

Idealpos 8 Build 11 - Update History

Update Details:

Important Note:

This build release will migrate data from various Customer tables in the Access Database into the SQL Database. It is therefore recommended that a Customer Database is tested first on a demo system to ensure that the migration is completed successfully as well as to gauge the length of time the conversion will take. The data conversion will take place the first time Idealpos is started after installing the new build.

ALERTS	2
IP-5257 – ALERTS – SUPPORT FOR REFUNDS	2
CUSTOMERS	5
IP-64 – CUSTOMERS SEARCH SCREEN – SUPPORT FOR FIELD FILTERING.....	5
IP-5282 – CUSTOMERS/STOCK ITEMS – TOP N RECORDS FUNCTIONALITY.....	6
EXPORT DATA	7
IP-5343 – EXPORT STOCK ITEM SALES – OPTION TO EXPORT EVERY X MINUTES	7
GAMING	9
IP-5248 – GAMING – ENABLE/DISABLE CUSTOMER TYPE DISCOUNTS BY POINTS BUCKET	9
GLOBAL OPTIONS	11
IP-5365 – eCOMMERCE – OPTION TO PLAY ALERT SOUND EVERY X MINUTES	11
POS SCREEN	15
IP-5084 – POS SCREEN SUPPORT FOR 1920 x 1280 RESOLUTION.....	15
IP-5261 – POSTEC INTEGRATION – POS SCREEN SUPPORT FOR 1920x1080 RESOLUTION.....	18
IP-5290 – WEB PAGE FUNCTION	19
RESTAURANT & TABLE MAP	24
IP-1740 – ABILITY TO PRINT SEAT BILL FOR PARTIAL ITEMS	24
STOCK ITEMS	31
IP-4538 – STOCK ITEM VARIANTS – ABILITY TO CREATE INDIRECT ITEMS	31
IP-5266 – STOCK ITEMS – PRINT LABEL FROM WITHIN ADD/MODIFY SCREEN.....	46
IP-5282 – CUSTOMERS/STOCK ITEMS – TOP N RECORDS FUNCTIONALITY.....	52
IP-5301 – STOCK ITEM MODIFY SCREEN – PREVIOUS/NEXT/SEARCH ITEM FUNCTIONALITY	53
STOCK PURCHASES	59
IP-5304 – STOCK PURCHASES – COLOUR HIGHLIGHT UNIT COST VARIATIONS	59
IP-5305 – STOCK PURCHASES – IMPORT CUSTOM CSV FORMATS BY SUPPLIER.....	60
IP-5332 – STOCK PURCHASES – LIVE UPDATING OF SELL PRICE AND DEPARTMENT	73
TAXES	80
IP-5372 – TAX SHIFT EXEMPTION BY STOCK ITEM.....	80

Alerts

IP-5257 – Alerts – Support for Refunds

This function adds the ability to create alerts for the Refund function.

Once the Refund function has been triggered on the POS Screen the number of times configured in the Alert, the Alert action configured in the Alert will be triggered (e.g. Write an entry to Alerts.log and/or Send Email).

To configure and use this function, go to: Back Office > Setup > Global Options > Other Options.

Ensure that the Alerts > Output from POS # is set to a valid POS Number on your network.

The Alerts.log will be written to the POS Terminal number entered here, and will contain alerts that are triggered across all POS Terminals on the network.

If Email functionality is required for alerts, ensure that the Email Settings are also configured as required:

Global Options
Site 1 (Site 1)

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

Home Screen

Home Screen Graphic (pictures folder) Homescreen Blue.jpg >

Last Transaction Timeout 10

Slideshow Start Time 10

Seconds between images 30

Alerts

Output from POS # 1

Mag Card Printing

Mag Card Format Format 1

Printer Connection

Email Settings

SMTP Outgoing Email Server

Sending Email Address

SMTP Username

SMTP Password *****

SMTP Port Enable SSL/TLS Protocol

Default CC Email Address

Default BCC Email Address

Default Subject for Invoices Invoice from [UN] - [INV]

Default Subject for Statements This is the statement from [UN]

Default Message when sending Reports

Default Message when sending Customer Statements/Invoices

FTP Details

Server Address

Server Port 21

Folder

Username

Password

Special Attribute Types

Stock Item Linking

Remove Tax

Transaction Event

Special Item Subtotal

Attribute Column Headers

1

2

3

4

5

Default Variant Types

Size

Colour

Stock Item Descriptions

Description 2 Kitchen Description

Description 3 Long Description

idealpos Update History

[Return to top](#)

After saving the Refund Alert, close the Alert window then go to POS Screen.

Trigger the number of refunds configured in the Alert.

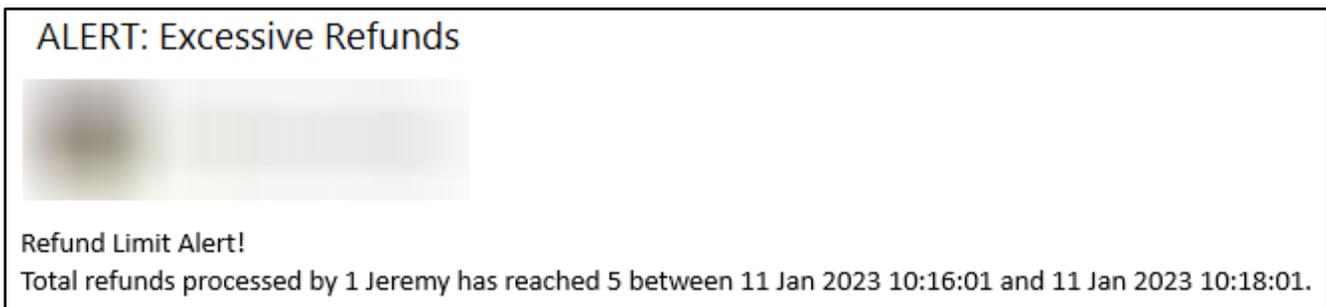
As mentioned previously, the number of refunds configured in the Alert refer to the number of transactions that contain a refund within the specified period, not the refund quantity.

E.g. Using the refund amount shown on the Alerts configuration screenshot on the previous page (5 refunds in 2 minutes), refunding a quantity of 5x items in a single transaction will not trigger the alert.

Five separate transactions which contain a refund must be completed within two minutes for the refund alert to trigger.

Once triggered, the Alert will be emailed to the email address(es) and/or written to the Alerts.log, as configured in the Alert.

Email Alert:



Alerts.log (located in C:\ProgramData\Idealpos Solutions\Idealpos\LOGS on the POS Terminal that was configured in Setup > Global Options > Other Options > Alerts > Output from POS #):



Customers

IP-64 – Customers Search Screen – Support for Field Filtering

This function will enable the ability to filter the Customer Search Screen by each field, (in the same manner as the field filtering which is available on the Stock Items search screen).

This function does not require any additional configuration.

To use this function, go to: Back Office > File > Customers > Customers.

The field filters are displayed at the top of each column, just below the column header.

The screenshot shows the 'Customers' search screen with 28 records. The table has the following columns: Code, Last Name, First Name, Address 1, Address 2, Suburb, and Scan Code. A search bar is visible on the left side of the table. A yellow arrow points to the search bar in the 'Last Name' column.

Code	Last Name	First Name	Address 1	Address 2	Suburb	Scan Code
1	Harrison	Ben	Unit 17	31 Honeysuckle Ave	Groundsborough	9874902100196
2	Charlton	Sarah	42 Wallaby Way		Hampden	9850859357357
3	Townsend	Mick	Ableman Lodge	232 Punter Lane	Hackford	9869881290839
4	Winters	Charlotte	18 Sicklman Terrace		Bunters Point	9829235556813
5	Andrews	Theresa	87 Naghum St		Crawford	9898639962605
6	Graham	Alan				9806633749962
7	Account Customer					
8	Points Customer					
9	Master Account					
10	Sub Account					
11	Layby Customer					
101	Murray	Steve				
102	Brown	Talia				
103	Singh	Jamal				
104	Brinkle	Rebecca				
105	Smulders	Ashleigh				
111	Bronze					
112	Silver					
113	Gold					
114	Platinum					
115	Life					
123456	Customer 123456					
888888	Customer 888888					
41438880	Robertson	Robert				
STAFF001	Jeremy (Owner)					
STAFF002	Melissa					
STAFF003	Hiroku					
STAFF004	Bjorn					

Enter a search term into any of the available field filters to search for any matching Customers.

The screenshot shows the 'Customers' search screen with 2 records. The search filter 'Harl' is applied to the 'Last Name' column. The table shows the following records:

Code	Last Name	First Name	Address 1	Address 2	Suburb	Scan Code
1	Harrison	Ben	Unit 17	31 Honeysuckle Ave	Groundsborough	9874902100196
2	Charlton	Sarah	42 Wallaby Way		Hampden	9850859357357

IP-5282 – Customers/Stock Items – Top N Records Functionality

This function limits the number of records (to the top 50 records by default) that are displayed when opening the Customers function via Back Office > File > Customers > Customers. The top number of records that are displayed when opening the Customers screen can be toggled between Top 50 records, Top 1000 records, or All records. By selecting a smaller number of top Customer records to display, the amount of time it takes to open the Customers screen in venues that contain an excess number of customer records will be greatly reduced. When the Top N records function is actively restricting the number of records displayed, a note will appear and will specify the number of records currently being shown (e.g. Top 50 records, Top 1000 records).



If all records are being displayed, the 'Top' text will be omitted and the total number of records will be listed, as shown below:



Note that when the number of records is limited to a smaller sample, the search and filter function on the Customers screen is not affected; if one or more customers exist which match the entered search criteria, the Customers will be displayed in the filtered search results.

On the top-left corner of the Customers window, select from the following options to toggle the number of records to display:

- Top 50 records
- Top 1000 records
- All records



Once an option is selected, that option will be used each time the Customers screen is opened.

The Top records option is specific to each POS Terminal/Back Office and applies to all users.

If a user toggles the Top N records option on a terminal, that selection will apply to that terminal for all users of that terminal, and the chosen option is persistent, even after restarting Idealpos on the terminal.

Export Data

IP-5343 – Export Stock Item Sales – Option to export every x minutes

This function adds the ability to Export Stock Item Sales every x minutes, where x is a configurable number of minutes that can be customised as required.

When Stock Item Sales are exported every x minutes, Idealpos will export the Stock Item Sales that have occurred between the previous Stock Item Sales Export and the number of minutes interval that has been set.

If no Stock Item Sales took place between the previous export and the number of minutes configured in this function, then no data will be exported. Once Stock Item Sales have taken place, the Stock Item Sales data will be exported at the next interval, as configured in this function.

To configure and use this function, go to: Back Office > Setup > POS Terminals > Select a POS Terminal > Modify.

Within the Import/Export tab, configure the following settings under the Automatic Export Settings section:

Export Folder: Enter the folder location to where the data should be exported.

Export Sales Format: Specify a Sales Format from the dropdown list. Available options include Standard Stock Item Sales, Impact Data, Live ExternalSales.mdb, TimeTarget, iKnow, Deputy, Tanda, Nielsen or Generic.

Sales From: Specify where the sales should be exported from. Available options include All POS Terminals, This POS Only or This Site Only.

Export Daily at [daily time in 24 hour format] or **every x minutes**. If using the export every x minutes, ensure that the export daily at is set to blank, or if using export every x minutes, ensure export daily at is set to blank.

The screenshot displays the 'Pos Terminals' configuration window with the 'Import/Export' tab selected. The 'Automatic Export Settings' section is highlighted with orange boxes around the following fields:

- Export Folder:** C:\Export\
- Export Sales Format:** Standard Stock Item Sales
- Export Daily at:** Or every 5 minutes

The 'Automatic Import Settings' section is also visible, showing options for import folder, filename, and supplier invoices.

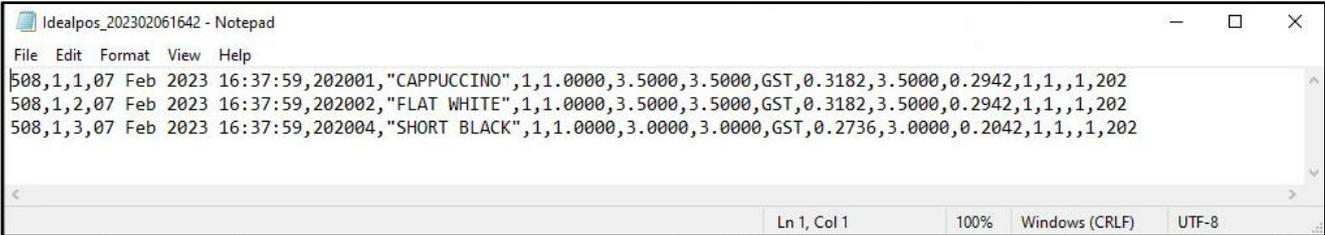
idealpos Update History

[Return to top](#)

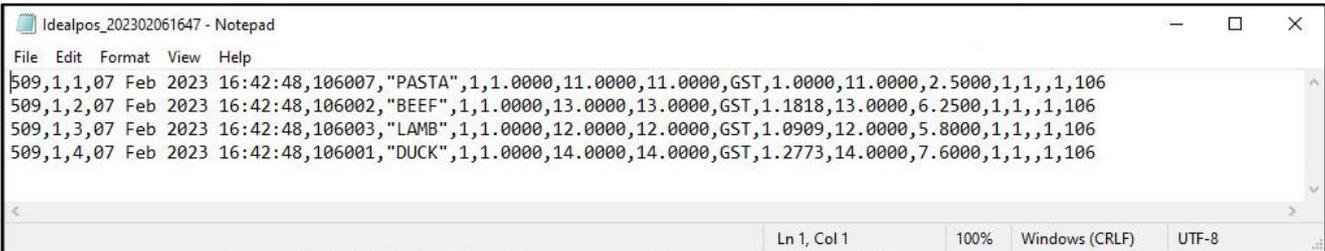
Once configured, close the POS Terminal configuration windows.

The Sales Export will be performed at the number of minutes interval configured and the data will be exported to the Export Folder configured.

The below examples show two sets of sales data that was exported at the configured interval of 5 minutes, as configured on the previous page.

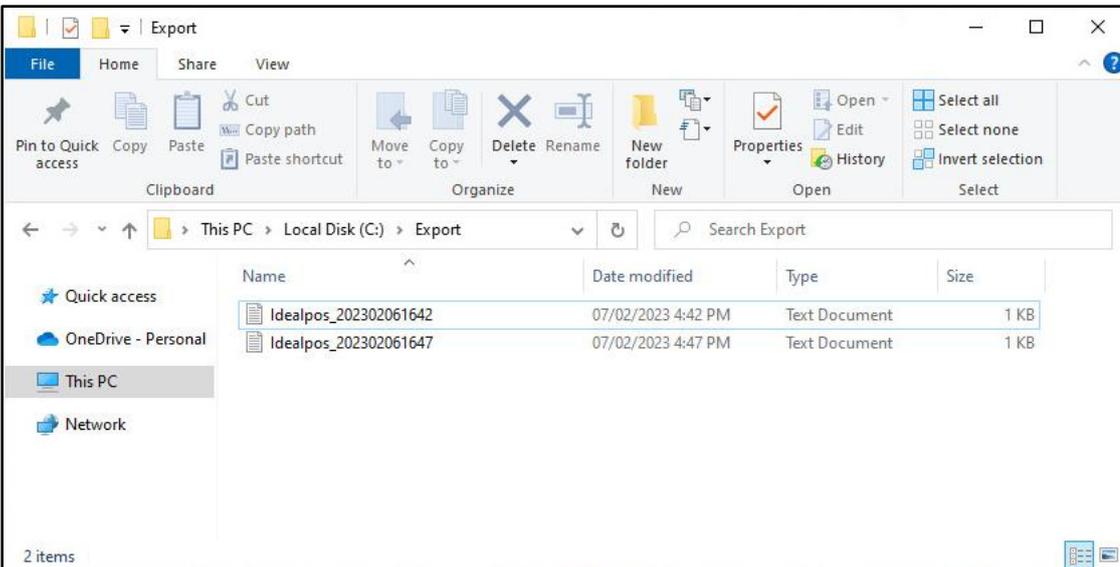


```
File Edit Format View Help
508,1,1,07 Feb 2023 16:37:59,202001,"CAPPUCCINO",1,1.0000,3.5000,3.5000,GST,0.3182,3.5000,0.2942,1,1,,1,202
508,1,2,07 Feb 2023 16:37:59,202002,"FLAT WHITE",1,1.0000,3.5000,3.5000,GST,0.3182,3.5000,0.2942,1,1,,1,202
508,1,3,07 Feb 2023 16:37:59,202004,"SHORT BLACK",1,1.0000,3.0000,3.0000,GST,0.2736,3.0000,0.2042,1,1,,1,202
```



```
File Edit Format View Help
509,1,1,07 Feb 2023 16:42:48,106007,"PASTA",1,1.0000,11.0000,11.0000,GST,1.0000,11.0000,2.5000,1,1,,1,106
509,1,2,07 Feb 2023 16:42:48,106002,"BEEF",1,1.0000,13.0000,13.0000,GST,1.1818,13.0000,6.2500,1,1,,1,106
509,1,3,07 Feb 2023 16:42:48,106003,"LAMB",1,1.0000,12.0000,12.0000,GST,1.0909,12.0000,5.8000,1,1,,1,106
509,1,4,07 Feb 2023 16:42:48,106001,"DUCK",1,1.0000,14.0000,14.0000,GST,1.2773,14.0000,7.6000,1,1,,1,106
```

The below shows the folder where the data was exported (C:\Export\) as configured on the previous page.



Gaming

IP-5248 – Gaming – Enable/Disable Customer Type Discounts by Points Bucket

This function enables the enabling or disabling of Customer Type Discounts by the Points Bucket.

This function is available when using the following Gaming Integrations:

- MaxGaming
- eBet
- Aristocrat
- Konami

Refer to the Gaming Integration in use at the venue for further details about using and configuring the Gaming Points/Customer Type Discounts for each Gaming Points Bucket.

This function is configured by going to: Back Office > Setup > Global Options > Gaming

Global Options
Site 1 (Site 1)
S X

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

Gaming Interface

Interface Type Aristocrat

Redeem Tender No Pay by Points

Username

Password

Source Id

Add Members to POS

Code Length

Customer Type 1

Update Customer Type from Member Analysis

Use Price Level Schedule

Redemptions treated as Discounts

Trigger Card Swipe manually using [;] Prefix

StarrSrvr Interface

Use StarrSrvr

IP Address

Redeem Tender EFTPOS

Redeem Tender 2 EFTPOS

Interface Type IRC

Customer Timeout 0

Rating Points per Dollar

Add Members to POS

Scan Code

Membership ID

Update Customer Type from Member Price Level

Update Customer Type from Member Rating Grade

Redemptions treated as Discounts

Customer Type

Length 0

Tickets

None

One Only

Multiple by Threshold

Multiple by Points

Use Price Level Schedule

Copies on Detailed Statement

Maximum PO Amount 0

Gaming Points

Enable	Description	Code	Points Per \$	Point Value	Customer Type Discounts
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>

Combine Accounts into one Redeemable Total

idealpos Update History

[Return to top](#)

Some Gaming Integrations (such as Aristocrat or eBet) allow Gaming Override options to be configured. The Gaming Override options also contain the ability to toggle Customer Type Discounts for each Points Bucket.

Go to: Back Office > Setup > POS Terminals > Select a POS Terminal > Modify > Miscellaneous Options > Gaming Override Options:

Pos Terminals Main Settings POS Settings Receipt Printer Kitchen Printers Display / Kiosk Customer Readers Other Peripherals EFTPOS Settings Import / Export Miscellaneous Settings

General

Points per Dollar
 Point Redemption Value
 Delete Points when Customer Inactive for Months
 Lock Price Level to
 Default Table Map
 Default User

Customer Codes From
 Stock Item Codes From to
 Show Order to
 Pending Sales From to
 Force Order Menu
 Force Receipt Amount
 Auto Expand Activity

POSServer

POSServer Override IP
 Automatically Reconnect

Cash Declaration

Print to Receipt Printer Stock Sales
 Print to Windows Printer Department Sales
 Don't Print Price Levels
 Waste Mode
 Promotions

Include Figures for Multiple Terminals >
 Current Shift Start

Gaming Override Options

Price Level Remote POS
 Ticket Threshold
 System ID 2nd S7000 Port
 Username
 Password

Enable	Description	Code	Points Per \$	Point Value	Customer Type Discounts
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>

Machine Order Clerk
 Unmatched Items Link >

Dashboard

Sales in Locations >
 Shortcut Bar Small Font

Handhelds

Force Food to Print
 Force Drinks to Print
 Force Bills Printer
 Item Graphic Location
 Handheld Background

Global Options

IP-5365 – eCommerce – Option to play Alert Sound every X minutes

This function adds the ability to play an Alert Sound every X minutes (where X is the number of minutes that can be customised, with 5 minutes being the default interval). The Alert Sound will be repeated at the interval configured whilst there are any eCommerce Orders which have not been processed or finalised.

To configure and use this function, go to:

Back Office > Setup > Global Options > Interfaces > eCommerce

Ensure that a sound file is specified in the field 'Play Sound when Orders Arrive'.

Set the 'Repeat Sound every # minutes' to a value that suits your requirements.

If the repetition of the Alert Sound every X minutes is not required, set the value to blank or 0.

Play Sound when Orders Arrive C:\Windows\Media\Ring01.wav >

Repeat Sound every minutes

Play Sound when Orders Arrive C:\Windows\Media\Ring01.wav >

Repeat Sound every 0 minutes

idealpos Update History

[Return to top](#)

When an eCommerce order arrives, the specified sound file will play, and if the repeat sound option has been configured, the sound will be repeated as per the number of minutes which have been configured (the sound will repeat whilst there are pending Web Orders which have not been processed or finalised).

30 Jan 10:57 Adult ID: 30-Jan-2005
 POS 1 Jeremy STANDARD #508

WEB ORDERS **1**

✕



\$0.00

RECEIPT	CLERK	7	8	9	CL
RESERVATIONS					
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	

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

idealpos Update History

[Return to top](#)

To stop the sound from repeating, finalise each Web Order (press the Web Orders button at the top of the POS Screen, select the Web Order > Finalise and repeat until each Web Order has been finalised):.

Web Orders ✕

Search For Code Clerk Code >

All Dates ▾

Code	Date	Name	Address	Postcode	Status	Expected
43	30 Jan 23					Today 10:56

CAPPUCCINO	\$3.50
FLAT WHITE	\$3.50
SHORT BLACK	\$3.00
PASTA	\$11.00
BEEF	\$13.00
LAMB	\$12.00
DUCK	\$14.00
<hr/>	
	\$60.00

[Email](#) [Kitchen Reprint](#) [Print](#) [Finalize](#)



idealpos Update History

[Return to top](#)

After all Web Orders have been finalised, the Web Orders button will be cleared from the top of the POS Screen, and the sound will no longer repeat.

30 Jan 11:12 Adult ID: 30-Jan-2005
POS 1 Jeremy STANDARD #508
X

				RECEIPT	CLERK	7	8	9	CL
				RESERVATIONS					
				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	
\$0.00									
CAPPUCCINO	FLAT WHITE	LATTE	CHAI	SHORT BLACK	LONG BLACK	MOCHA	HOT CHOC	TEA	
EXTRA HOT	SKINNY	DECAF	1 SUGAR	TAKEAWAY	SMALL	ICED DRINK	WATER	KEYBOARD	
EXTRA CHOC	SOY	WEAK	2 SUGAR	MARSH MALLOW	MEDIUM	MILKSHAKE	JUICE	ORDER NUMBER	
NO CHOC	ALMOND	DOUBLE SHOT	3 SUGAR	EQUAL	LARGE	SMOOTHIE	SOFTDRINK	REWARDS ENQUIRY	
DRINKS	CAFE	TAP BEER	SPIRITS	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL	MANAGER	
	RESTAURANT	BOTTLE BEER & RTD	WINE				SERVICES	ADMIN	

POS Screen

IP-5084 – POS Screen Support for 1920 x 1280 Resolution

This function adds support for a POS Screen Resolution of 1920x1280 at either 125% or 150% scaling. This resolution is utilised by some devices (such as the Surface Go 3) and this resolution is now available in Idealpos.

To configure and use this resolution, go to:

Back Office > Setup > POS Terminals > Select the POS Terminal > Modify.

Within the POS Settings tab > POS Screen section, set the Resolution to one of the following options:

1920 x 1280 (3:2 @ 125%)

1920 x 1280 (3:2 @ 150%)

The screenshot shows the 'Pos Terminals' configuration window with the 'POS Settings' tab selected. The 'POS Screen' section is expanded, displaying a dropdown menu for 'Resolution'. The menu is open, showing several options, with '1920 x 1280 (3:2 @ 125%)' and '1920 x 1280 (3:2 @ 150%)' highlighted in blue. Other options include '1024 x 768 (4:3)', '1024 x 600 (15.4:9)', '1280 x 800 (16:10)', '1366 x 768 (16:9)', '1920 x 1080 (16:9 @ 125%)', and '1920 x 1080 (16:9 @ 125%) Retail'. The 'Colour Theme' dropdown is also visible, currently set to '1024 x 768 (4:3)'. Other sections like 'POS Screen Tabs' and 'Price Level Mapping' are also visible in the background.

idealpos Update History

[Return to top](#)

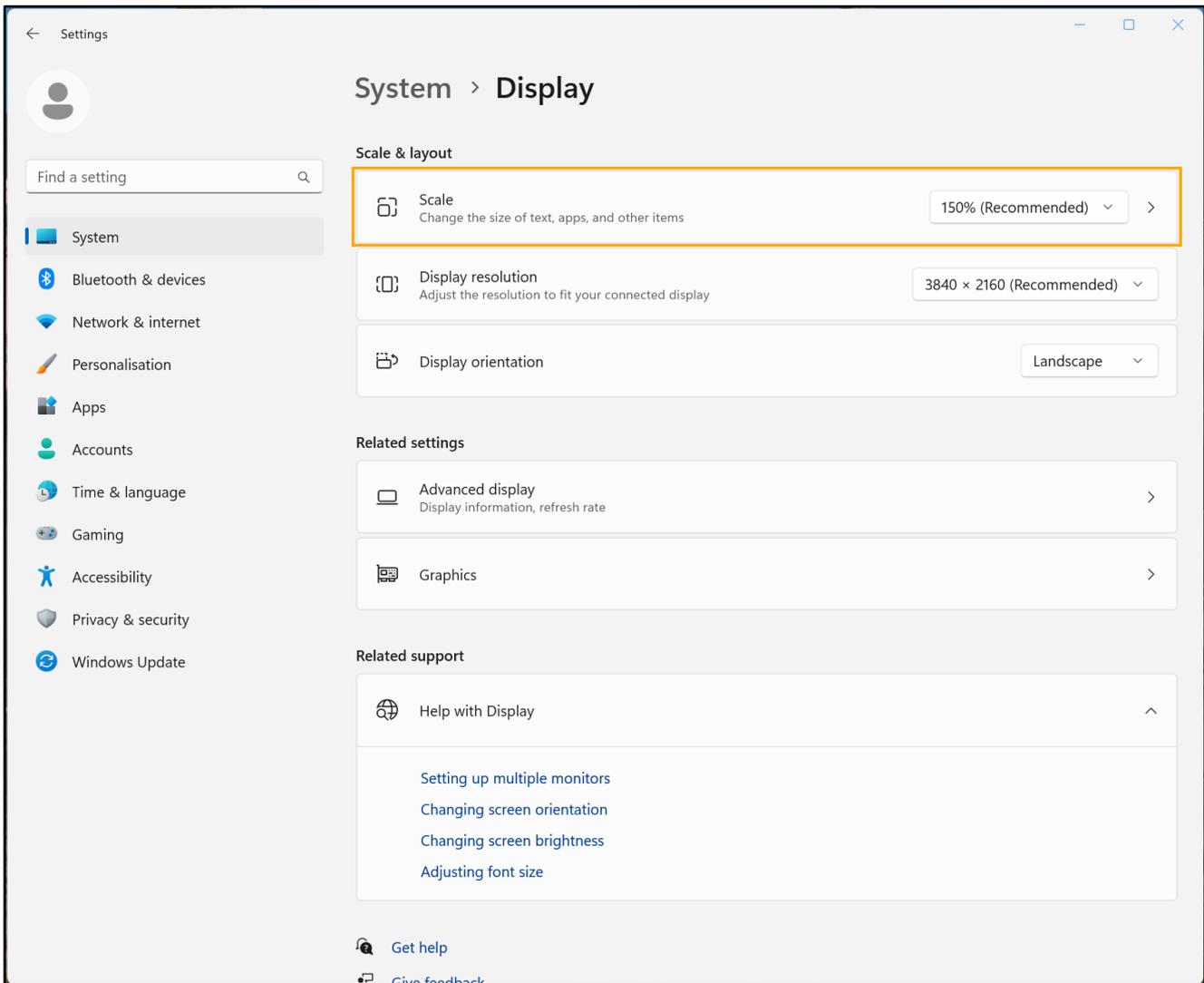
To check and set the scaling in Windows (Windows 10 or Windows 11):

Right-click on the Windows desktop > Select 'Display Settings'.

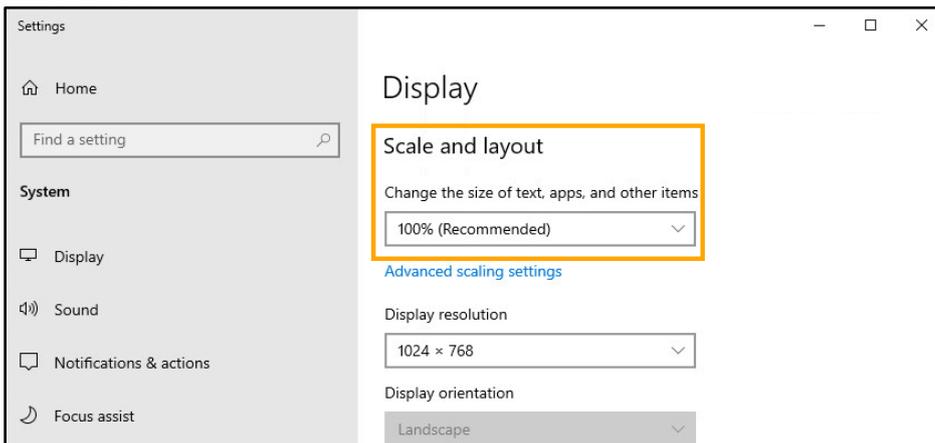
Scroll down to 'Scale & Layout' – The current scaling settings that are in use and the recommended scale setting for the current screen resolution and screen size will appear; if required, the scale option can be changed.

Any changes to the scaling options will require the user to Sign Out/Log out of Windows and log back in again.

Windows 11:



Windows 10:



idealpos Update History

[Return to top](#)

The below example shows Idealpos running at 1920x1280 (125% scaling):



The below example shows Idealpos running at 1920x1280 (150% scaling):



idealpos Update History

[Return to top](#)

IP-5261 – POSTEC Integration – POS Screen support for 1920x1080 Resolution

This function adds support for the 1920x1080 POS Screen Resolution to be used with the POSTEC Fuel Integration. When the POSTEC Integration is enabled and the POS Screen Resolution is set to 1920x1080, all elements of the POS Screen will now be visible. Attempting to use the 1920x1080 POS Screen Resolution with POSTEC on previous builds of Idealpos would result in essential elements of the POS Screen UI being cut off/appearing off the screen.

To use this function, go to: Back Office > Setup > POS Terminals > Select a POS Terminal > Modify > POS Settings. Select the 1920x1080 resolution.

Note – The Retail layout is not supported.

Also note that when using this resolution with POSTEC, not all POS Screen tabs will be available due to the reserved screen real-estate that is required for the POSTEC interface (which will also be displayed on-screen at the same time as the Idealpos POS Screen interface). Additional configuration to the POS Screen layout will be required so that all required functions/tabs will be accessible from the POS Screen.

The screenshot shows the 'Pos Terminals' configuration window with the 'POS Settings' tab selected. The interface is divided into several sections:

- POS Screen Tabs:** A list of categories with radio buttons for 'Default' and checkmarks for 'Enabled'. Categories include DRINKS, CAFE, TAP BEER, SPIRITS, COCKTAILS, FRUIT & VEG, GROCERY, RETAIL, MANAGER, RESTAURANT, BOTTLE BEER & RTD, WINE, SERVICES, and ADMIN. All are enabled.
- Default Tabs for Sessions:** Three dropdown menus, all set to 'Don't Change'.
- Price Level Mapping:** A list of 12 price levels with dropdown menus for each, ranging from STANDARD to OWNERS.
- POS Screen:** A section containing a 'Resolution' dropdown menu (highlighted with a yellow box and a yellow arrow pointing to it) set to '1920 x 1080 (16:9 @ 125%)' and a 'Colour Theme' dropdown menu set to 'Standard'.
- User-Defined Options:** A table with columns for 'Description' and 'Setting', currently empty, with a 'Remove All' button below it.

IP-5290 – Web Page Function

This function adds the ability to create a POS Screen button that will open a Web Page when pressed. The Web Page types available are as follows:

- Idealpos User Guide – The Idealpos User Guide will be displayed when the button is pressed.
- eCommerce Order Feed –
- Custom – When this option is selected, a URL field will be displayed when configuring the button. The website address entered in the URL field will be displayed when the button is pressed.

Any web page that is opened via the POS Screen using this function will be displayed within the Idealpos embedded web browser window; the browser window does not contain any navigational buttons (e.g. no refresh, back or forward buttons, nor does it contain a web address field). This will prevent staff from using the Web Browser function to browse various web sites except for the site(s) specified within each Web Page POS Screen Button.

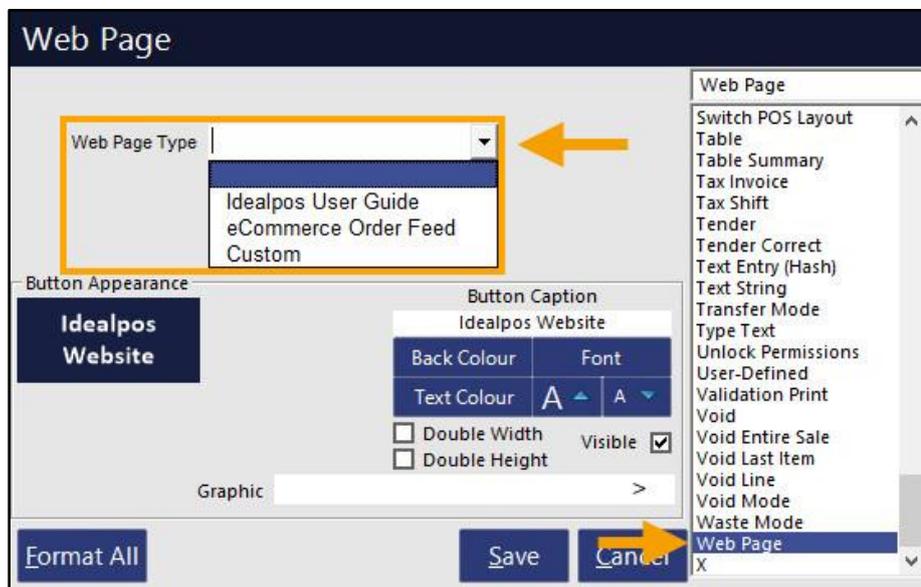
To prevent unauthorised clerks from using the Web Page function, access can be restricted via Clerk Permissions (Back Office > Setup > Clerks > Select Clerk > Permissions > Clerk Permissions > POS > Web Page).

To configure and use this function, go to:

Back Office > Setup > POS Screen > POS Screen Setup.

Select a POS Screen Layout > Buttons.

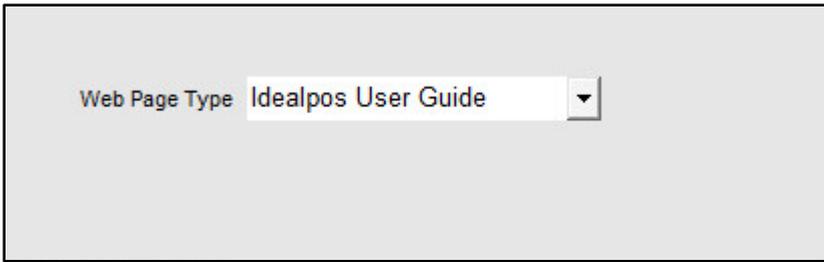
Select an unused/blank button on the desired POS Screen tab and configure as follows:



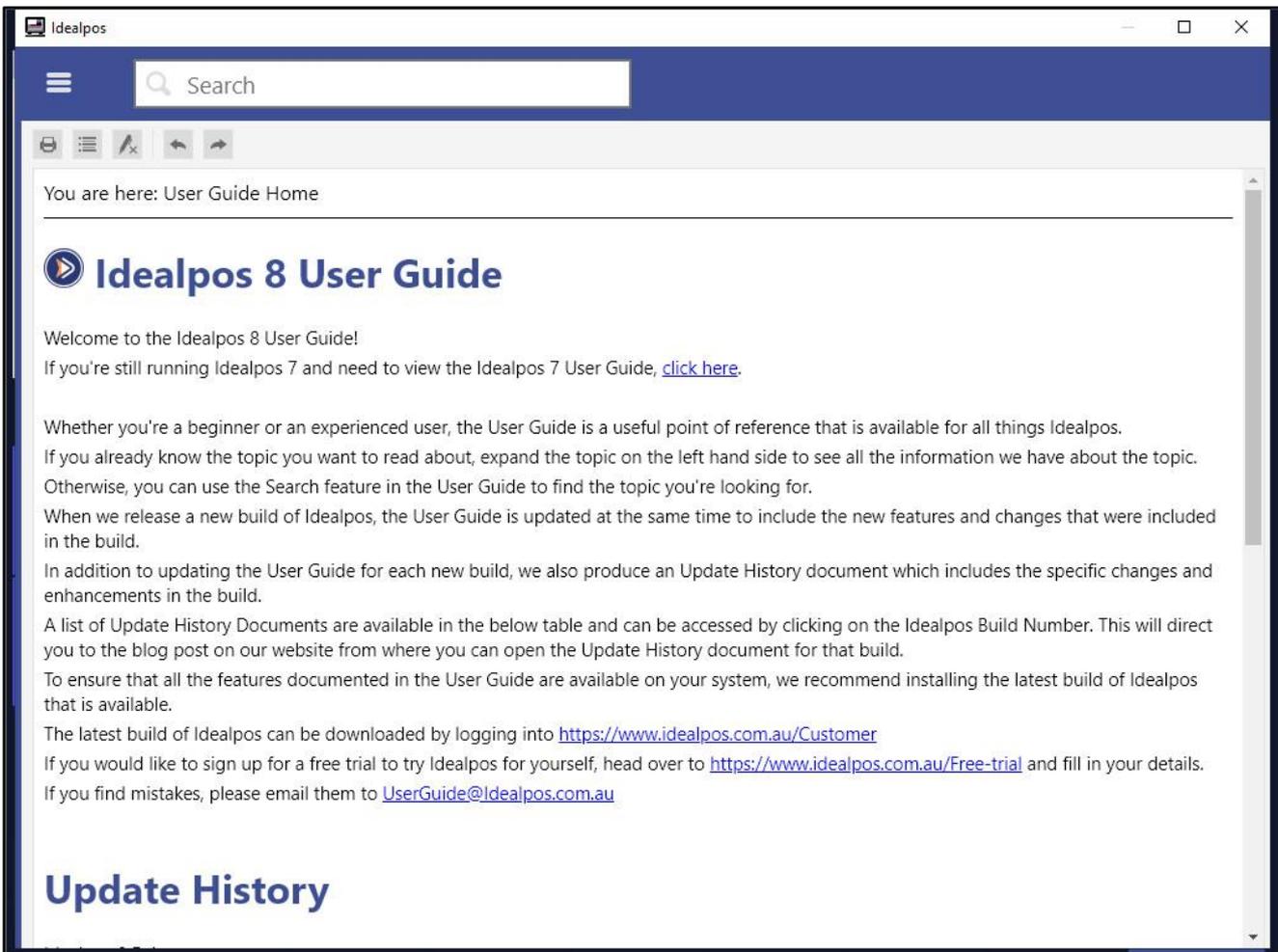
idealpos Update History

[Return to top](#)

Depending on the Web Page Type that is selected, different configuration options will be available.



When the button is pressed, this function will open the Idealpos User Guide:



idealpos Update History

[Return to top](#)

Web Page Type ▼
Client ID
Password

When this function is fully configured and the button is pressed, the eCommerce Orders Feed will be displayed:

The screenshot shows a window titled "Idealpos" with a header "Orders Feed". It displays two test orders in a list format. The first order is titled "Test order" and the second is titled "TEST IP". Each order entry includes a phone number, total amount, order type, table number, order status, and order paid status. On the right side of each entry, the order ID, order time, and order source are listed.

Order ID	Order Time	Order Source
13179723	11:52 AM	Localserves Mobile
13179696	11:41 AM	Idealpos Web

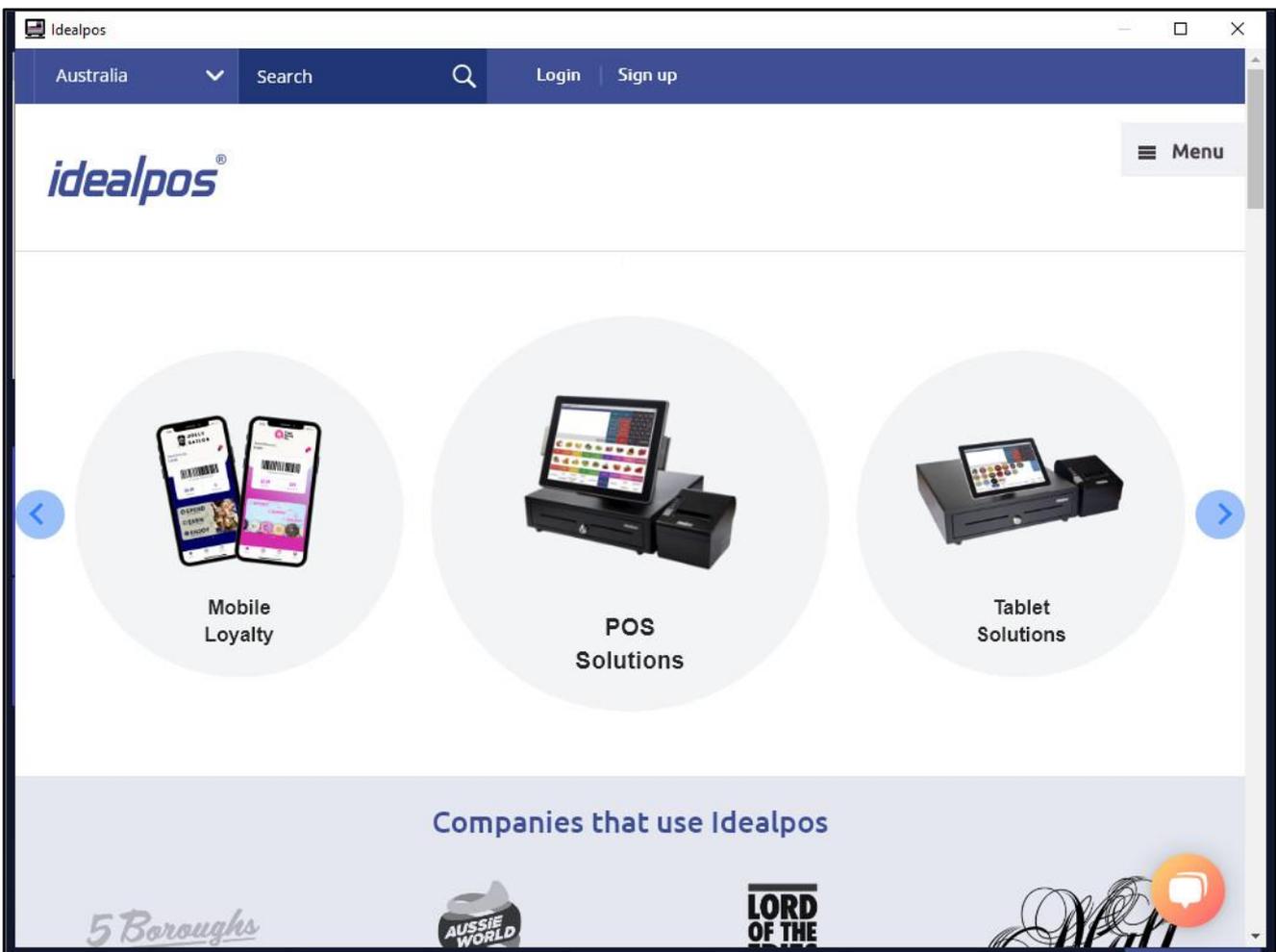
idealpos Update History

[Return to top](#)

Web Page Type

URL

When this function is configured to open a website (e.g. <https://www.idealpos.com.au>) and the button is pressed, the website specified in the URL field will be displayed.



idealpos Update History

[Return to top](#)

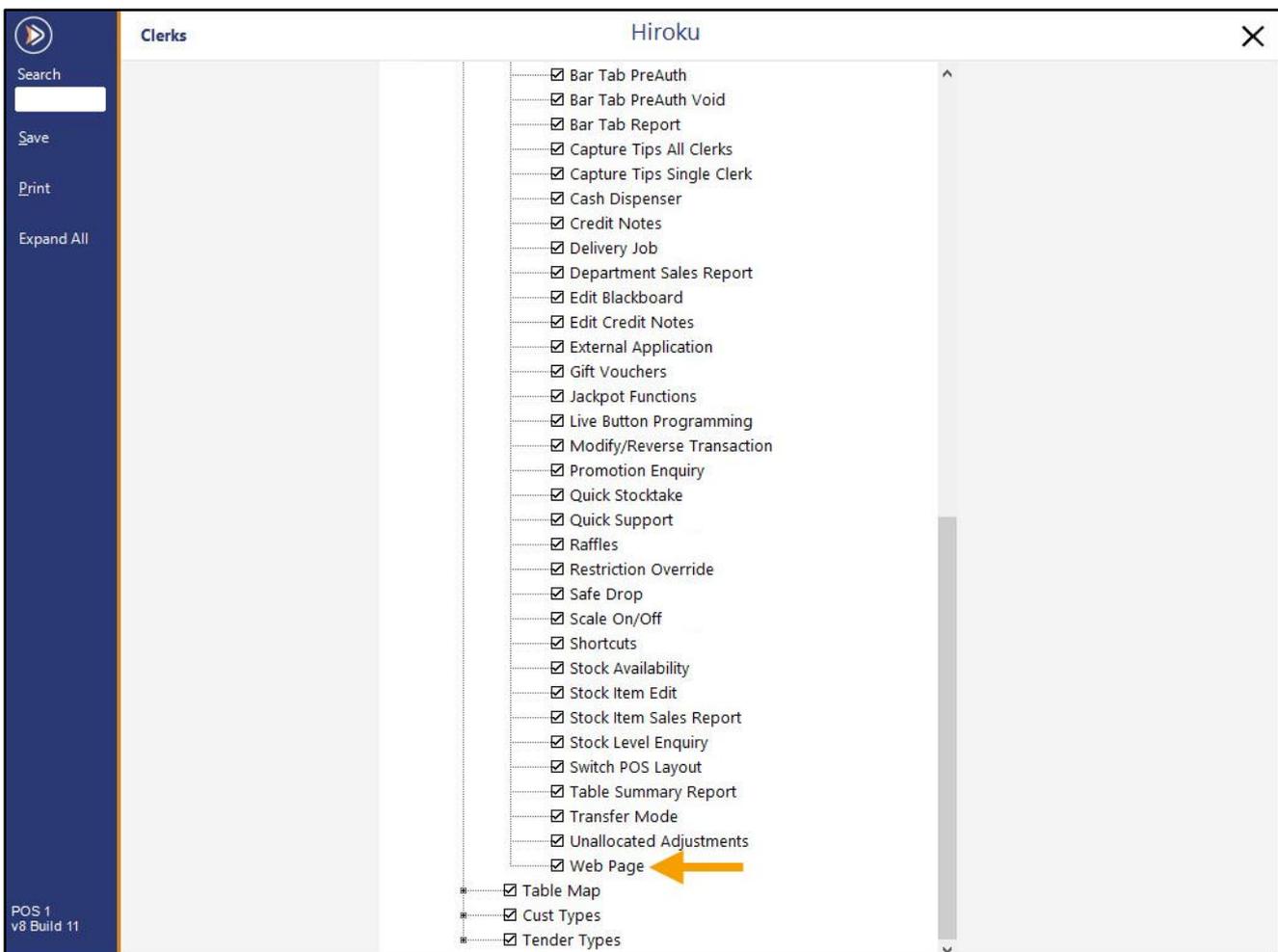
If access to the Web Page function needs to be restricted, this can be done via Clerk Permissions. Go to: Back Office > Setup > Clerks > Select a Clerk > Permissions.



Toggle the Web Page function as required.

Note that the Web Page function can also be toggled via User Permissions (Back Office > Setup > Users > Select a User > Modify > Clerk Permissions > POS > Web Page).

If the Web Page function has been disabled for a User, it will also be disabled for all Clerks linked to the User, regardless of whether the Clerk has the Web Page function enabled or not.



Restaurant & Table Map

IP-1740 – Ability to Print Seat Bill for Partial Items

This function enables the ability to Print Seat Bills for Partial Items.

I.e. from the Table Details screen > Select a partial payment option > Select Items on the Table Details screen > Print Bill > Enter Seat Number > Print.

On previous builds and versions of Idealpos, when performing the above sequence of steps to print a seat bill for Partial Items, a prompt 'Cannot Print Seat Bill for Partial items' would appear, preventing this action from being performed.

This functionality is now available.

This function requires the Restaurant Module enabled in the Licence Gateway and also requires that the POSServer to be configured. For further details about configuring POSServer, refer to the [POSServer topic](#) in the User Guide.

For further details about the Restaurant functionality, refer to the [Restaurant & Table Map topic](#) in the User Guide.

To use this function, go to:

POS Screen > Add Items to sale > Table Map > Select a table > Enter number of Guests if prompted.

Select the Table from the Table Map and press 'Details'.



idealpos Update History

[Return to top](#)

Select the portion for the bill > select the Stock Items > press 'Print Bill'.
In this example, the 1/2 payment option has been selected.

TABLE 10		2 min		\$20.00				
4 Covers - Average \$5.00		Amount	Outstanding	Pay	Seat			
Ordered: 11:47am								Jeremy
SHORT BLACK		3.00	3.00	1.50				
DOUBLE SHOT		2.00	2.00	1.00				
JAM & TOAST		5.00	5.00	2.50				
CAPPUCCINO		3.50	3.50					
FLAT WHITE		3.50	3.50					
SHORT BLACK		3.00	3.00					
		-----	-----	-----				
		20.00	20.00	5.00				

Full 1/3 1/5 1/7 1/Covers Amount

1/2 ← 1/4 1/6 1/8 Quantity Fraction

Print Bill Select All

Pay 5.00

idealpos Update History

[Return to top](#)

The Seat Selection prompt will appear.
Enter the Guest's Seat Number > Print.

TABLE 10		11 min	\$20.00					
4 Covers - Average \$5.00		Amount	Outstanding	Pay	Seat			
Ordered: 11:47am						Jeremy		
SHORT BLACK		3.00	3.00	1.50		Group by Print Group		
DOUBLE SHOT		2.00	2.00	1.00		Reorder Items		
JAM & TOAST		5.00	5.00	2.50		Hide Paid Items		
CAPPUCCINO						Transfer		
FLAT WHITE						Reprint Kitchen		
SHORT BLACK						Name		
						Delete		
						Covers		
Full	1/3	1/5	1/7	1/Covers	Amount			
1/2	1/4	1/6	1/8	Quantity	Fraction	Print Bill	Select All	Pay 5.00

7	8	9	×
4	5	6	Whole Table
1	2	3	Single Seat
0	C	Print	
1			

idealpos Update History

[Return to top](#)

The bill will be printed for the partial payment items:

```

      I D E A L P O S

      1/212 Curtin Ave West
      Eagle Farm QLD 4009
      Australia

      TAX INVOICE
      123-456-789-11

T A B L E  1 0 - S e a t  1

Jeremy 09-Feb-2023 11:59
Covers :

- - - F O O D - - - -
JAM & TOAST
0.5 @ $5.00 ea           $2.50

- - - B E V E R A G E - - - -
SHORT BLACK
0.5 @ $3.00 ea           $1.50
-> DOUBLE SHOT           $1.00

Includes Tax:
GST Amount                $0.45
-----
S U B T O T A L           $ 5 . 0 0
-----

TIPS Amount
-----

G R A N D T O T A L
-----
*indicates taxable supply

      Powered by Idealpos

```

idealpos Update History

[Return to top](#)

The items will remain selected on the Table Details screen using the partial payment amount so that the Clerk can then press the 'Pay' button to process the payment for those items.

TABLE 10		11 min		\$20.00				✕		
4 Covers - Average \$5.00		Amount	Outstanding	Pay	Seat					
Ordered: 11:47am										Jeremy
SHORT BLACK		3.00	3.00	1.50		Group by Print Group				
DOUBLE SHOT		2.00	2.00	1.00		Reorder Items				
JAM & TOAST		5.00	5.00	2.50		Hide Paid Items				
CAPPUCCINO		3.50	3.50			Transfer				
FLAT WHITE		3.50	3.50			Reprint Kitchen				
SHORT BLACK		3.00	3.00			Name				
		-----	-----	-----		Delete				
		20.00	20.00	5.00		Covers				
Full	1/3	1/5	1/7	1/Covers	Amount	Print Bill		Select All	Pay 5.00	
1/2	1/4	1/6	1/8	Quantity	Fraction					

idealpos Update History

[Return to top](#)

Press 'Pay' > The Items are added to the sale screen.

09 Feb 12:03 Adult ID: 09-Feb-2005
POS 1 Jeremy STANDARD #511

SHORT BLACK(part)[1] 0.5 1.50									
DOUBLE SHOT(part)[1] 0.5 1.00									
JAM & TOAST(part)[1] 0.5 2.50									

Table 10 (4)
Balance: \$20.00 1x

TABLE PAYMENT

\$5.00

RECEIPT

RESERVATIONS

PRICE LEVEL 5% ST DISC

CUSTOMER 5% ITEM

BAR TAB REFUND

PENDING VOID SALE

TABLE MAP VOID

CLERK

7 8 9 CL

4 5 6 NO SALE

1 2 3 X

0 . ENTER

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

idealpos Update History

[Return to top](#)

Press Enter > Select a Tender Type > The items are partially paid > The Table Details screen is displayed so payments can continue to be taken for the outstanding items/amounts on the table.

The Outstanding amount on the partially paid items has been updated based on the partial payment that was just processed.

TABLE 10		17 min	\$15.00				×	
4 Covers - Average \$5.00		Amount	Outstanding	Pay	Seat			
Ordered: 11:47am								Jeremy
SHORT BLACK		3.00	1.50		1	Group by Print Group		
DOUBLE SHOT		2.00	1.00		1	Reorder Items		
JAM & TOAST		5.00	2.50		1	Hide Paid Items		
CAPPUCCINO		3.50	3.50			Transfer		
FLAT WHITE		3.50	3.50			Reprint Kitchen		
SHORT BLACK		3.00	3.00			Name		
		-----	-----			Delete		
		20.00	15.00			Covers		
Full	1/3	1/5	1/7	1/Covers	Amount	Print Bill	Select All	
1/2	1/4	1/6	1/8	Quantity	Fraction	Pay 0.00		

Stock Items

IP-4538 – Stock Item Variants – Ability to create Indirect Items

This function adds the ability to create Indirect Stock Items through the Stock Item Variants functionality. This enhancement is primarily targeted towards hospitality venues that source alcohol from kegs and sell to their customers in Jugs, Pints, Pots or Schooners.

When using this function, the Keg Stock Item will be the parent item, and each of the tap sizes (Jugs, Pints, Pots, Schooners, etc.) will be created as the indirect variant items. The indirect variant items will be created using the indirect quantity that makes up the tap size, and the cost of each tap size will be displayed within each tap size item. By using this function, the amount of time required to create each of the tap sizes and indirect quantities will be greatly reduced.

To configure and use this function, go to:

Back Office > File > Sales > Stock Item Variants

Beer Kegs will be used to demonstrate this function.

Select 'Add New Variant Type' > Enter 'Beer Tap Size' as the Variant Type name > Either press 'Enter' or 'Save'.

Stock Item Variants S X

Variant Types	Colour (8)	Abbreviation	Indirect	Indirect Quantity
Colour	Black			
Material	Blue			
Size	Brown			
	Green			
	Orange			
	Red			
	White			
	Yellow			

Save

Add Variant Type

POS 1
v8 Build 11

idealpos Update History

[Return to top](#)

Select 'Add New Beer Tap Size'

The screenshot displays the 'Stock Item Variants' window. On the left, a dark blue sidebar contains the following options: 'Modify', 'Add New Variant Type', 'Add New Beer Tap Size' (highlighted with an orange arrow), and 'Delete'. The main area is divided into two sections. The top section is a table with the following columns: 'Beer Tap Size (0)', 'Abbreviation', 'Indirect', and 'Indirect Quantity'. The bottom section is a large, empty light gray area. The window title is 'Stock Item Variants' and it includes window control buttons 'S' and 'X' in the top right corner. The bottom left corner of the window shows 'POS 1 v8 Build 11'.

idealpos Update History

[Return to top](#)

Add the following Beer Tap Sizes – these sizes can be modified as per the sizes and Indirect Quantities used at the venue:

Beer Tap Size	Abbreviation	Indirect	Indirect Quantity
JUG	JUG	Yes/Enable Checkbox	1140/49500
PINT	PINT	Yes/Enable Checkbox	570/49500
POT	POT	Yes/Enable Checkbox	285/49500
SCHOONER	SCH	Yes/Enable Checkbox	485/49500

When entering multiple Beer Tap Sizes, start by entering the Beer Tap Size into the Beer Tap Size field, then use the Tab key on the keyboard to cycle through each field. After populating all the fields for a Beer Tap Size, the ENTER button can be pressed on the keyboard which will add the Beer Tap Size and clear the fields, ready for the entry of the next Beer Tap Size. Repeat this process until each required Beer Tap Size has been created.

The screenshot shows the 'Stock Item Variants' interface. On the left, a sidebar contains a 'Save' button and a list of variant types: 'Beer Tap Size' (highlighted), 'Colour', 'Material', and 'Size'. The main area is a table with columns: 'Beer Tap Size (0)', 'Abbreviation', 'Indirect', and 'Indirect Quantity'. At the bottom, a form for adding a new Beer Tap Size is highlighted with an orange border. The form contains the following fields:

- Add Beer Tap Size: JUG
- Abbreviation: JUG
- Indirect:
- Indirect Quantity: 1140/49500

idealpos Update History

[Return to top](#)

After entering each Beer Tap Size, the sizes will appear in the list, like the below example:

Save

Stock Item Variants

Variant Types	Beer Tap Size (4)	Abbreviation	Indirect	Indirect Quantity
Beer Tap Size	JUG	JUG	Yes	1140/49500
Colour	PINT	PINT	Yes	570/49500
Material	POT	POT	Yes	285/49500
Size	SCHOONER	SCH	Yes	485/49500

POS 1
v8 Build 11

Add Beer Tap Size | Abbreviation

Indirect
Indirect Quantity

idealpos Update History

[Return to top](#)

Close the Stock Item Variants window, then go to: Back Office > File > Stock Control > Stock Items.

Select an existing Beer Keg Stock Item, ensuring that Stock Items for each Beer Tap Size (Jug, Pint, Pot, Schooner, etc.) for that variety of Beer do not already exist (the process outlined below will demonstrate the creation of those Beer Tap Size items via the Variants functionality).

Alternatively, create a new Beer Keg Stock Item via the 'Add' button.

The process outlined below demonstrates the creation of a new Keg Stock Item and the creation of the Beer Tap Size items.

Create a new Stock Item and enter a Description/Kitchen Description/Long Description for the Beer Keg Stock Item. E.g. ACME BEER KEG

Note that when entering the Description for the Beer Keg Stock Item, the item should end with the word Keg or KEG. This will then ensure that when the variant items for each Beer Tap Size are created, the word 'Keg' will be omitted from the resulting child or variant items (the resulting variant or child items will contain the Beer Tap Size in place of the word 'Keg').

When creating the main Beer Keg Stock Item, ensure that a Cost Price has been entered and set the Department and Purchase Category as required. If required, Sell Prices can also be entered for the Beer Keg Stock Item. Enter and set any other fields for the item as required.

Stock Items
Add New

General Advanced Variants

Stock Code: 1

Description: ACME BEER KEG (13)

Kitchen Description: ACME BEER KEG (13)

Long Description: ACME BEER KEG (13)

Department: 208 > BEER KEGS

Scan Code: Auto

Selling Prices (inc Tax)

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

Force Selling Price Entry

Cost Prices (ex Tax)

Standard Cost: 250.0000

Last Cost: 250.0000

Average Cost: 250.0000

Recalculate Sell Prices:
 Don't Recalculate Sell Prices
 Based on Profit %
 Based on Profit \$

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
 Has Variants
 Indirect Item

Non-Accumulating
 Can't Buy with GIFT VOUCHER
 Scale

Instruction
 Print Red
 Web Store
 Inhibit Discounts
 Inhibit Voids
 Manufactured Item

Tags

Tax Settings (Selling)

GST
 Not Defined
 Not Defined
 Not Defined
 Not Defined
 Not Defined

Attributes

POS 1
v8 Build 11

idealpos Update History

[Return to top](#)

After the required details have been entered for the Keg Stock Item, enable the 'Has Variants' checkbox, then click on the 'Variants' tab.

Stock Items Add New General **Advanced** Add New Item **Variants** ←

Stock Code 1 Department 208 > BEER KEGS

Description ACME BEER KEG (13) Scan Code Auto

Kitchen Description ACME BEER KEG (13)

Long Description ACME BEER KEG (13)

Selling Prices (inc Tax)

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

Force Selling Price Entry

Printer Settings

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

Purchasing

Purchase Category 2 > BEVERAGE

Default Supplier >

Default Supplier Stock Code

Other Options

- Stock Control
- Has Variants** ←
- Indirect Item
- Non-Accumulating
- Can't Buy with GIFT VOUCHER
- Scale

Instruction

Print Red

Web Store

Inhibit Discounts

Inhibit Voids

Manufactured Item

Tags

Cost Prices (ex Tax)

Standard Cost 250.0000

Last Cost 250.0000

Average Cost 250.0000

Recalculate Sell Prices

- Don't Recalculate Sell Prices
- Based on Profit %
- Based on Profit \$

Tax Settings (Selling)

- GST
- Not Defined

Attributes

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

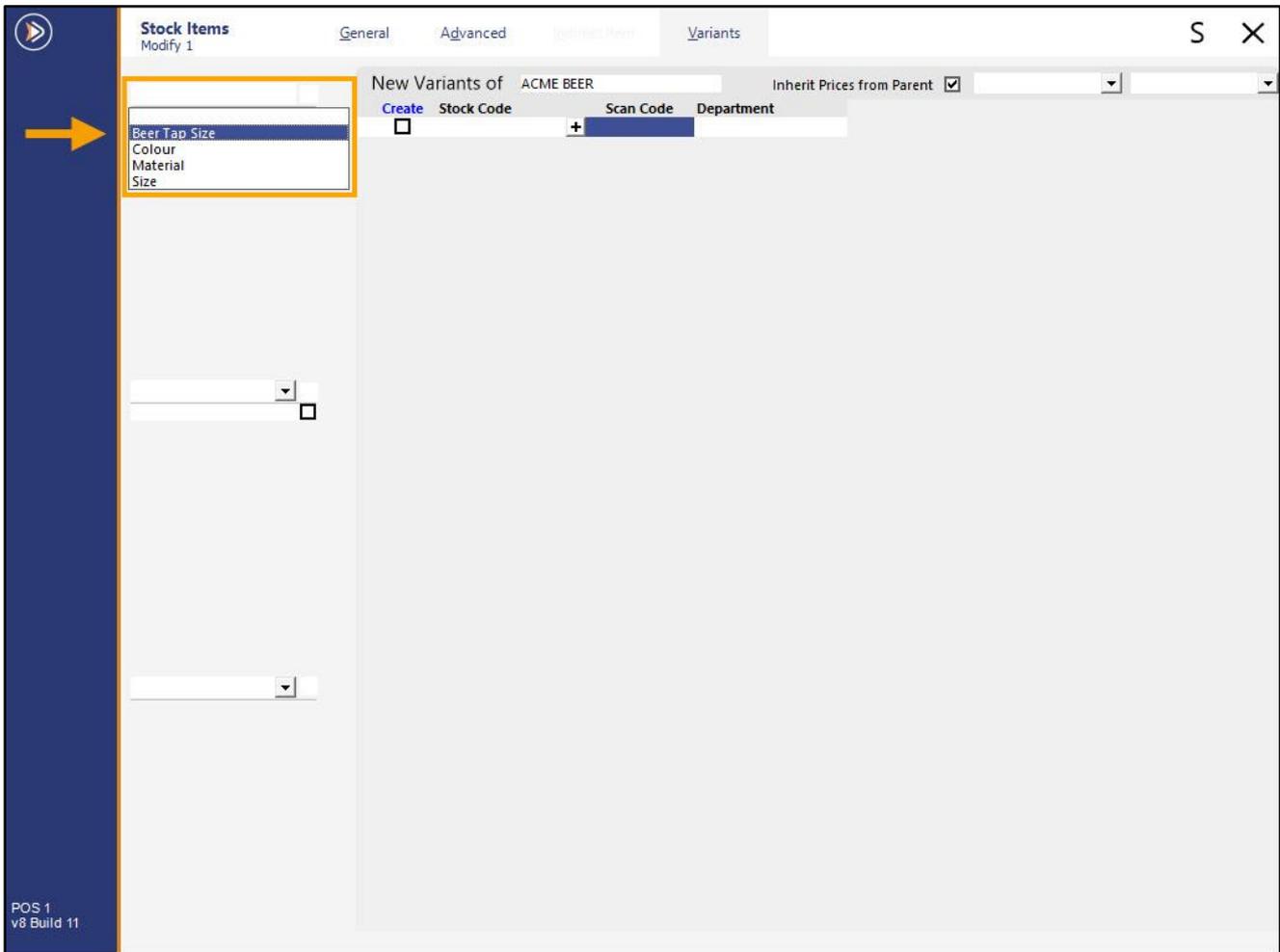
POS 1 v8 Build 11

idealpos Update History

[Return to top](#)

Clicking on the Variants tab will automatically save the Keg Stock Item.

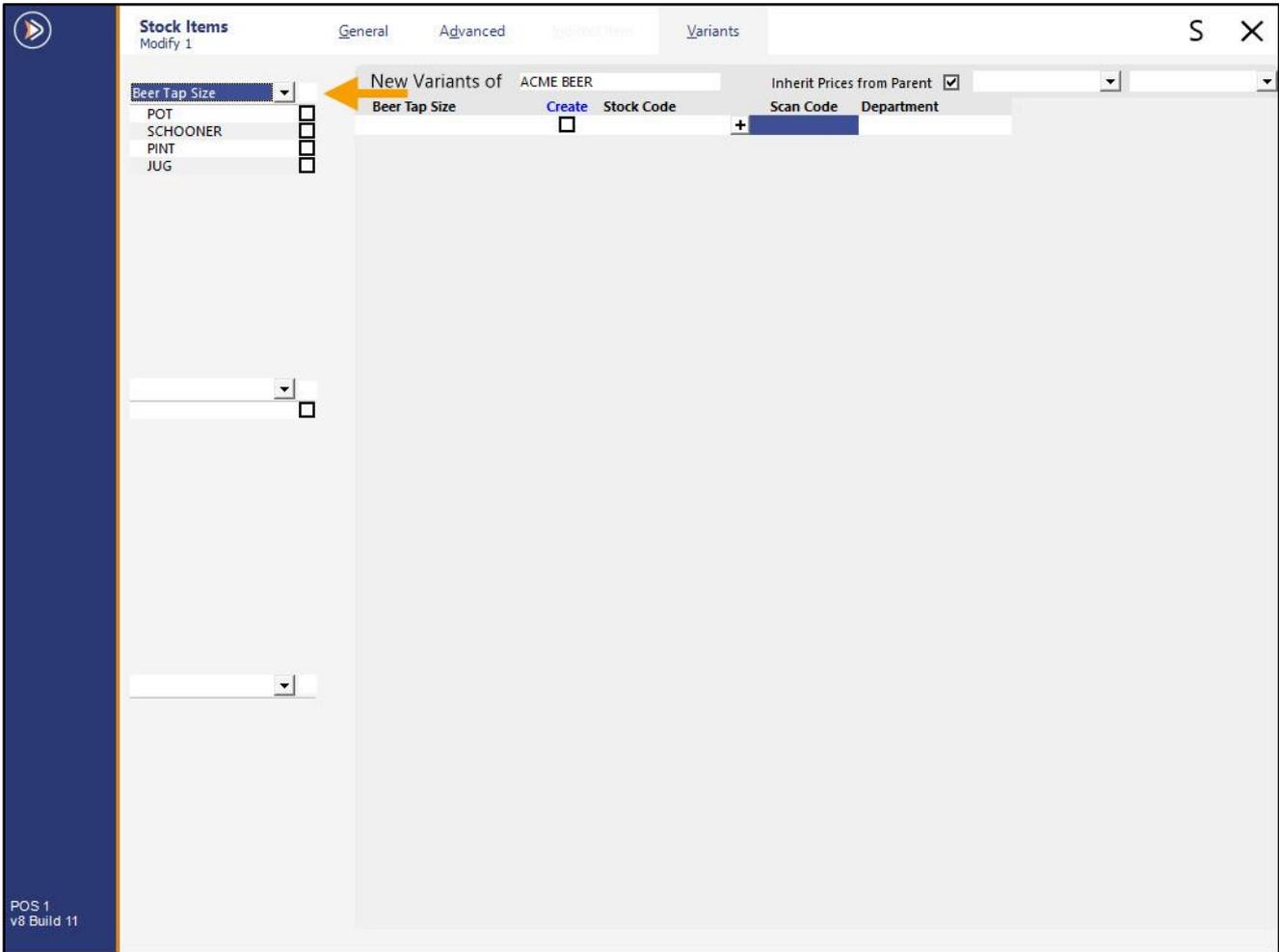
Within the Variants tab, select the Beer Tap Size option from the Variant Type dropdown box.



idealpos Update History

[Return to top](#)

To create all Beer Tap Sizes for this variety of Keg Beer, enable the checkbox next to the Beer Tap Size dropdown box. If only specific Beer Tap Sizes are required, select the individual Beer Tap Size checkboxes instead.



idealpos Update History

[Return to top](#)

After enabling the checkbox(es), each Beer Tap Size will be displayed.

At this point, the Department of each Beer Tap Size can be specified as well as the Sell Prices for each Price Level.

The Department will be pre-populated using the Department of the Beer Keg Stock Item.

The Sell Prices for each Price Level can be entered, or the 'Inherit Prices from Parent' option can be selected which will automatically set the Prices for each Beer Tap Size using the Sell Prices from the Beer Keg Stock Item.

If the option 'Inherit Prices from Parent' is enabled, all Sell Price Levels will be hidden.

On widescreen monitors, Sell Prices can be viewed with the Beer Tap Size Description without the need to scroll.

Lower resolutions may require horizontal scrolling to see the Sell Price Levels.

Stock Items
Modify 1

General Advanced **Variants**

Beer Tap Size: [dropdown] ✓

Create New Variants

Beer Tap Size: POT, SCHOONER, PINT, JUG

New Variants of ACME BEER

Inherit Prices from Parent

Beer Tap Size	Create	Stock Code	Scan Code	Department	STANDARD	STAFF	EXTRAS
POT	<input checked="" type="checkbox"/>	[auto create]	+	208	0.00	0.00	0.00
SCHOONER	<input checked="" type="checkbox"/>	[auto create]	+	208	0.00	0.00	0.00
PINT	<input checked="" type="checkbox"/>	[auto create]	+	208	0.00	0.00	0.00
JUG	<input checked="" type="checkbox"/>	[auto create]	+	208	0.00	0.00	0.00

POS 1
v8 Build 11

idealpos Update History

[Return to top](#)

After the required Sell Prices for each Price Level have been entered, press the 'Create New Variants' button.

It should also be noted that prior to pressing the 'Create New Variants' button, the Stock Item Description prefix that will be used to create the new Beer Tap Size items can be modified if required.

As noted earlier above, the word 'KEG' is automatically omitted, which is evident in the field next to the 'New Variants of' text. This Description can be modified if required and the text entered here will be used as the basis for the descriptions of the new Beer Tap Size Stock Items.

Stock Items
Modify 1

General Advanced **Variants**

New Variants of ACME BEER

Beer Tap Size POT SCHOONER PINT JUG

Beer Tap Size	Create	Stock Code	Scan Code	Department	STANDARD	STAFF	EXTRAS B
POT	<input checked="" type="checkbox"/>	[auto create]	+	208	4.50	4.09	0.00
SCHOONER	<input checked="" type="checkbox"/>	[auto create]	+	208	6.00	5.45	0.00
PINT	<input checked="" type="checkbox"/>	[auto create]	+	208	7.50	6.82	0.00
JUG	<input checked="" type="checkbox"/>	[auto create]	+	208	10.00	9.09	0.00

POS 1
v8 Build 11

A confirmation prompt is displayed showing the number of Variants that will be created.

Press 'Yes' to proceed.

You are about to create 4 Variants of ACME BEER.

Are you sure you wish to proceed?

Yes No

idealpos Update History

[Return to top](#)

A confirmation prompt is displayed after the variants have been created.
Press 'OK' to continue.

The screenshot shows the 'Stock Items' application window with the 'Variants' tab selected. The window title is 'Stock Items Modify 1'. On the left, there is a list of 'Beer Tap Size' options: POT, SCHOONER, PINT, and JUG, each with a checkmark and a minus sign. The main area displays 'Existing Variants of ACME BEER KEG' with a table:

Beer Tap Size	Stock Code	
POT	2	-
SCHOONER	3	-
PINT	4	-
JUG	5	-

Below the table, a dark blue banner displays the message '4 Variants Created.' and an 'OK' button. The bottom left corner of the window shows 'POS 1 v8 Build 11'.

idealpos Update History

[Return to top](#)

Close the Beer Keg Stock Item via the 'X' on the top-right corner of the window.
 The newly created Beer Keg Stock Item will be highlighted on the Stock Items grid.
 Press the dropdown arrow within the Keg Stock Item's Description field.

Stock Items		Edit Mode		Multi Select		S X	
1625 records							
Code	Description	Kitchen	Department	Plu Code	Scan Code	Standard Cost	Average C
1	ACME BEER KEG	ACME BEER KEG	BEER KEGS	0		250.00	
101001	EGGS ON TOAST	EGGS ON TOAST	BREAKFAST	0		2.50	
101002	BACON & EGGS	BACON & EGGS	BREAKFAST	0		3.00	
101003	EGGS BENEDICT	EGGS BENEDICT	BREAKFAST	0		4.50	
101004	AVOCADO ON TOAST	AVOCADO ON TOAST	BREAKFAST	0		5.00	
101005	BAKED BEANS & TOAST	BAKED BEANS & TOAST	BREAKFAST	0		2.00	
101006	PANCAKES	PANCAKES	BREAKFAST	0		2.00	
101007	CANADIAN PANCAKES	CANADIAN PANCAKES	BREAKFAST	0		3.50	
101008	WAFFLES	WAFFLES	BREAKFAST	0		2.50	
101009	WAFFLES CHOCOLATE	WAFFLES CHOCOLATE	BREAKFAST	0		3.00	
101010	JAM & TOAST	JAM & TOAST	BREAKFAST	0		1.20	
101011	BIG BREAKFAST	BIG BREAKFAST	BREAKFAST	0		5.20	
101012	BAKED BEANS & TOAST*COPY*	BAKED BEANS & TOAST	BREAKFAST	0		2.00	
102001	EXTRA BACON	EXTRA BACON	BREAKFAST MODS	0		0.65	
102002	EXTRA EGG	EXTRA EGG	BREAKFAST MODS	0		0.23	
102003	EXTRA TOAST	EXTRA TOAST	BREAKFAST MODS	0		0.10	
102004	EXTRA AVOCADO	EXTRA AVOCADO	BREAKFAST MODS	0		0.50	
102005	EXTRA CHEESE	EXTRA CHEESE	BREAKFAST MODS	0		0.20	
102006	EXTRA SALMON	EXTRA SALMON	BREAKFAST MODS	0		1.00	
102007	EXTRA JAM	EXTRA JAM	BREAKFAST MODS	0		0.10	
102008	EXTRA MAPLE	EXTRA MAPLE	BREAKFAST MODS	0		0.50	
102009	EXTRA CREAM	EXTRA CREAM	BREAKFAST MODS	0		0.10	
102010	EXTRA SAUCE	EXTRA SAUCE	BREAKFAST MODS	0		0.10	
102011	EXTRA HASHBROWN	EXTRA HASHBROWN	BREAKFAST MODS	0		0.05	
102012	WHITE	WHITE	BREAKFAST MODS	0		0.00	
102013	MULTI-GRAIN	MULTI-GRAIN	BREAKFAST MODS	0		0.00	
102014	WHOLEMEAL	WHOLEMEAL	BREAKFAST MODS	0		0.00	
102015	GLUTEN FREE	GLUTEN FREE	BREAKFAST MODS	0		0.25	
102016	TURKISH	TURKISH	BREAKFAST MODS	0		0.20	
102017	BAGEL	BAGEL	BREAKFAST MODS	0		0.20	
103001	GARLIC BREAD	GARLIC BREAD	LUNCH	0		1.50	
103002	COB LOAF	COB LOAF	LUNCH	0		1.80	
103003	SOUP OF THE DAY	SOUP OF THE DAY	LUNCH	0		2.20	
103004	FISH OF THE DAY	FISH OF THE DAY	LUNCH	0		3.40	
103005	STEAK SPECIAL	STEAK SPECIAL	LUNCH	0		6.50	

idealpos Update History

[Return to top](#)

This will filter the Stock Items grid so that the only Stock Items displayed will be the Keg Stock Item and the child variant Stock Items (i.e. the Beer Tap Sizes for the Beer Keg Stock Item) associated with the Keg Stock Item.

The screenshot shows a software interface for 'Stock Items' with a filter set to 'Variants of ACME BEER KEG'. The table displays 5 records. The first record is highlighted in orange. The interface includes a left-hand navigation menu with options like 'Description', 'Modify', 'Add', 'Discontinue', 'Enquiry', 'Locations', 'Promotions', 'Alternate Codes', 'Copy', and 'Supplier Codes'. At the bottom left, it shows 'POS 1 v8 Build 11'. At the top right, there are icons for 'Edit Mode', 'Multi Select', and a search icon.

Code	Description	Kitchen	Department	Plu Code	Scan Code	Standard Cost	Average Cost
1	ACME BEER KEG	ACME BEER KEG	BEER KEGS	0		250.00	250
2	ACME BEER POT	ACME BEER POT	BEER KEGS	0		1.44	1
3	ACME BEER SCH	ACME BEER SCH	BEER KEGS	0		2.45	2
4	ACME BEER PINT	ACME BEER PINT	BEER KEGS	0		2.88	2
5	ACME BEER JUG	ACME BEER JUG	BEER KEGS	0		5.76	5

idealpos Update History

[Return to top](#)

Select one of the child items (e.g. ACME BEER POT, ACME BEER SCH, ACME BEER PINT or ACME BEER JUG) and press 'Modify'.

Each of the created items are Indirect, and the Cost Price displayed is calculated based on the quantity taken from the Keg Stock Item and the Cost Price of the Keg Stock Item.

Note that additional modifications may be required for each variant item, such as Kitchen Printer settings, Attributes and/or any other required values.

Stock Items

General
Advanced
Indirect Item
Options

<<<
Q
>
>>>

Modify 2
ACME BEER KEG
ACME BEER SCH
✕

Created 03 Feb 2023 15:54:56

Stock Code 2

Description ACME BEER POT (13)

Kitchen Description ACME BEER POT (13)

Long Description ACME BEER POT (13)

Variant of [1 - ACME BEER KEG]

Department 208 > BEER KEGS

Scan Code Auto

Selling Prices (inc Tax)

		Profit	
		%	\$
STANDARD	4.50	64.81	2.65
STAFF	4.09	61.31	2.28
EXTRAS	0.00		
BOTTLESHOP	0.00		
Price 5	0.00		
Price 6	0.00		
Price 7	0.00		
Price 8	0.00		
Price 9	0.00		
Price 10	0.00		
Price 11	0.00		
OWNERS	0.00		

Force Selling Price Entry
 Inherit Prices from Parent

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

Other Options

<input checked="" type="checkbox"/> Stock Control	<input type="checkbox"/> Instruction
<input type="checkbox"/> Has Variants	<input type="checkbox"/> Print Red
<input checked="" type="checkbox"/> Indirect Item	<input type="checkbox"/> Web Store
<input type="checkbox"/> Indirect Components go to Kitchen Printers	<input type="checkbox"/> Inhibit Discounts
<input checked="" type="checkbox"/> Non-Accumulating	<input type="checkbox"/> Inhibit Voids
<input type="checkbox"/> Can't Buy with GIFT VOUCHER	<input type="checkbox"/> Manufactured Item
<input type="checkbox"/> Scale	

Tags

Cost Prices (ex Tax)

Standard Cost 1.4394

Last Cost 1.4394

Average Cost 1.4394

Recalculate Sell Prices

Don't Recalculate Sell Prices
 Based on Profit %
 Based on Profit \$

Tax Settings (Selling)

- GST
- Not Defined

Attributes

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

POS 1 v8 Build 11

idealpos Update History

[Return to top](#)

The Indirect Item tab will also show the quantity that is taken from the Keg Stock Item, along with the Standard Cost, Last Cost and Average Cost based on the quantity.

The screenshot displays the 'Stock Items' interface in the 'Indirect Item' tab. The main window title is 'ACME BEER POT' and the sub-title is 'ACME BEER SCH'. The 'Stock Code' is '2' and the 'Description' is 'ACME BEER POT'. Below this, a 'Made up of:' section contains a table with the following data:

Stock Code	Description	Quantity	Standard Cost	Last Cost	Average Cost
1	ACME BEER KEG	285/49500	1.4394	1.4394	1.4394

At the bottom right of the table area, there are 'Totals' for Standard Cost, Last Cost, and Average Cost, all showing 1.4394. Below the table are three buttons: 'Add', 'Delete', and 'Modify'. The interface also includes a left sidebar with 'Save' and 'Keyboard' options, and a bottom left corner with 'POS 1 v8 Build 11'.

idealpos Update History

[Return to top](#)

IP-5266 – Stock Items – Print Label from within Add/Modify Screen

This function adds the ability to print a label for the Stock Item from within the Add/Modify Stock Item screen. This is done via a new 'Print Label' button on the left-hand side of the Add/Modify Stock Item screen; the 'Print Label' button will only appear when one or more Label Formats have been configured and saved.

To configure and use this function, go to: Back Office > Utilities > Labels

Ensure that there are one or more Label Formats which appear in the Format dropdown box.

If there are no Label Formats saved, the Format dropdown box will appear as blank (as shown in the example below):

Labels S X

Format Delete

Data Type: Stock Items
Output To: Idealpos A4 Labels
A4 Printer: Microsoft Print to PDF
Dimensions: 22 labels (2 x 11) Portrait
Design: Format 1
Top Margin: 0
Left Margin: 0
Start Position: 1
Price Level: 1

Use Stock Code as Barcode
 Show Print Dialog Box

Barcode Type
 Auto
 EAN 13
 EAN 8
 UPCE
 UPCA
 Code 128
 Code 39

Code > to >
Scan Code > to >
Description > to >
Department > to >
Indirect
Quantity: 1
Modified Stock Items Only
Quantities Match Stock Levels

Sort by: Code
 Department /Description
 Description

Multi Select Add to Grid

Code	Description	Quantity
------	-------------	----------

Save Format As

Clear Grid after Printing

Preview Print

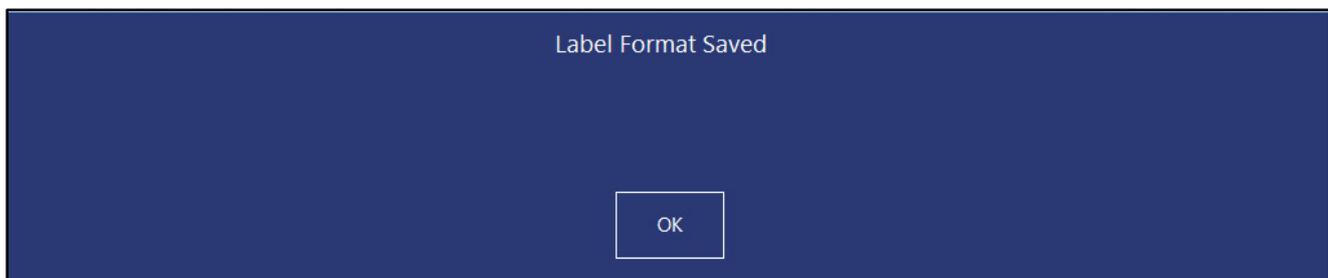
idealpos Update History

[Return to top](#)

To add a new Label Format, configure the Label Format options as required, enter a name for the Format, then press the 'Save Format As' button.

The screenshot shows the 'Labels' configuration window. The 'Save Format As' button and the text field containing 'A4 Labels' are highlighted with a yellow border. The 'Barcode Type' section is also visible, with 'Auto' selected.

The Label Format Saved prompt is displayed – Press OK.



idealpos Update History

[Return to top](#)

The Format now appears in the Format dropdown box.

Labels

Format **A4 Labels**

A4 Labels

Data Type **Stock Items**

Output To **Idealpos A4 Labels**

A4 Printer **Microsoft Print to PDF**

Dimensions **22 labels (2 x 11) Portrait**

Design **Format 1**

Top Margin **0** Price Level **1**

Left Margin **0**

Start Position **1**

Use Stock Code as Barcode

Show Print Dialog Box

Barcode Type

Auto

EAN 13

EAN 8

UPCE

UPCA

Code 128

Code 39

Code > to >

Scan Code > to >

Description > to >

Department > to >

Indirect

Modified Stock Items Only

Quantities Match Stock Levels

Quantity **1**

Sort by Code Department /Description Description

Code	Description	Quantity
------	-------------	----------

Clear Grid after Printing

A4 Labels

idealpos Update History

[Return to top](#)

Close the Labels window, then go to: Back Office > File > Stock Control > Stock Items.

Select a Stock Item > Modify.

The 'Print Label' button will appear on the left-hand side of the Modify Stock Item window.

Stock Items
Modify 205401

General Advanced **Print Label** Labels

COKE 250ML BTL DIET COKE 250ML BTL

Last Modified 04 Oct 2016 14:27:34

Stock Code: 205401 Department: 205 > SOFT DRINK

Description: COKE 2L (7) Scan Code: 9861576846574 Auto

Kitchen Description: COKE 2L (7)

Long Description: COKE 2L (7)

Selling Prices (inc Tax)

		Profit	
		%	\$
STANDARD	2.50	64.49	1.46
STAFF	1.50	40.73	0.55
EXTRAS	0.00		
BOTTLESHOP	1.50	40.73	0.55
Price 5	0.00		
Price 6	0.00		
Price 7	0.00		
Price 8	0.00		
Price 9	0.00		
Price 10	0.00		
Price 11	0.00		
OWNERS	0.00		

Force Selling Price Entry

Printer Settings

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

Purchasing

Purchase Category: 2 > BEVERAGE

Default Supplier: 3 > Coca Cola

Default Supplier Stock Code: 124KSS333

Other Options

- Stock Control
- Has Variants
- Indirect Item
- Non-Accumulating
- Can't Buy with GIFT VOUCHER
- Scale
- Instruction
- Print Red
- Web Store
- Inhibit Discounts
- Inhibit Voids
- Manufactured Item

Tags

Cost Prices (ex Tax)

Standard Cost: 0.8100

Last Cost: 0.8100

Average Cost: 0.8061

Recalculate Sell Prices: Don't Recalculate Sell Prices, Based on Profit %, Based on Profit \$

Tax Settings (Selling)

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

Attributes

Container Type: 2L Bottle

POS 1
v8 Build 11 p.9

idealpos Update History

[Return to top](#)

If more than 1 Label Format exists, the Description of the Label Format will appear in light-grey below the Print Label button.

Stock Items

General Advanced Advanced View Options

<<< Q >>>

Modify 205401

COKE 250ML BTL

COKE 600ML X

Last Modified 04 Oct 2016 14:27:34

Stock Code 205401
 Description COKE 2L (7)
 Kitchen Description COKE 2L (7)
 Long Description COKE 2L (7)

Department 205 > SOFT DRINK
 Scan Code 9861576846574 Auto

Selling Prices (inc Tax)

		Profit	
		%	\$
STANDARD	2.50	64.49	1.46
STAFF	1.50	40.73	0.55
EXTRAS	0.00		
BOTTLESHOP	1.50	40.73	0.55
Price 5	0.00		
Price 6	0.00		
Price 7	0.00		
Price 8	0.00		
Price 9	0.00		
Price 10	0.00		
Price 11	0.00		
OWNERS	0.00		

Force Selling Price Entry

Printer Settings

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

Purchasing

Purchase Category 2 > BEVERAGE

Default Supplier 3 > Coca Cola

Default Supplier Stock Code 124KSS333

Other Options

- Stock Control
- Has Variants
- Indirect Item
- Non-Accumulating
- Can't Buy with GIFT VOUCHER
- Scale
- Instruction
- Print Red
- Web Store
- Inhibit Discounts
- Inhibit Voids
- Manufactured Item

Tags

Cost Prices (ex Tax)

Standard Cost 0.8100

Last Cost 0.8100

Average Cost 0.8061

Recalculate Sell Prices

- Don't Recalculate Sell Prices
- Based on Profit %
- Based on Profit \$

Tax Settings (Selling)

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

Attributes

Container Type 2L Bottle +

POS 1 v8 Build 11 p.9

Save

Keyboard

Print Label

A4 Labels

idealpos Update History

[Return to top](#)

To change the Label Format type, click on the light-grey Label Description and a dropdown box will appear, where the desired Label Format can be selected.

The screenshot shows the 'Stock Items' configuration interface. The top navigation bar includes 'General', 'Advanced', 'Inventory Items', and 'Labels'. The current item is 'COKE 250ML BTL' (Stock Code: 205401). The 'Labels' section is active, showing a dropdown menu with options: 'A4 Labels', 'A4 Labels', and 'A3 Labels'. The 'A4 Labels' option is selected.

Selling Prices (inc Tax)

		Profit	
		%	\$
STANDARD	2.50	64.49	1.46
STAFF	1.50	40.73	0.55
EXTRAS	0.00		
BOTTLESHOP	1.50	40.73	0.55
Price 5	0.00		
Price 6	0.00		
Price 7	0.00		
Price 8	0.00		
Price 9	0.00		
Price 10	0.00		
Price 11	0.00		
OWNERS	0.00		

Force Selling Price Entry

Printer Settings

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

Purchasing

Purchase Category: 2 > BEVERAGE
 Default Supplier: 3 > Coca Cola
 Default Supplier Stock Code: 124KSS333

Other Options

- Stock Control
- Has Variants
- Indirect Item
- Non-Accumulating
- Can't Buy with GIFT VOUCHER
- Scale
- Instruction
- Print Red
- Web Store
- Inhibit Discounts
- Inhibit Voids
- Manufactured Item

Cost Prices (ex Tax)

Standard Cost: 0.8100
 Last Cost: 0.8100
 Average Cost: 0.8061

Recalculate Sell Prices: Don't Recalculate Sell Prices
 Based on Profit %
 Based on Profit \$

Tax Settings (Selling)

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

Attributes

Container Type: 2L Bottle

Pressing the 'Print Label' button will immediately print a label for the currently displayed Stock Item (using the currently selected Print Format, or if only one Print Format exists, that single Print Format will be used to Print Labels).

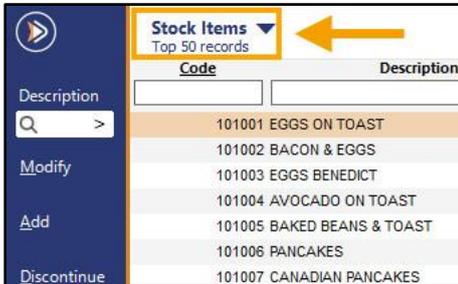


IP-5282 – Customers/Stock Items – Top N Records Functionality

This function limits the number of records (to the top 50 records by default) that are displayed when opening the Stock Items function via Back Office > File > Stock Control > Stock Items. The top number of records that are displayed can be toggled between Top 50 records, Top 1000 records, or All records.

By selecting a smaller number of top Stock Item records to display, the amount of time it takes to open the Stock Items screen will be greatly reduced.

When the Top N records function is actively restricting the number of records displayed, a note will appear and will specify the number of records currently being shown (e.g. Top 50 records, Top 1000 records).



If all records are being displayed, the 'Top' text will be omitted and the total number of records will be listed, as shown below:



Note that when the number of records is limited to a smaller sample, the search and filter function on the Stock Items screen is not affected; if one or more Stock Items exists which match the entered search criteria, the Stock Items will be displayed in the filtered search results.

On the top-left corner of the window, select from the following options to toggle the number of records to display:

- Top 50 records
- Top 1000 records
- All records



Once an option is selected, that option will be used each time the Stock Items screen is opened. The top records option is specific to each POS Terminal/Back Office and applies to all users.

If a user toggles the Top N records option on a terminal, that selection will apply to that terminal for all users of that terminal, and the chosen option is persistent, even after restarting Idealpos on the terminal.

idealpos Update History

[Return to top](#)

IP-5301 – Stock Item Modify Screen – Previous/Next/Search Item Functionality

This function adds the ability to navigate between the Previous and Next Stock Item whilst modifying a Stock Item. The previous button will display the previous Stock Item's description and the next button will display the next Stock Item's description.

Pressing either of these navigational buttons will switch the Modify Stock Item screen to display the Stock Item. The Previous/Next Stock Item buttons are relative to the current Stock Item's position on the Stock Items grid. If the Stock Items grid was filtered/sorted before the currently displayed item was opened for modification, that filter or sort order will influence the Stock Items shown on the Previous/Next Item buttons. Also note that the Previous/Next Item/Search buttons are only visible when modifying an existing Stock Item. When creating a new Stock Item, the Previous/Next/Search functions will be hidden.

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

Select a Stock Item for modification and press the 'Modify' button.

Alternatively, double-click on a Stock Item to open it for modification.

Stock Items		Edit	Multi		S	X	
1822 records		Mode	Select				
Code	Description	Kitchen	Department	Plu Code	Scan Code	Standard Cost	Average C
122002	6PK WHITE ROLLS	6PK WHITE ROLLS	BREADS	0	9821250306725	2.00	
122003	6PK WHOLEMEAL ROLLS	6PK WHOLEMEAL R	BREADS	0	9882694763796	2.00	
122004	6PK HAMBURGER BUNS	6PK HAMBURGER B	BREADS	0	9807783694874	2.25	
122005	WHITE LOAF	WHITE LOAF	BREADS	0	9866859008250	1.50	
122006	WHOLEMEAL LOAF	WHOLEMEAL LOAF	BREADS	0	9830509250726	1.50	
122007	MULTI-GRAIN LOAF	MULTI-GRAIN LOAF	BREADS	0	9821534379193	1.50	
122008	TURKISH PIDE	TURKISH PIDE	BREADS	0	9854087908848	2.00	
122009	6PK TURKISH ROLLS	6PK TURKISH ROLLS	BREADS	0	9844635974524	2.25	

idealpos Update History

[Return to top](#)

After opening the item, the top-right corner of the Modify Stock Item window will display the Previous/Next/Search functions.

Stock Items

General
Advanced
Advanced Items

<<<

>>>

✕

Modify 122005
6PK HAMBURGER BUNS
WHOLEMEAL LOAF

Last Modified 09 Mar 2017 11:41:01

Stock Code 122005

Description WHITE LOAF (10)

Kitchen Description WHITE LOAF (10)

Long Description WHITE LOAF (10)

Department 122 > BREADS

Scan Code 9866859008250 Auto

Selling Prices (inc Tax)

		Profit	
		%	\$
STANDARD	2.00	17.58	0.32
STAFF	2.00	17.58	0.32
EXTRAS	0.00		
BOTTLESHOP	0.00		
Price 5	0.00		
Price 6	0.00		
Price 7	0.00		
Price 8	0.00		
Price 9	0.00		
Price 10	0.00		
Price 11	0.00		
OWNERS	0.00		

Force Selling Price Entry

Printer Settings

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

Purchasing

Purchase Category 1 > FOOD

Default Supplier 11 > Rolls Choice Bakery

Default Supplier Stock Code BPS5321

Other Options

- Stock Control
- Has Variants
- Indirect Item
- Non-Accumulating
- Can't Buy with GIFT VOUCHER
- Scale
- Instruction
- Print Red
- Web Store
- Inhibit Discounts
- Inhibit Voids
- Manufactured Item

Tags

Cost Prices (ex Tax)

Standard Cost 1.5000

Last Cost 1.5000

Average Cost 1.5000

Recalculate Sell Prices

- Don't Recalculate Sell Prices
- Based on Profit %
- Based on Profit \$

Tax Settings (Selling)

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

Attributes

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

POS 1 v8 Build 11

idealpos Update History

[Return to top](#)

Pressing the '<<<' button will switch the Modify Stock Item window to the previous item.

<<<
Q
>
>>>

6PK HAMBURGER BUNS WHOLEMEAL LOAF

Stock Items

General Advanced **Optimized Item** Options

<<<
Q
>
>>>

6PK WHOLEMEAL ROLLS WHITE LOAF

Last Modified 09 Mar 2017 11:41:16

Stock Code 122004 Department 122 > BREADS

Description 6PK HAMBURGER BUNS (18) Scan Code 9807783694874 Auto

Kitchen Description 6PK HAMBURGER BUNS (18)

Long Description 6PK HAMBURGER BUNS (18)

Selling Prices (inc Tax)

		Profit	
		%	\$
STANDARD	3.50	29.25	0.93
STAFF	3.00	17.58	0.48
EXTRAS	0.00		
BOTTLESHOP	0.00		
Price 5	0.00		
Price 6	0.00		
Price 7	0.00		
Price 8	0.00		
Price 9	0.00		
Price 10	0.00		
Price 11	0.00		
OWNERS	0.00		

Force Selling Price Entry

Printer Settings

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

Purchasing

Purchase Category 1 > FOOD

Default Supplier 11 > Rolls Choice Bakery

Default Supplier Stock Code BPS6432

Other Options

- Stock Control
- Has Variants
- Indirect Item
- Non-Accumulating
- Can't Buy with GIFT VOUCHER
- Scale

- Instruction
- Print Red
- Web Store
- Inhibit Discounts
- Inhibit Voids
- Manufactured Item

Tags

[]

Cost Prices (ex Tax)

Standard Cost 2.2500

Last Cost 2.2500

Average Cost 2.2500

Recalculate Sell Prices

- Don't Recalculate Sell Prices
- Based on Profit %
- Based on Profit \$

Tax Settings (Selling)

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

Attributes

[]	[]
[]	[]
[]	[]
[]	[]
[]	[]

Save

Keyboard

POS 1
v8 Build 11

idealpos Update History

[Return to top](#)

Pressing the '>>>' button will switch the Modify Stock Item window to the next item.

6PK HAMBURGER BUNS WHOLEMEAL LOAF

Stock Items

General

Advanced

Optimized Item

Options

Modify 122006

WHITE LOAF

MULTI-GRAIN LOAF

Last Modified 09 Mar 2017 11:41:06

Stock Code 122006

Description WHOLEMEAL LOAF (14)

Kitchen Description WHOLEMEAL LOAF (14)

Long Description WHOLEMEAL LOAF (14)

Department 122 > BREADS

Scan Code 9830509250726 Auto

Selling Prices (inc Tax)

		Profit	
		%	\$
STANDARD	2.00	17.58	0.32
STAFF	2.00	17.58	0.32
EXTRAS	0.00		
BOTTLESHOP	0.00		
Price 5	0.00		
Price 6	0.00		
Price 7	0.00		
Price 8	0.00		
Price 9	0.00		
Price 10	0.00		
Price 11	0.00		
OWNERS	0.00		

Force Selling Price Entry

Printer Settings

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

Purchasing

Purchase Category 1 > FOOD

Default Supplier 11 > Rolls Choice Bakery

Default Supplier Stock Code BPS4210

Other Options

- Stock Control
- Has Variants
- Indirect Item
- Non-Accumulating
- Can't Buy with GIFT VOUCHER
- Scale

- Instruction
- Print Red
- Web Store
- Inhibit Discounts
- Inhibit Voids
- Manufactured Item

Cost Prices (ex Tax)

Standard Cost 1.5000

Last Cost 1.5000

Average Cost 1.5000

Recalculate Sell Prices

Don't Recalculate Sell Prices

Based on Profit %

Based on Profit \$

Tax Settings (Selling)

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

Attributes

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

Tags

POS 1

v8 Build 11

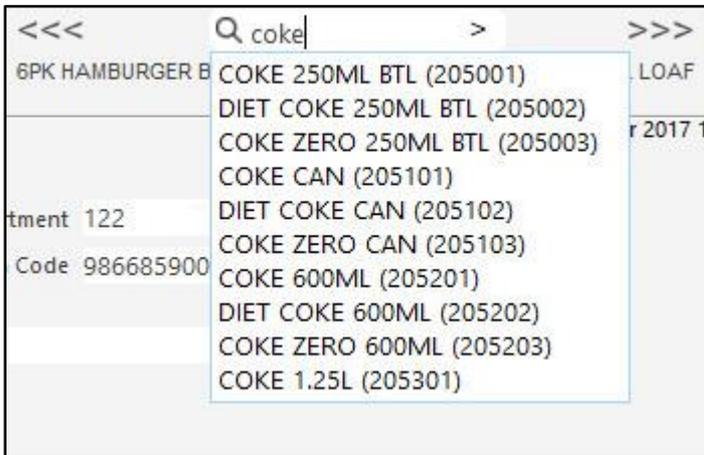
idealpos Update History

[Return to top](#)

The Search function can also be used to switch to another item.

Click into the search field which appears between the '<<<' and '>>>' buttons, then enter a Stock Item Description to search.

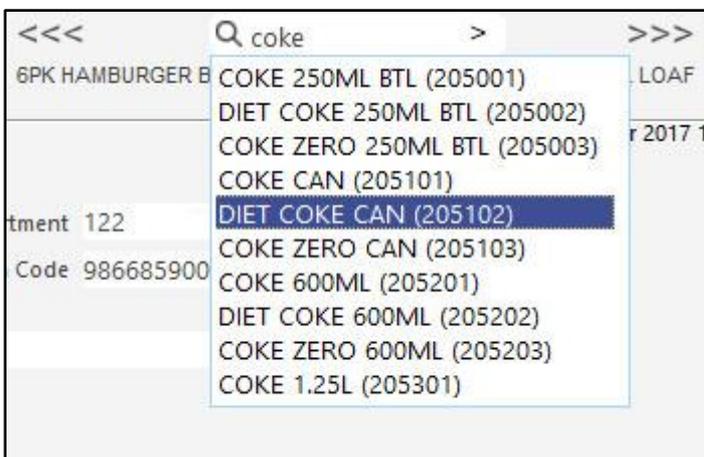
A list of suggested items will appear as the search term is being entered.



Once the desired Stock Item appears in the list of suggested Stock Items, click on it.

Alternatively, a Stock Item's Stock Code can be entered into the search field, followed by pressing the ENTER button.

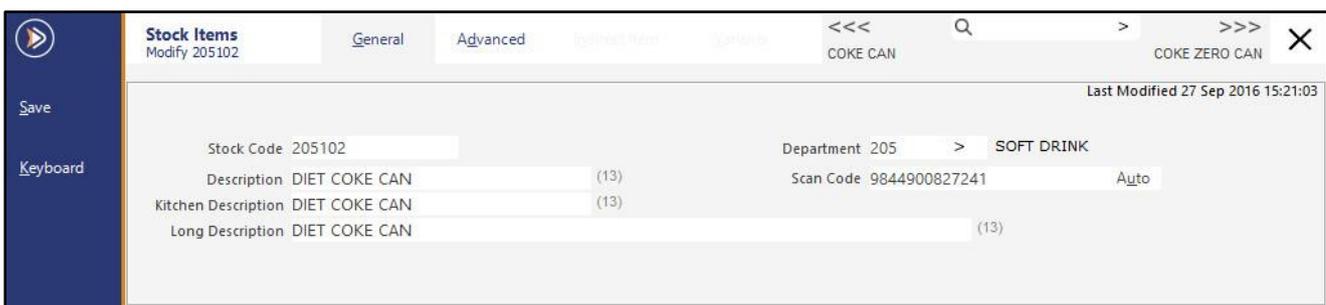
This will open the Stock Item for modification.



The Modify Stock Item window will display the selected Stock Item.

Note that the Modify Stock Item window screenshot shown below has been cropped for documentation purposes.

The full Modify Stock Item window will be displayed when opening a Stock Item for modifying using the search method outlined above.



If a Stock Item's Scan Code or Alternate Codes are known, the code can be entered into the Search field, followed by pressing the ENTER button. The Stock Item that matches the entered Scan Code/Alternate Code will be displayed.

idealpos Update History

[Return to top](#)

If the Previous/Next or Search functions are used to switch to another Stock Item and the current Stock Item contains any unsaved changes, the changes will be saved automatically and the Previous/Next or Searched item will be displayed.

If the unsaved changes include changes to the Descriptions of the item, the 'Update Button Captions, Kitchen Description, Menu Items and Supplier Links' prompt will be displayed.

You have changed the Description of this item.

Would you like to Update the Button Captions, Kitchen Description, Menu Items and any Supplier Links?

Stock Purchases

IP-5304 – Stock Purchases – Colour Highlight Unit Cost variations

This function will highlight any Unit Cost variations using one of three different colour highlights.

The colour highlight used to display the Unit Cost is based on the comparison between the Unit Cost that has been entered into the Stock Purchase/Stock Receive and the Last Cost of the Stock Item.

The following outlines the different colours and the trigger to display those colours:

- The Unit Cost Price entered in Purchase/Receive is equal to Last Cost = No Colour Highlight is used.
- The Unit Cost Price entered in Purchase/Receive is less than Last Cost = Unit Cost is highlighted in green.
- The Unit Cost Price entered in Purchase/Receive is greater than Last Cost = Unit Cost is highlighted in red.

There is no additional configuration required to enable this function; it is hard coded to always highlight the Unit Cost Price based on the dot points outlined above.

To use this function, go to: Back Office > Transactions > Stock Control > Stock Purchases > Add

Purchase Type: Stock Received/Purchase Order

Supplier: Select Supplier

Add the required Stock Items to the Stock Receive/Purchase Order and update the Unit Cost as required.

If the Unit Cost Price is less than Last Cost, Unit Cost will be highlighted in green.

If the Unit Cost Price is greater than Last Cost, Unit Cost will be highlighted in red

If the Unit Cost Price is equal to the Last Cost Price, the Unit Cost will not be highlighted.

To demonstrate the different highlight colours in a Purchase Order, each of the following items have had their Last Cost Price set to 0.8100 [via File > Stock Control > Stock Items > Modify each Stock Item] and their Unit Cost Prices have been entered as follows (for simplicity, the Tax Inc option was unchecked):

COKE 2L – Unit Cost 0.81 [No highlight as this Unit Cost Price is the same as the Last Cost]

SPRITE 2L – Unit Cost 0.82 [Red highlight as this Unit Cost Price is greater than the Last Cost]

FANTA 2L – Unit Cost 0.80 [Green highlight as this Unit Cost Price is less than the Last Cost]

The screenshot shows a 'Purchase Order' window with the following details:

- Purchase Type: Purchase Order
- Location: Location 1
- Supplier: Coca Cola
- Purchase Order No: 11
- Order Date: 10/01/2023
- Invoice No: [blank]
- Stock Process Date: 10/01/2023
- Due Date: 24/01/2023
- Tax Inc:

Stock Code	Supplier Code	Description	Quantity Ordered	Unit Cost	Disc %	Tax 1	Total	Last Cost
205401	124KSS333	COKE 2L	1	0.81	0.00	GST	0.81	0.81
205404	124KSS270	SPRITE 2L	1	0.82	0.00	GST	0.82	0.82
205407	124KSS207	FANTA 2L	1	0.80	0.00	GST	0.80	0.80

Summary:

- Subtotal: 2.43
- Freight: 0.00
- Admin Fee: 0.00
- Tax: 0.24
- Invoice Total: 2.67

An orange arrow points to the 'Unit Cost' column, highlighting the values 0.81 (no highlight), 0.82 (red highlight), and 0.80 (green highlight).

IP-5305 – Stock Purchases – Import Custom CSV Formats by Supplier

This function adds the ability to import a Custom CSV Format Invoice for each Supplier.

This is achieved via the Import option in Idealpos Stock Purchases by selecting the Supplier, then selecting a CSV file from that supplier.

Each column in the Supplier Invoice then needs to be mapped to the corresponding Idealpos field.

Once this process has been completed and the defaults saved for that Supplier, any future invoices imported from that same Supplier will use the saved mapping.

As each Supplier will have their own Invoice Format, this process must be repeated for each Supplier and their respective Invoice Format, ensuring that defaults are saved after completing the mapping process for each Supplier.

From that point on, when an Invoice is imported from a Supplier, the required fields in the Supplier's Invoice Format will be mapped correctly, enabling Idealpos to successfully import the Invoice and extract the required data from the Invoice to create and update the Stock Items included in the Invoice.

To use this function, go to: Back Office > File > Suppliers > Suppliers.

Select the Supplier > Modify.

Alternatively, create a new Supplier by pressing 'Add' > Enter Supplier Details.

Whether modifying or creating a new Supplier, ensure that the settings are configured as follows:

Default Tax Rate – Set the tax rate according to the Supplier.

Electronic Invoice Format – (None). This must be set to None to Import Custom CSV Formats by Supplier.

Once configured accordingly, press 'Save' on the top-left corner of the window to save the Supplier then close the Supplier windows.

The screenshot shows the 'Suppliers Add New' window. The 'Save' button is highlighted with a yellow arrow. The 'Default Tax Rate' dropdown is highlighted with a yellow box and arrow, showing 'GST' selected. The 'Electronic Invoice Format' dropdown is highlighted with a yellow box and arrow, showing '(None)' selected. The form includes fields for Supplier Code, Company Name, Address, Suburb, State, Postcode, Phone, Fax, Mobile, Contact, Email, ABN, Account No, Credit Limit, Default Tax Rate, Default Tax Inclusive, Default Delivery Method, Accounting, and Payment Due Date.

idealpos Update History

[Return to top](#)

Go to: Back Office > Transactions > Stock Control > Stock Purchases.
Select 'Import'.

The screenshot displays the 'Stock Purchases' window. The top bar includes a 'Location' dropdown menu, an eye icon, and 'S' and 'X' icons. The table header is as follows:

Code	Supplier Name	Date	Type	Order No.	Invoice No.	Details	Processed	Location	Total
------	---------------	------	------	-----------	-------------	---------	-----------	----------	-------

The left sidebar contains the following menu items: Search, Modify, Add, Delete, Copy, View, Email, **Import** (indicated by an orange arrow), Export, and Labels.

At the bottom of the window, there are several options:

- Show Purchase Orders
- Show Stock Received
- Show Orders NOT Received
- Show Tax Inclusive
- Send to Label Printing

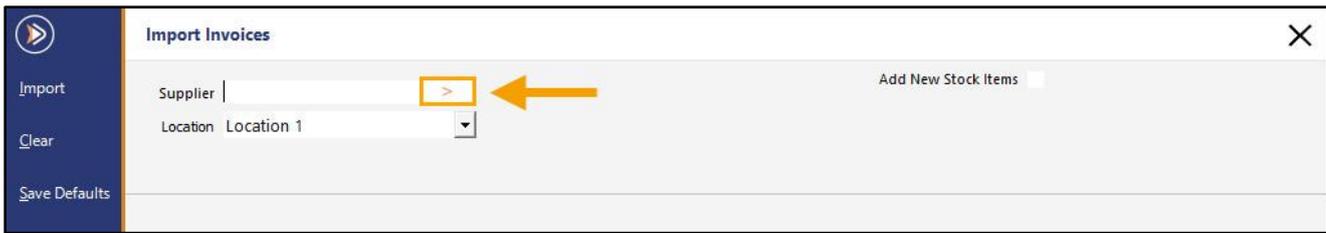
Buttons for 'Items Only' and 'Process' are located at the bottom right.

Version information: POS 1 v8 Build 11

idealpos Update History

[Return to top](#)

Press '>' in the Supplier field to select a Supplier.



Import Invoices

Supplier [] > 

Location Location 1

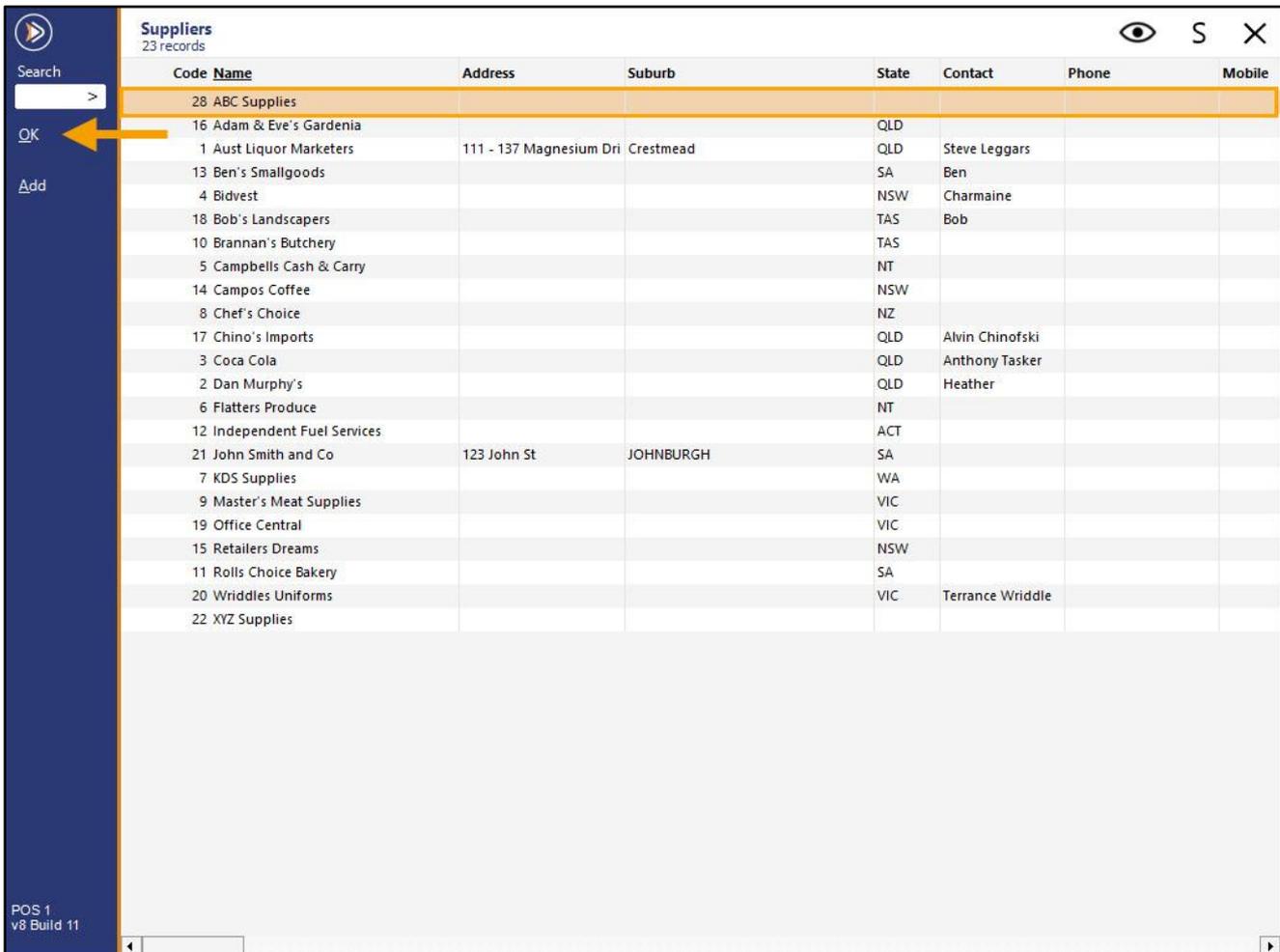
Add New Stock Items

Import

Clear

Save Defaults

Select a Supplier from the list > OK.



Suppliers

23 records

Code	Name	Address	Suburb	State	Contact	Phone	Mobile
28	ABC Supplies						
16	Adam & Eve's Gardenia			QLD			
1	Aust Liquor Marketers	111 - 137 Magnesium Dri	Crestmead	QLD	Steve Leggars		
13	Ben's Smallgoods			SA	Ben		
4	Bidvest			NSW	Charmaine		
18	Bob's Landscapers			TAS	Bob		
10	Brannan's Butchery			TAS			
5	Campbells Cash & Carry			NT			
14	Campos Coffee			NSW			
8	Chef's Choice			NZ			
17	Chino's Imports			QLD	Alvin Chinofski		
3	Coca Cola			QLD	Anthony Tasker		
2	Dan Murphy's			QLD	Heather		
6	Flatters Produce			NT			
12	Independent Fuel Services			ACT			
21	John Smith and Co	123 John St	JOHNBURGH	SA			
7	KDS Supplies			WA			
9	Master's Meat Supplies			VIC			
19	Office Central			VIC			
15	Retailers Dreams			NSW			
11	Rolls Choice Bakery			SA			
20	Wriddles Uniforms			VIC	Terrance Wriddle		
22	XYZ Supplies						

Search [] >

OK 

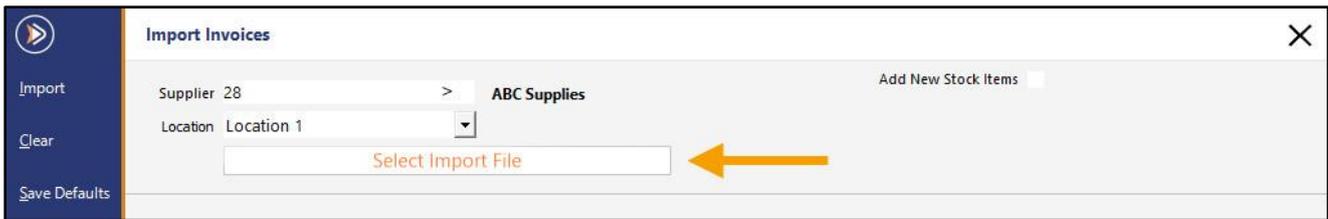
Add

POS 1
v8 Build 11

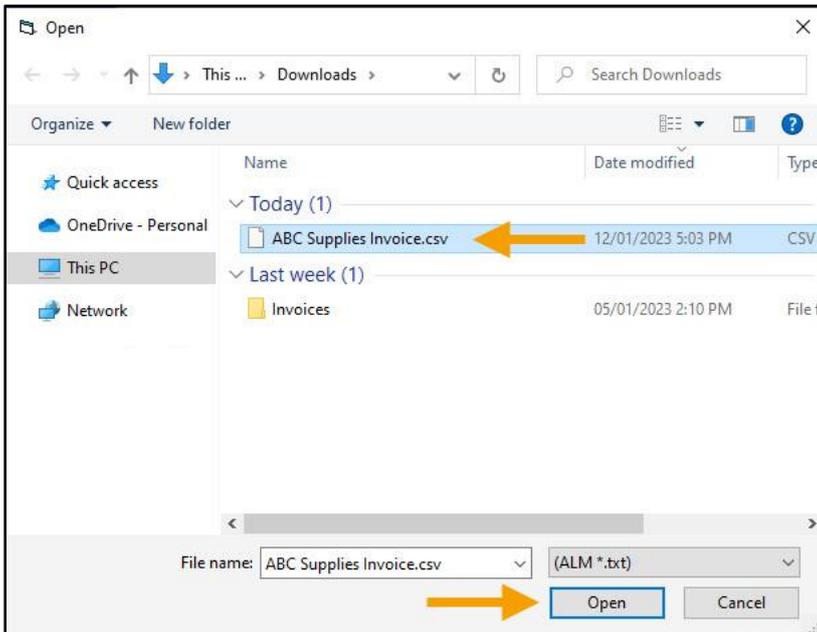
idealpos Update History

[Return to top](#)

Press 'Select Import File'.



Browse to the folder location and select the Invoice > Open.



idealpos Update History

[Return to top](#)

The Invoice is displayed in the Import Invoices window.

Import Invoices
✕

Supplier 28 > ABC Supplies
Add New Stock Items

Location Location 1
ABC Supplies Invoice.csv

Unmapped	Unmapped	Unmapped	Unmapped	Unmapped	Unmapped
Invoice Number	Date	Store Code	Invoice Total	Item Code	EAN Barcode
839018	4/11/2022	ABCCOM	\$1870.00	400042DOM	0810902037420
839018	4/11/2022	ABCCOM	\$1870.00	BIND1180	9313559510069
839018	4/11/2022	ABCCOM	\$1870.00	BIND1195	9313559510212
839018	4/11/2022	ABCCOM	\$1870.00	BIND1201	9313559511493
839018	4/11/2022	ABCCOM	\$1870.00	BIND1204	9313559511523
839018	4/11/2022	ABCCOM	\$1870.00	BIND1209	9313559511578
839018	4/11/2022	ABCCOM	\$1870.00	BIND1233	9313559517426
839018	4/11/2022	ABCCOM	\$1870.00	BIND1255	9313559529719
839018	4/11/2022	ABCCOM	\$1870.00	BIND1265	9313559529818
839018	4/11/2022	ABCCOM	\$1870.00	BIND1275	9313559529917
839018	4/11/2022	ABCCOM	\$1870.00	BIND1329	9313559578496
839018	4/11/2022	ABCCOM	\$1870.00	BIND1346	9313559586064
839018	4/11/2022	ABCCOM	\$1870.00	BIND1374	9313559598944
839018	4/11/2022	ABCCOM	\$1870.00	BIND1389	9313559607943
839018	4/11/2022	ABCCOM	\$1870.00	BIND1415	9313559612855
839018	4/11/2022	ABCCOM	\$1870.00	BIND1423	9313559612930
839018	4/11/2022	ABCCOM	\$1870.00	BIND610	9313559412462
839018	4/11/2022	ABCCOM	\$1870.00	BIND615	9313559412516
839018	4/11/2022	ABCCOM	\$1870.00	BIND641	9313559412776
839018	4/11/2022	ABCCOM	\$1870.00	BIND648	9313559412844
839018	4/11/2022	ABCCOM	\$1870.00	BINE1005	9313559461521
839018	4/11/2022	ABCCOM	\$1870.00	BINE1060	9313559509797
839018	4/11/2022	ABCCOM	\$1870.00	BINE1079	9313559511752
839018	4/11/2022	ABCCOM	\$1870.00	BINE1087	9313559511837
839018	4/11/2022	ABCCOM	\$1870.00	BINE1098	9313559517600
839018	4/11/2022	ABCCOM	\$1870.00	BINE1129	9313559517914
839018	4/11/2022	ABCCOM	\$1870.00	BINE1140	9313559518027
839018	4/11/2022	ABCCOM	\$1870.00	BINE1143	9313559518058
839018	4/11/2022	ABCCOM	\$1870.00	BINE1175	9313559530098
839018	4/11/2022	ABCCOM	\$1870.00	BINE1177	9313559530128
839018	4/11/2022	ABCCOM	\$1870.00	BINE1181	9313559530166
839018	4/11/2022	ABCCOM	\$1870.00	BINE1197	9313559530371
839018	4/11/2022	ABCCOM	\$1870.00	BINE1231	9313559560262
839018	4/11/2022	ABCCOM	\$1870.00	BINE1232	9313559560279
839018	4/11/2022	ABCCOM	\$1870.00	BINE1233	9313559560286
839018	4/11/2022	ABCCOM	\$1870.00	BINE1234	9313559560293
839018	4/11/2022	ABCCOM	\$1870.00	BINE1270	9313559583537
839018	4/11/2022	ABCCOM	\$1870.00	BINE1296	9313559596452
839018	4/11/2022	ABCCOM	\$1870.00	BINE1300	9313559597442
839018	4/11/2022	ABCCOM	\$1870.00	BINE1302	9313559597466
839018	4/11/2022	ABCCOM	\$1870.00	BINE1305	9313559597916

POS 1
v8 Build 11

idealpos Update History

[Return to top](#)

If required, enable the 'Add New Stock Items' option.

This will trigger Idealpos to Add New Stock Items from the Invoice that don't already exist in your system.

When enabling 'Add New Stock Items', the following options will need to be configured:

Department – Stock Items that are added will be linked to the specified Department. Press the '>' button in this field to display a list of Departments and select the Department to link to new Stock Items created during the Invoice Import.

New Item Codes – Three options are available as follows.

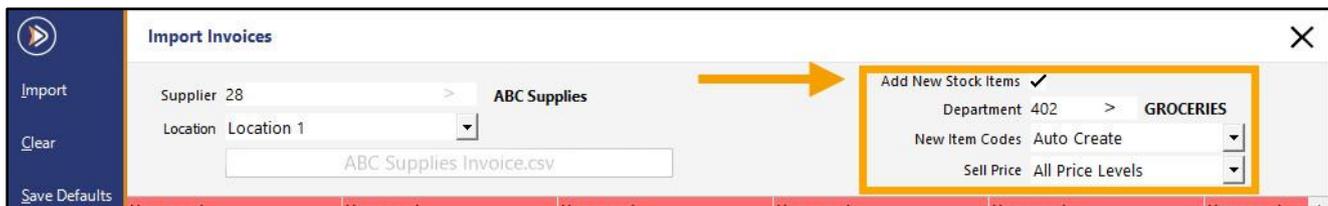
Auto Create – Stock Item Codes are automatically created for each new item that is added.

Supplier's Code – Each new Stock Item that is added will use the Supplier's Code from the Invoice.

Supplier's Code + Suffix – Each new Stock Item that is added will use the Supplier's Code from the Invoice and the Suffix that is entered into the Suffix field (when this option is selected, a Suffix field will appear to the right-side of the dropdown box where a custom Suffix can be entered).

Sell Price – Thirteen options are available (All Price Levels, or select from one of the twelve Price Levels). This option will specify which Price Levels are to be populated with the Stock Item's Sell Price.

Note that Invoices can only specify a single Sell Price for each Stock Item, which means if 'All Price Levels' are selected, all Price Levels will be populated with the same Sell Price.



idealpos Update History

[Return to top](#)

Each field/column in the Invoice must be mapped to an Idealpos field.

Each column on the first row of the Invoice will display 'Unmapped'.

To map the values in each column, click on the 'Unmapped' text and a dropdown list will be displayed.

Select the option which corresponds to the data that appears in that column below.

Note that not all fields in a Supplier Invoice will be supported or required by Idealpos.

In such cases, select the 'Skip Field' option.

The screenshot shows the 'Import Invoices' window for 'ABC Supplies'. The interface includes fields for Supplier (28), Location (Location 1), Department (402 - GROCERIES), and a file name 'ABC Supplies Invoice.csv'. Below these fields is a table with 6 columns, all of which are currently 'Unmapped'. A dropdown menu is open over the first 'Unmapped' header, and 'Skip Field' is selected. The table contains 25 rows of data with columns: Date, Store Code, Invoice Total, Item Code, and EAN Barcode.

Unmapped	Unmapped	Unmapped	Unmapped	Unmapped	Unmapped
Date	Store Code	Invoice Total	Item Code	EAN Barcode	
4/11/2022	ABCCOM	\$1870.00	400042DOM	0810902037420	
4/11/2022	ABCCOM	\$1870.00	BIND1180	9313559510069	
4/11/2022	ABCCOM	\$1870.00	BIND1195	9313559510212	
4/11/2022	ABCCOM	\$1870.00	BIND1201	9313559511493	
4/11/2022	ABCCOM	\$1870.00	BIND1204	9313559511523	
4/11/2022	ABCCOM	\$1870.00	BIND1209	9313559511578	
4/11/2022	ABCCOM	\$1870.00	BIND1233	9313559517426	
4/11/2022	ABCCOM	\$1870.00	BIND1255	9313559529719	
4/11/2022	ABCCOM	\$1870.00	BIND1265	9313559529818	
4/11/2022	ABCCOM	\$1870.00	BIND1275	9313559529917	
4/11/2022	ABCCOM	\$1870.00	BIND1329	9313559578496	
4/11/2022	ABCCOM	\$1870.00	BIND1346	9313559586064	
4/11/2022	ABCCOM	\$1870.00	BIND1374	9313559598944	
4/11/2022	ABCCOM	\$1870.00	BIND1389	9313559607943	
4/11/2022	ABCCOM	\$1870.00	BIND1415	9313559612855	
4/11/2022	ABCCOM	\$1870.00	BIND1423	9313559612930	
4/11/2022	ABCCOM	\$1870.00	BIND610	9313559412462	
4/11/2022	ABCCOM	\$1870.00	BIND615	9313559412516	
4/11/2022	ABCCOM	\$1870.00	BIND641	9313559412776	
4/11/2022	ABCCOM	\$1870.00	BIND648	9313559412844	
4/11/2022	ABCCOM	\$1870.00	BINE1005	9313559461521	
4/11/2022	ABCCOM	\$1870.00	BINE1060	9313559509797	
4/11/2022	ABCCOM	\$1870.00	BINE1079	9313559511752	
4/11/2022	ABCCOM	\$1870.00	BINE1087	9313559511837	
4/11/2022	ABCCOM	\$1870.00	BINE1098	9313559517600	
4/11/2022	ABCCOM	\$1870.00	BINE1129	9313559517914	
4/11/2022	ABCCOM	\$1870.00	BINE1140	9313559518027	
4/11/2022	ABCCOM	\$1870.00	BINE1143	9313559518058	
4/11/2022	ABCCOM	\$1870.00	BINE1175	9313559530098	
4/11/2022	ABCCOM	\$1870.00	BINE1177	9313559530128	
4/11/2022	ABCCOM	\$1870.00	BINE1181	9313559530166	
4/11/2022	ABCCOM	\$1870.00	BINE1197	9313559530371	
4/11/2022	ABCCOM	\$1870.00	BINE1231	9313559560262	
4/11/2022	ABCCOM	\$1870.00	BINE1232	9313559560279	
4/11/2022	ABCCOM	\$1870.00	BINE1233	9313559560286	
4/11/2022	ABCCOM	\$1870.00	BINE1234	9313559560293	
4/11/2022	ABCCOM	\$1870.00	BINE1270	9313559583537	
4/11/2022	ABCCOM	\$1870.00	BINE1296	9313559596452	
4/11/2022	ABCCOM	\$1870.00	BINE1300	9313559597442	
4/11/2022	ABCCOM	\$1870.00	BINE1302	9313559597466	
4/11/2022	ABCCOM	\$1870.00	BINE1305	9313559597916	

When skipping a field, the contents of the column will appear as greyed out and the header will display 'Skip Field'.

The screenshot shows the 'Import Invoices' window with the same data as the previous image. The first column header is now 'Skip Field' and is greyed out. The first row of data is also greyed out, and the first column contains the value 'Invoice Number'. The rest of the table remains the same.

Skip Field	Unmapped	Unmapped	Unmapped	Unmapped	Unmapped
Invoice Number	Date	Store Code	Invoice Total	Item Code	EAN Barcode
839018	4/11/2022	ABCCOM	\$1870.00	400042DOM	0810902037420
839018	4/11/2022	ABCCOM	\$1870.00	BIND1180	9313559510069
839018	4/11/2022	ABCCOM	\$1870.00	BIND1195	9313559510212
839018	4/11/2022	ABCCOM	\$1870.00	BIND1201	9313559511493
839018	4/11/2022	ABCCOM	\$1870.00	BIND1204	9313559511523
839018	4/11/2022	ABCCOM	\$1870.00	BIND1209	9313559511578
839018	4/11/2022	ABCCOM	\$1870.00	BIND1233	9313559517426
839018	4/11/2022	ABCCOM	\$1870.00	BIND1255	9313559529719

idealpos Update History

[Return to top](#)

Ensure that each column in the Invoice is mapped according to the data that appears in the column. Once completed, press the 'Save Defaults' option on the top-left corner of the Import Invoices window.

Import Invoices

Supplier: 28 > ABC Supplies
 Location: Location 1
 Add New Stock Items:
 Department: 402 > GROCERIES
 New Item Codes: Auto Create
 Sell Price: All Price Levels

ABC Supplies Invoice.csv

Item Code	Scan Code	Item Description	Invoice Quantity	Order Quantity	Skip Field
400042DOM	0810902037420	APP STRETCH CATPLR ASST SRT	24	48	
BIND1180	9313559510069	CARD DELUXE BD FEMALE GEN	6	6	
BIND1195	9313559510212	CARD DELUXE THANK YOU FEM	6	6	
BIND1201	9313559511493	CARD DELUXE BD FEMALE GEN	6	6	
BIND1204	9313559511523	CARD DELUXE BD FEMALE GEN	6	6	
BIND1209	9313559511578	CARD DELUXE BD FEMALE GEN	6	6	
BIND1233	9313559517426	CARD DELUXE BD FEMALE GEN	6	6	
BIND1255	9313559529719	CARD DELUXE BD FEMALE GEN	6	6	
BIND1265	9313559529818	CARD DELUXE BD HUMOUR G	6	6	
BIND1275	9313559529917	CARD DELUXE THANK YOU FEM	6	6	
BIND1329	9313559578496	CARD DELUXE OCC BLANK	6	6	
BIND1346	9313559586064	CARD DELUXE BD FEMALE GEN	6	6	
BIND1374	9313559598944	CARD DELUXE BD FEMALE GEN	6	6	
BIND1389	9313559607943	CARD DELUXE BD FEMALE GEN	6	6	
BIND1415	9313559612855	CARD DELUXE BD MALE GEN	6	6	
BIND1423	9313559612930	CARD DELUXE BD FEMALE GEN	6	6	
BIND610	9313559412462	CARD DELUXE BD FEMALE GEN	6	6	
BIND615	9313559412516	CARD DELUXE BD FEMALE GEN	6	6	
BIND641	9313559412776	CARD DELUXE BD FEMALE GEN	6	6	
BIND648	9313559412844	CARD DELUXE BD FEMALE GEN	6	6	
BINE1005	9313559461521	CARD ELEGANCE BD AGE 50 F	6	6	
BINE1060	9313559509797	CARD ELEGANCE BD AGE 80 F	6	6	
BINE1079	9313559511752	CARD ELEGANCE BD MALE GEN	6	6	
BINE1087	9313559511837	CARD ELEGANCE SYMPATHY GEN	6	6	
BINE1098	9313559517600	CARD ELEGANCE BD FEMALE GE	6	6	
BINE1129	9313559517914	CARD ELEGANCE BD GDAUGHTF	6	6	
BINE1140	9313559518027	CARD ELEGANCE BD GRANDSOI	6	6	
BINE1143	9313559518058	CARD ELEGANCE ANNIV YOUR C	6	6	
BINE1175	9313559530098	CARD ELEGANCE BD AGE 70 F	6	6	
BINE1177	9313559530128	CARD ELEGANCE BD FEMALE GE	6	6	
BINE1181	9313559530166	CARD ELEGANCE BD FEMALE GE	6	6	
BINE1197	9313559530371	CARD ELEGANCE BABY BOY	6	6	
BINE1231	9313559560262	CARD ELEGANCE BD AGE 70 M	6	6	
BINE1232	9313559560279	CARD ELEGANCE BD FEMALE GE	6	6	
BINE1233	9313559560286	CARD ELEGANCE BD FEMALE GE	6	6	
BINE1234	9313559560293	CARD ELEGANCE BD MALE GEN	6	6	
BINE1270	9313559583537	CARD ELEGANCE BD AGE 16 F	6	6	
BINE1296	9313559596452	CARD ELEGANCE OCC BLANK	6	6	
BINE1300	9313559597442	CARD ELEGANCE BD GDAUGHTF	6	6	
BINE1302	9313559597466	CARD ELEGANCE OCC BLANK	6	6	
BINE1305	9313559597916	CARD ELEGANCE BD DAD GEN	6	6	

POS 1
v8 Build 11

A 'Defaults Saved' prompt will appear to confirm that the Defaults were saved successfully > Press 'OK'.

Defaults Saved

OK

idealpos Update History

[Return to top](#)

The next time this Supplier is chosen, and an Invoice file selected, the field mappings will be used to link the Invoice fields to the Idealpos fields, enabling the data to import correctly.

Select the 'Import' button on the top-left corner of the Import Invoices window to Import the Invoice into Idealpos.

Import Invoices

Supplier: 28 > ABC Supplies
 Location: Location 1
 Add New Stock Items:
 Department: 402 > GROCERIES
 New Item Codes: Auto Create
 Sell Price: All Price Levels

Item Code	Scan Code	Item Description	Invoice Quantity	Order Quantity	Skip Field
Item Code	EAN Barcode	Item Name	Pack Qty	Quantity	Disc Prcnt
400042DOM	0810902037420	APP STRETCH CATPLR ASST SRT	24	48	0
BIND1180	9313559510069	CARD DELUXE BD FEMALE GEN	6	6	0
BIND1195	9313559510212	CARD DELUXE THANK YOU FEM	6	6	0
BIND1201	9313559511493	CARD DELUXE BD FEMALE GEN	6	6	0
BIND1204	9313559511523	CARD DELUXE BD FEMALE GEN	6	6	0
BIND1209	9313559511578	CARD DELUXE BD FEMALE GEN	6	6	0
BIND1233	9313559517426	CARD DELUXE BD MALE GEN	6	6	0
BIND1255	9313559529719	CARD DELUXE BD FEMALE GEN	6	6	0
BIND1265	9313559529818	CARD DELUXE BD HUMOUR G	6	6	0
BIND1275	9313559529917	CARD DELUXE THANK YOU FEM	6	6	0
BIND1329	9313559578496	CARD DELUXE OCC BLANK	6	6	0
BIND1346	9313559586064	CARD DELUXE BD FEMALE GEN	6	6	0
BIND1374	9313559598944	CARD DELUXE BD FEMALE GEN	6	6	0
BIND1389	9313559607943	CARD DELUXE BD FEMALE GEN	6	6	0
BIND1415	9313559612855	CARD DELUXE BD MALE GEN	6	6	0
BIND1423	9313559612930	CARD DELUXE BD FEMALE GEN	6	6	0
BIND610	9313559412462	CARD DELUXE BD FEMALE GEN	6	6	0
BIND615	9313559412516	CARD DELUXE BD FEMALE GEN	6	6	0
BIND641	9313559412776	CARD DELUXE BD FEMALE GEN	6	6	0
BIND648	9313559412844	CARD DELUXE BD FEMALE GEN	6	6	0
BINE1005	9313559461521	CARD ELEGANCE BD AGE 50 F	6	6	0
BINE1060	9313559509797	CARD ELEGANCE BD AGE 80 F	6	6	0
BINE1079	9313559511752	CARD ELEGANCE BD MALE GEN	6	6	0
BINE1087	9313559511837	CARD ELEGANCE SYMPATHY GEN	6	6	0
BINE1098	9313559517600	CARD ELEGANCE BD FEMALE GE	6	6	0
BINE1129	9313559517914	CARD ELEGANCE BD GDAUGHTI	6	6	0
BINE1140	9313559518027	CARD ELEGANCE BD GRANDSOI	6	6	0
BINE1143	9313559518058	CARD ELEGANCE ANNIV YOUR C	6	6	0
BINE1175	9313559530098	CARD ELEGANCE BD AGE 70 F	6	6	0
BINE1177	9313559530128	CARD ELEGANCE BD FEMALE GE	6	6	0
BINE1181	9313559530166	CARD ELEGANCE BD FEMALE GE	6	6	0
BINE1197	9313559530371	CARD ELEGANCE BABY BOY	6	6	0
BINE1231	9313559560262	CARD ELEGANCE BD AGE 70 M	6	6	0
BINE1232	9313559560279	CARD ELEGANCE BD FEMALE GE	6	6	0
BINE1233	9313559560286	CARD ELEGANCE BD FEMALE GE	6	6	0
BINE1234	9313559560293	CARD ELEGANCE BD MALE GEN	6	6	0
BINE1270	9313559583537	CARD ELEGANCE BD AGE 16 F	6	6	0
BINE1296	9313559596452	CARD ELEGANCE OCC BLANK	6	6	0
BINE1300	9313559597442	CARD ELEGANCE BD GDAUGHTI	6	6	0
BINE1302	9313559597466	CARD ELEGANCE OCC BLANK	6	6	0
BINE1305	9313559597916	CARD ELEGANCE BD DAD GEN	6	6	0

POS 1 v8 Build 11

During the Import process, a light orange progress bar will appear within the Invoice Filename button.

Import Invoices

Supplier: 28 > ABC Supplies
 Location: Location 1
 Add New Stock Items:
 Department: 402 > GROCERIES
 New Item Codes: Auto Create
 Sell Price: All Price Levels

Import

ABC Supplies Invoice.csv

Item Code	Scan Code	Item Description	Invoice Quantity	Order Quantity	Skip Field
Item Code	EAN Barcode	Item Name	Pack Qty	Quantity	Disc Prcnt
400042DOM	0810902037420	APP STRETCH CATPLR ASST SRT	24	48	0
BIND1180	9313559510069	CARD DELUXE BD FEMALE GEN	6	6	0
BIND1195	9313559510212	CARD DELUXE THANK YOU FEM	6	6	0

idealpos Update History

[Return to top](#)

After the Import has been completed, the Import Invoices window will close, and the Stock Purchases window will appear, displaying the newly imported Invoice.

Stock Purchases Location

Code	Supplier Name	Date	Type	Order No.	Invoice No.	Details	Processed	Location	Total
28	ABC Supplies	04/11/2022	Invoice		csv		No	Location 1	\$1,700.00

POS 1
v8 Build 11

Show Purchase Orders
 Show Stock Received
 Show Orders NOT Received

Show Tax Inclusive
 Send to Label Printing

Items Only Process

idealpos Update History

[Return to top](#)

Select 'Modify' to view the Invoice details and make any required changes.

Any new items which have been created will have the Unit Cost highlighted in purple.

An Invoice Number can be manually entered into the 'Invoice No' field and any other changes made as required. Press 'Save' to save any changes made.

idealpos Update History

[Return to top](#)

Ensure that the Invoice is selected/highlighted, then process the Invoice by pressing the 'Process' button on the bottom-right corner.

The screenshot displays the 'Stock Purchases' interface. At the top, there is a search bar and a 'Location' dropdown menu. Below this is a table with the following data:

Code	Supplier Name	Date	Type	Order No.	Invoice No.	Details	Processed	Location	Total
28	ABC Supplies	04/11/2022	Invoice		839018		No	Location 1	\$1,690.91

At the bottom of the interface, there are several checkboxes for filtering: 'Show Purchase Orders', 'Show Stock Received', 'Show Orders NOT Received', 'Show Tax Inclusive', and 'Send to Label Printing'. To the right of these checkboxes are two buttons: 'Items Only' and 'Process'. An orange arrow points to the 'Process' button.

Once processed, the Invoice listing will disappear from the Stock Purchases.

idealpos Update History

[Return to top](#)

The Stock Items from the Invoice have been imported and linked to the Department that was configured during the Invoice field mapping process.

		Stock Items				Edit	Multi		S	X
		1822 records				Mode	Select			
Description	Code	Description	Kitchen	Department	Plu Code	Scan Code	Standard Cost	Average C		
		1 APP STRETCH CATPLR ASST SRT		GROCERIES	0	0810902037420	0.96			
		2 CARD DELUXE BD FEMALE GEN		GROCERIES	0	9313559510069	0.91			
		3 CARD DELUXE THANK YOU FEM		GROCERIES	0	9313559510212	0.91			
		4 CARD DELUXE BD FEMALE GEN		GROCERIES	0	9313559511493	0.91			
		5 CARD DELUXE BD FEMALE GEN		GROCERIES	0	9313559511523	0.91			
		6 CARD DELUXE BD FEMALE GEN		GROCERIES	0	9313559511578	0.91			
		7 CARD DELUXE BD MALE GEN		GROCERIES	0	9313559517426	0.91			
		8 CARD DELUXE BD FEMALE GEN		GROCERIES	0	9313559529719	0.91			
		9 CARD DELUXE BD HUMOUR G		GROCERIES	0	9313559529818	0.91			
		10 CARD DELUXE THANK YOU FEM		GROCERIES	0	9313559529917	0.91			
		11 CARD DELUXE OCC BLANK		GROCERIES	0	9313559578496	0.91			
		12 CARD DELUXE BD FEMALE GEN		GROCERIES	0	9313559586064	0.91			
		13 CARD DELUXE BD FEMALE GEN		GROCERIES	0	9313559598944	0.91			
		14 CARD DELUXE BD FEMALE GEN		GROCERIES	0	9313559607943	0.91			
		15 CARD DELUXE BD MALE GEN		GROCERIES	0	9313559612855	0.91			
		16 CARD DELUXE BD FEMALE GEN		GROCERIES	0	9313559612930	0.91			
		17 CARD DELUXE BD FEMALE GEN		GROCERIES	0	9313559412462	0.91			
		18 CARD DELUXE BD FEMALE GEN		GROCERIES	0	9313559412516	0.91			
		19 CARD DELUXE BD FEMALE GEN		GROCERIES	0	9313559412776	0.91			
		20 CARD DELUXE BD FEMALE GEN		GROCERIES	0	9313559412844	0.91			
		21 CARD ELEGANCE BD AGE 50 F		GROCERIES	0	9313559461521	1.33			
		22 CARD ELEGANCE BD AGE 80 F		GROCERIES	0	9313559509797	1.33			
		23 CARD ELEGANCE BD MALE GEN		GROCERIES	0	9313559511752	1.33			
		24 CARD ELEGANCE SYMPATHY GEN		GROCERIES	0	9313559511837	1.33			
		25 CARD ELEGANCE BD FEMALE GEN		GROCERIES	0	9313559517600	1.33			
		26 CARD ELEGANCE BD GDAUGHTR GEN		GROCERIES	0	9313559517914	1.33			
		27 CARD ELEGANCE BD GRANDSON GEN		GROCERIES	0	9313559518027	1.33			
		28 CARD ELEGANCE ANNIV YOUR GEN		GROCERIES	0	9313559518058	1.33			
		29 CARD ELEGANCE BD AGE 70 F		GROCERIES	0	9313559530098	1.33			
		30 CARD ELEGANCE BD FEMALE GEN		GROCERIES	0	9313559530128	1.33			
		31 CARD ELEGANCE BD FEMALE GEN		GROCERIES	0	9313559530166	1.33			
		32 CARD ELEGANCE BABY BOY		GROCERIES	0	9313559530371	1.33			
		33 CARD ELEGANCE BD AGE 70 M		GROCERIES	0	9313559560262	1.33			
		34 CARD ELEGANCE BD FEMALE GEN		GROCERIES	0	9313559560279	1.33			
		35 CARD ELEGANCE BD FEMALE GEN		GROCERIES	0	9313559560286	1.33			

IP-5332 – Stock Purchases – Live Updating of Sell Price and Department

This function enables the ability to perform live updating of each Stock Item's Sell Price and Department whilst in the Stock Purchases screen. Prior to using this function, the desired Price Level will need to be configured; the selected Price Level will then be displayed in a column in the Stock Purchases screen next to each Stock Item in the Stock Purchase.

To configure and use this function, go to: Back Office > Setup > Global Options > Purchases.

Within the Miscellaneous section, ensure that the 'Live Stock Updating' checkbox is enabled, then select the required Price Level from the dropdown box.

If this functionality is not required, uncheck the 'Live Stock Updating' checkbox; the Department, Sell Price and Profit Margin columns will be hidden in the Stock Purchases function.

The screenshot displays the 'Global Options' window for 'Site 1 (Site 1)', specifically the 'Purchases' tab. The interface is divided into several sections:

- Purchase Order Default Settings:** Includes fields for Title (PURCHASE ORDER), Delivery Address, Fields 1 (Contact, Delivery Via, Delivery Date), and a checked option 'Show Delivery Date instead of Field 3'. It also has message fields (Top, Middle, Bottom) and checkboxes for 'Show Amounts', 'Use Supplier's Codes', 'Use Scan Codes', and 'Show Stock Codes next to Descriptions'.
- Fees & Rates:** A list of dropdown menus for 'Freight Purchase Category' (FREIGHT), 'Admin Fee Purchase Category' (ADMIN FEE), 'Default Freight Tax Rate' (GST), and 'Default Admin Fee Tax Rate' (GST).
- Send to Labels - Default Sort Order:** Radio buttons for 'Original Entry Order', 'Order by Stock Code', and 'Order by Description'.
- Miscellaneous:** Contains checkboxes for 'Large Size Grid', 'Default to Purchase Orders', and 'Default to Stock Received'. The 'Live Stock Updating' checkbox is checked and highlighted with a yellow box. Below it, a dropdown menu shows 'Price Level' set to 'STANDARD', also highlighted with a yellow box and pointed to by a yellow arrow.
- Programmable Barcodes:** A table with columns for 'Use?', 'Prefix', 'Position', 'Length', and 'Decimal Point'. It lists 'Field 1' as 'Stock Code' and 'Field 2' as 'Quantity'.

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[Return to top](#)

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

Select an existing Stock Purchase/Stock Receive, or press 'Add' to create a new Stock Purchase/Stock Receive.

The Department, Sell Price and Profit Margin % columns will be displayed on the right-hand side of each row.

Stock Received Purchase Type: Stock Received Location: Location 1

Supplier: > Purchase Order No: Invoice No: Details: Date of Invoice: 30/01/2023 Stock Process Date: 30/01/2023 Due Date: 30/01/2023 Tax Inc:

Stock Code	Supplier Code	Description	Quantity	Unit Cost	Disc %	Tax 1	Total	Last Cost	Department	Sell Price (STANDARD)	Profit Margin %
*											

Enquiry Prices

Sales Quantity: Week 4: 0 Week 3: 0 Week 2: 0 Week 1: 0 This Week: 0 All Locations:

Auto-Allocate: GST: Freight: 0.00 Admin Fee: 0.00 Tax: > 0.00

Subtotal: 0.00 Invoice Total: 0.00

Save

idealpos Update History

[Return to top](#)

Select the required Supplier, enter the Purchase Order No, Invoice No, Details, etc., then add the required Stock Items to the Stock Purchase Order/Receive.

The Department, Sell Price and Profit Margin columns will contain the relevant details for each Stock Item in the Stock Receive/Purchase Order.

Purchase Order
Purchase Type: Purchase Order Location: Location 1
✕

Supplier: 3 >
Coca Cola

Purchase Order No: 11

Invoice No: 20230130

Details: Coke Order

Order Date: 30/01/2023

Stock Process Date: 30/01/2023

Due Date: 13/02/2023

>>>

Tax Inc

Stock Code	Supplier Code	Description	Quantity Ordered	Unit Cost	Disc %	Tax 1	Total	Last Cost	Department	Sell Price (STANDARD)	Profit Margin %
205504	124KSS102	SPRITE 15L POSTMIX	0	285	0.00	GST	0.00		205	0.00	
205503	124KSS123	COKE ZERO 15L POSTMIX	0	285	0.00	GST	0.00		205	0.00	
205502	124KSS144	DIET COKE 15L POSTMIX	0	285	0.00	GST	0.00		205	0.00	
205501	124KSS165	COKE 15L POSTMIX	0	285	0.00	GST	0.00		205	0.00	
205508	124KSS18	TONIC 5L POSTMIX	0	145	0.00	GST	0.00		205	0.00	
205408	124KSS186	TONIC 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205407	124KSS207	FANTA 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205406	124KSS228	DRY GINGER 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205405	124KSS249	LIFT 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205404	124KSS270	SPRITE 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205403	124KSS291	COKE ZERO 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205402	124KSS312	DIET COKE 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205401	124KSS333	COKE 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205309	124KSS354	SODA WATER 1.25L	0	0.63	0.00	GST	0.00		205	1.00	30.8
205308	124KSS375	TONIC 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205507	124KSS39	FANTA 15L POSTMIX	0	285	0.00	GST	0.00		205	0.00	
205307	124KSS396	FANTA 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205306	124KSS417	DRY GINGER 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205305	124KSS438	LIFT 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205304	124KSS459	SPRITE 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205303	124KSS480	COKE ZERO 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205302	124KSS501	DIET COKE 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205301	124KSS522	COKE 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205208	124KSS543	TONIC 600ML	0	1.13	0.00	GST	0.00		205	5.00	75.2
205207	124KSS564	FANTA 600ML	0	1.13	0.00	GST	0.00		205	5.00	75.2
205206	124KSS585	DRY GINGER 600ML	0	1.13	0.00	GST	0.00		205	5.00	75.2
205506	124KSS60	DRY GINGER 5L POSTMIX	0	145	0.00	GST	0.00		205	0.00	

0x SPRITE 15L POSTMIX (205504)

@ \$285.00 each
Department: SOFT DRINK

Enquiry Prices

Sales Quantity: Week 4 Week 3 Week 2 Week 1 This Week

Subtotal 0.00

Auto-Allocate GST Freight 0.00

Auto-Allocate GST Admin Fee 0.00

Tax > 0.00

Invoice Total 0.00

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

idealpos Update History

[Return to top](#)

To modify a Stock Item's Department, click into the Department field for the required item, then press the dropdown arrow.

Purchase Order
Purchase Type Purchase Order Location Location 1
✕

Supplier 3 >
Coca Cola

Purchase Order No 11
Invoice No 20230130
Details Coke Order

Order Date 30/01/2023
Stock Process Date 30/01/2023
Due Date 13/02/2023

>>>

Tax Inc

Stock Code	Supplier Code	Description	Quantity Ordered	Unit Cost	Disc %	Tax 1	Total	Last Cost	Department	Sell Price (STANDARD)	Profit Margin %
205504	124KSS102	SPRITE 15L POSTMIX	0	285	0.00	GST	0.00		205	0.00	
205503	124KSS123	COKE ZERO 15L POSTMIX	0	285	0.00	GST	0.00		205	0.00	
205502	124KSS144	DIET COKE 15L POSTMIX	0	285	0.00	GST	0.00		205	0.00	
205501	124KSS165	COKE 15L POSTMIX	0	285	0.00	GST	0.00		205	0.00	
205508	124KSS18	TONIC 5L POSTMIX	0	145	0.00	GST	0.00		205	0.00	
205408	124KSS186	TONIC 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205407	124KSS207	FANTA 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205406	124KSS228	DRY GINGER 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205405	124KSS249	LIFT 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205404	124KSS270	SPRITE 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205403	124KSS291	COKE ZERO 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205402	124KSS312	DIET COKE 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205401	124KSS333	COKE 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205309	124KSS354	SODA WATER 1.25L	0	0.63	0.00	GST	0.00		205	1.00	30.8
205308	124KSS375	TONIC 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205507	124KSS39	FANTA 15L POSTMIX	0	285	0.00	GST	0.00		205	0.00	
205307	124KSS396	FANTA 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205306	124KSS417	DRY GINGER 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205305	124KSS438	LIFT 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205304	124KSS459	SPRITE 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205303	124KSS480	COKE ZERO 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205302	124KSS501	DIET COKE 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205301	124KSS522	COKE 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205208	124KSS543	TONIC 600ML	0	1.13	0.00	GST	0.00		205	5.00	75.2
205207	124KSS564	FANTA 600ML	0	1.13	0.00	GST	0.00		205	5.00	75.2
205206	124KSS585	DRY GINGER 600ML	0	1.13	0.00	GST	0.00		205	5.00	75.2
205506	124KSS60	DRY GINGER 5L POSTMIX	0	145	0.00	GST	0.00		205	0.00	

0x TONIC 2L (205408)
@ \$0.81 each
Department: SOFT DRINK

Enquiry Prices

Sales Quantity ▼ Week ▼

Week 4 ▼ Week 3 ▼ Week 2 ▼ Week 1 ▼ This Week ▼

Subtotal 0.00

Auto-Allocate GST ▼ Freight 0.00

Auto-Allocate GST ▼ Admin Fee 0.00

Tax > 0.00

Invoice Total 0.00

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

idealpos Update History

[Return to top](#)

The Department list will be displayed; select the Department for the Stock Item then press 'OK'.

If required, the Search function (top-left corner) can be used to filter the list of Departments that are displayed.

The screenshot displays the 'Departments' screen with 93 records. The interface includes a search bar, an 'OK' button, and an 'Add' button on the left. The table below shows the data for the departments.

Code	Description	Sales Category
223	APERITIFS BTL	BEVERAGE
224	APERITIFS	BEVERAGE
225	COCKTAILS	BEVERAGE
226	SPARKLING BTL	BEVERAGE
227	SPARKLING GLS	BEVERAGE
228	WHITE WINE BTL	BEVERAGE
229	WHITE WINE GLS	BEVERAGE
230	RED WINE BTL	BEVERAGE
231	RED WINE GLS	BEVERAGE
232	DESSERT BTL	BEVERAGE
233	DESSERT GLS	BEVERAGE
234	DRINK MODS	BEVERAGE
301	BED SHEETS	RETAIL
302	PILLOW CASES	RETAIL
303	ELECTRICAL APPLIANCES	RETAIL
304	FISHING EQUIPMENT	RETAIL
305	TOYS	RETAIL
306	BOOKS	RETAIL
307	SCHOOL CLOTHING	RETAIL
308	SCHOOL SUPPLIES	RETAIL
401	CEREAL	GROCERIES
402	GROCERIES	GROCERIES
403	PACKET MIXES	GROCERIES
404	CLEANING PRODUCTS	GROCERIES
501	FUEL	FUEL
502	GAS BOTTLES	FUEL
503	ELECTRICITY	FUEL
601	CHARGES	MEMBERSHIPS
701	ADMISSIONS	ADMISSIONS
702	RIDES	ADMISSIONS
801	DRY CLEANING MENS	SERVICES
802	DRY CLEANING LADIES	SERVICES
803	DRY CLEANING BEDDING	SERVICES
804	DRY CLEANING OTHER	SERVICES
805	DELIVERY	SERVICES
901	BULK LANDSCAPE SUPPLIES	LANDSCAPE
902	PLANTS	LANDSCAPE
903	TOOLS & EQUIPMENT	LANDSCAPE
1001	MISCELLANEOUS	MISCELLANEOUS
1002	COOK TYPES	MISCELLANEOUS
1003	INSTRUCTIONS	MISCELLANEOUS
1004	RAFFLES	MISCELLANEOUS
1100	NON-TURNOVER STOCK	MISCELLANEOUS

idealpos Update History

[Return to top](#)

The Stock Item's Department is updated on-the-fly, and the change is replicated immediately to all networked POS Terminals.

Purchase Order
Purchase Type Purchase Order Location Location 1
✕

Supplier 3 >
Coca Cola

Purchase Order No 11
Invoice No 20230130
Details Coke Order

Order Date 30/01/2023
Stock Process Date 30/01/2023
Due Date 13/02/2023

>>>

Tax Inc

Stock Code	Supplier Code	Description	Quantity Ordered	Unit Cost	Disc %	Tax 1	Total	Last Cost	Department	Sell Price (STANDARD)	Profit Margin %
205504	124KSS102	SPRITE 15L POSTMIX	0	285	0.00	GST	0.00		205	0.00	
205503	124KSS123	COKE ZERO 15L POSTMIX	0	285	0.00	GST	0.00		205	0.00	
205502	124KSS144	DIET COKE 15L POSTMIX	0	285	0.00	GST	0.00		205	0.00	
205501	124KSS165	COKE 15L POSTMIX	0	285	0.00	GST	0.00		205	0.00	
205508	124KSS18	TONIC 5L POSTMIX	0	145	0.00	GST	0.00		205	0.00	
205408	124KSS186	TONIC 2L	0	0.81	0.00	GST	0.00		402	2.50	64.3
205407	124KSS207	FANTA 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205406	124KSS228	DRY GINGER 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205405	124KSS249	LIFT 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205404	124KSS270	SPRITE 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205403	124KSS291	COKE ZERO 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205402	124KSS312	DIET COKE 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205401	124KSS333	COKE 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205309	124KSS354	SODA WATER 1.25L	0	0.63	0.00	GST	0.00		205	1.00	30.8
205308	124KSS375	TONIC 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205507	124KSS39	FANTA 15L POSTMIX	0	285	0.00	GST	0.00		205	0.00	
205307	124KSS396	FANTA 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205306	124KSS417	DRY GINGER 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205305	124KSS438	LIFT 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205304	124KSS459	SPRITE 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205303	124KSS480	COKE ZERO 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205302	124KSS501	DIET COKE 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205301	124KSS522	COKE 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205208	124KSS543	TONIC 600ML	0	1.13	0.00	GST	0.00		205	5.00	75.2
205207	124KSS564	FANTA 600ML	0	1.13	0.00	GST	0.00		205	5.00	75.2
205206	124KSS585	DRY GINGER 600ML	0	1.13	0.00	GST	0.00		205	5.00	75.2
205506	124KSS60	DRY GINGER 5L POSTMIX	0	145	0.00	GST	0.00		205	0.00	

0x TONIC 2L (205408)

@ \$0.81 each
Department: GROCERIES

Enquiry Prices

Sales Quantity ▼ Week ▼

Week 4 ▼ Week 3 ▼ Week 2 ▼ Week 1 ▼ This Week ▼

Subtotal 0.00

Auto-Allocate GST ▼ Freight 0.00

Auto-Allocate GST ▼ Admin Fee 0.00

Tax > 0.00

Invoice Total 0.00

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

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[Return to top](#)

The Stock Item's Sell Price can also be modified in a similar manner.

Click into the Sell Price field of a Stock Item, modify the Sell Price as required, then click into another field to save the change.

Purchase Order Purchase Type: Purchase Order Location: Location 1

Supplier: 3 > **Coca Cola** Purchase Order No: 11 Invoice No: 20230130 Order Date: 30/01/2023

Stock Process Date: 30/01/2023 Due Date: 13/02/2023 Tax Inc:

Stock Code	Supplier Code	Description	Quantity Ordered	Unit Cost	Disc %	Tax 1	Total	Last Cost	Department	Sell Price (STANDARD)	Profit Margin %
205504	124KSS102	SPRITE 15L POSTMIX	0	285	0.00	GST	0.00		205	0.00	
205503	124KSS123	COKE ZERO 15L POSTMIX	0	285	0.00	GST	0.00		205	0.00	
205502	124KSS144	DIET COKE 15L POSTMIX	0	285	0.00	GST	0.00		205	0.00	
205501	124KSS165	COKE 15L POSTMIX	0	285	0.00	GST	0.00		205	0.00	
205508	124KSS18	TONIC 5L POSTMIX	0	145	0.00	GST	0.00		205	0.00	
205408	124KSS186	TONIC 2L	0	0.81	0.00	GST	0.00		402	4.00	77.7
205407	124KSS207	FANTA 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205406	124KSS228	DRY GINGER 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205405	124KSS249	LIFT 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205404	124KSS270	SPRITE 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205403	124KSS291	COKE ZERO 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205402	124KSS312	DIET COKE 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205401	124KSS333	COKE 2L	0	0.81	0.00	GST	0.00		205	2.50	64.3
205309	124KSS354	SODA WATER 1.25L	0	0.63	0.00	GST	0.00		205	1.00	30.8
205308	124KSS375	TONIC 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205507	124KSS39	FANTA 15L POSTMIX	0	285	0.00	GST	0.00		205	0.00	
205307	124KSS396	FANTA 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205306	124KSS417	DRY GINGER 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205305	124KSS438	LIFT 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205304	124KSS459	SPRITE 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205303	124KSS480	COKE ZERO 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205302	124KSS501	DIET COKE 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205301	124KSS522	COKE 1.25L	0	0.75	0.00	GST	0.00		205	2.00	58.8
205208	124KSS543	TONIC 600ML	0	1.13	0.00	GST	0.00		205	5.00	75.2
205207	124KSS564	FANTA 600ML	0	1.13	0.00	GST	0.00		205	5.00	75.2
205206	124KSS585	DRY GINGER 600ML	0	1.13	0.00	GST	0.00		205	5.00	75.2
205506	124KSS60	DRY GINGER 5L POSTMIX	0	145	0.00	GST	0.00		205	0.00	

0x TONIC 2L (205408) @ \$0.81 each Department: GROCERIES

Sales Quantity: Week 4: 0, Week 3: 0, Week 2: 0, Week 1: 0, This Week: 0

Subtotal: 0.00, Freight: 0.00, Admin Fee: 0.00, Tax: 0.00, Invoice Total: 0.00

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

After making a change to a Stock Item's Sell Price, the Profit Margin % will be calculated automatically based on the change. The change to the Stock Item's Sell Price will be replicated immediately to all networked POS Terminals.

Any changes to a Stock Item's Sell Price will also be reflected in the Price Changes Report.

The Price Changes Report is available via Back Office > Reports > Stock Control > Price Changes.

205408	124KSS186	TONIC 2L	0	0.81	0.00	GST	0.00		402	4.00	77.7
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Stock Items Modify 205408

General Advanced **Supplier Items** **Settings** <<< TONIC 250ML BTL >>> TONIC 5L POSTMIX

Last Modified 30 Jan 2023 14:24:06

Stock Code: 205408 Department: 402 > GROCERIES

Description: TONIC 2L (8) Scan Code: 9859323939907 Auto

Kitchen Description: TONIC 2L (8)

Long Description: TONIC 2L (8)

Selling Prices (inc Tax)		Profit %	
	Price	%	\$
STANDARD	4.00	77.75	2.83
STAFF	1.50	40.44	0.55
EXTRAS	0.00		
BOTTLESHOP	1.50	40.44	0.55
Price 5	0.00		
Price 6	0.00		

Printer Settings

- Receipt Printer
- KITCHEN
- BAR
- COFFEE
- IKM
- Kitchen Printer 5
- Kitchen Printer 6

Purchasing

Purchase Category: 2 > BEVERAGE

Default Supplier: 3 > Coca Cola

Default Supplier Stock Code: 124KSS186

Other Options

- Stock Control
- Instruction Print Red

Taxes

IP-5372 – Tax Shift Exemption by Stock Item

This function is only applicable to regions that support multiple Tax Rates (such as USA, Canada, etc.).

This function enables the ability to configure specific Stock Items so that they are exempt from the Tax Shift function. The Tax Shift function is used via a button on the POS Screen which will toggle a specific Tax Rate on/off and any items that are added to the sale after the button is pressed will have their Tax Rates shifted (according to the Tax Rate configured within the Tax Shift button).

When this Tax Shift Exemption function has been configured on one or more Stock Items (and those items are added to a sale), pressing the Tax Shift button will not have any effect on those exempt items, and the Tax Rates that were set within those exempted items will essentially be locked in and enforced.

To configure and use this function, go to:

Back Office > File > Stock Control > Stock Items.

Select a Stock Item that requires the Tax Shift Exemption and Modify the Stock Item.

In the Advanced Tab > Sales Prompt, enter #NOTAXSHIFT# (as shown in the example below).

Press 'Save' to save the change to the item and repeat the process for any other Stock Items that require the No Tax Shift function.

The screenshot shows the 'Stock Items' configuration window for 'CAPE MENTELL SSB BTL' (SKU: CAPSICUM GREEN). The 'Advanced' tab is selected. The 'Sales Prompt' field is highlighted with a yellow box and contains the text '#NOTAXSHIFT#'. A yellow arrow points to the 'Save' button on the left sidebar. Other fields include 'Graphic', 'Copy to POS Buttons', 'Availability' (set to 'Always Available'), 'Link to Menu' (0), 'Link Table' (0), 'Modifier Grids', 'Amount Override Limits' (Lower Limit: 0.00, Upper Limit: 0.00), 'Location 1' (Stock Level: 0, Recommended Level: 0, Reorder Level: 0), 'Points by Price Level' (STANDARD: 0, STAFF: 0, EXTRAS: 0, BOTTLESHOP: 0, Price 5-11: 0, OWNERS: 0), 'Points Settings' (Use Special Points: 0, Inhibit Points Accrual, Inhibit Purchase With Points, Print Promotional Ticket), and 'Miscellaneous' (National Product Number: 0, Receipt Tabs: 0, Weight: 0). The bottom left corner shows 'POS 1 v8 Build 11'.

idealpos Update History

[Return to top](#)

Any Stock Items that have the #NOTAXSHIFT# function configured will essentially be locked into using the Tax Settings that are configured in the Stock Item's General tab and the Tax Shift button will not toggle the Tax Settings for #NOTAXSHIFT# items.

Stock Items

General
Advanced
Indirect Item

<<<
Q
>>>

Modify 202001
CAPE MENTELL SSB BTL
CAPSICUM GREEN
✕

Last Modified 31 Jan 2023 11:29:09

Stock Code: 202001

Description: CAPPUCCINO (10)

Kitchen Description: CAPPUCCINO (10)

Long Description: CAPPUCCINO (10)

Department: 202 > COFFEE

Scan Code: Auto

Selling Prices

		Profit	
		%	\$
STANDARD	3.50	91.59	3.21
STAFF	0.50	41.16	0.21
EXTRAS	0.00		
BOTTLESHOP	0.50	41.16	0.21
Price 5	0.00		
Price 6	0.00		
Price 7	0.00		
Price 8	0.00		
Price 9	0.00		
Price 10	0.00		
Price 11	0.00		
OWNERS	0.00		

Force Selling Price Entry

Printer Settings

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

Purchasing

Purchase Category: 2 > BEVERAGE

Other Options

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

Tags

Cost Prices (ex Tax)

Standard Cost: 0.2942

Last Cost: 0.2942

Average Cost: 0.2942

Recalculate Sell Prices

- Don't Recalculate Sell Prices
- Based on Profit %
- Based on Profit \$

Tax Settings (Selling)

- GST
- PST
- Not Defined
- Not Defined
- Not Defined
- Not Defined

Attributes

POS 1
v8 Build 11

idealpos Update History

[Return to top](#)

Tax Rates and Descriptions are configured in Back Office > Setup > Global Options > Sales.

The screenshot shows the 'Global Options' window for 'Site 1 (Site 1)' with the 'Sales' tab selected. Under the 'Tax Rates' section, there is a table with columns: Default, Description, Rate, Label, and Inc. The table contains five rows: GST (5.000), PST (7.000), and three 'Not Defined' rows (all 0.000). Below the table are two checkboxes: 'Show Rates next to items on Receipt' (unchecked) and 'Combine Rates into One Total on Receipts/Bills' (checked).

Default	Description	Rate	Label	Inc
<input type="checkbox"/>	GST	5.000	GST	<input type="checkbox"/>
<input type="checkbox"/>	PST	7.000	PST	<input type="checkbox"/>
<input type="checkbox"/>	Not Defined	0.000		<input type="checkbox"/>
<input type="checkbox"/>	Not Defined	0.000		<input type="checkbox"/>
<input type="checkbox"/>	Not Defined	0.000		<input type="checkbox"/>

Show Rates next to items on Receipt
 Combine Rates into One Total on Receipts/Bills

Ensure that a Tax Shift button exists on the POS Screen so that the Tax Shift can be toggled.

Go to: Back Office > Setup > POS Screen > POS Screen Setup > Select a POS Screen Layout > Buttons.

Select a POS Screen Tab to create the Tax Shift button, locate a blank/unused button and configure as follows:

Automatic Text: Enter a number between 1 and 6 which corresponds to the number of the Tax Rate that will be shifted (looking at the Global Options – Sales screenshot above, 1 corresponds to the 1st Tax Rate (GST), 2 corresponds to the 2nd Tax Rate (PST) and so on).

Button Caption: Enter a caption to make the button's function recognisable.

Customise the button's Font, Colour, Text Colour, etc. as required, then press 'Save' to save the button.

The screenshot shows the 'Tax Shift' configuration window. It has a 'Tax Shift' dropdown menu on the right with 'Tax Shift' selected. The 'Automatic Text' field contains '1'. The 'Button Appearance' section shows a preview of a dark blue button with the text 'Tax Shift - GST'. Below the preview are settings for 'Button Caption' (Tax Shift - GST), 'Back Colour', 'Font', 'Text Colour', 'Double Width' (unchecked), 'Double Height' (unchecked), and 'Visible' (checked). At the bottom are 'Format All', 'Save', and 'Cancel' buttons.

idealpos Update History

[Return to top](#)

To demonstrate this function, go to: POS Screen.

From the POS Screen, press the Tax Shift button.

The sale window on the POS Screen will show 'Toggle TAX – [TaxRateDescription]', where [TaxRateDescription] is the Description of the Tax Rate being toggled by the button.



Add the Stock Items to the sale.

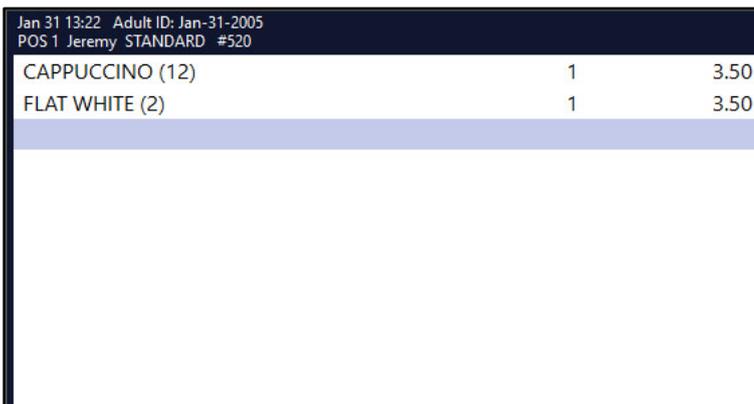
Stock Items which have the #NOTAXSHIFT# option configured will be unaffected by the Tax Shift button/function.

E.g. In the below example, both Cappuccino and Flat White have Tax Rates 1 (GST) and 2 (PST) enabled.

However, Cappuccino has the #NOTAXSHIFT# function configured, whereas Flat White does not.

Cappuccino's Tax Rates of 1 and 2 will remain enabled (as shown in the bracket next to the Stock Item in the sale window).

Flat White's Tax Rate 1 will be shifted to off, leaving only Tax Rate 2 enabled for Flat White (as the Flat White Stock Item did not have the #NOTAXSHIFT# function configured).

A screenshot of the POS screen showing a sale window. The window displays two items: "CAPPUCCINO (12)" and "FLAT WHITE (2)". Each item has a quantity of 1 and a price of 3.50. The items are listed in a table with a light blue header row. Above the table, the POS screen header shows "Jan 31 13:22 Adult ID: Jan-31-2005" and "POS 1 Jeremy STANDARD #520".

Item	Quantity	Price
CAPPUCCINO (12)	1	3.50
FLAT WHITE (2)	1	3.50