Day			1
1	Meat Raffle Ticket 5	Promotions	\$2.00 off Total	01 Oct 16 - 01 Jan 25	All Day	Every Day			2
3	Burger Meal Deal Small	Promotions	\$16.50 Price	01 Oct 16 - 01 Jan 25	All Day	Every Day			3
4	Burger Meal Deal Large	Promotions	\$18.50 Price	01 Oct 16 - 01 Jan 25	All Day	Every Day			4
5	Salad Deal \$1.50 Off	Promotions	\$1.50 off	01 Oct 16 - 01 Jan 25	All Day	Every Day			5
6	10% off RTD Singles	Promotions	10% off	01 Oct 16 - 01 Jan 25	All Day	Every Day	4		6
7	Corona Bucket Stubby Cooler	Promotions	Bonus Item	01 Oct 16 - 01 Jan 25	All Day	Every Day			7
22	Daily Specials \$4 Off	Promotions	\$4.00 off	Expired	All Day	Every Day			8
8	Main Meal Buy 1 Get 1 Free	Promotions	100% off cheapest	Expired	All Day	Every Day			9
9	Sides Only \$3	Promotions	\$3.00 Each	01 Oct 16 - 01 Jan 25	All Day	Every Day			10
10	20% Off Most Exp. Dessert	Promotions	20% off expensive	01 Oct 16 - 01 Jan 25	17:00 - 23:59	Every Day			11
11	2 School Outfits Bonus Cap	Promotions	Bonus Item	01 Oct 16 - 01 Jan 25	All Day	Every Day			12
12	Cocktail Happy Hour \$3 Off	Promotions	\$3.00 off Each	01 Oct 16 - 01 Jan 25	17:30 - 19:00	Every Day			13
13	Wine & Cheese 50% Off	Promotions	50% off cheapest	01 Oct 16 - 01 Jan 25	All Day	Every Day			14
14	5KG Bulk Buy 10% Discount	Promotions	10% off	01 Oct 16 - 01 Jan 25	All Day	Every Day			15
15	Milk & Bread for \$3	Promotions	\$3.00 Price	01 Oct 16 - 01 Jan 25	All Day	Every Day			16
16	Buy 2 Milk for \$3	Promotions	\$3.00 Price	01 Oct 16 - 01 Jan 25	All Day	Every Day			17
17	20% Off Bananas After 1pm	Promotions	20% off	01 Oct 16 - 01 Jan 25	13:00 - 14:59	Every Day			18
18	35% Off Bananas After 3pm	Promotions	35% off	01 Oct 16 - 01 Jan 25	15:00 - 23:59	Every Day			19
19	Snack Pack Small	Promotions	\$2.00 off Total	Expired	All Day	Every Day			20
20	Snack Pack Large	Promotions	\$3.00 off Total	Expired	All Day	Every Day			21
21	2 Flat Whites 25% Off	Promotions	25% off	01 Jan 17 - 01 Jan 25	All Day	Every Day			22
23	Bonus Hat Promo	Promotions	Bonus Item	Expired	All Day	Every Day			23
24	Stella Ctn Promo - Free Glass	Promotions	Bonus Item	Expired	All Day	Every Day			24
25	LYNX OFFER	Promotions	\$1.00 off	Expired	All Day	Every Day			25
26	20210107-PROMO-TEST	ImportPromo20210107_B	Bonus Item	01 Jan 21 - 31 Jan 21	All Day	Every Day			26
27	BUY-3-COKE600ML-GET-BNS-C		Bonus Item	01 Jan 21 - 31 Jan 21	All Day	Every Day			27
28	BUY-MEAL-DRINK-SNACK-BON		Bonus Item	01 Jan 21 - 31 Jan 21	All Day	Every Day			28
29	BUY-3XFANTA2L-FOR-\$3.50		\$3.50 Price	01 Jan 21 - 31 Jan 21	All Day	Every Day			29

29 records

Change Priority    Import    Copy    Delete    Add    Modify

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Each of the promotions that were imported from the promotions text file are shown below:

**promotions** Promotion **Advanced** ✕

Description: BUY-3-COKE600ML-GET-BNS-COKE2L  
Group: Promo210125  
POS: >  
Customer Type: >  
 Multiple Trips

From: 01 Jan 2021 00:00  
to: 31 Jan 2021 23:59  
 Continuous  
 During Specific Times

Discount Type: Bonus Stock Item 2054C >  
COKE 2L

**Trip Conditions Set 1**  
 Trip by Quantity  Trip by Amount  
Buy: 3 of items below  
205201 COKE 600ML

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

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

Delete Promotion Link Enquiry Add Department Add Stock Item

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promotions
Promotion
Advanced
✕

Description  
**BUY-MEAL-DRINK-SNACK-BONUS-ITM**

Group  
Promo210125

POS >

Customer Type >

Multiple Trips

From

to

Continuous

During Specific Times

Discount Type  
Bonus Stock Item  >

**MATCHBOX CAR MUSTANG**

**Trip Conditions Set 1**

Trip by Quantity Buy

Trip by Amount of items below

101002	BACON & EGGS
112001	BEEF BURGER

**Trip Conditions Set 2**

Trip by Quantity And Buy

Trip by Amount of items below

205201	COKE 600ML
205203	COKE ZERO 600ML
205202	DIET COKE 600ML
205207	FANTA 600ML
205205	LIFT 600ML
205204	SPRITE 600ML

**Trip Conditions Set 3**

Trip by Quantity And Spend

Trip by Amount on items below

125011	CRUNCHIE
125008	MARS BAR
125009	SNICKERS
125010	VIOLET CRUMBLE

Delete   Promotion Link Enquiry   Add Department   Add Stock Item

Delete   Promotion Link Enquiry   Add Department   Add Stock Item

Delete   Promotion Link Enquiry   Add Department   Add Stock Item

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promotions Promotion Advanced ✕

Description: BUY-3XFANTA2L-FOR-\$3.50

Group: Promo210125

POS: >

Customer Type: >

Multiple Trips

From: 01 Jan 2021 00:00

to: 31 Jan 2021 23:59

Continuous

During Specific Times

Discount Type: Fixed Price for Items 3.50

**Trip Conditions Set 1**

Trip by Quantity  Trip by Amount

Buy: 3 of items below

205407 FANTA 2L

**Trip Conditions Set 2**

Trip by Quantity  Trip by Amount

And Buy: 0 of items below

**Trip Conditions Set 3**

Trip by Quantity  Trip by Amount

And Buy: 0 of items below

Delete Promotion Link Enquiry Add Department Add Stock Item

## POS Screen

### IP-3844 – Fast Customer Screen – Support for Email Filtering

This function adds the ability to filter the Fast Customer Screen by email addresses.

When pressing the Email button on the Fast Customer Screen, only customers that have an email address will be displayed. To perform further filtering, you can then begin entering their email address to only display customers that match the entered address. The list of customers that are displayed will live-update as you type the customer's email address.

There is no configuration required to enable the email button.

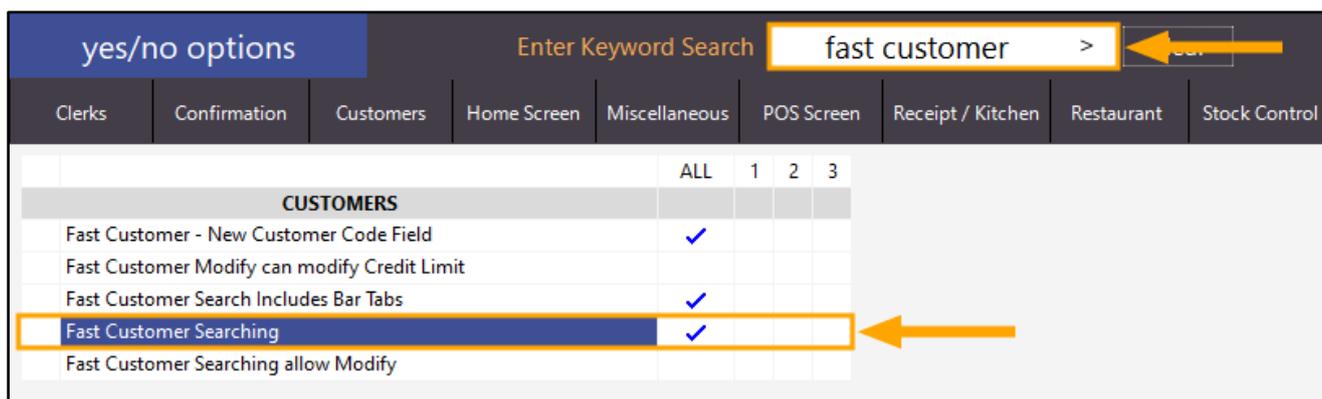
The only steps that are required to use this function are:

- The "Fast Customer Searching" Yes/No Option must be enabled
- At least one customer will need to have an email address entered in their customer record
- Customers Button must exist on the POS Screen

To ensure that Fast Customer Searching is enabled, go to: Setup > Yes/No Options

Enter Keyword Search: fast customer

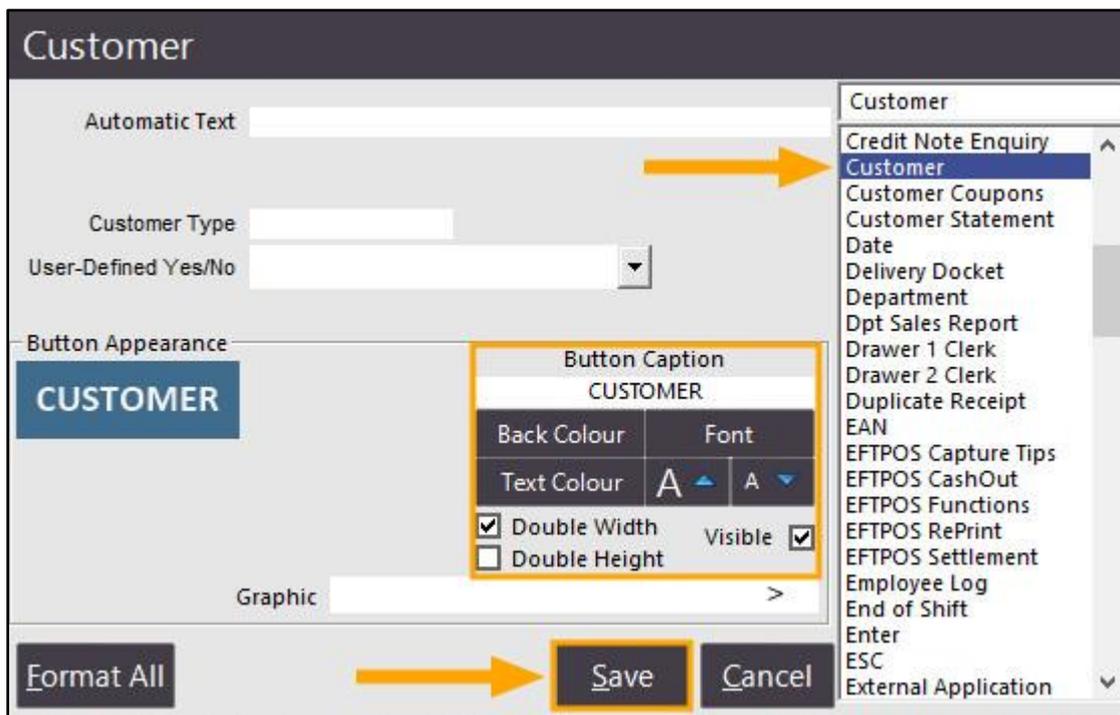
Then ensure that "Fast Customer Searching" is enabled as shown in the below example:



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Once you've enabled the Yes/No Option, go to: Setup > POS Screen > POS Screen Setup  
Select the POS Screen Layout then press the button labelled "Buttons" on the bottom-left corner of the window.  
Ensure that you have a button to open the Customers screen.  
If a Customers button does not exist, select any unused/blank button and select the "Customer" option from the Function List. Customise the button as required, then press "Save":



Close the POS Screen Layout windows once the Customer button has been created.

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Once you've ensured that a Customer button exists, you will need to ensure that at least one or more customers have an email address entered in their customer record.

Go to: File > Customers > Customers

Select a Customer from the list and either double click on the Customer name, or press the "Modify" button on the bottom-right corner of the Customers window.

The email address field is located on the bottom-left corner of the Modify Customer window as shown in the example below. Once you've entered an email address, press the "Save" button on the bottom-right corner of the Modify Customer window:

modify customer    General    Advanced    X

Code 2    Customer Type MEMBERS    Scan Code 9850859357357    Auto  
Last Name Charlton    Other Codes  
Given Names Sarah  
Title Miss

**Address Details**  
Address 42 Wallaby Way  
Suburb HAMPDEN  
State QLD    Postcode 4741

**Sales / Accounting**  
Auto % Discount 0     Account  
Price Level 1    Credit Limit 0.00  
 Bar Tab  
 Room Interface

**Delivery Address**  
 Delivery Address same as Above  
Address  
Suburb  
State    Postcode

**Contact Details**  
Phone  
Mobile 0499754163  
Fax  
Email sarahcharlton@yopmail.com

**Miscellaneous**  
Company  
ABN  
Occupation  
Next of Kin  
Contact No  
Birth Date 06/09/1987  
Birth Date 2 02/03/2015  
Password  
Gender F  
Marital Status  
 Mail Out  
 Discontinue

Comments

Save

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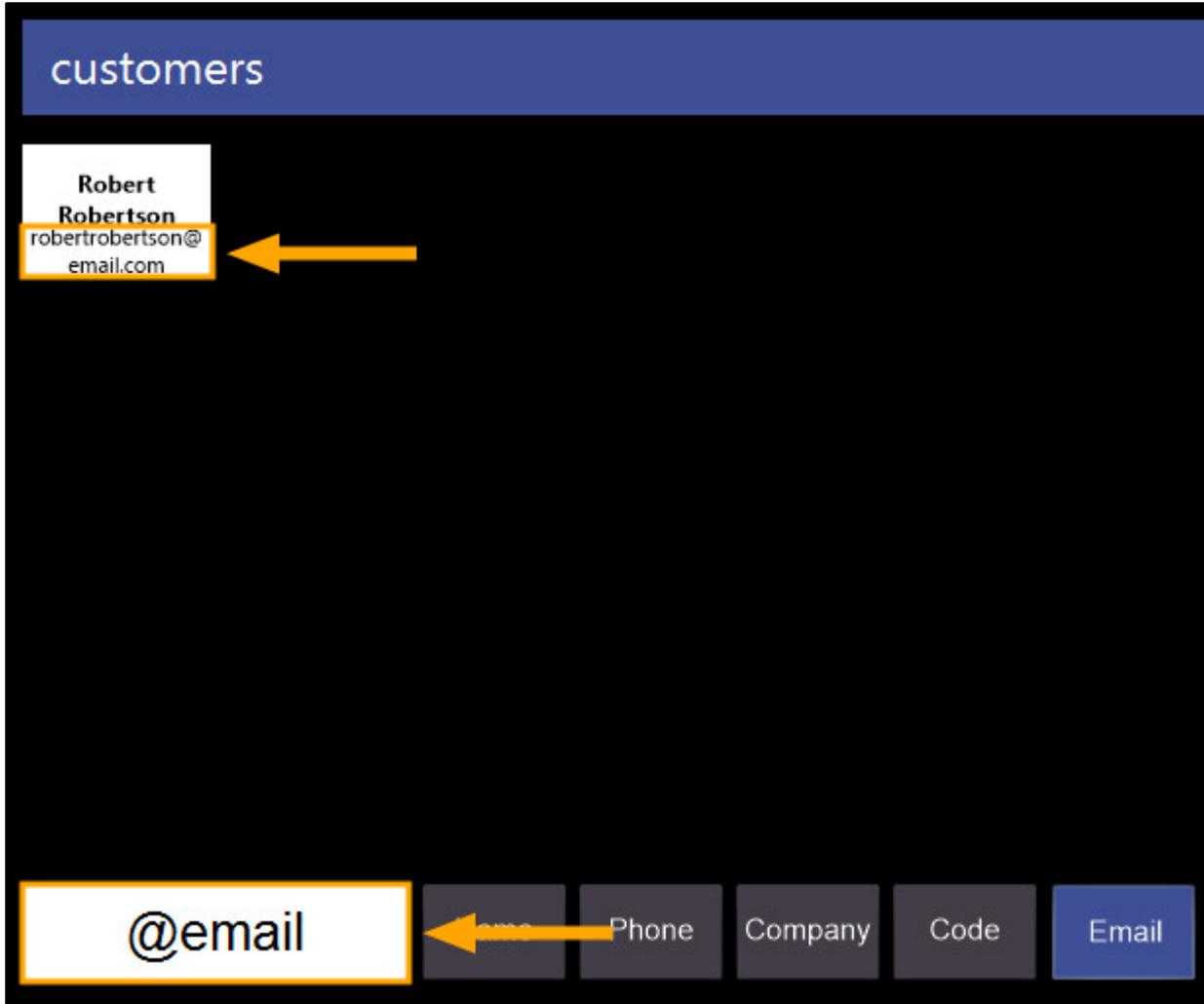
You can repeat the above process for each customer that requires an email address to be recorded. Once customers have had an email address entered against their customer record, close the Customers window. From the top-left corner of the Back-Office Dashboard, press the POS button to open the POS Screen. Press the "Customer" button to display a list of Customers. Within the Customers screen, press the "Email" button located half-way down the screen. A list of Customers which have an email address recorded will be displayed. Each customer's email address will appear on the button below the Customer's name.



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To search for a specific customer by email address, enter the email address using the on-screen keyboard. Either the entire email address can be entered, or part of the email address can be entered (such as the domain name – e.g. @email.com, etc.). Any customers that have an email address which matches the entered address will be displayed.



## Users

### IP-3951 – User Security Option – Modify Customer Type

This function adds the ability to control whether or not a User can access the Modify Customer Type function. Note that disabling access to the Modify Customer Type function only prevents a User from modifying an existing Customer's Customer Type. Access to the Customer Type dropdown box will still be available when a User is creating a new Customer regardless of the "Modify Customer Type" User permission setting.

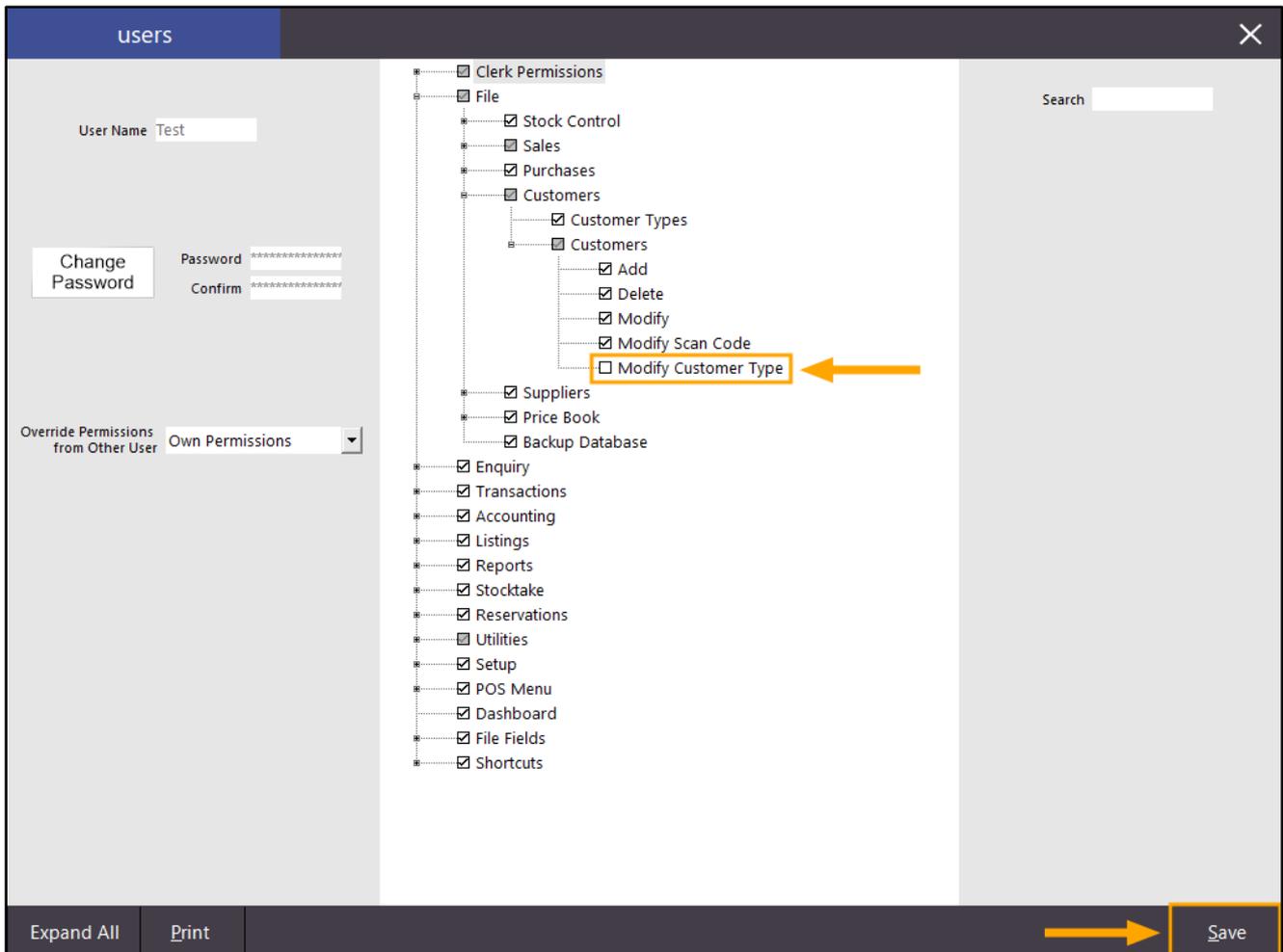
To control a User's access to the Customer Type dropdown box, go to:

Back Office > Setup > Users > Select User > Modify

The Modify Customer Type setting can be configured by going to:

File > Customers > Customers > Modify Customer Type

Toggle the option as required, then press the "Save" button on the bottom-right corner to save your change.



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Once Saved, you will need to login as the User which the setting was applied to.

Go to: File > Log Out

Then enter the Username and Password of the User which this setting was applied to.

Once logged in, the Modify Customer Type function is available on the Modify Customer screen by going to:

Back Office > File > Customers > Customers > Select existing Customer > Modify.

When "Modify Customer Type" is enabled, the Customer Type dropdown box will be enabled and available when modifying an existing Customer as shown in the below example:

The screenshot displays the 'modify customer' interface with the following details:

- Customer Information:** Code 2, Last Name Charlton, Given Names Sarah, Title Miss. Customer Type is set to MEMBERS (highlighted with an orange box and an arrow). Scan Code 9850859357357, Auto, Other Codes.
- Address Details:** Address 42 Wallaby Way, Suburb Hampden, State NSW, Postcode.
- Delivery Address:**  Delivery Address same as Above, Address, Suburb, State, Postcode.
- Contact Details:** Phone 0765536455, Mobile 0499754163, Fax, Email sarahcharlton@yopmail.com.
- Sales / Accounting:** Auto % Discount 0, Price Level 1,  Bar Tab,  Account, Credit Limit 0.00.
- Miscellaneous:** Company, ABN, Occupation, Next of Kin, Contact No, Birth Date 06/09/1987, Birth Date 2 02/03/2015, Password, Gender F, Marital Status,  Mail Out,  Discontinue.
- Comments:** [Text area]
- Sales Prompt:** [Text area]
- Buttons:** Save

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When "Modify Customer Type" is disabled, the Customer Type dropdown box will be greyed out when modifying an existing Customer as shown in the below example:

The screenshot shows the 'modify customer' interface with the following details:

- Header:** 'modify customer' (active), 'General', 'Advanced', and a close button.
- Customer Information:** Code: 2, Last Name: Charlton, Given Names: Sarah, Title: Miss, Customer Type: MEMBERS (disabled), Scan Code: 9850859357357, Auto, Other Codes.
- Address Details:** Address: 42 Wallaby Way, Suburb: Hampden, State: NSW, Postcode.
- Sales / Accounting:** Auto % Discount: 0, Price Level: 1, Bar Tab (unchecked), Account (unchecked), Credit Limit: 0.00.
- Delivery Address:** Delivery Address same as Above (unchecked), Address, Suburb, State, Postcode.
- Contact Details:** Phone: 0765536455, Mobile: 0499754163, Fax, Email: sarahcharlton@yopmail.com.
- Miscellaneous:** Company, ABN, Occupation, Next of Kin, Contact No, Birth Date: 06/09/1987, Birth Date 2: 02/03/2015, Password, Gender: F, Marital Status, Mail Out (checked), Discontinue (unchecked).
- Comments:** Comments, Sales Prompt.
- Footer:** Save button.

## Yes/No Options

### IP-3919 – Yes/No Option – Stock Purchases – Show Indirect Items in Stock Items Grid

This function adds the ability to control whether or not Indirect Stock Items are displayed within the Stock Items grid when opened from a Stock Purchase.

In builds older than Idealpos 7.1 Build 12, Indirect Items could not be added to Stock Purchases.

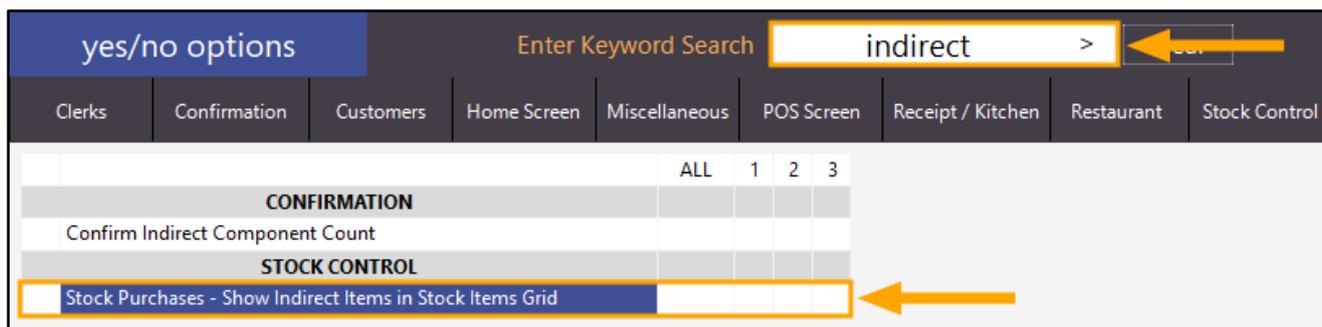
In Idealpos 7.1 Build 12, we added the ability to add Indirect Stock Items to Stock Purchases (so that Idealpos could handle Indirect Stock Items that were received in a Stock Purchase generated via Stock Manage/Pocket Stock).

Some customers may want the ability to hide Indirect Stock Items on the Stock Items screen (only when the Stock Items screen is opened via the Stock Purchases screen).

To enable this function, go to: Setup > Yes/No Options

Enter Keyword Search: indirect

Disable the checkbox on the Yes/No Option “Stock Purchases – Show Indirect Items in Stock Items Grid”



Close the Yes/No Options window to save the change.

The change should apply without needing to restart Idealpos.

# idealpos Update History

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To confirm that Indirect Items no longer appear, go to:  
Back Office > Transactions > Stock Control > Stock Purchases

Either create a new Stock Purchase by pressing the "Add" button on the bottom-left corner of the screen, or modify an existing Stock Purchase by selecting it and pressing the "Modify" button on the bottom-left corner of the screen.

Press the dropdown arrow located in the Stock Code field to open the Stock Items window:

In the Indirect field, enter a "Y" as shown in the below example.  
Indirect Items should no longer appear in the Stock Items grid:

Stock Control	Indirect	PRICE 1	PRICE 2
	Y		

When the above Yes/No Option is enabled, entering a "Y" into the Indirect field will display results (provided that you have Indirect Items in your system):

Stock Control	Indirect	PRICE 1	PRICE 2
	Y		
No	Yes	0.00	
No	Yes	0.00	
No	Yes	0.50	
No	Yes	0.00	
No	Yes	0.00	