

Idealpos 8 Build 1 - Update History

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Installation and Upgrade

IP-4182 – v8 Framework and Build Installers

Before jumping in and installing the Idealpos v8 Framework and the build, there are some important steps and points that need to be covered off regarding the installation and upgrade process.

Idealpos v8 Licence

Idealpos v8 requires a v8 licence. Simply installing Idealpos v8 on your terminal without having your licence updated will result in a Licence Expired prompt and an unusable terminal (until you pay for a v8 licence).

Idealpos v8 is also not a free upgrade from Idealpos v7. You will need to speak to our sales team so they can organise a v8 license for your terminals and obtain payment for the upgrade.

SQL Server version installed by the Idealpos v8 Framework

When the Idealpos v7 Framework was installed, it installed SQL Server 2008 R2.

This behaviour has now changed with the Idealpos v8 Framework Installation.

Depending on whether you are installing the Idealpos v8 Framework on a system that doesn't contain an existing v7/v7.1 installation (clean install) or installing the Framework on an existing v7/v7.1 system (upgrade), the behaviour will vary and is outlined further detail as follows:

- **Existing Idealpos v7/v7.1 Installation** – Running the v8 Framework installer on a terminal that contains existing Idealpos v7.1 installation will keep the existing SQL Server 2008 R2 in place and will not display a prompt asking the user which SQL Server version they want to install.
- **New Framework Installation on a system that already has SQL Server installed** – The v8 Framework will use the existing SQL Server installation and will not display a prompt asking the user which SQL Server version they want to install.
- **New Framework Installation on a system that doesn't already have SQL Server or Idealpos v7/7.1 installed** – The v8 Framework installer will install SQL Server 2019 on a 64-bit Operating System or SQL Server 2014 on a 32-bit Operating System. If Advanced SQL Server Options is selected during the Framework install, the user can select the SQL Server version they want to install. The version that is selected will be downloaded and installed as part of the Framework installation. Note that SQL Server 2019 is only supported on terminals running a 64-bit Operating System. When the Framework install is run on a 32-bit Operating System, the SQL Server 2019 option will be greyed out in the Advanced SQL Server Options.

To minimise any problems and to reduce the amount of time spent on upgrading to Idealpos v8, we recommend that you leave your existing Idealpos v7/v7.1 and SQL Server installations in place, then follow the recommended steps listed for each of the below scenarios.

If you would like to take the opportunity to upgrade your SQL Server version, you will need to uninstall Idealpos v7/v7.1 and SQL Server. You can then run the Idealpos v8 Framework which will perform a clean install, at which point you will be given the option to select your desired version of SQL Server to install.

Upgrade/Install processes

Follow the recommended list of steps for your current environment from one of the below headings:

Recommended upgrade process for sites already running Idealpos v7

- Do not uninstall Idealpos v7 or the Framework
- We recommend that you upgrade to the latest build of Idealpos v7.1
- Install the new Idealpos v8 Framework, then install the Idealpos v8 build.
- The SQL Server will not be upgraded.

Recommended upgrade process for sites already running Idealpos v7.1

- Do not uninstall Idealpos or the Framework
- Install the new Idealpos v8 Framework, then install the Idealpos v8 build.
- The SQL Server will not be upgraded

Recommended install process for new sites that are not running Idealpos

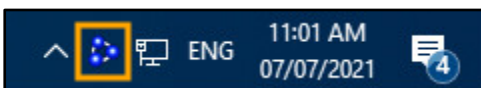
- Check the Windows architecture (32-bit or 64-bit) of each POS terminal and Back Office system.
- If all systems are running a 64-bit version of Windows, you can select "Download SQL Server 2019 (64-bit only)" [from the "Advanced SQL Server options"] during the Idealpos v8 Framework install, then run the Idealpos v8 build install..
- If there is a mix of systems running 32-bit and 64-bit versions of Windows, you will need to run the v8 Framework installer and select either "Download SQL Server 2014" or "Download SQL Server 2008 R2", ensuring that whichever version is selected is then consistently selected and installed on all terminals across your site. Once the Idealpos Framework install has been completed, run the Idealpos v8 build install.

Recommended install process for adding new terminals to an existing v8 installation

- When additional terminals are being added to an existing Idealpos v8 environment, they will also need to be running the same SQL Server version as your existing systems.
- You will need to determine which version of SQL Server is installed on the existing terminals before installing Idealpos onto your new terminals.
- There are a couple of different ways to determine which SQL Server version is currently running on a terminal.

IPS Client Method – Open the IPS Client by clicking on the system tray icon.

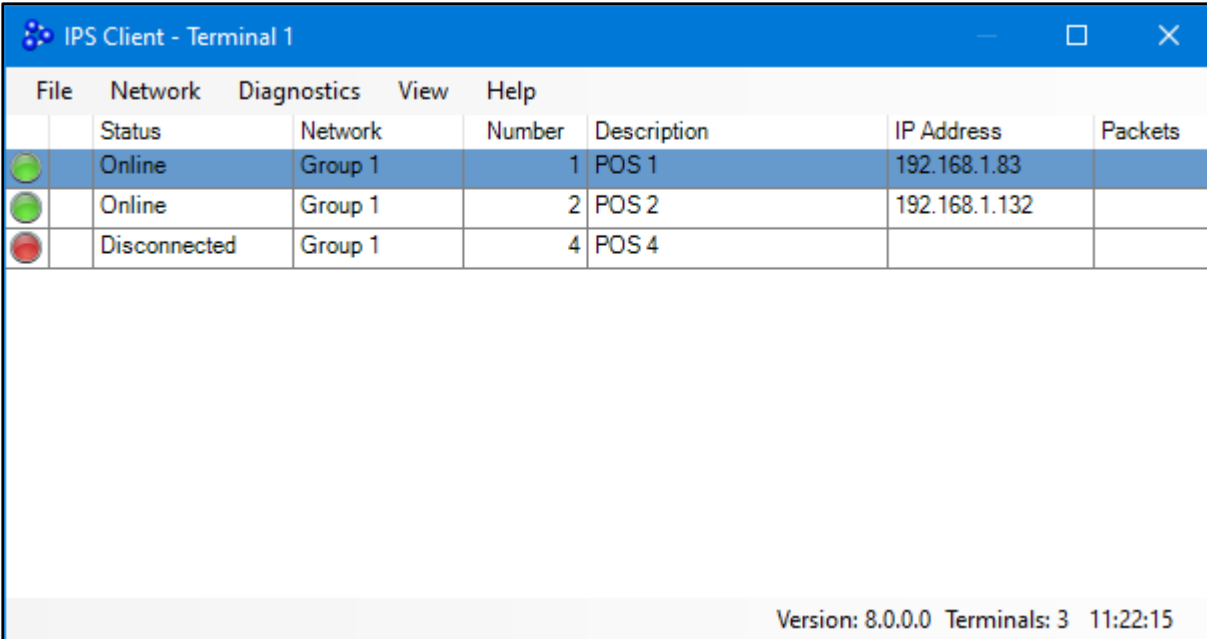
If the icon doesn't appear in the system tray as shown in the below example, you may need to press the up arrow to display hidden icons. If the IPS Client icon does not appear in the Windows System Tray, Idealpos might be closed. Start Idealpos which will also start IPS Client.



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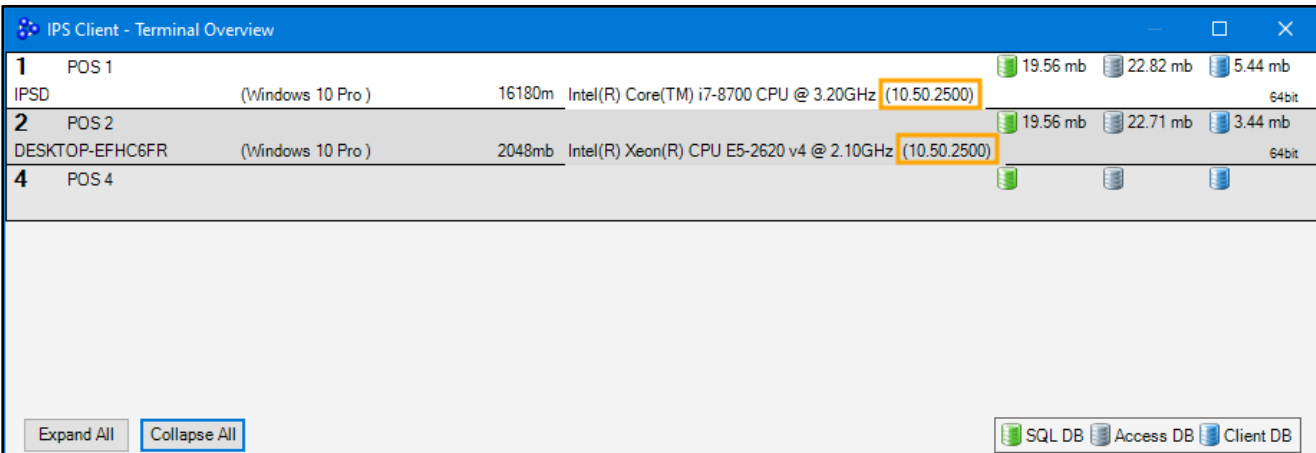
Click on any terminal shown in the list.



The screenshot shows a window titled "IPS Client - Terminal 1" with a menu bar (File, Network, Diagnostics, View, Help) and a table of terminal status. The table has columns for Status, Network, Number, Description, IP Address, and Packets. There are three rows: POS 1 (Online), POS 2 (Online), and POS 4 (Disconnected). The status of each terminal is indicated by a colored circle (green for Online, red for Disconnected). At the bottom right, it says "Version: 8.0.0.0 Terminals: 3 11:22:15".

Status	Network	Number	Description	IP Address	Packets
Online	Group 1	1	POS 1	192.168.1.83	
Online	Group 1	2	POS 2	192.168.1.132	
Disconnected	Group 1	4	POS 4		

The IPS Client – Terminal Overview window will be displayed. The version will appear in brackets next to the CPU name.



The screenshot shows a window titled "IPS Client - Terminal Overview" with a table of terminal details. The table has columns for ID, Name, OS, Uptime, CPU, Version, Memory, and Disk. There are three rows: POS 1 (IPSD), POS 2 (DESKTOP-EFHC6FR), and POS 4. The version information is highlighted in orange boxes. At the bottom, there are buttons for "Expand All" and "Collapse All", and a status bar showing "SQL DB", "Access DB", and "Client DB".

ID	Name	OS	Uptime	CPU	Version	Memory	Disk
1	POS 1	(Windows 10 Pro)	16180m	Intel(R) Core(TM) i7-8700 CPU @ 3.20GHz	(10.50.2500)	19.56 mb	22.82 mb
2	POS 2	(Windows 10 Pro)	2048mb	Intel(R) Xeon(R) CPU E5-2620 v4 @ 2.10GHz	(10.50.2500)	19.56 mb	22.71 mb
4	POS 4						

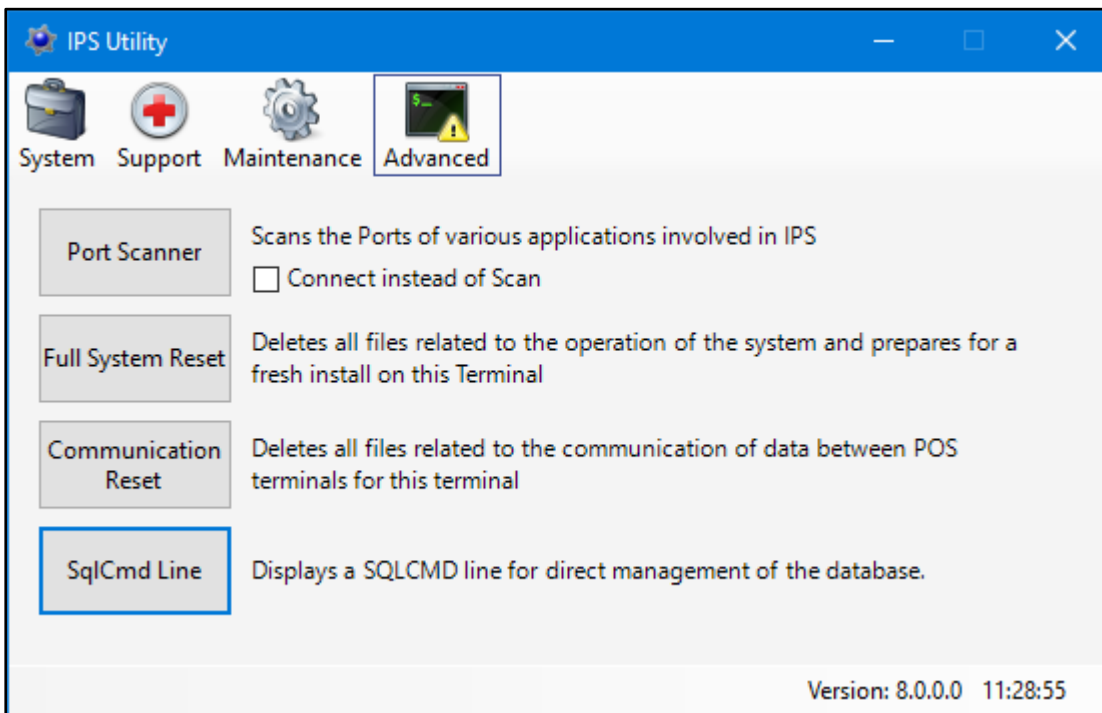
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SQL Query Method – You can determine the SQL Server version by running an SQL Query (SELECT @@VERSION) via the SQLCMD tool.

Go to: Start > Idealpos > IPSUtils.

Within the IPS Utility, go to: Advanced > SqlCmd Line.

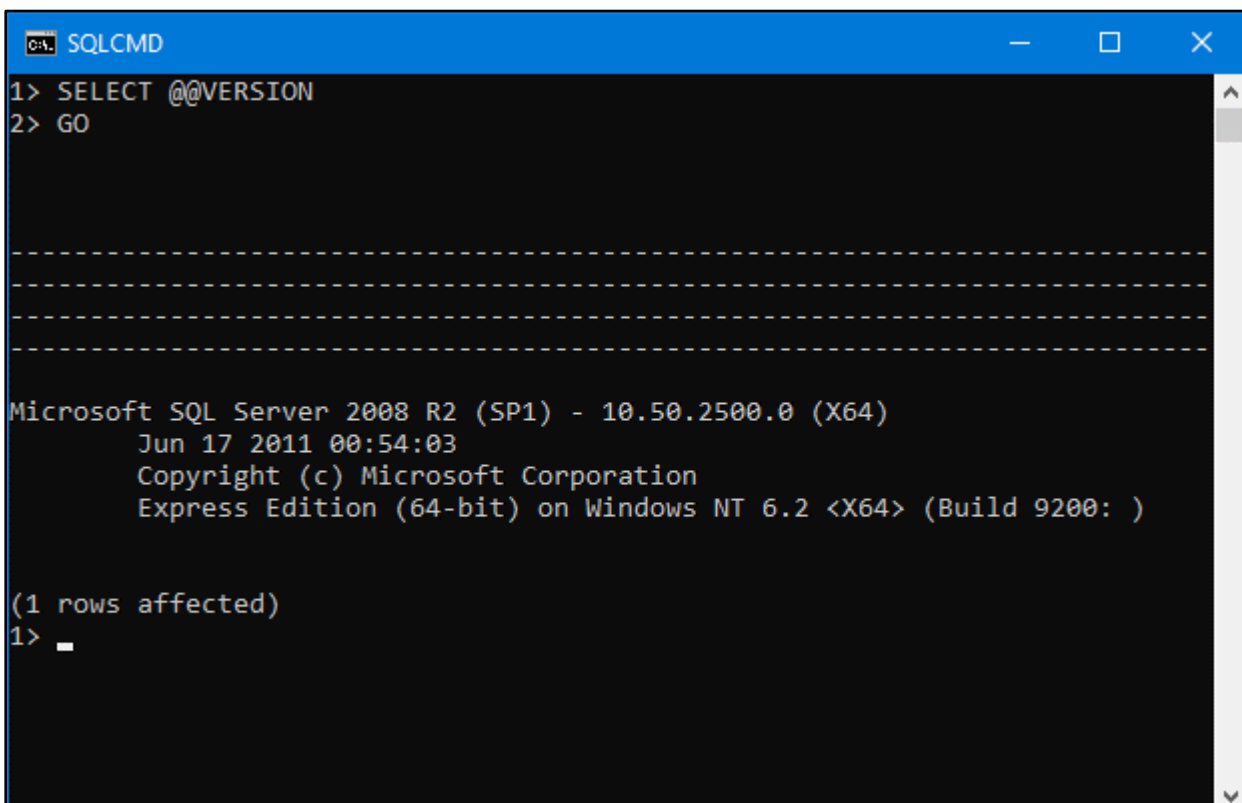


Within the SQLCMD window, enter the following commands, ensuring that you press ENTER after each line.

```
SELECT @@VERSION
```

```
GO
```

The SQL Server version will be displayed as shown in the example below:



IP-4240 – SQL Server 2019 Support

Idealpos v8 now supports SQL Server 2019.

The Idealpos Framework installer will give the option to install SQL Server 2019 Express when each of the following conditions are met:

- A clean system which does not already contain Idealpos v7 or v7.1
- Idealpos v7 Framework has not been installed (if the Idealpos v7 Framework has been installed, SQL Server 2008 R2 Express will also be installed)
- SQL Server is not already installed on the system
- The PC or POS Terminal is running a 64-bit version of Windows

If the above conditions are not met, the Idealpos Framework installer will either keep the existing SQL Server installation in place, or will display a prompt for you to select which SQL Server version to install depending on the current environment:

- **New Framework Installation on a 32-bit version of Windows that doesn't already have SQL Server installed** – The Framework installer will display a list of SQL Server versions for you to select the required version (excluding SQL Server 2019 which will be greyed out/unavailable for 32-bit Operating Systems).
- **New Framework Installation on a 64-bit version of Windows that doesn't already have SQL Server installed** – The Framework installer will display a list of SQL Server versions for you to select the required version. SQL Server 2019 can be selected from the “Advanced SQL Server Options”.
- **New Framework Installation on a system that already has SQL Server installed** – The Framework installer will not prompt you to select a version of SQL Server and will keep the existing SQL Server installation in place.
- **Existing Idealpos v7.1 Installation** – The Framework installer will keep the existing SQL Server in place and will not prompt you to select a version of SQL Server to install.

Ensure that you take the necessary steps to ensure that the correct version of SQL Server is installed across all your terminals.

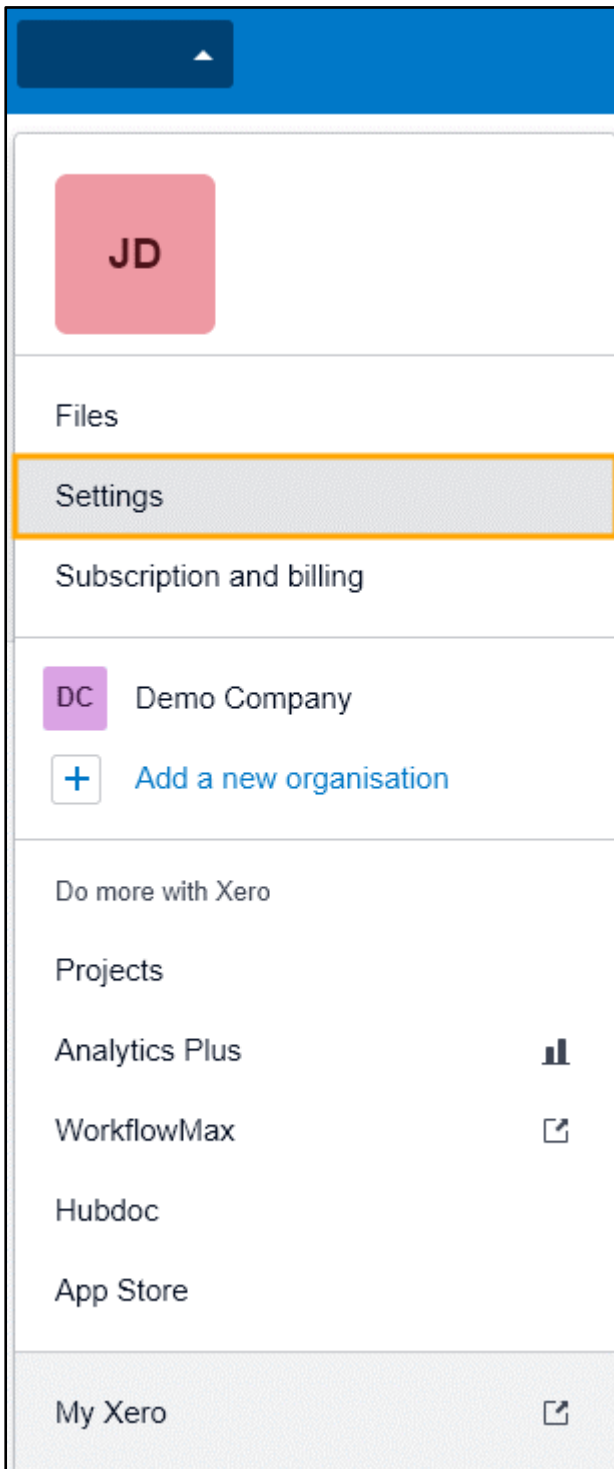
To ensure all POS Terminals and Back Office systems can support SQL Server 2019, ensure that all systems are currently running a 64-bit version of Windows. If all terminals are not running a 64-bit Operating System, select “Download SQL Server 2014” during the Framework installation.

Accounting

IP-2560 – Xero Accounting – Support for default Due Date for Customer Invoices

This function adds support for the Default Due Date Payment Terms that are configured in Xero when exporting Customer Invoices from Idealpos into Xero. Previous to this change, the Default Due Date Payment Terms configured in Xero were not used when exporting Customer Invoices from Idealpos into Xero; the original Invoice Date would be posted into Xero.

To configure this function, login to Xero > Select the Organisation Name on the top-left corner > Settings



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Select "Invoice Settings"

Organisation settings

General

- [Organisation details](#)
Address, logo and basic financial information
- [Users](#)
Add, remove or modify users of this organisation
- [Currencies](#)
Manage the currencies your business uses
- [Connected Apps](#)
Add and manage third party connections to Xero
- [Subscription and billing](#)
Change plan and update credit card details

Features

- [Invoice settings](#)
Create branding themes for documents, add payment services and auto reminders for invoices
- [Payment services](#)
Add and manage online payment options for your sales invoices
- [Email settings](#)
Set a reply-to email address and email template content
- [Payroll settings](#)
Manage your payroll settings
- [Xero to Xero](#)
Connect with other Xero users to automate invoices and bills
- [Custom contact links](#)
Create shortcuts for your favourite Xero contacts and other tools

Select "Default Settings"

What's this?

[+ New Branding Theme](#) [Default Settings](#) [Invoice Reminders](#)

Standard Options ▾

Page: **A4** Margins Top: **1.35cm** Bottom: **1.00 cm** Address Padding: **1.00 cm**
Font: **Arial Unicode ms, 9pt**

Contact Details
Juan Duan Upload Logo

Show:

- Tax number
- Column headings
- Tax column
- Unit price and quantity
- Payment advice cut-away
- Logo
- Discount
- Logo align: Right
- Tax exclusive
- Tax subtotals by tax rates over 0%
- Currency conversion as a single tax total

Headings: DRAFT INVOICE, TAX INVOICE, TAX INVOICE, CREDIT NOTE, STATEMENT, DRAFT PURCHASE ORDER, PURCHASE ORDER, DRAFT QUOTE, QUOTE, REMITTANCE ADVICE, RECEIPT

Payment service: None

Terms & Payment Advice (Invoice and Statement):
(None added)

Terms (Quotes):
(None added)

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The Default Settings window will appear.
Configure your Payment Terms as required, then press "Save".

Default Settings

Payment Terms

These terms will be used to set the default Due Dates on all bills and sales invoices. You can always override these terms when you create bills and sales invoices. You can also set custom payment terms for individual contacts.

Bills Default Due Date (Optional)
Due day(s) after the bill date

Sales Invoices Default Due Date (Optional)
Due day(s) after the invoice date

Automatic Sequencing

Define the number to be used when creating your next invoice, credit note or purchase order. The number will automatically increment with each new document you create.

Invoice Prefix	Next Number
<input type="text" value="INV-"/>	<input type="text" value="0001"/>
Credit Note Prefix	
<input type="text" value="CN-"/>	
Purchase Order Prefix	Next Number
<input type="text" value="PO-"/>	<input type="text" value="0001"/>
Quote Prefix	
<input type="text" value="QU-"/>	<input type="text" value="0001"/>

Show Outstanding Bills

Include a link on online invoices to show all outstanding bills for a contact.

Quote Expiry Date

Due of the following month

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Customer Invoices will be exported to Xero when one or more Account Customers have made a purchase on Account and the following steps have been completed:

- An End of Shift is performed on the POS
- End Sales Period is run via Back Office > Accounting > End Sales Period
- Sales Reconciliation is run via Back Office > Accounting > Sales Reconciliation

Note that all Customer Invoices from Idealpos are exported to Xero under a single Debtor called "POS Debtor".

After the transactions have been exported, Customer Invoices will appear in Xero under Business > Invoices. The "Due Date" will be set as per the Default Settings that were configured further above:

Screenshot of the Xero Invoices page. The page title is "Invoices" under "Sales overview". There are buttons for "New Invoice", "New Credit Note", "Send Statements", and "Import". Below these are filters for "All", "Draft (0)", "Awaiting Approval (0)", and "Awaiting Payment (1)". There are also buttons for "Print", "Email", "Deposit", and "Copy to..." with the text "No items selected". The main table has columns: Number, Ref, To, Date, Due Date, and Over. A row is visible with Number 669002, Ref (empty), To POS Debtor, Date 30 Aug 2021, and Due Date 9 Sep 2021. The Due Date cell is highlighted with an orange border.

<input type="checkbox"/>	Number	Ref	To	Date	Due Date	Over
<input type="checkbox"/>	669002		POS Debtor	30 Aug 2021	9 Sep 2021	

Back Office

IP-4007 – New Backoffice UI Design

In Idealpos v8, the Backoffice has had a UI Design overhaul.

Buttons on most screens have been moved from the bottom of the screen over to the left-hand side.

As part of the design overhaul, the colour scheme in the Idealpos application has been changed from the Charcoal-Grey colour to Navy-Blue, with a few light Mandarin-Orange accents also being used. This colour scheme change includes changes to popup prompts and POS Screen buttons.

A bullet-point list of changes is listed below:

- Back Office screens now occupy the entire screen resolution (except for the main Back Office window which can be run at either the traditional 1024x768 windowed state, or maximised to occupy the entire screen)
- Buttons have been moved from the bottom of the screen to the left-hand side
- Colour scheme changed from Charcoal-Grey to Navy-Blue
- The Idealpos logo on the top-left corner of each screen can be pressed to close the screen and return to the Back Office Dashboard.

To experience the User Interface changes, open any screen from the Back Office.

For this example, we will demonstrate the change on the Stock Items grid as well as the Financial Report, however, most screens have been overhauled, with only some screens retaining their previous layout (such as Global Options).

Go to: Back Office > File > Stock Control > Stock Items.

The Stock Items grid is displayed.

All buttons that used to appear at the bottom of the Stock Items grid are now located on the left-hand side.

Code	Description	Kitchen	Department	Plu Code	Scan Code	Standard Cost	Average Cost
101001	EGGS ON TOAST	EGGS ON TOAST	BREAKFAST	0		2.50	2.50
101002	BACON & EGGS	BACON & EGGS	BREAKFAST	0		3.00	3.00
101003	EGGS BENEDICT	EGGS BENEDICT	BREAKFAST	0		4.50	4.50
101004	AVOCADO ON TOAST	AVOCADO ON TOAST	BREAKFAST	0		5.00	5.00
101005	BAKED BEANS & TOAST	BAKED BEANS & TOAST	BREAKFAST	0		2.00	2.00
101006	PANCAKES	PANCAKES	BREAKFAST	0		2.00	2.00
101007	CANADIAN PANCAKES	CANADIAN PANCAKES	BREAKFAST	0		3.50	3.50
101008	WAFFLES	WAFFLES	BREAKFAST	0		2.50	2.50
101009	WAFFLES CHOCOLATE	WAFFLES CHOCOLATE	BREAKFAST	0		3.00	3.00
101010	JAM & TOAST	JAM & TOAST	BREAKFAST	0		1.20	1.20
101011	BIG BREAKFAST	BIG BREAKFAST	BREAKFAST	0		5.20	5.20
101012	BAKED BEANS & TOAST*COPY*	BAKED BEANS & TOAST	BREAKFAST	0		2.00	2.00
102001	EXTRA BACON	EXTRA BACON	BREAKFAST MODS	0		0.65	0.65
102002	EXTRA EGG	EXTRA EGG	BREAKFAST MODS	0		0.23	0.23
102003	EXTRA TOAST	EXTRA TOAST	BREAKFAST MODS	0		0.10	0.10
102004	EXTRA AVOCADO	EXTRA AVOCADO	BREAKFAST MODS	0		0.50	0.50
102005	EXTRA CHEESE	EXTRA CHEESE	BREAKFAST MODS	0		0.20	0.20
102006	EXTRA SALMON	EXTRA SALMON	BREAKFAST MODS	0		1.00	1.00
102007	EXTRA JAM	EXTRA JAM	BREAKFAST MODS	0		0.10	0.10
102008	EXTRA MAPLE	EXTRA MAPLE	BREAKFAST MODS	0		0.50	0.50
102009	EXTRA CREAM	EXTRA CREAM	BREAKFAST MODS	0		0.10	0.10
102010	EXTRA SAUCE	EXTRA SAUCE	BREAKFAST MODS	0		0.10	0.10
102011	EXTRA HASHBROWN	EXTRA HASHBROWN	BREAKFAST MODS	0		0.05	0.05
102012	WHITE	WHITE	BREAKFAST MODS	0		0.00	0.00
102013	MULTI-GRAIN	MULTI-GRAIN	BREAKFAST MODS	0		0.00	0.00
102014	WHOLEMEAL	WHOLEMEAL	BREAKFAST MODS	0		0.00	0.00
102015	GLUTEN FREE	GLUTEN FREE	BREAKFAST MODS	0		0.25	0.25
102016	TURKISH	TURKISH	BREAKFAST MODS	0		0.20	0.20
102017	BAGEL	BAGEL	BREAKFAST MODS	0		0.20	0.20
103001	GARLIC BREAD	GARLIC BREAD	LUNCH	0		1.50	1.50
103002	COB LOAF	COB LOAF	LUNCH	0		1.80	1.80
103003	SOUP OF THE DAY	SOUP OF THE DAY	LUNCH	0		2.20	2.20
103004	FISH OF THE DAY	FISH OF THE DAY	LUNCH	0		3.40	3.40
103005	STEAK SPECIAL	STEAK SPECIAL	LUNCH	0		6.50	6.50
103006	CHICKEN SPECIAL	CHICKEN SPECIAL	LUNCH	0		4.80	4.80

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Another example is the Financial Report.

Go to: Back Office > Reports > Financial Report.

The View and Print buttons are now located on the top-left corner of the window.

The screenshot shows the 'Financial Report' window in the idealpos application. The window has a dark blue sidebar on the left with the 'idealpos' logo at the top, and 'View' and 'Print' buttons below it. The main content area is light gray and contains several filter sections:

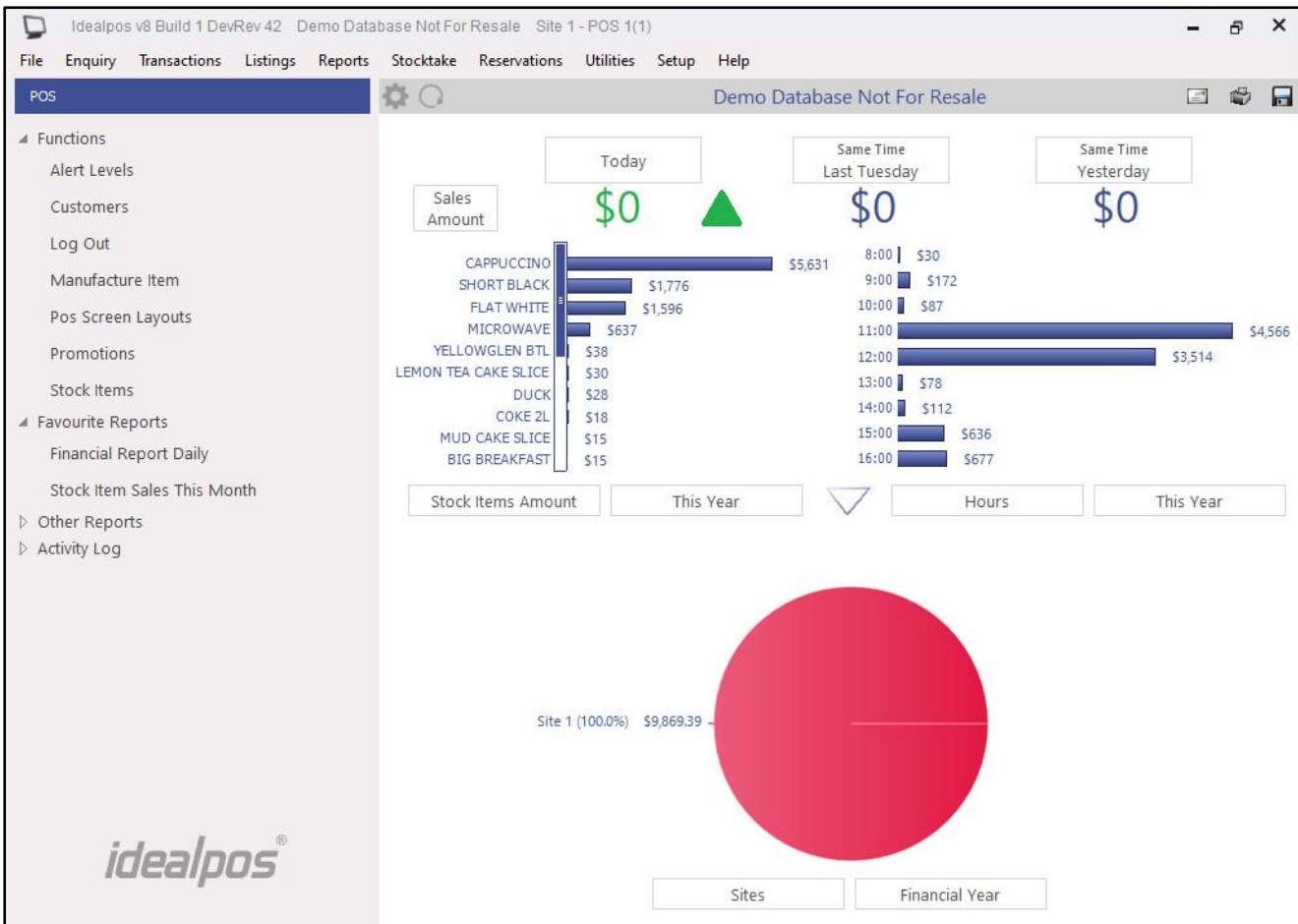
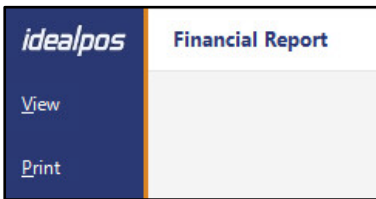
- Date Range:** A dropdown menu set to 'Today', and two date pickers for 'From' (06 Jul 2021 00:00:00) and 'To' (06 Jul 2021 23:59:59).
- Group by:** Three radio buttons: 'POS System' (selected), 'Clerk', and 'Location'.
- Options:** A checkbox labeled 'Calculate Sales Categories above 10'.
- Selection Range:** Four rows of input fields with 'to' separators and arrow buttons: 'Clerk Code', 'Clerk Name', 'Location', and 'POS System'.

At the bottom left of the sidebar, the text 'POS 2 v8 Build 1' is visible. A close button (X) is in the top right corner of the window.

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Pressing the Idealpos logo on the top-left corner of the screen will close the window and return to the Back Office Dashboard. This behaviour applies to all screens that display the Idealpos logo on the top-left corner.



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IP-4008 – ‘Save Changes’ Prompt when exiting any Add/Modify screen

This function triggers a ‘Save Changes’ prompt to be displayed when exiting any Add/Modify screen. The screen is only triggered when changes have been made and the Add/Modify window is closed without saving the changes.

To trigger this function, open any Add/Modify screen, make changes and close the window without pressing “Save”. For the below example, go to: File > Sales > Departments.

Press the “Add” button on the top-left corner > Enter a Description > Select a Sales Category > Press “X”.

The screenshot shows the 'idealpos' interface for adding a new department. The title bar reads 'Departments Add New'. The 'Code' field contains '1'. The 'Description' field is highlighted with an orange box and contains 'TOILETRIES'. The 'Sales Category' dropdown is also highlighted with an orange box and is set to 'RETAIL'. The 'Print Group' dropdown is set to 'X'. Below these are fields for 'GL Code' and two checkboxes: 'Sales Prompt / Inhibit Pre-paid Sales' and 'Adult Restriction'. There are two main sections: 'Direct Department Sale' and 'Stock Item Points'. The 'Direct Department Sale' section includes 'Price' and 'Rate' fields, and checkboxes for 'Non-Turnover', 'Scale', 'GST' (checked), 'GST-Free', and three 'Not Defined' options. The 'Stock Item Points' section includes checkboxes for 'Inhibit Points Accrual', 'Inhibit Purchase with Points', and 'Print Promotional Tickets'. A 'Save' button is visible on the left sidebar. The bottom left corner shows 'POS 2 v8 Build 1'. A yellow arrow points to the 'X' button in the top right corner.

The Save Changes prompt is displayed.

Press “Yes” to save your change, or press “No” to abandon any changes.

This prompt will be displayed when creating a new record and not saving changes as well as modifying an existing record and not saving changes. If a window is closed without any changes being made, the prompt will not appear.

The dialog box is titled 'Save Changes?'. It has a dark blue background and contains two buttons: 'Yes' and 'No'.

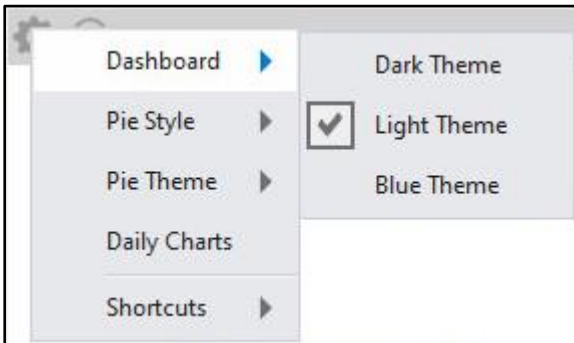
IP-4218 – Dashboard Themes

This function adds the ability to select from one of three colour schemes (Dark Theme, Light Theme and Blue Theme) change the appearance of the Back Office Dashboard.

Dashboard Themes are system/terminal specific which means that setting the Dashboard Theme on one PC or terminal will not set the same theme for all other networked Idealpos systems. The selected Dashboard Theme applies to all Users of the terminal.

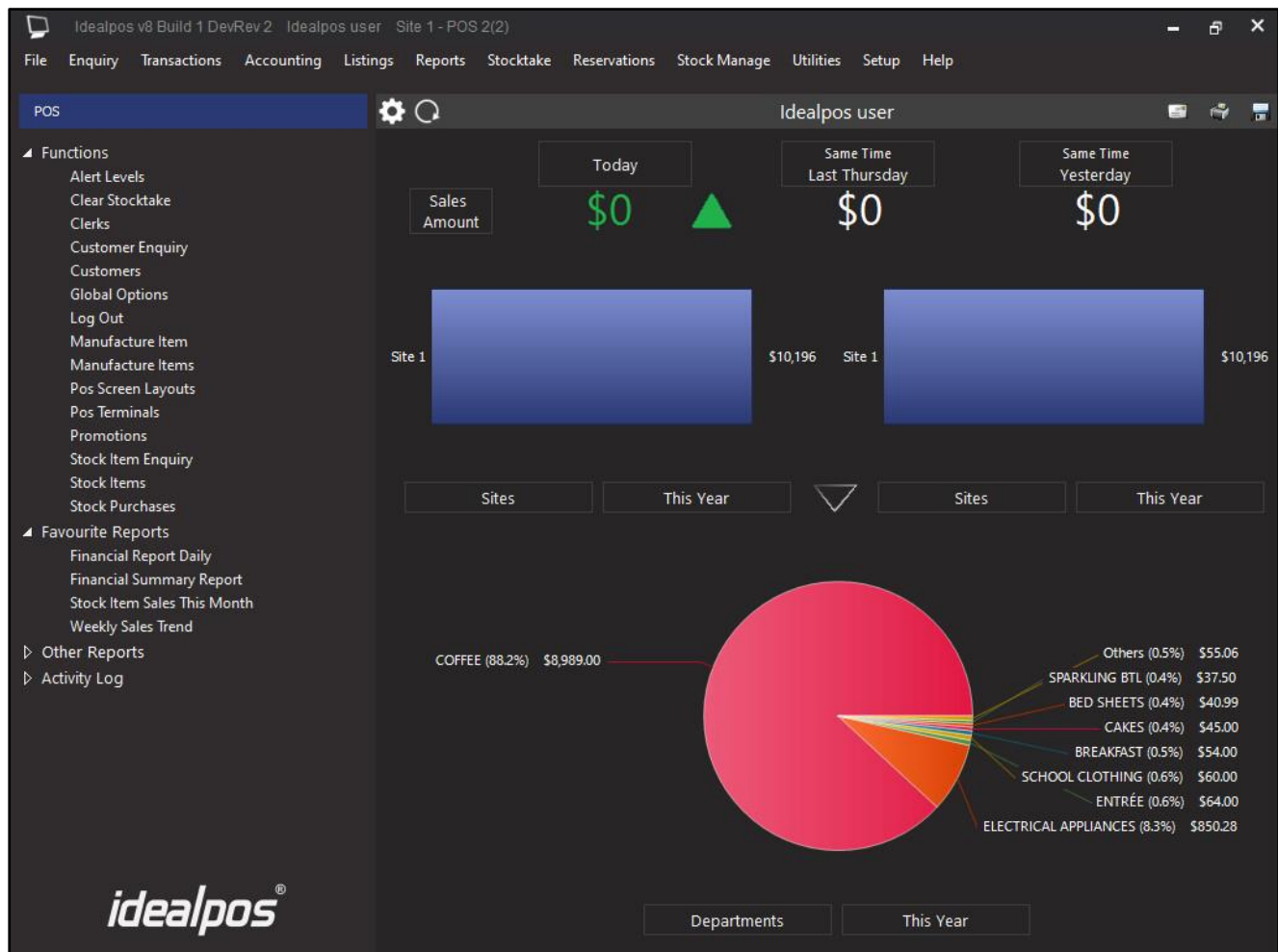
To select the Dashboard Theme, click on the Cog icon shown at the top of the Dashboard, then from the Dashboard Theme menu, select the desired theme.

The currently selected theme will contain a checkbox next to it:



Each of the available themes are illustrated below.

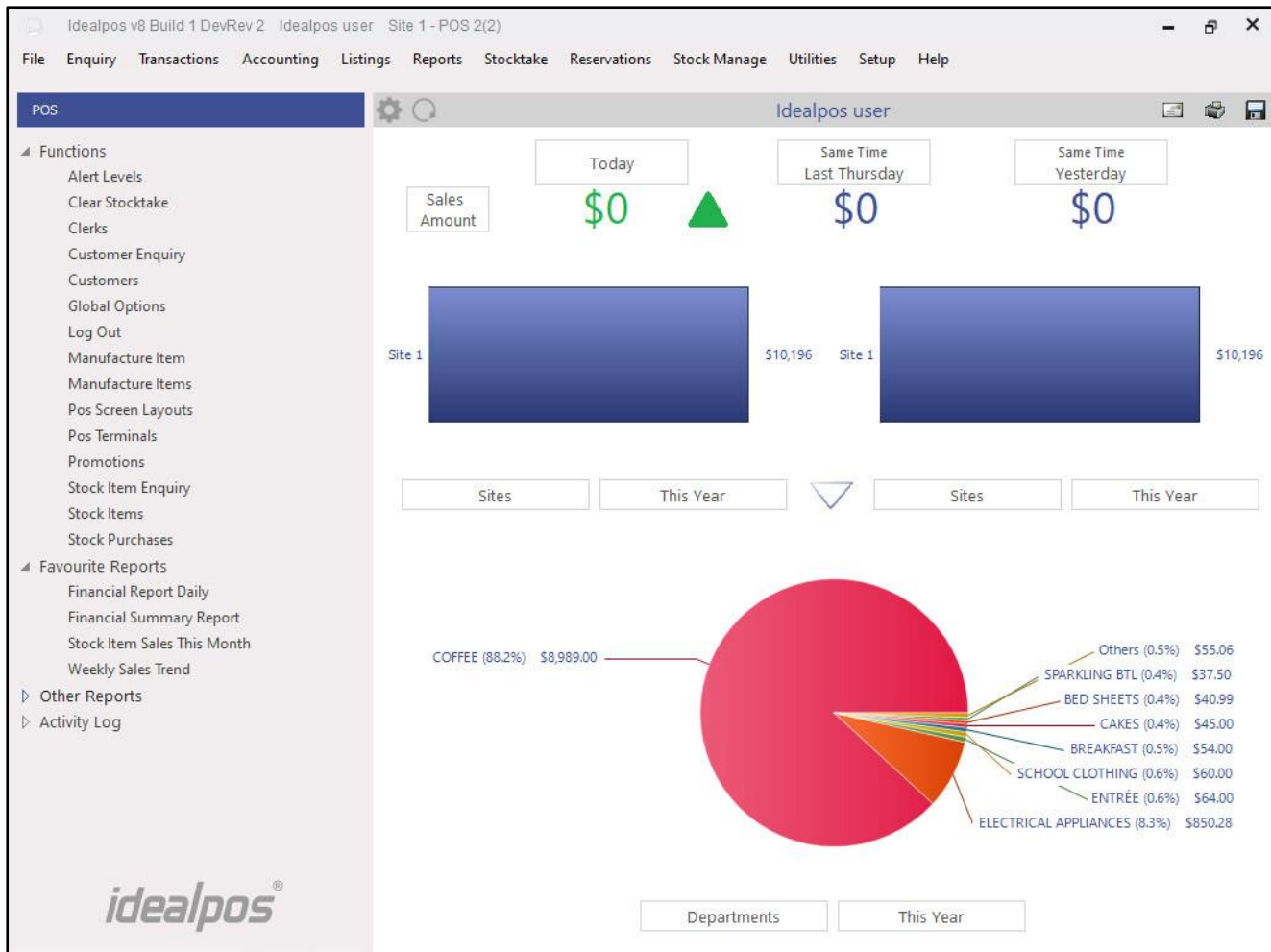
Dark Theme:



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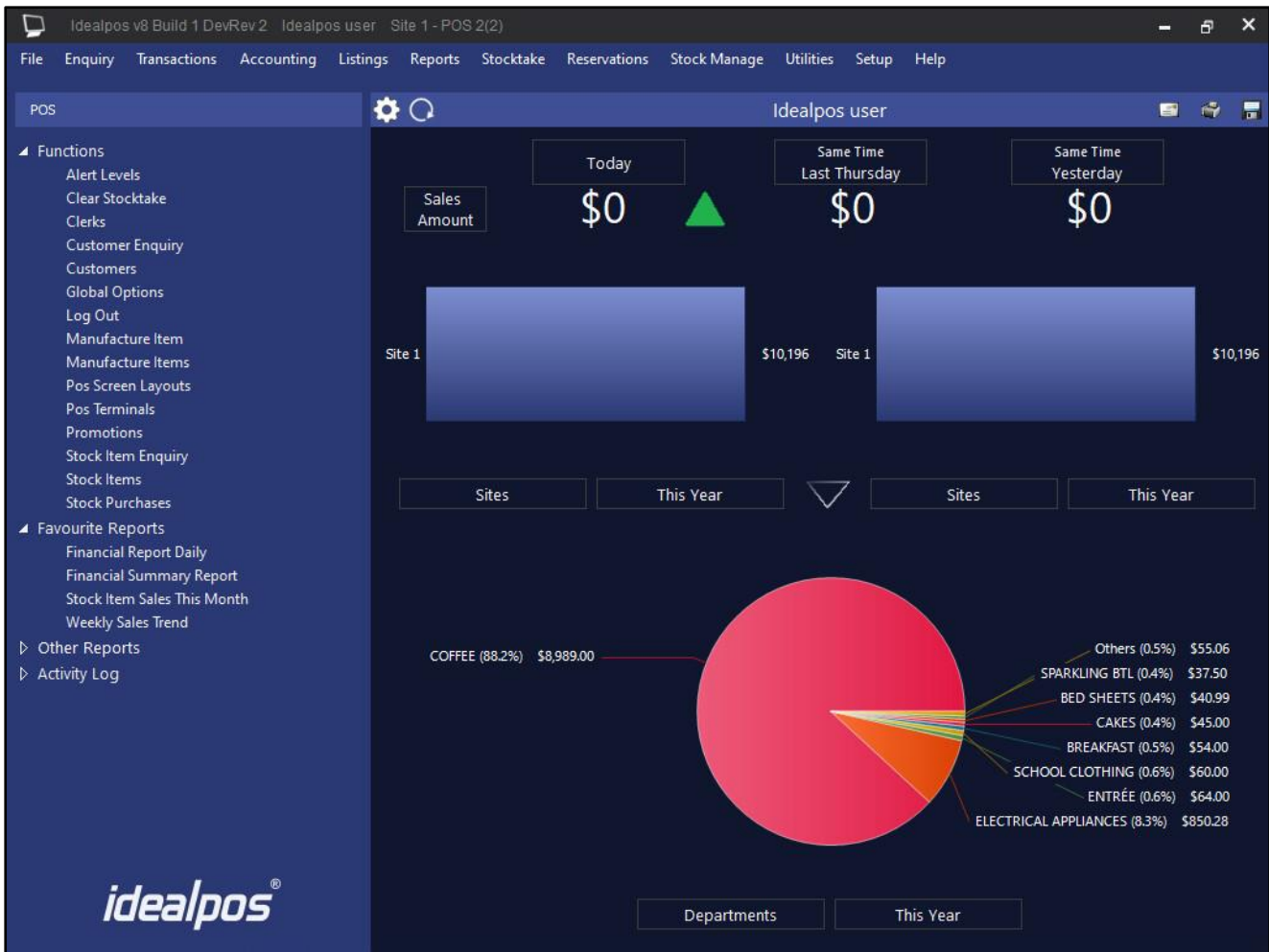
Light Theme (the same theme as the traditional Idealpos V7 Dashboard):



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Blue Theme:



IP-4219 – Shortcut Groups

This function adds support for Shortcut Groups to the Back Office Dashboard.

Shortcut Groups can be created and any new or existing shortcuts can then be saved or moved into those groups.

Shortcut Groups are stored globally and individual Shortcuts are site specific.

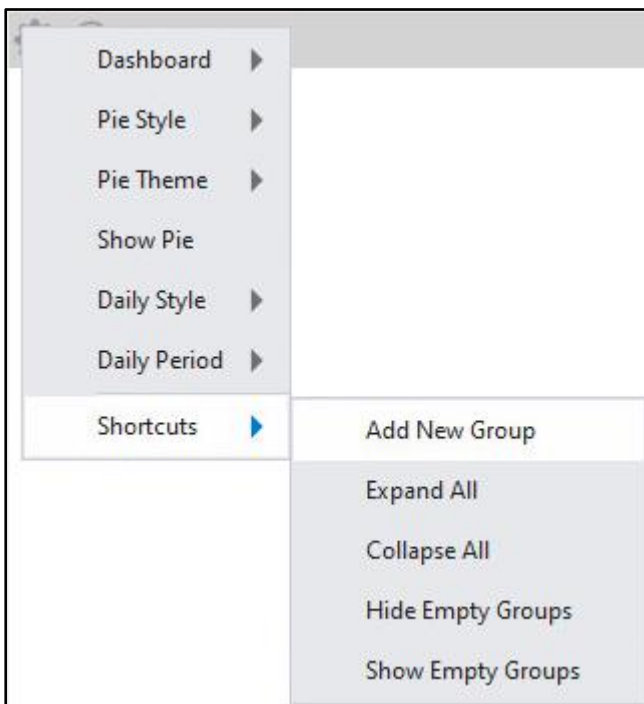
When a Shortcut Group is created in Site 1, the Shortcut Group will also appear at other sites. However, the Shortcuts that have been saved into the Shortcut Groups will only be site specific.

This function is especially useful for customers that have numerous shortcuts on their Back Office Dashboard and find it difficult to find a particular shortcut in the list.

In order to use this function, the Back Office must be able to view the Dashboard.

Go to the Back Office.

At the top of the Dashboard, press the cog icon, then select Shortcuts > Add New Group:



An "Add New Shortcut Group" window will appear.

Enter the name of the Shortcut Group that you want to create, then press the "+" button to the left-hand side of the field to create the Shortcut Group.

For this example, we have created a Shortcut Group called "Sales Reports".



The Add New Shortcut Group window will remain open after the Shortcut Group has been created.

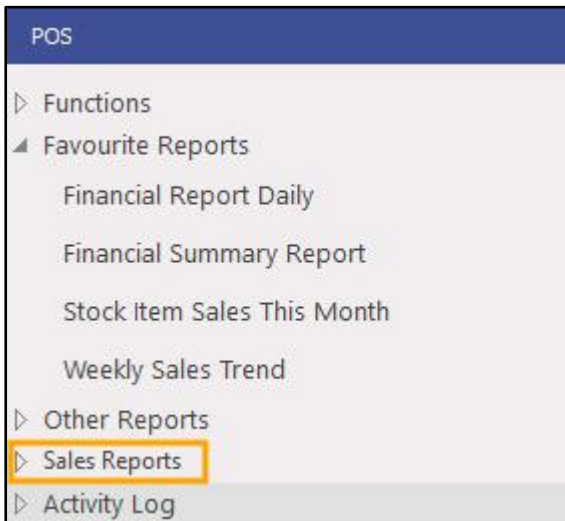
Create additional Shortcut Groups if required.

Press the "X" button on the top-right corner of the window once you have created your required Shortcut Groups.

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The newly created Shortcut Group(s) will appear on the left-hand side of the Back Office Dashboard in the Shortcut area:



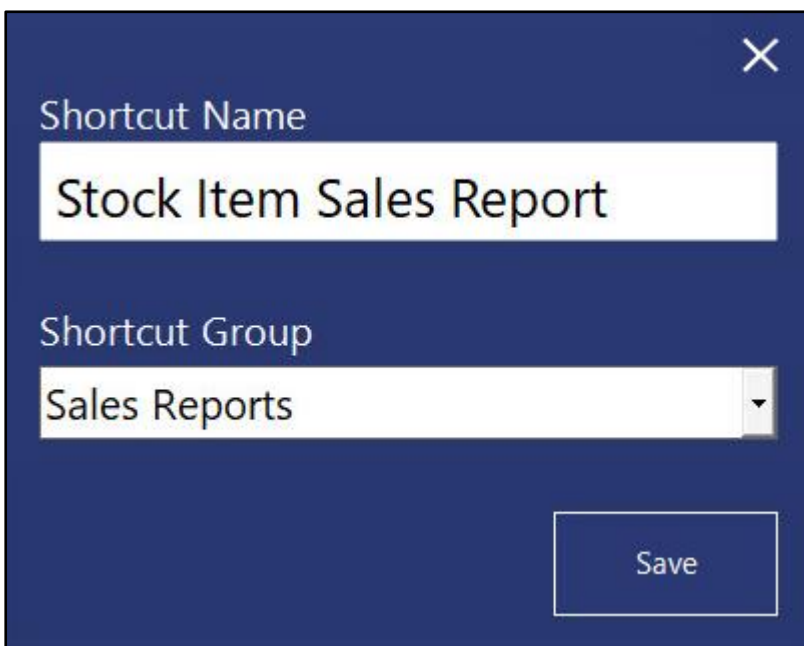
Now that the Shortcut Group(s) have been created, you can either move existing Shortcuts into the Shortcut Groups, or you can save Report Shortcuts into the Shortcut Groups.

To save a Report Shortcut into the Shortcut Group, run any report as required from the Reports menu in the Back Office.

For this example, we have run the Stock Item Sales Report from the Reports > Sales > Stock Item Sales menu.

Select the "S" shortcut button on the top-right corner of the report.

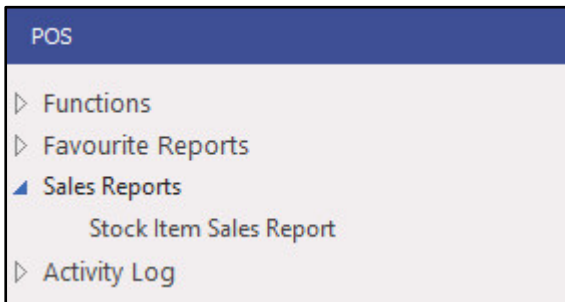
Enter a name for the Shortcut and select the Shortcut Group that you want to save the report into.



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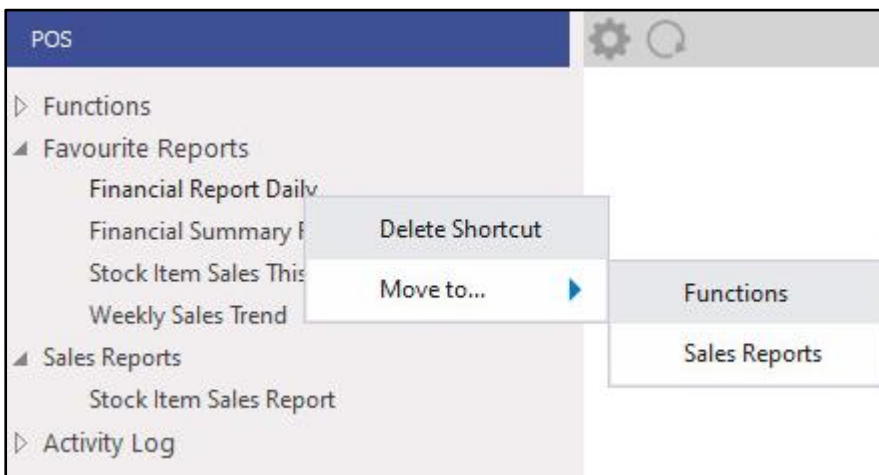
You may then close the Report and return to the Back Office Dashboard. The newly created Shortcut will appear within the Shortcut Group.



The above process can be repeated to save additional shortcuts into the required Shortcut Groups.

If you already have existing Shortcuts that you want to move into a Shortcut Group, right click on the Shortcut from the Back Office Dashboard and select Move to... > Shortcut Group name.

In the below example, we have right-clicked on the Financial Report Daily Shortcut and moved to the Sales Reports Shortcut Group.



The Shortcut is then moved into the Shortcut Group as shown in the below example:



Additional functions available within Shortcuts are outlined below:

- Ability to delete Shortcuts and Shortcut Groups by right-clicking on them within the left-hand side Shortcut menu and selecting the "Delete Shortcut" option. A confirmation prompt is displayed when deleting Shortcuts/Shortcut Groups.

It is not possible to delete a Shortcut Group that still contains Shortcuts; attempting to do this will display a prompt "Cannot delete Shortcut Groups with Items.". When Shortcut Groups are in use at a Multi-Site environment,

- Ability to Expand All/Collapse All Shortcut Groups by clicking on the cog icon at the top of the Dashboard and selecting Shortcuts – Expand All/Collapse All – Selecting Expand All will expand all the Shortcut Groups so that all the Shortcuts contained within each group are visible. Selecting Collapse All will collapse all the Shortcut Groups so that all the shortcuts contained within each group are hidden/collapsed.
- Ability to Hide Empty Groups/Show Empty Groups – As Shortcut Groups are stored globally (Shortcut Groups created at Site 1 will appear in Site 2, Site 3 and so on), and individual Shortcuts are site specific, the ability to Hide and Show Empty Groups is available via the Shortcuts menu.
- Right-click on a Shortcut Group > Move to... - Right-clicking on a Shortcut Group on the left-hand side of the Back Office Dashboard will show a "Move to..." menu option. From this menu, you can move the Shortcut Group. The options available are:
 - Top – Moves the Shortcut Group to the very top of the list.
 - Up - Moves the Shortcut Group up one line.
 - Down – Moves the Shortcut Group down one line.
 - Bottom – Moves the Shortcut Group to the very bottom of the list. Note that when moving to the bottom, the Activity Log will always be the last option shown at the bottom of the list.
- Right-click on a Shortcut > Move to... - Right-clicking on a Shortcut on the left-hand side of the Back Office Dashboard will show a "Move to..." menu option. This menu will display a list of Shortcut Groups that the Shortcut can be moved to.

IP-4246 – Support for Fast Lookup Textboxes [beta]

This function adds the ability to perform a fast lookup within text fields without having to open the full listing via the ">" button. As a value is entered into the textboxes, a list of options which match the entered value will be displayed and the required option can then be selected from the list.

This functionality supports looking up data either using a numeric value (e.g. Stock Code) or a text value (e.g. the Stock Item Description).

This functionality has initially been enabled in the following reports:

- Stock Item Sales Report (Reports > Sales > Stock Item Sales)
- Stocktake Forms (Stocktake > Stocktake Forms)
- Stock Item Enquiry (Enquiry > Stock Items)

To use this function, open any of the above reports.

To demonstrate this function, we will open the Stock Item Sales Report.

Go to: Back Office > Reports > Sales > Stock Item Sales

In any of the text/numeric fields displayed within the Selection Range area of the Stock Item Sales Report window, you may enter either a text or numeric value.

The screenshot displays the 'Stock Item Sales' report window. The 'Date Range' is set to 'Today' with a date range from 10 Jun 2021 00:00:00 to 10 Jun 2021 23:59:59. The 'Optional Grouping' section includes a table with columns for 'Group Field', 'Show Group Label', 'Totals Only', and 'Totals with Group Label'. The 'Sort Order' section has radio buttons for 'Code', 'Description', 'Best', and 'Worst', and a 'Quantity' dropdown. The 'Selection Range' section has a 'Price Level' dropdown set to 'All Price Levels' and a table of fields with '>' buttons. The 'Attributes' section has a dropdown and a '+' button. The 'Tags' section has 'Show' and 'Exclude' radio buttons and a search box. The bottom left corner shows 'POS 2 v8 Build 1'.

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As you enter a value, any records that match what has been entered so far will be displayed in the list. You may then select the required entry from the list to populate the field. To select a value from the list, either click on it or use the down arrow key until the required entry has been highlighted, then press Tab or Enter.

The screenshot shows the 'Selection Range' dialog box. The 'Price Level' is set to 'All Price Levels'. The 'Code' field contains '2053'. A dropdown menu is open, listing the following items:

- 205301: COKE 1.25L
- 205302: DIET COKE 1.25L
- 205303: COKE ZERO 1.25L
- 205304: SPRITE 1.25L
- 205305: LIFT 1.25L (highlighted)
- 205306: DRY GINGER 1.25L
- 205307: FANTA 1.25L
- 205308: TONIC 1.25L
- 205309: SODA WATER 1.25L

Other fields include 'Description', 'Supplier', 'Department', 'Location', 'POS System', and 'Clerk', each with a right-pointing arrow. At the bottom, there are 'Attributes' dropdowns, a 'Show' radio button (selected), an 'Exclude' radio button, and a 'Tags' field.

The selected entry is then populated into the field.

The screenshot shows the 'Selection Range' dialog box after the selection. The 'Code' field now contains '205305'. The dropdown menu is closed. The other fields and options remain the same as in the previous screenshot.

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Text values can also be entered into a field to search by description.

A text description may be entered, including text entry in a code field.

E.g. Entering "Lift" into the Code field will show any items that contain a description of "Lift", and when any of these entries are selected, the Code for the selected item will be entered into the Code field.

The screenshot shows the 'Selection Range' dialog box. The 'Price Level' is set to 'All Price Levels'. The 'Code' field contains 'Lif'. A dropdown menu is open, showing a list of items with their codes and descriptions. The item 'LIFT 1.25L (205305)' is highlighted. Other items in the list include 'LIFT CAN (205105)', 'LIFT 600ML (205205)', 'LIFT 2L (205405)', 'LIFT 15L POSTMIX (205505)', 'LIFT (205605)', and 'LIFT (234005)'. The 'Attributes' section has two dropdown menus and a plus sign. The 'Show' radio button is selected, and the 'Exclude' radio button is unselected. The 'Tags' field is empty.

A code of "205305" for the Stock Item "LIFT 1.25L" is entered into the Code field.

The screenshot shows the 'Selection Range' dialog box. The 'Price Level' is set to 'All Price Levels'. The 'Code' field now contains '205305'. The dropdown menu is closed, and the list of items is empty. The 'Attributes' section has two dropdown menus and a plus sign. The 'Show' radio button is selected, and the 'Exclude' radio button is unselected. The 'Tags' field is empty.

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Once the required criteria have been entered into the Selection Range, run the report by pressing the "View" button on the top-left corner of the window.

idealpos Stock Item Sales [S] [X]

View (highlighted with yellow box and arrow)

Print

Save Defaults

POS 2
v8 Build 1

Date Range
Today [v] From 10 Jun 2021 00:00:00 [v] To 10 Jun 2021 23:59:59 [v]

Optional Grouping

Group Field	Show Group Label	Totals Only	Totals with Group Label
Department [v]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
[v]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
[v]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
[v]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
[v]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
[v]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Sort Order

Code
 Description
 Best Quantity [v]
 Worst

Show Stock Items
 Group by Sell Price
 Unit Price is Price 1
 Hide Unit Price/Tax
 Portrait
 Consolidate Variants

Selection Range

Price Level All Price Levels [v]
 Code 205305 [v] to 205305 [v]
 Description [v] to [v]
 Supplier [v] to [v]
 Department [v]
 Location [v]
 POS System [v]
 Clerk [v]

Attributes [v] [v] +
 Show [X]
 Exclude
 Tags [v]

The report is displayed:

idealpos user
POS 2(2)

Stock Item Sales Report

Printed 10/06/2021 10:21:53
 10 Jun 2021 00:00:00 to 10 Jun 2021 23:59:59
 Code 205305 to 205305
 Page 1 of 1

	Unit Price inc	Unit Tax	Quantity	Sales			Discounts	Gross inc
				Nett ex	Tax	Nett inc		
SOFT DRINK								
205305 LIFT 1.25L	2.00	0.18	10.0000	18.18	1.82	20.00	0.00	20.00
			10.0000	18.18	1.82	20.00	0.00	20.00
			10.0000	18.18	1.82	20.00	0.00	20.00

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IP-4254 – Shortcuts – Support for multiple shortcuts of the same Function

This feature adds the ability to create multiple shortcuts to the same function.

When pressing the "S" button (on the top-right corner of the window) to create a Shortcut, Idealpos will display a prompt allowing you to choose a Shortcut name as well as a Shortcut Group where you'd like to create the Shortcut. Prior to this change, it was only possible to create a single shortcut for each function.

The ability to create multiple shortcuts for the same function can be used when you want to specify a filter within the shortcut function (such as creating a Shortcut for Journal History Last Week and another Shortcut for Journal History Last Month).

There is no additional configuration to enable this functionality.

To use this function, open any function from the Idealpos menu such as Journal History Enquiry.

Go to: Enquiry > Journal History Enquiry

Select the Period from the period dropdown, then press the "S" button on the top-right corner.

Audit	POS	Date	Customer
695	2	Fri 18 Jun 2021 15:46:01	
694	2	Fri 18 Jun 2021 15:33:29	
693	2	Fri 18 Jun 2021 15:29:33	
692	2	Fri 18 Jun 2021 15:13:54	
691	2	Fri 18 Jun 2021 12:18:25	
2121	1	Fri 18 Jun 2021 10:10:53	
2120	1	Fri 18 Jun 2021 10:08:19	
690	2	Thu 17 Jun 2021 10:10:45	
689	2	Wed 16 Jun 2021 16:06:30	

Item	Amount	Customer
18 Jun 2021 15:46:01 Audit 695,2		Jeremy
202001 CAPPUCCINO	3.50	Jeremy
202002 FLAT WHITE	3.50	Jeremy
202004 SHORT BLACK	3.00	Jeremy
10011002 Eftpos Surcharge	1.00	Jeremy
GST Subtotal	7.50	Jeremy
GST Amount	0.68	Jeremy
Not Defined Subtotal	3.50	Jeremy
Not Defined Amount	0.00	Jeremy
EFTPOS	11.00	Jeremy
Change	0.00	Jeremy

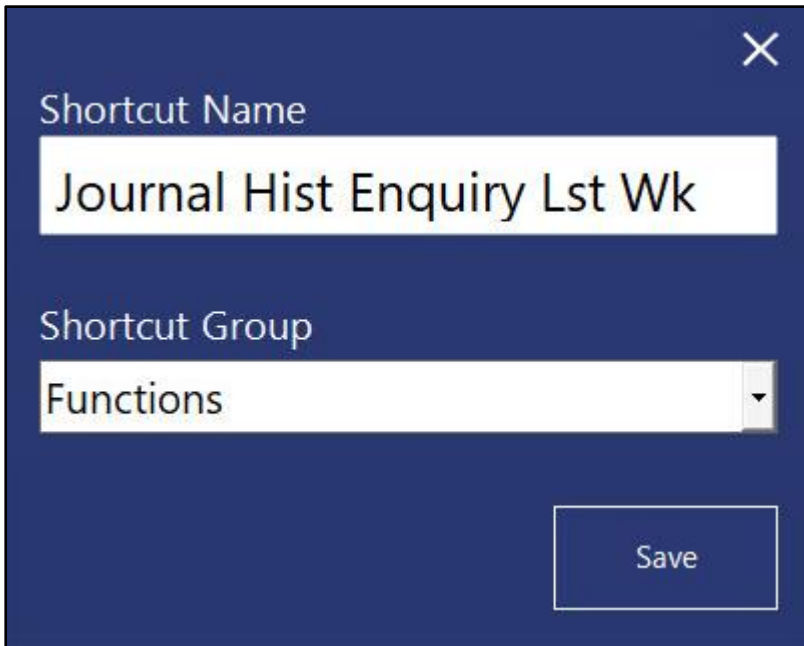
idealpos Update History

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A window is displayed prompting you to enter a Shortcut Name and Shortcut Group to save the shortcut to. Enter a name that resembles the function along with the Period that was selected, then press "Save".

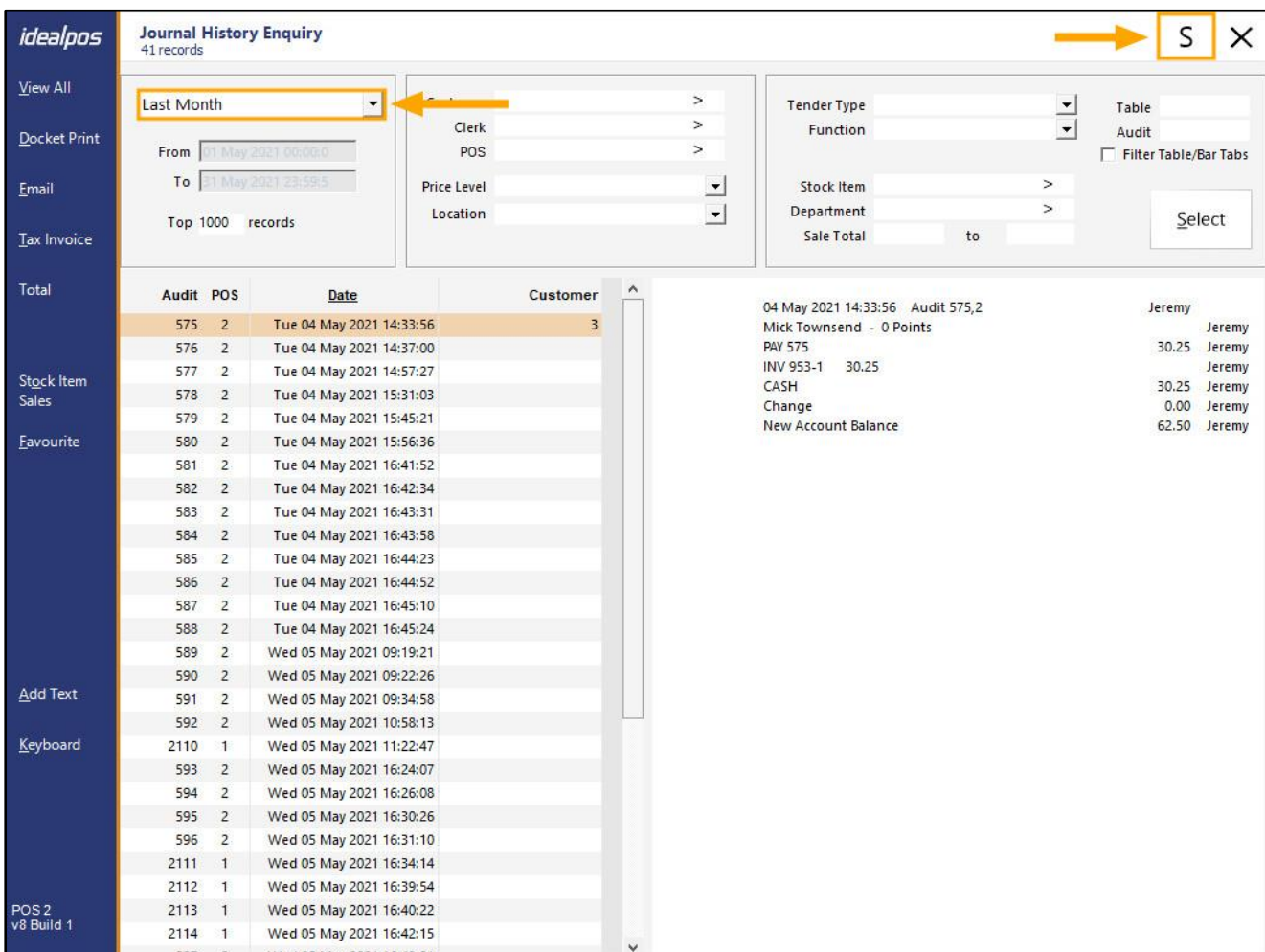
Note that the Shortcut Name is limited to a maximum of 27 characters, so you may need to abbreviate the Shortcut Name description.

E.g. Journal Hist Enquiry Lst Wk



The screenshot shows a dialog box titled "Shortcut Name" with a close button (X) in the top right corner. The "Shortcut Name" field contains the text "Journal Hist Enquiry Lst Wk". The "Shortcut Group" dropdown menu is set to "Functions". A "Save" button is located at the bottom right of the dialog.

Once the Shortcut has been saved, select another period, then press the "S" button to create another Shortcut.



The screenshot shows the "Journal History Enquiry" screen with 41 records. The "Last Month" dropdown is highlighted with a yellow box and an arrow. The "S" button in the top right corner is also highlighted with a yellow box and an arrow. The screen displays a list of transactions with columns for Audit, POS, Date, and Customer. A summary table is visible on the right side of the screen.

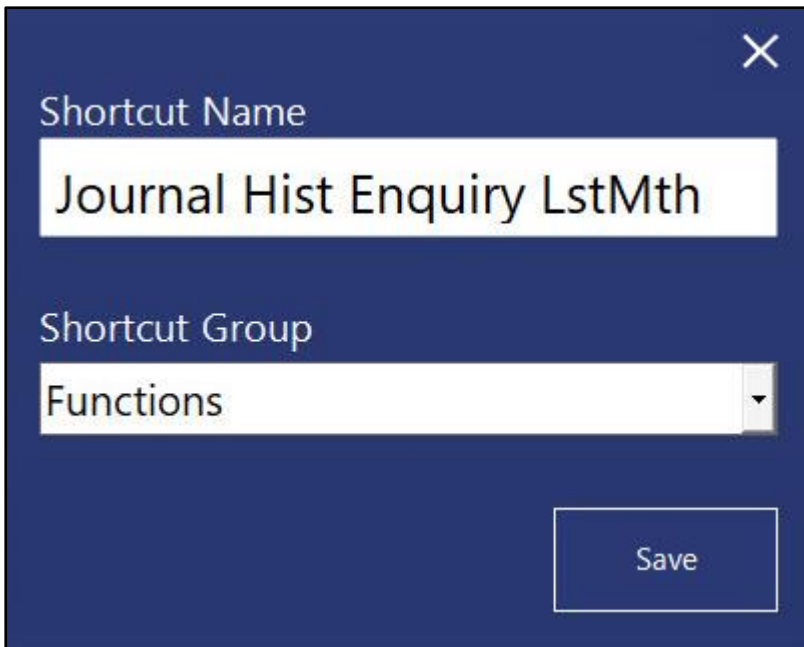
Audit	POS	Date	Customer
575	2	Tue 04 May 2021 14:33:56	3
576	2	Tue 04 May 2021 14:37:00	
577	2	Tue 04 May 2021 14:57:27	
578	2	Tue 04 May 2021 15:31:03	
579	2	Tue 04 May 2021 15:45:21	
580	2	Tue 04 May 2021 15:56:36	
581	2	Tue 04 May 2021 16:41:52	
582	2	Tue 04 May 2021 16:42:34	
583	2	Tue 04 May 2021 16:43:31	
584	2	Tue 04 May 2021 16:43:58	
585	2	Tue 04 May 2021 16:44:23	
586	2	Tue 04 May 2021 16:44:52	
587	2	Tue 04 May 2021 16:45:10	
588	2	Tue 04 May 2021 16:45:24	
589	2	Wed 05 May 2021 09:19:21	
590	2	Wed 05 May 2021 09:22:26	
591	2	Wed 05 May 2021 09:34:58	
592	2	Wed 05 May 2021 10:58:13	
2110	1	Wed 05 May 2021 11:22:47	
593	2	Wed 05 May 2021 16:24:07	
594	2	Wed 05 May 2021 16:26:08	
595	2	Wed 05 May 2021 16:30:26	
596	2	Wed 05 May 2021 16:31:10	
2111	1	Wed 05 May 2021 16:34:14	
2112	1	Wed 05 May 2021 16:39:54	
2113	1	Wed 05 May 2021 16:40:22	
2114	1	Wed 05 May 2021 16:42:15	
507	2	Wed 05 May 2021 16:46:04	

Date	Audit	Customer	Amount	Customer
04 May 2021 14:33:56	Audit 575,2			Jeremy
	Mick Townsend - 0 Points			Jeremy
	PAV 575		30.25	Jeremy
	INV 953-1 30.25			Jeremy
	CASH		30.25	Jeremy
	Change		0.00	Jeremy
	New Account Balance		62.50	Jeremy

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Enter a name for the Shortcut, select the Shortcut Group, then press "Save".

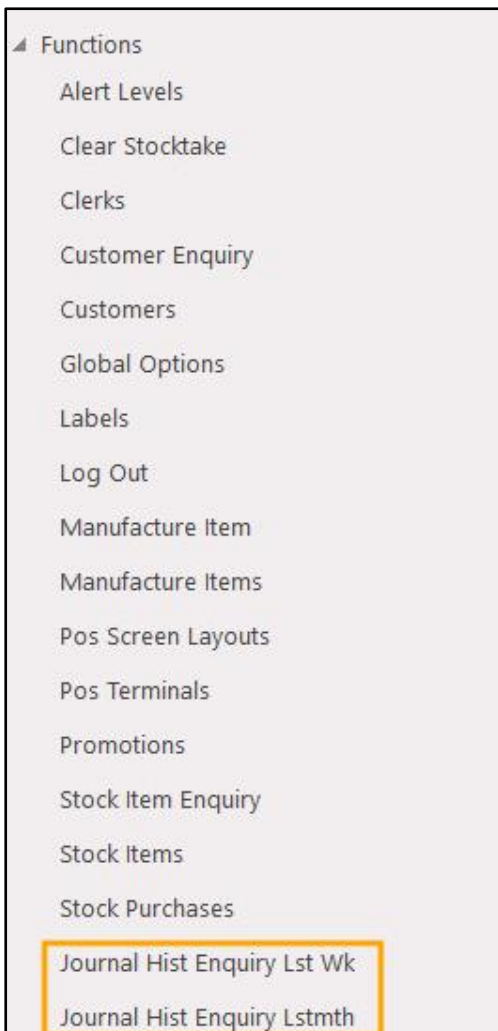


A screenshot of a dialog box with a dark blue background. At the top right is a white 'X' icon. Below it, the text 'Shortcut Name' is followed by a white text input field containing 'Journal Hist Enquiry LstMth'. Below that, the text 'Shortcut Group' is followed by a white dropdown menu showing 'Functions'. At the bottom right is a white rectangular button with the text 'Save'.

Close the Journal History Enquiry window.

The new Shortcuts will appear within the Shortcut Group that was selected above. When selecting either of these shortcuts, the period that was selected will be used to display the Journal History Enquiry.

The period is always relative to the current date on which the shortcut is being run.



idealpos Update History

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IP-4370 – Dashboard KPI – Support for Profit Amount

This function adds the ability to display the Profit Amount on the Back Office Dashboard.

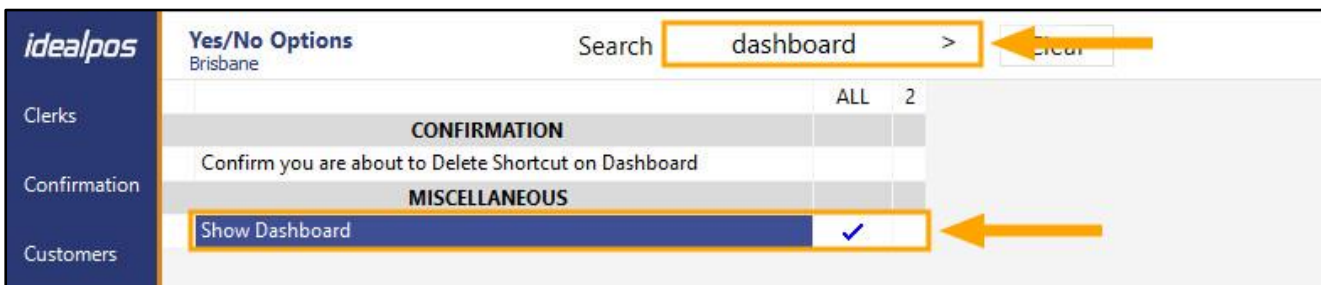
The Profit Amount is the amount of profit that has been made after deducting tax and cost of items that have been sold. The Profit Amount shown on the Back Office Dashboard is the same as the \$ Margin shown in the Financial Report.

To use this function, ensure that the terminal is licensed for the Back Office Module and the Dashboard is configured to appear.

The option to Show Dashboard is available by going to:

Back Office > Setup > Yes/No Options > Search: dashboard

Enable "Show Dashboard"

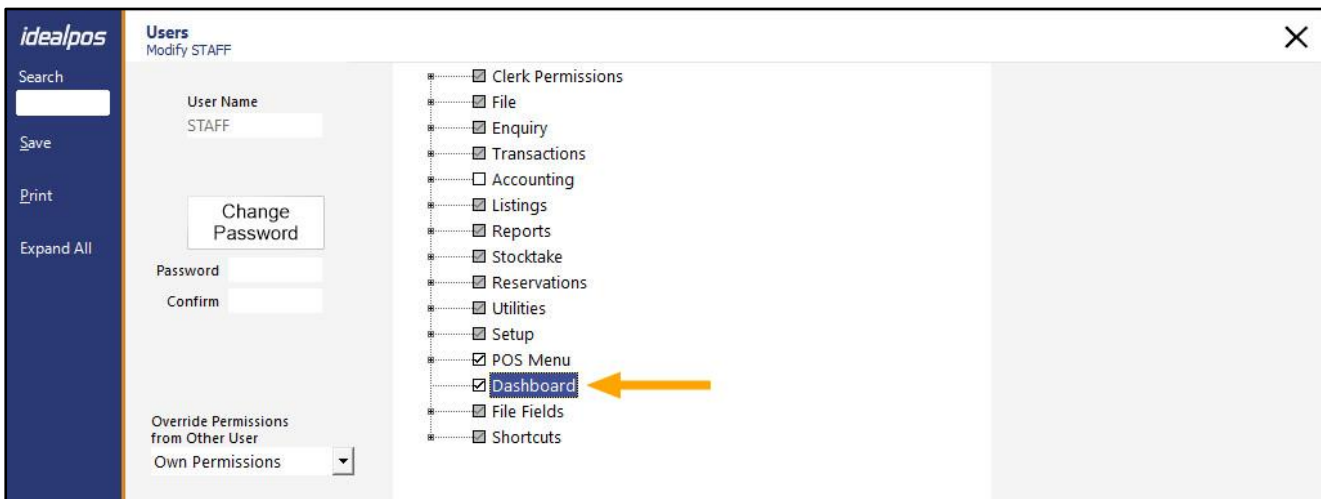


The User which is logged into Idealpos will also need to have permission to view the Dashboard.

This can be configured or confirmed by going to: Back Office > Setup > Users.

Select a User > Modify.

Ensure that the "Dashboard" option is enabled as shown in the example below:



idealpos Update History

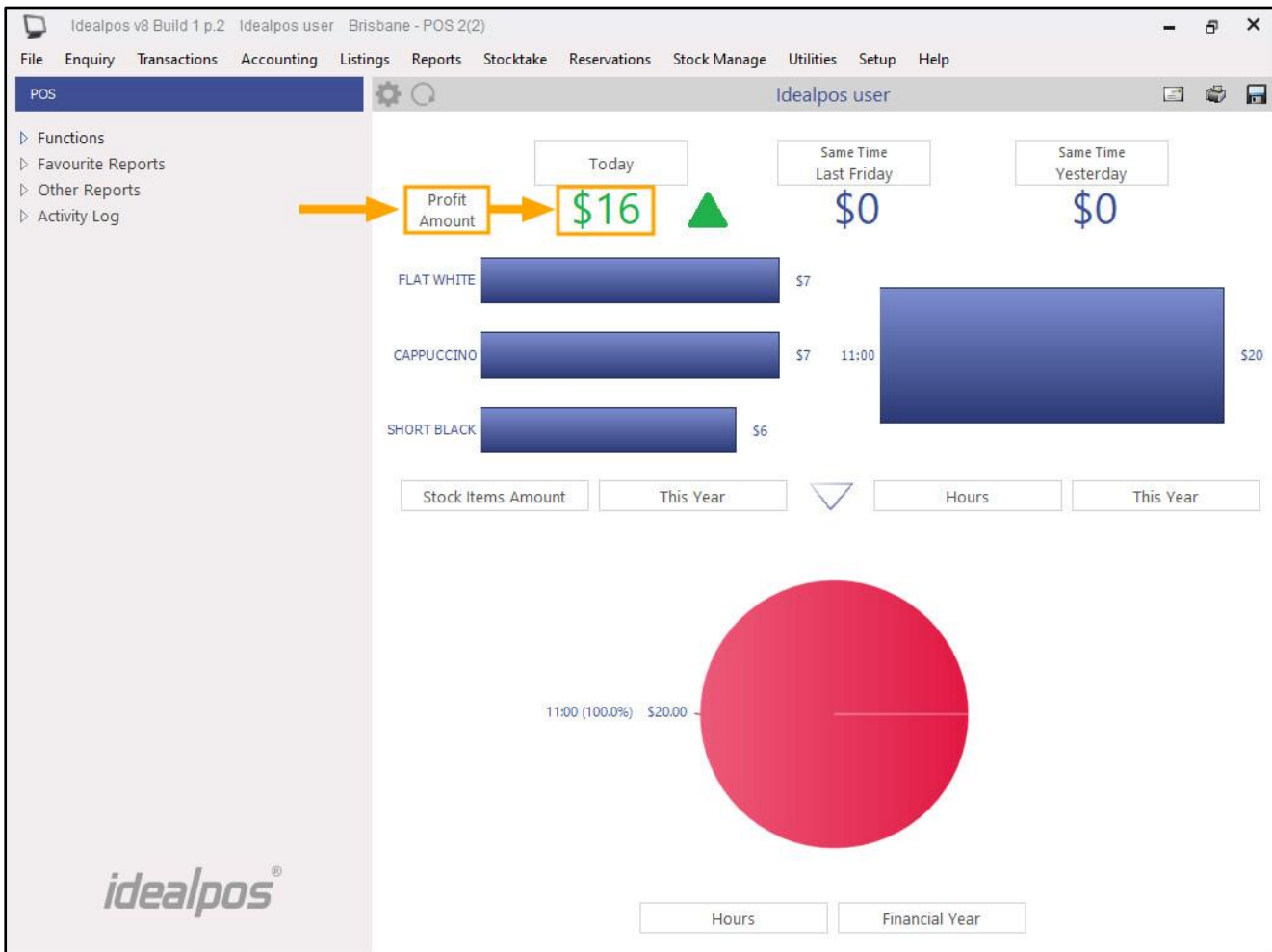
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When viewing the Dashboard, the first button towards the top-left corner of the Dashboard graphs/charts can be pressed repeatedly to toggle the data that is represented on the chart.

The button will toggle between the following options (with the new option that was added in this change being "Profit Amount")...

- Sales Amount
- **Profit Amount**
- Number of Sales

The below example shows the new Profit Amount option selected, showing a Profit Amount of \$16:



idealpos Update History

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The Period buttons can also be pressed to toggle between the following period options:

Today:



This Week:



This Month:



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The Profit Amount shown on the Dashboard (whole amount without decimal or rounding) is the same as the amount shown in the Financial Report - \$ Margin.



Reports > Financial > Financial Report > Date Range: Today > View

Idealpos user POS 2(2)		Financial Report		Printed 20/08/2021 09:41:55 Page 1 of 1	
20 Aug 2021 00:00:00 to 20 Aug 2021 23:59:59					
	Quantity	Amount		Quantity	Amount
Gross Sales	6.00	20.00	Transactions	2	
ST Discount	0	0.00	Sales	2	
ST Discount 2	0	0.00	No-Sales	0	
ST Discount 3	0	0.00			
ST Discount 4	0	0.00	Average \$ per Sale		\$10.00
Subtotal Surcharges	0	0.00	Refunds	0	0.00
Promotions	0	0.00	Voids	0	0.00
Item Discount	0	0.00	Void Mode Transactions	0	0.00
Item Disc 2	0	0.00	Void Entire Sales		0.00
Item Disc 3	0	0.00	Non-Turnover Sales	0	0.00
Item Disc 4	0	0.00			
% Item Surcharges	0	0.00	Cost of Sales		\$1.59
Points Redemptions	0	0.00	\$ Margin		\$16.59
NETT Sales (incl. tax)		20.00	Gross Profit (%)		91.3
Rounding		0.00	<u>Tax Amounts</u>		
TIPS IN	0	0.00			
PAID IN	0	0.00	GST	1.82	20.00
GV PURCHASE	0	0.00			
CREDIT NOTE	0	0.00			
TIPS OUT		0.00			
PAID OUT		0.00			
PO 3		0.00			
PO 4		0.00			
		20.00			
			GST Reportable Sales		20.00

Docket Printing

IP-4281 – Docket Receipts – Trading Name and Business ID locked in Header/Footer

This functionality forces the Trading Name and Business ID to be printed at the bottom of the receipt if the Trading Name and/or Business ID have not been entered into the Receipt Header or Receipt Footer.

If the Trading Name and/or Business ID do not match the details stored in the Licence Gateway, Idealpos will print the Trading Name and Business ID at the bottom of the receipt.

Each set of data is treated independently, meaning that only the missing or mismatching Trading Name or Business ID will be printed at the bottom of the receipt.

E.g. The Trading Name in the Receipt Header/Footer matches the Licence Gateway, but the Business ID is missing, then only the Business ID will be printed at the bottom of the receipt.

When entering your Trading Name into the Receipt Header/Footer, the name must be the same as the details stored in the Licence Gateway. For the Business ID, you are permitted to enter the ID without spaces, enter spaces between each set of numbers within the ID or you may place a hyphen "-" between each set of numbers.

To ensure that your Receipt Header/Footer contains your Trading Name and Business ID, go to:

Back Office > Setup > Licence Gateway

Note down the Trading Name and the Business ID as shown in the below example:

The screenshot shows the 'licence gateway' application window. On the left, the 'Settings' section includes fields for Connection Mode (Online Licence), Username, Password, Computer Name (DESKTOP-EFHC6FR), and Computer Signature, with a 'Disconnect' button below. On the right, the 'Registered Licence Information' section displays: POS Number: 2, Company Name: Idealpos user, Trading Name: Idealpos user (highlighted with a yellow box and arrow), Contact Name, ABN 34091801204 (highlighted with a yellow box and arrow), Phone Number, and Address. Below this is a table with columns: Product, Ver, Options, POS #, Scr#, Type, and Expiry(D/M/Y). The table contains several rows of data, some highlighted in green and blue. At the bottom right, there are three status indicators: 'This terminal' (green), 'Other terminals' (blue), and 'Available' (white). At the bottom of the window are buttons for 'Activate', 'Deactivate', 'Reload', and 'OK'.

idealpos Update History

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Close the Licence Gateway, then go to: Setup > POS Terminals > Select POS Terminal > Modify

In the "Receipt Printer" tab, ensure that your Trading Name and Business ID have been entered into either the Header or Footer.

In the below example, the Trading Name "Idealpos User" has been entered into the Header field.

The characters @# have also been appended to the start of the name to centre and bold the text when printed to a receipt printer.

The Business ID has been entered and the @ character has been appended to the start of the ID to centre it when it is printed on the receipt.

The screenshot displays the 'Pos Terminals' configuration window with the 'Receipt Printer' tab selected. The interface is divided into several sections:

- Receipt Printer:** Type is set to 'Epson TM-T88' and Connection is '-Kitchen'. A 'Test' button is present.
- Second Receipt Printer:** 'Use Second Receipt Printer' is unchecked. Type is 'None' and Connection is empty. 'Test' button is present. Below are fields for 'Start Chr 0', 'End Chr 0', and 'Live Output'.
- Account Footer:** A large empty text area for account-related footer text.
- Redeem Points Footer:** A large empty text area for redeem points footer text.
- Receipt Header/Footer:** This section is highlighted with an orange border. It contains:
 - Header Logo Graphic (pictures folder): IdealposHeaderLogo.jpg
 - Header text: @#Idealpos User, @1/212 Curtin Ave West, @Eagle Farm QLD 4009, @Australia
 - Footer text: @TAX INVOICE, @34-091-801-204
 - Footer text: *indicates taxable supply
 - Footer text: @Powered by Idealpos
- Bill Header/Footer (if different from Receipt):** Similar to the Receipt section, but currently empty.

At the bottom right, there is a 'Copy from POS 1' button.

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When both the Trading Name and Business ID have been entered correctly, these details are not printed at the bottom of the receipt:

Idealpos User	
1/212 Curtin Ave West	
Eagle Farm QLD 4009	
Australia	
TAX INVOICE	
34-091-801-204	
#000724-2 Jeremy 28-Jun-2021 13:44:16	
-----BEVERAGE-----	
CAPPUCCINO*	\$3.50
7g Coffee	
2x Sugar Sachets	
1x Napkin	
120mL Milk	
FLAT WHITE*	\$3.50
SHORT BLACK*	\$3.00

TOTAL	\$10.00

GST Subtotal	\$10.00
GST Amount	\$0.91
CASH	\$10.00
FOOD TOTAL	\$0.00
BEVERAGE TOTAL	\$10.00
Other Categories TOTAL	\$0.00
724-2*indicates taxable supply	
Powered by Idealpos	

If the Trading Name and/or Business ID are either missing from the Receipt Header/Receipt Footer or the details entered into the Receipt Header/Footer do not match the Licence Gateway, the correct details will be printed at the bottom of the receipt as shown in the example below:

IDEALPOS	
1/212 Curtin Ave West	
Eagle Farm QLD 4009	
Australia	
TAX INVOICE	
123-456-789-11	
#000725-2 Jeremy 28-Jun-2021 13:46:57	
-----BEVERAGE-----	
CAPPUCCINO*	\$3.50
7g Coffee	
2x Sugar Sachets	
1x Napkin	
120mL Milk	
FLAT WHITE*	\$3.50
SHORT BLACK*	\$3.00

TOTAL	\$10.00

GST Subtotal	\$10.00
GST Amount	\$0.91
CASH	\$10.00
FOOD TOTAL	\$0.00
BEVERAGE TOTAL	\$10.00
Other Categories TOTAL	\$0.00
725-2*indicates taxable supply	
Powered by Idealpos	
Idealpos user	
34091801204	

IP-4389 – Receipt QR Codes – Support for more embedded data

This function adds the ability to include more embedded data within receipt QR Codes.

When the new data tags have been configured and a customer scans the QR Code at the bottom of their receipt, the data will be displayed as text on their device.

This data may also be used for other purposes such as querying data from or posting data to a website as part of a URL.

E.g. [www.mycompany.com/\[CUSTOMERCODE\]](http://www.mycompany.com/[CUSTOMERCODE])

This will result in the [CUSTOMERCODE] tag being replaced with your customer's code in the website URL.

If your website supports functionality where the Customer's Code can be posted for them to lookup their details on your site, register for a competition, etc., it is possible to do this with the additional embedded data which can now be utilised. Any of the other tags can also be used as part of the website URL.

The additional data which can now be embedded into the receipt QR Code is listed as follows:

[DATE] – This will embed the date of the sale in the format of DD MMM YYYY HH:MM:SS (e.g. 01 Sep 2021 15:53:25).

[CUSTOMERCODE] – This will embed the Customer Code.

[CUSTOMERNAME] – This will embed the Customer Name.

[TAX] – This will embed the Tax amount for the sale.

[AMOUNT] – This will embed the total amount for the sale.

[ddMMyy] – This will embed the date in the short format of ddMMyy. E.g. 010921, where dd is the day of the month, mm is the month number and yy is the year.

[INV] – This will embed the invoice number. E.g. 000731-2. This is essentially the Audit Number and POS Terminal number which performed the sale (as shown in the Journal History Enquiry).

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

Enable **Print on Receipt Footer**

QR Code Size: We recommend entering a number of 4 or greater so that the QR Code is prominent on the receipt, however, you may enter any size that you desire. This may require trial and error to find a size which is suitable for your requirements.

Receipt QR Code Data: Enter the tags that you require to be embedded in the QR Code data.

Text underneath Code: There are two fields available for you to enter any text that you'd like to have printed below the QR Code. You can enter A message to your customer to scan the QR Code for more information, Scan QR Code to go to your website, etc.

Global Options
Site 1 (Site 1)

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

Print Formats

Kitchen Docket Format

- Standard
- Order by Print Group
- Order by Seat / Print Group
- Order by Print Group / Seat
- Group Instructions by Seat
 - Accumulate Items
 - Show each Instruction on its own line
 - Print Instructions/Seats in small font
 - Print Instructions Red
 - Print Instructions White on Black
 - Use Course Separator instead of Print Groups
 - Use Instruction Separator Line
 - Print Entire Order to triggered Kitchen Printers: All Items

Bill Format

- Standard
- Order by Print Group
- Order by Seat / Print Group
- Order by Print Group / Seat
- Accumulate Items
- Print Discounts White on Black

QR Codes

Receipt QR Code Data Customer Code: [CUSTOMERCODE]
Customer Name: [CUSTOMERNAME]
Long Date: [DATE]
Invoice#: IINV/1

QR Code Size: 4 (2-9)

Print on Coupons
 Print on Receipt Footer

Text underneath Code: Scan QR Code for more info!

Kitchen Printer Names

- KP 1 KITCHEN
- KP 2 BAR
- KP 3 COFFEE
- KP 4 IKM
- KP 5 Kitchen Printer 5
- KP 6 Kitchen Printer 6
- KP 7 Kitchen Printer 7
- KP 8 Kitchen Printer 8
- KP 9 Kitchen Printer 9
- KP 10 Kitchen Printer 10
- KP 11 Kitchen Printer 11
- KP 12 Kitchen Printer 12

Other Options

- Use Smallest Line Spacing
- Double Height
- Double Width
- Bold
- Member Photo on IKM Runner Dockets

Print Group Header Format - Kitchen Printers

- MAIN
- MAIN---
- MAIN
- Left-Aligned
- Centred
- Double Height
- Double Width
- Bold

Print Group Header Format - Receipts/Bills

- MAIN
- MAIN---
- MAIN
- Left-Aligned
- Centred
- Double Height
- Double Width
- Bold

Show Total Discounts on Receipt

- This Sale
Descriptor: TOTAL SAVINGS
- Customer Lifetime
Descriptor: LIFETIME SAVINGS
- User-Defined Field: Don't Use

idealpos Update History

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The below example shows each of the new tags entered into the Receipt QR Code Data field:

QR Codes

Receipt QR Code Data

Customer Code: [CUSTOMERCODE]	QR Code Size 4 (2-9)
Customer Name: [CUSTOMERNAME]	<input type="checkbox"/> Print on Coupons
Long Date: [DATE]	<input checked="" type="checkbox"/> Print on Receipt Footer
Invoice#: [INV]	

Text underneath Code Scan QR Code for more info!

QR Codes

Receipt QR Code Data

[CUSTOMERNAME]	QR Code Size 4 (2-9)
Long Date: [DATE]	<input type="checkbox"/> Print on Coupons
Invoice#: [INV]	<input checked="" type="checkbox"/> Print on Receipt Footer
Short Date: [ddMMyy]	
VAT Amount: [TAX]	
Total: [AMOUNT]	

Text underneath Code Scan QR Code for more info!

idealpos Update History

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When a sale is completed and receipt printed, the QR Code will be printed at the bottom of the receipt. The QR Code will contain the embedded data as configured above. In the event that no data is available for an entered tag (such as when a customer has not been added to the sale but the Customer Tag exists in the QR Code Data), the [CUSTOMERCODE] and [CUSTOMERNAME] tags/data will not appear in the QR Code.

The below example shows a receipt for a sale which did not have a customer entered and the resulting QR Code text.

IDEALPOS

1/212 Curtin Ave West
Eagle Farm QLD 4009
Australia

TAX INVOICE
123-456-789-11

#000732-2 Jeremy 03-Sep-2021 10:57:58

-----BEVERAGE-----

CAPPUCCINO	\$3.50
FLAT WHITE	\$3.50
SHORT BLACK	\$3.00

TOTAL \$10.00

CASH \$10.00

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


*indicates taxable supply

Powered by Idealpos

Idealpos user
34091801204



Scan QR Code for more info!

 TEXT QR CODE

Customer Code:
Customer Name:
Long Date: 03 Sep 2021 10:57:58
Invoice#: 000732-2
Short Date: 030921
VAT Amount: \$0.00
Total: \$10.00

idealpos Update History

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The below example shows a receipt for a sale which had a customer entered and the resulting QR Code text.

IDEALPOS

1/212 Curtin Ave West
Eagle Farm QLD 4009
Australia

TAX INVOICE
123-456-789-11

#000733-2 Jeremy 03-Sep-2021 10:58:58

Cst 2
Sarah Charlton

42 Wallaby Way
Hampden NSW
Ph:0765538455

-----BEVERAGE-----

CAPPUCCINO	\$3.50
FLAT WHITE	\$3.50
SHORT BLACK	\$3.00
TOTAL	\$10.00

CASH \$10.00

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

POINTS REDEMPTION VALUE \$4.00

Rewards Progress


Spend \$300 Get \$30 Coupon
Spend \$205.75 more

Tea/Coffee: Buy 10 Get 1 Free
Buy 2 more


*indicates taxable supply

Powered by Idealpos

Idealpos user
34091801204



Scan QR Code for more info!

 TEXT QR CODE

Customer Code:2
Customer Name: Sarah Charlton
Long Date: 03 Sep 2021
10:58:58
Invoice#: 000733-2
Short Date: 030921
VAT Amount: \$0.00
Total: \$10.00

IP-4391 – Saudi Arabia region – Support for QR Codes on Arabic receipts

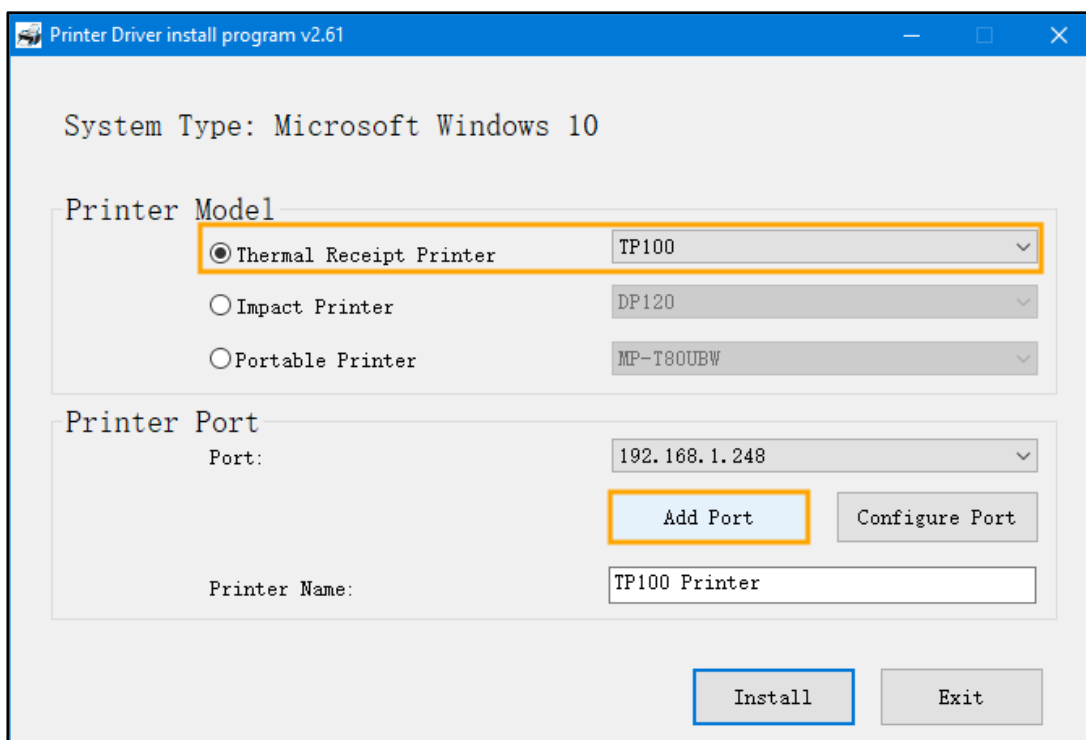
This function adds the ability to print QR Codes on receipts that contain Arabic characters. Note that this function is only applicable to the Saudi Arabia region.

In order to use this functionality, some additional configuration is required which has been summarised and outlined below:

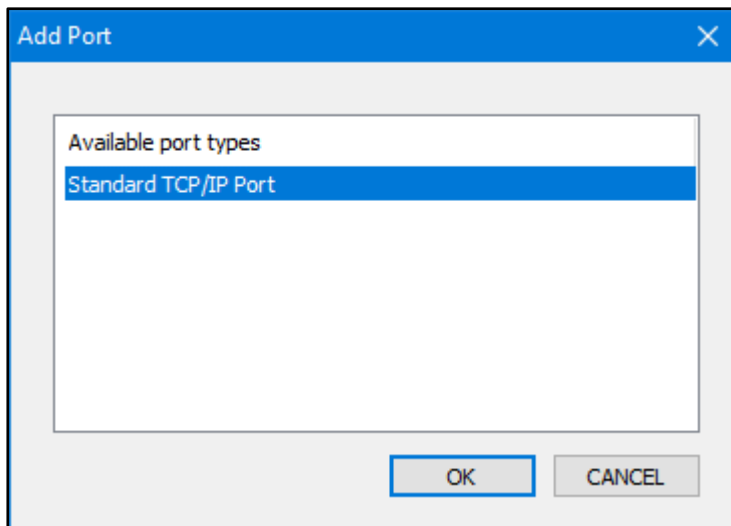
- The Receipt Printer must be installed as a Windows Printer with the correct Windows Printer Driver (do not use Generic Text Only), and the printer must be shared. You will need to obtain the relevant Windows Printer Driver for your receipt printer.
- Use the Windows Shared Printer method to add the printer via POS Terminal Setup (Back Office > Setup > POS Terminals > Select Terminal > Modify > Receipt Printer > Type = Select Printer, Connection = [\\PCIPADDRESSWherePrinterIsShared\SharedPrinterName](#))
- In the Windows Printer Driver, turn off "Automatic Paper Cut" – This results in two separate print jobs being sent to the printer then a cut to make it appear as one receipt.
- Enable "Arabic Print Style" and "Use Windows Driver" in Setup > Global Options > Printing
- QR Code data is configured via Setup > Global Options > Printing

Each of the above points are outlined in further detail as follows:

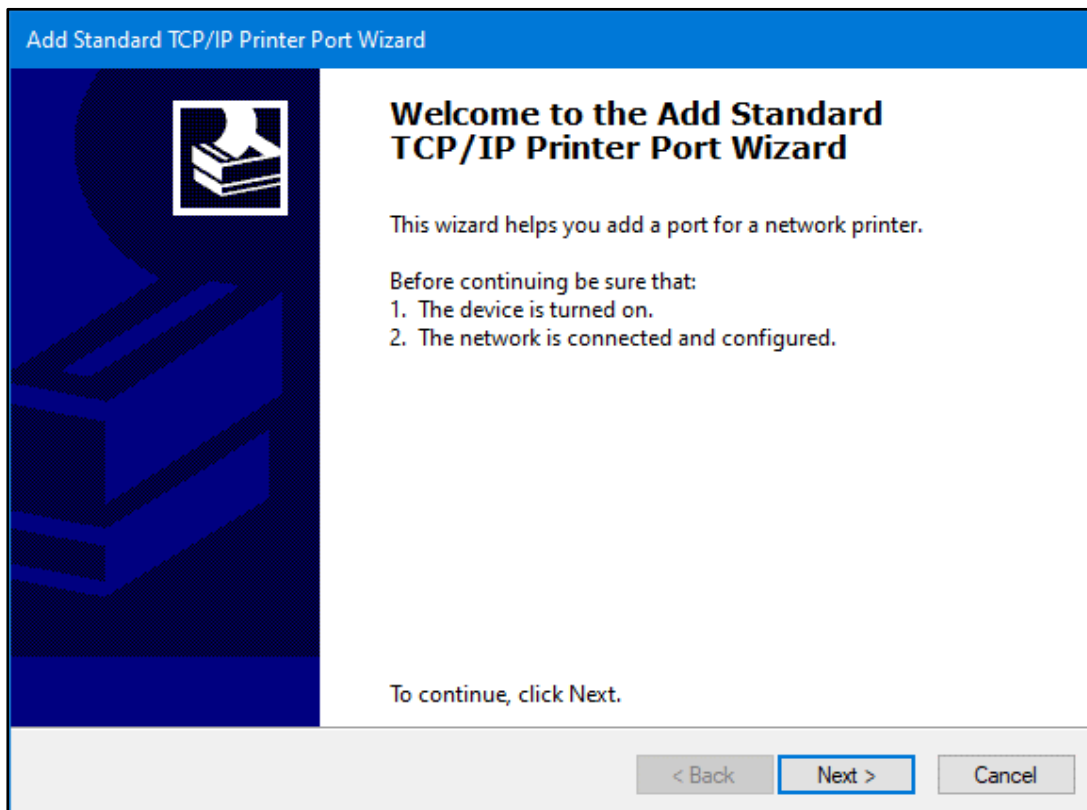
- Obtain the required Windows Printer Driver for your Receipt Printer. In this example, a TP-100 printer was used and the Printer Driver was obtained from www.senortech.com.au, however, this will differ depending on the make and model of the printer being used. The below steps are for the TP-100 Printer:
Install the TP-100 Printer Driver by pressing "Next" through the installation process. Once the Printer Driver install program is displayed, select the Printer from the dropdown box, then press the "Add Port" button as shown in the example below:



Select "Standard TCP/IP Port"



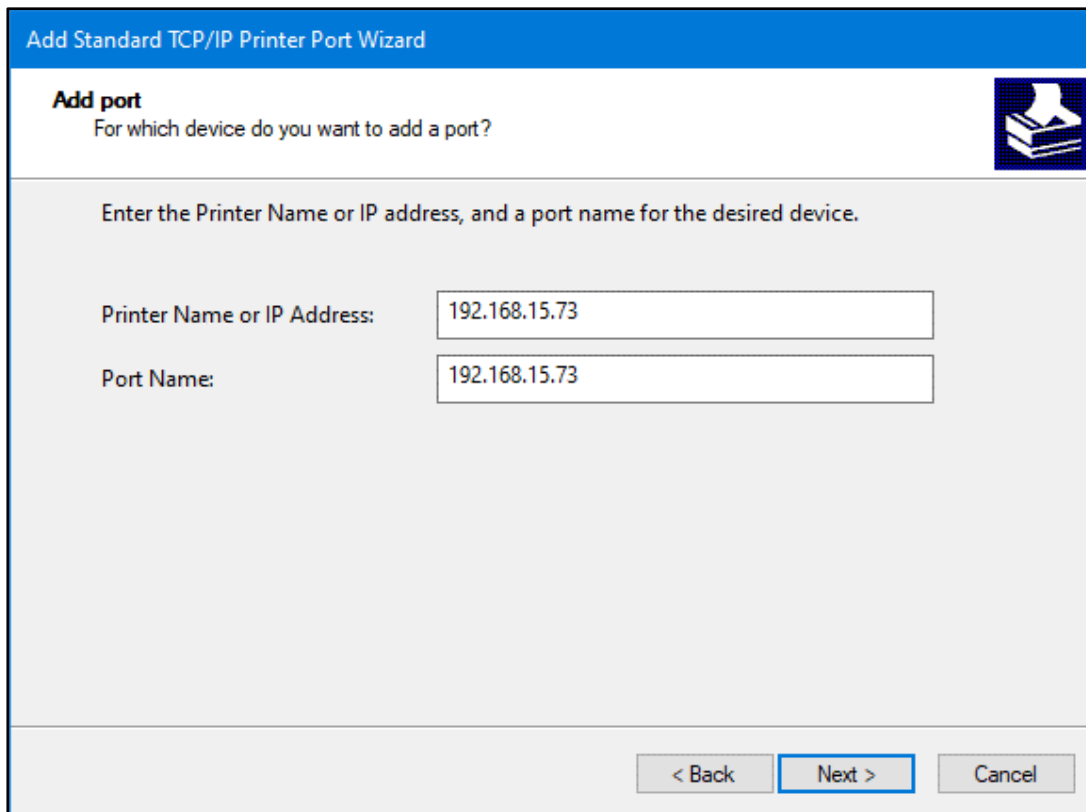
Press "Next" on the "Add Standard TCP/IP Printer Port Wizard"



idealpos Update History

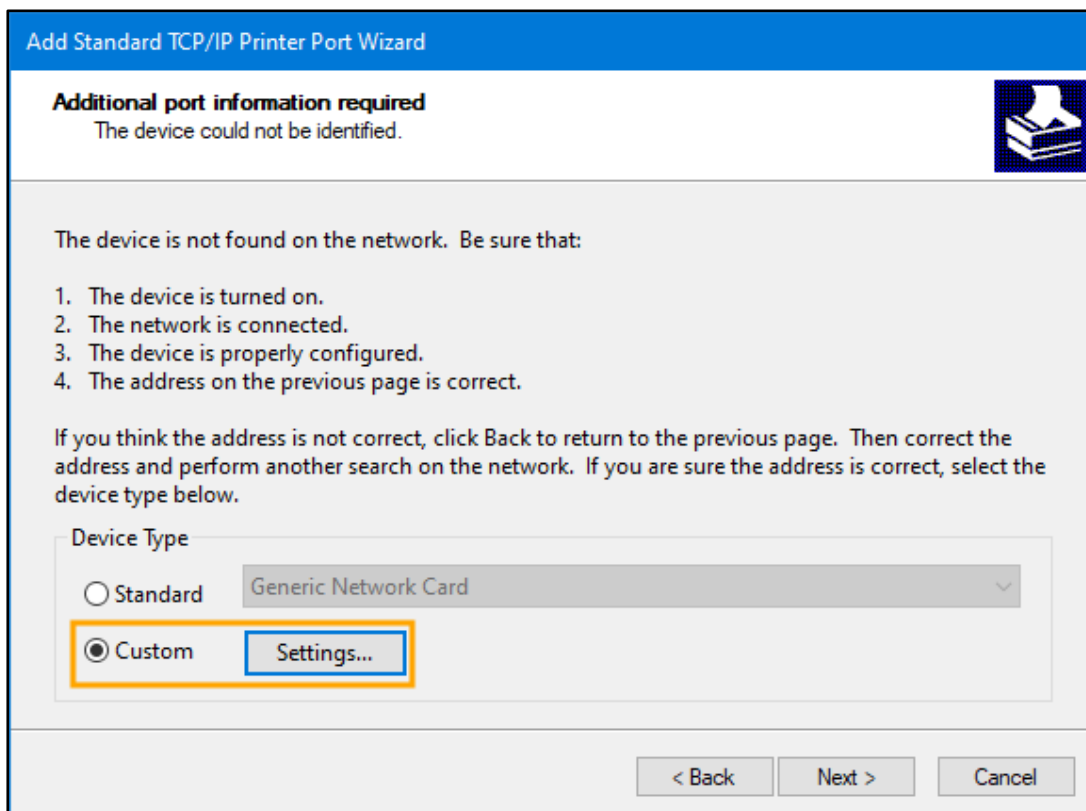
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Enter the IP Address of the printer, then press "Next"



The screenshot shows a Windows-style dialog box titled "Add Standard TCP/IP Printer Port Wizard". The main heading is "Add port" with the sub-heading "For which device do you want to add a port?". Below this, it says "Enter the Printer Name or IP address, and a port name for the desired device." There are two text input fields: "Printer Name or IP Address:" containing "192.168.15.73" and "Port Name:" also containing "192.168.15.73". At the bottom right, there are three buttons: "< Back", "Next >" (which is highlighted with a blue border), and "Cancel". A printer icon is visible in the top right corner.

It is more than likely that the device won't be found on the network. Select "Custom" and press "Settings"



The screenshot shows the same dialog box, but now the heading is "Additional port information required" with the sub-heading "The device could not be identified.". It says "The device is not found on the network. Be sure that:" followed by a numbered list: 1. The device is turned on. 2. The network is connected. 3. The device is properly configured. 4. The address on the previous page is correct. Below the list, it says "If you think the address is not correct, click Back to return to the previous page. Then correct the address and perform another search on the network. If you are sure the address is correct, select the device type below." There is a "Device Type" section with two radio buttons: "Standard" (unselected) and "Custom" (selected). The "Custom" option is highlighted with a yellow box. Next to the "Custom" radio button is a "Settings..." button, also highlighted with a blue box. A dropdown menu is visible next to the "Standard" option, showing "Generic Network Card". At the bottom right, there are three buttons: "< Back", "Next >" (disabled), and "Cancel". A printer icon is visible in the top right corner.

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A window similar to the following will be displayed. Confirm that Printer IP Address appears in the Port Name and Printer Name or IP Address fields as shown in the below example, then press OK:

Configure Standard TCP/IP Port Monitor

Port Settings

Port Name: 192.168.15.73

Printer Name or IP Address: 192.168.15.73

Protocol

Raw LPR

Raw Settings

Port Number: 9100

LPR Settings

Queue Name:

LPR Byte Counting Enabled

SNMP Status Enabled

Community Name: public

SNMP Device Index: 1

OK Cancel

Press "Next" on the "Add Standard TCP/IP Printer Port Wizard"

Add Standard TCP/IP Printer Port Wizard

Additional port information required

The device could not be identified.

The device is not found on the network. Be sure that:

1. The device is turned on.
2. The network is connected.
3. The device is properly configured.
4. The address on the previous page is correct.

If you think the address is not correct, click Back to return to the previous page. Then correct the address and perform another search on the network. If you are sure the address is correct, select the device type below.

Device Type

Standard Generic Network Card

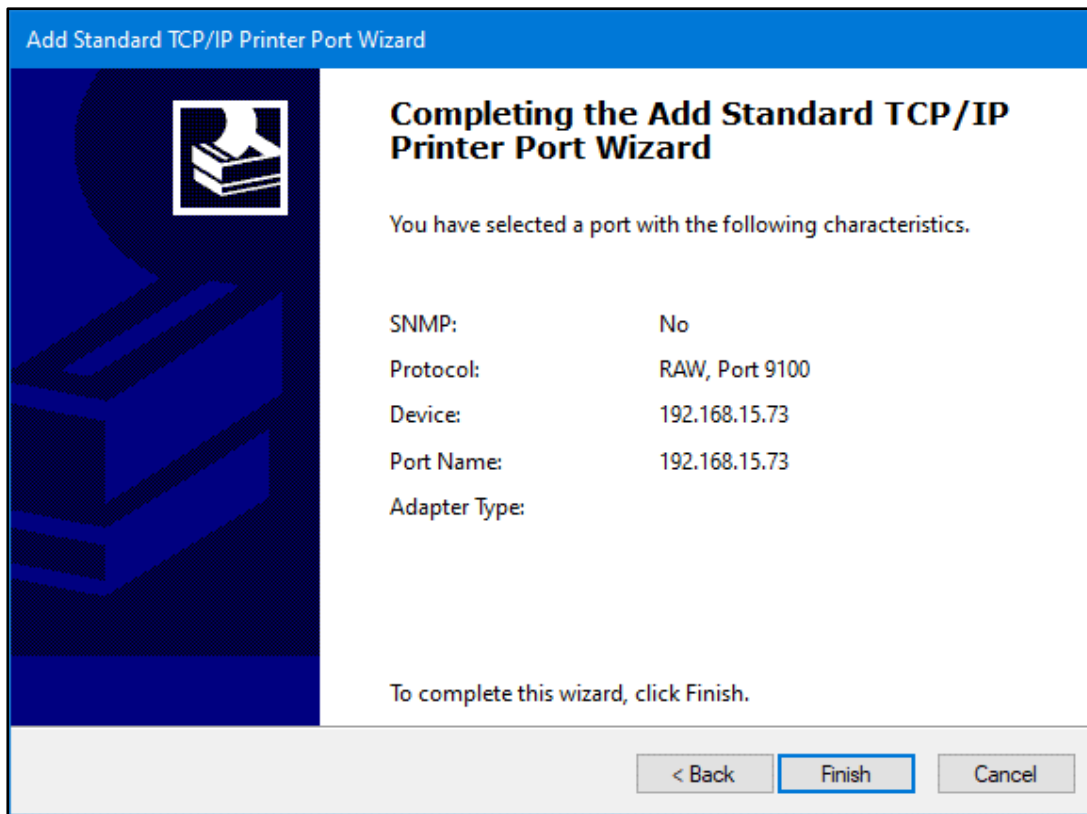
Custom Settings...

< Back Next > Cancel

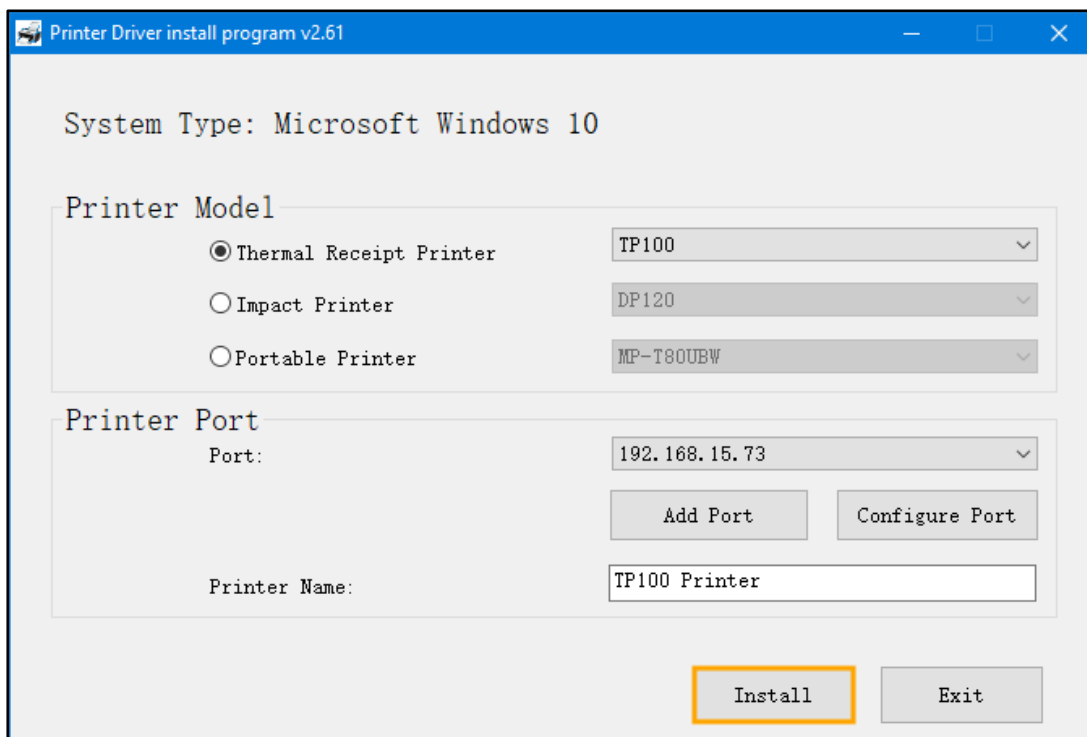
idealpos Update History

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Press "Finish" to complete the "Add Standard TCP/IP Printer Port Wizard"



The Printer Driver install program will show the IP address of the printer next to the Port field. Press the "Install" button to install the Printer Driver using the IP address settings that were just configured.



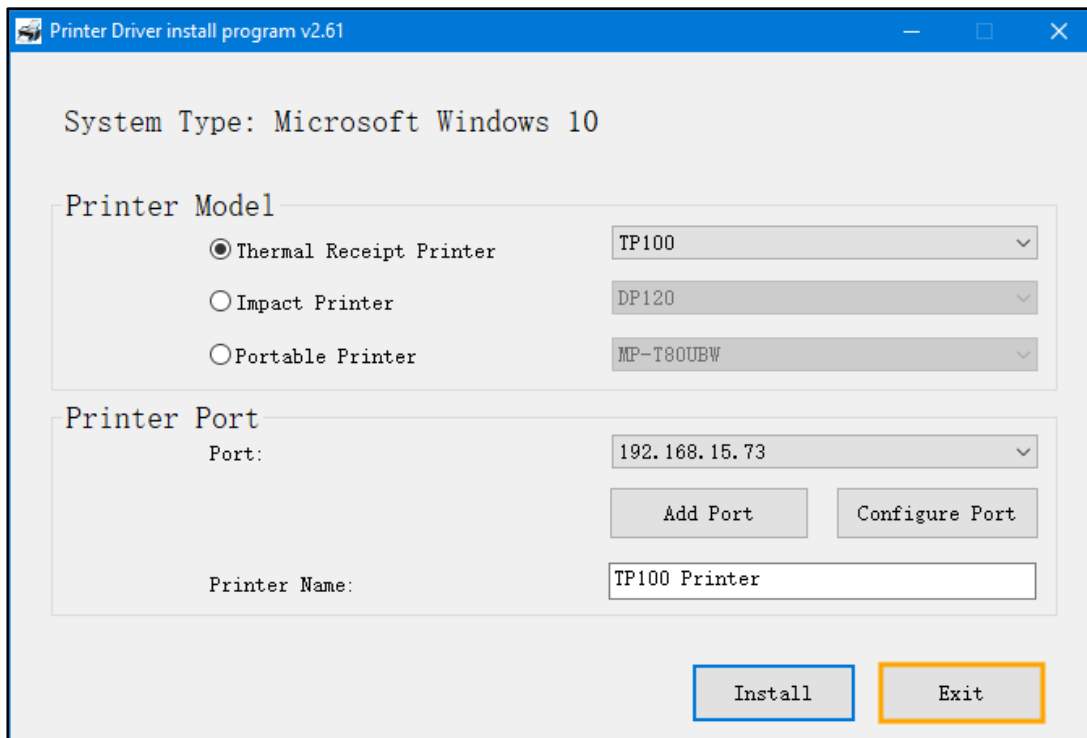
idealpos Update History

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After the driver has been installed, a SUCCESS prompt will be displayed. Press "OK" to continue.



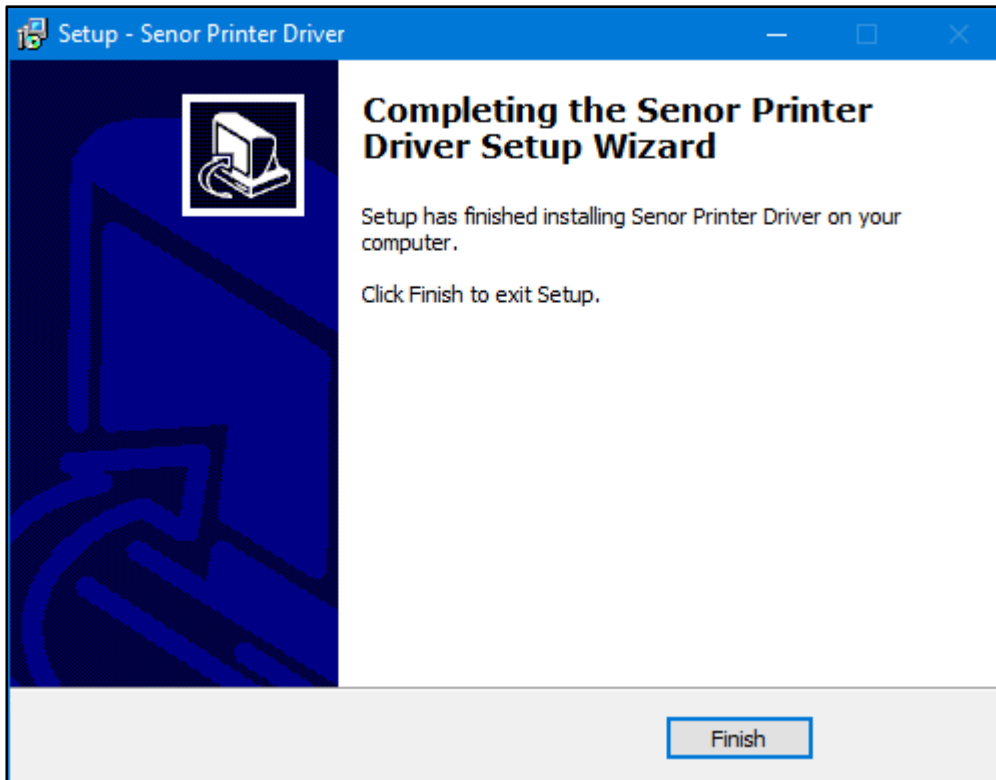
The Printer Driver install program will appear.
Press the "Exit" button to close the driver installer



idealpos Update History

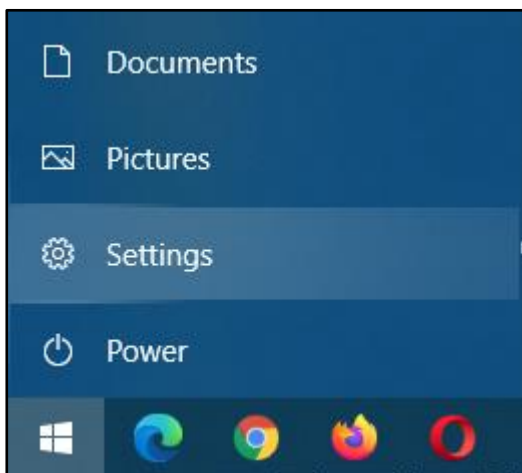
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Press the "Exit" button on the Senor Printer Driver installer.



Now that the Printer Driver has been installed, you will need to Share the Printer, enable "Allow" access on the Printer Security settings and disable printer cut.

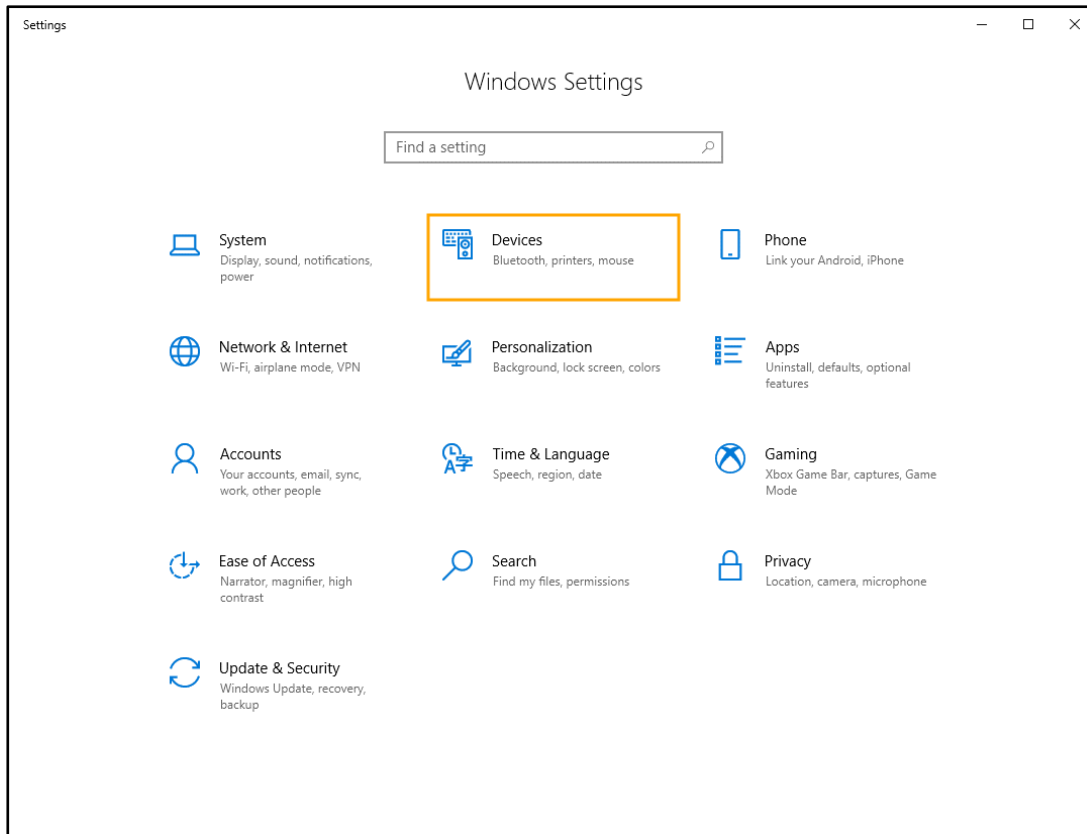
Go to: Windows Start button > Settings



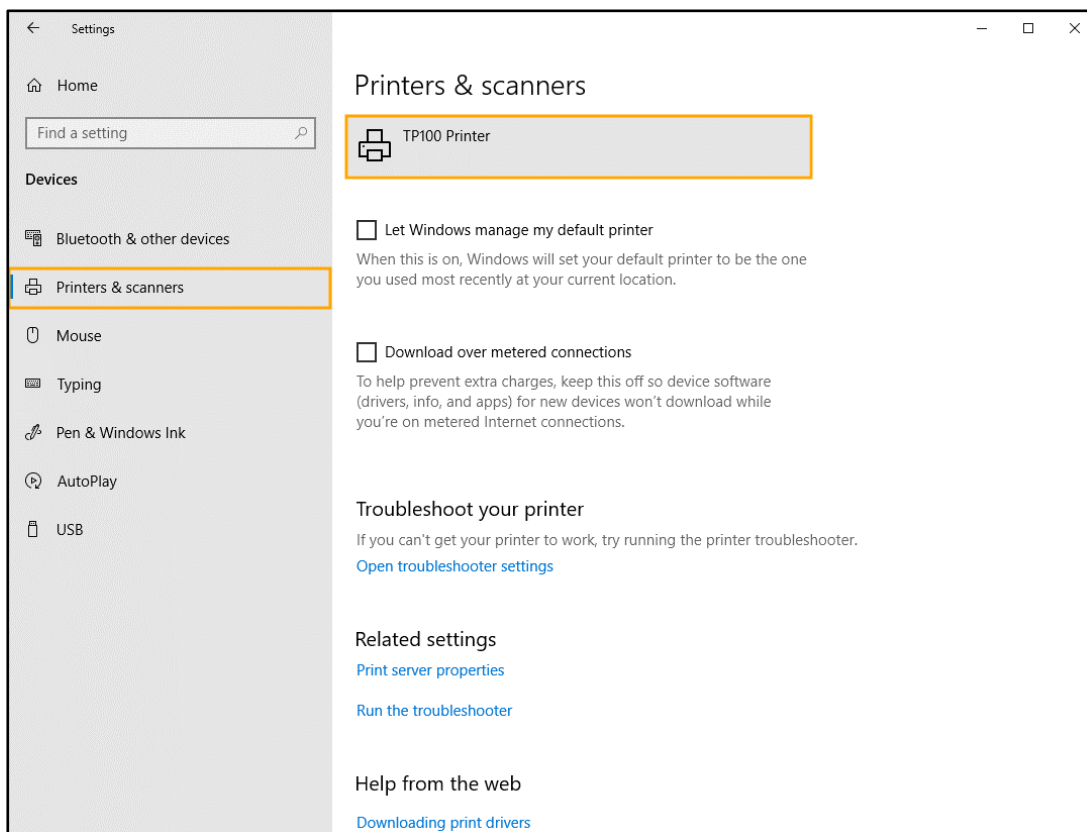
idealpos Update History

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Select "Devices, Bluetooth, printers, mouse"



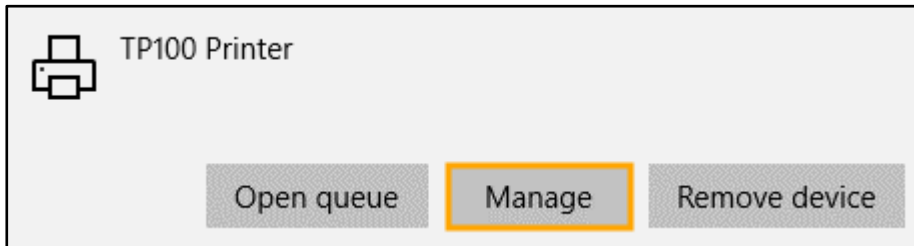
Select "Printers & scanners" from the menu on the left-hand side, then select the TP100 Printer on the right-hand side:



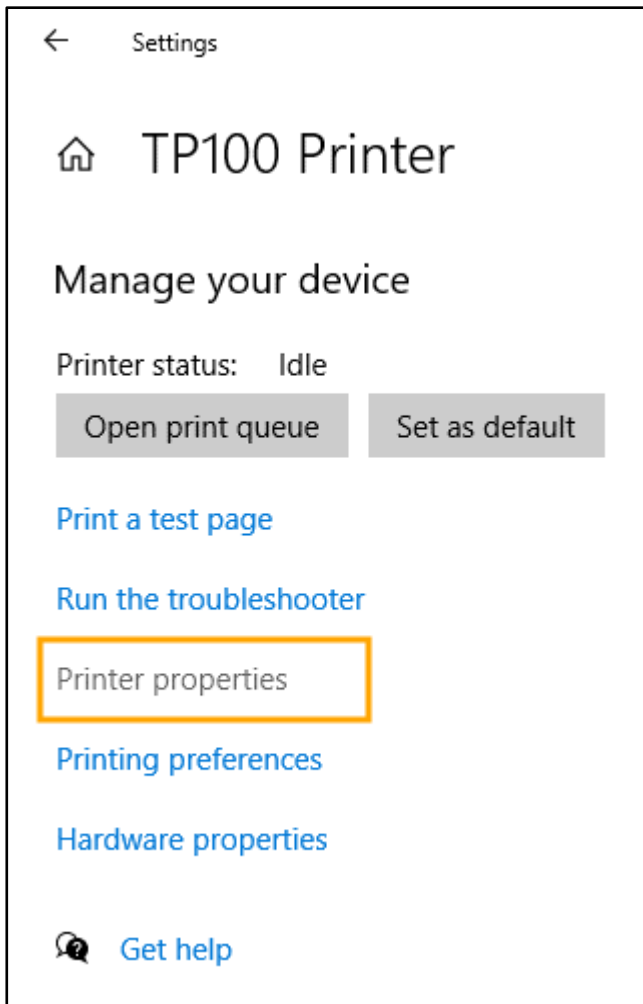
idealpos Update History

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After selecting the TP100 Printer, additional buttons will appear.
Select "Manage".



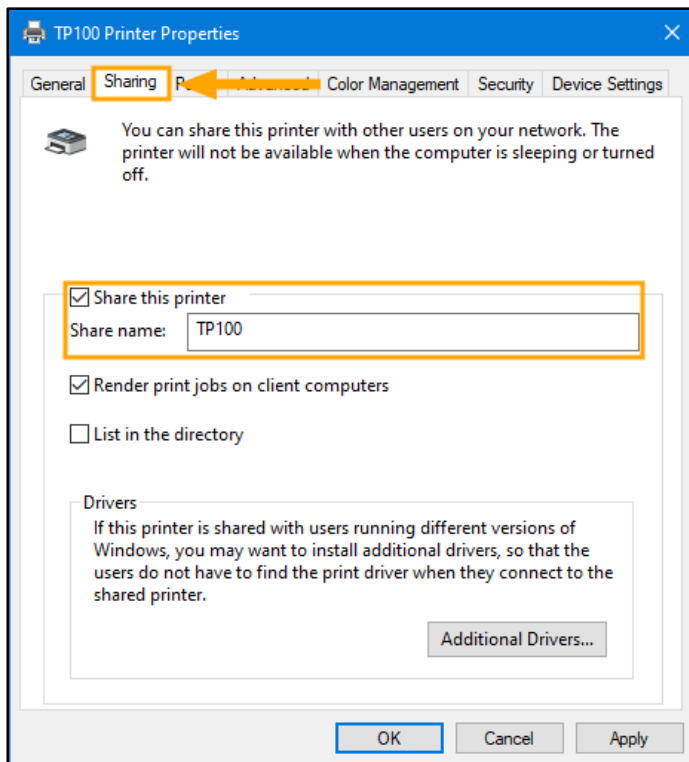
Select "Printer properties".



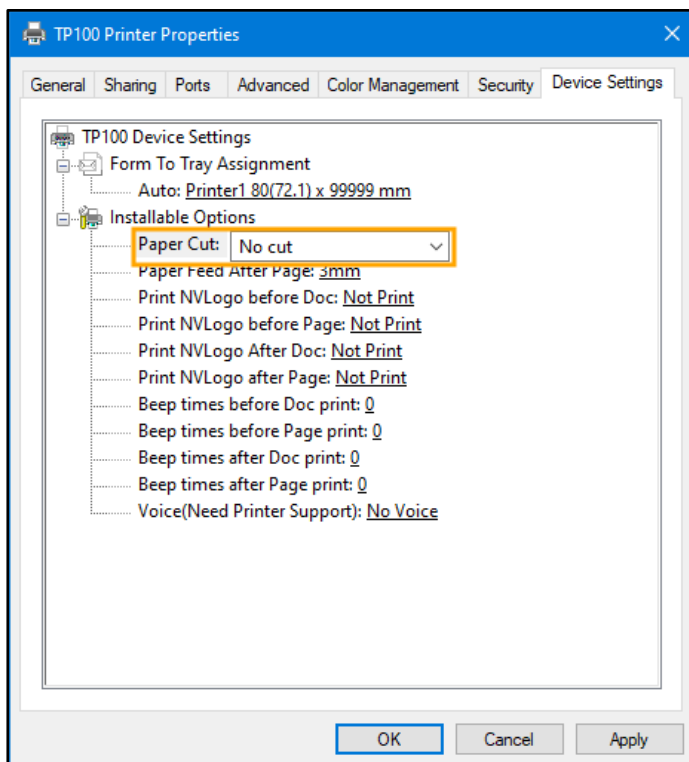
idealpos Update History

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Go to the Sharing tab, enable "Share this printer" and enter a Share name of "TP100".



Go to "Device Settings" and set the Paper Cut setting to "No cut"

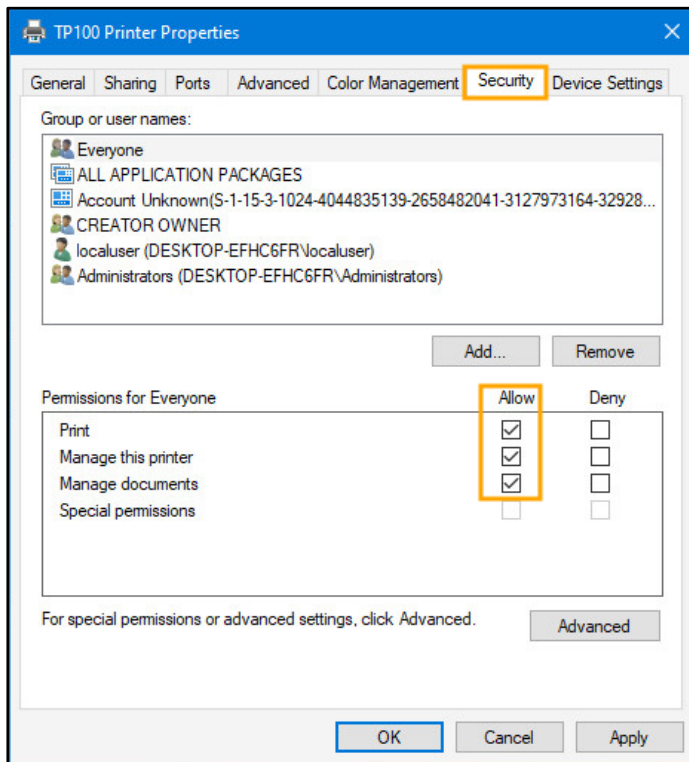


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You will also need to enable Allow access to the printer for all users.

Go to the "Security" tab and enable all checkboxes in the "Allow" column for Everyone and each User.



Press "OK" to close and save all changes to the TP100 Printer properties.

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Go to Idealpos > Back Office > Setup > POS Terminals > Select POS Terminal > Modify.

In the "Receipt Printer" tab, configure the Receipt Printer.

Set type to "Epson TM-T88".

Set Connection to: [\\IPADDRESS\SHARENAME](#)

Replace IPADDRESS with the IP Address of the POS terminal which the printer driver was installed onto and replace SHARENAME with the name of the Printer Share. E.g. [\\192.168.1.83\TP100](#)

You should ensure that the POS Terminal/PC IP Address is set to static, or has an IP Address reservation.

NOTE – If you enter incorrect details into the Connection field and press the "Test" button (which results in a failed test print), entering correct details and pressing "Test" may also result in a failed test print, even though the Connection setting was corrected and should have yielded a successful result. To ensure that the printer connection settings have been applied, you may need to close the POS Terminals setup window, re-open the POS Terminals setup window, then try the Test button again to ensure that the updated Receipt Printer Connection settings are being used for the test print.

The screenshot shows the 'Pos Terminals' window with the 'Receipt Printer' tab selected. The window has a menu bar with options: Main Settings, POS Settings, Receipt Printer, Kitchen Printers, Display / Kiosk, Customer Readers, Other Peripherals, EFTPOS Settings, Import / Export, and Miscellaneous Settings. The 'Receipt Printer' section is highlighted with an orange border and contains the following fields:

- Type: Epson TM-T88 (dropdown menu)
- Connection: \\192.168.1.83\TP100 (dropdown menu)
- Test button

The 'Second Receipt Printer' section contains:

- Use Second Receipt Printer:
- Type: None (dropdown menu)
- Connection: (empty dropdown menu)
- Test button
- Start Chr: 0, End Chr: 0, Live Output:

The 'Receipt Header/Footer' section contains:

- Header Logo Graphic (pictures folder): IdealposHeaderLogo.jpg
- Header: @#IDEALPOS
- Address: @1/212 Curtin Ave West, @Eagle Farm QLD 4009, @Australia
- Footer: *indicates taxable supply
- Footer: @Powered by Idealpos
- Footer Logo Graphic (pictures folder): (empty)
- Empty Lines: 0, Footer Logo #: (empty)

The 'Account Footer' section contains:

- Redeem Points Footer: (empty)

The 'Bill Header/Footer (if different from Receipt)' section contains:

- Header Logo Graphic (pictures folder): (empty)
- Header: (empty)
- Footer: (empty)
- Footer Logo Graphic (pictures folder): (empty)

A 'Copy from POS 1' button is located at the bottom right of the window.

- In Idealpos, go to: Setup > Global Options > Printing > Enable "Arabic Print Style" and "Use Windows Driver". To enable QR Codes on your receipt, also ensure that you enable and configure the following settings: QR Code Size (to ensure that the size of the QR Code is prominent on the receipt, we recommend a size of 4 or greater).

Enable Print on Receipt Footer

Enter the Receipt QR Code Data – This can be any data you want to embed in the QR Code such as your company website, etc. When the Customer scans the QR Code, their mobile device will read the data.

Text underneath Code – This is any text that you want printed below the QR Code (e.g. Scan the QR Code to visit our website!).

Global Options
Site 1 (Site 1)

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

Print Formats

Kitchen Docket Format

- Standard
- Order by Print Group
- Order by Seat / Print Group
- Order by Print Group / Seat
- Group Instructions by Seat
 - Accumulate Items
 - Show each instruction on its own line
 - Print Instructions/Seats in small font
 - Print Instructions Red
 - Print Instructions White on Black
 - Use Course Separator instead of Print Groups
 - Use Instruction Separator Line
 - Print Entire Order to triggered Kitchen Printers: All Items

Bill Format

- Standard
- Order by Print Group
- Order by Seat / Print Group
- Order by Print Group / Seat
- Accumulate Items
- Print Discounts White on Black

QR Codes

Receipt QR Code Data QR Code Size (2-9)

Print on Coupons

Print on Receipt Footer

Text underneath Code (38)

Kitchen Printer Names

- KP 1 KITCHEN
- KP 2 BAR
- KP 3 COFFEE
- KP 4 IKM
- KP 5 Kitchen Printer 5
- KP 6 Kitchen Printer 6
- KP 7 Kitchen Printer 7
- KP 8 Kitchen Printer 8
- KP 9 Kitchen Printer 9
- KP 10 Kitchen Printer 10
- KP 11 Kitchen Printer 11
- KP 12 Kitchen Printer 12

Other Options

- Use Smallest Line Spacing
- Double Height
- Double Width
- Bold
- Arabic Print Style
- Use Windows Driver
- Set Font to Bold
- Member Photo on IKM Runner Dockets

Print Group Header Format - Kitchen Printers

- MAIN
- MAIN---
- MAIN
- Left-Aligned
- Centred
- Double Height
- Double Width
- Bold

Print Group Header Format - Receipts/Bills

- MAIN
- MAIN---
- MAIN
- Left-Aligned
- Centred
- Double Height
- Double Width
- Bold

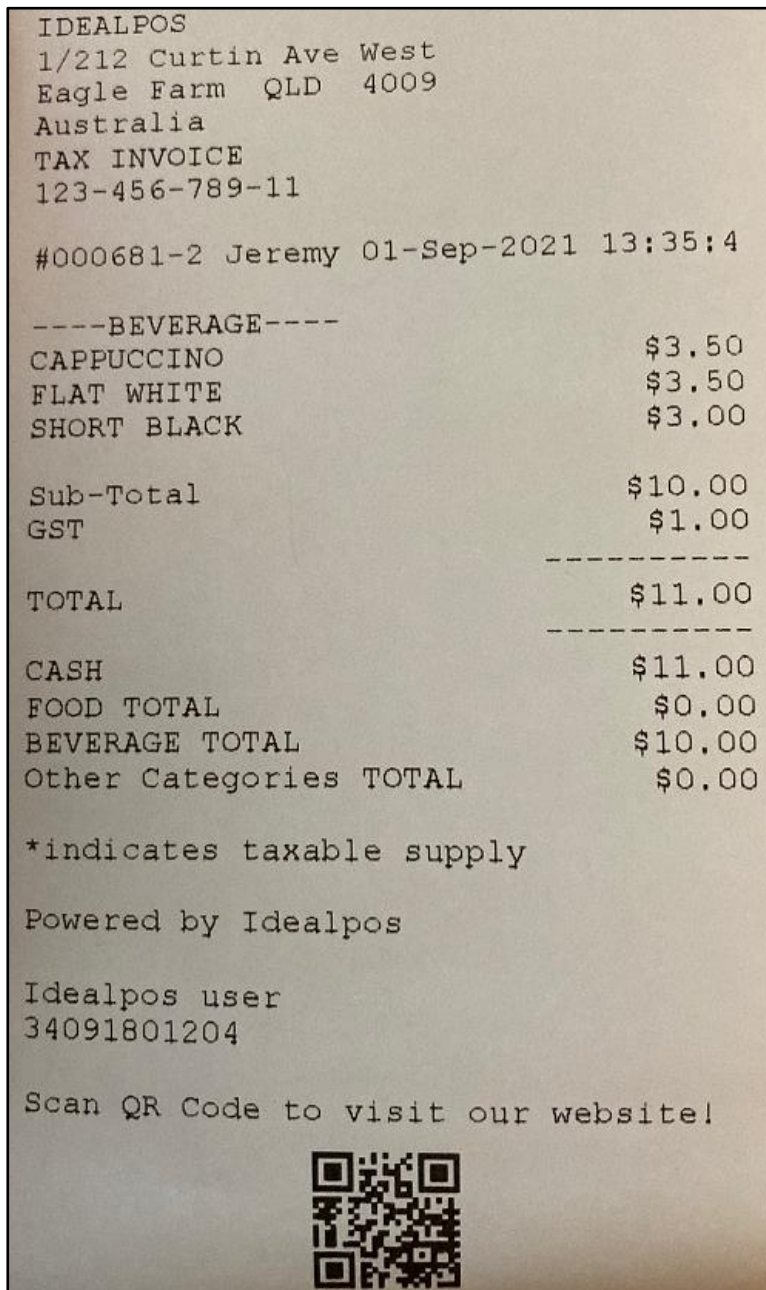
Show Total Discounts on Receipt

- This Sale
- Descriptor
- Customer Lifetime
- Descriptor
- User-Defined Field

idealpos Update History

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- This concludes the configuration required for setting up a printer with QR Codes on Arabic Receipts. When a receipt is printed, it will contain the QR Code at the bottom of the receipt.



eCommerce Interface

IP-4114 – eCommerce Option – Receive Prepaid Orders as Unpaid

This function adds the ability to receive Prepaid Orders as Unpaid.

This may be beneficial to customers who want the ability to recall and tender a prepaid order from a particular POS Terminal.

When enabling this option, "Automatically Finalise Prepaid Orders" will be unticked if it was initially enabled.

To enable this function, go to: Setup > Global Options > Interfaces > eCommerce
Enable the option "Receive Prepaid Orders as Unpaid"

The screenshot shows the 'Global Options' window for 'Site 1 (Site 1)'. The 'Interfaces' tab is active, and the 'eCommerce Interface' is selected in the left-hand list. The right-hand pane shows configuration options for the eCommerce interface. The 'Receive Prepaid Orders as Unpaid' checkbox is checked and highlighted with a yellow box and an arrow. Other options include 'Web Order Tender' (ONLINE), 'Web Order Location' (Current Store Location), 'Web Order Clerk' (Online), 'Default Customer Type' (ONLINE), 'Price Level' (STANDARD), 'Unmatched Items Link' (100), 'Sale Type Link' (No Sale Type, Pickup, Eat in, Delivery), 'Automatically Send Orders to Kitchen Printers' (checked), 'Automatically Finalize Prepaid Orders' (unchecked), and 'Play Sound when Orders Arrive'.

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Prepaid Web Orders can be retrieved by pressing the Web Order button at the top of the POS Screen.

26 Jul 16:47 Adult ID: 26-Jul-2003
 POS 3 Jeremy STANDARD #501

WEB ORDERS 1

×



\$0.00

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

								
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

EFTPOS

IP-101 – Quest WEX Australia Integrated Fuel Cards

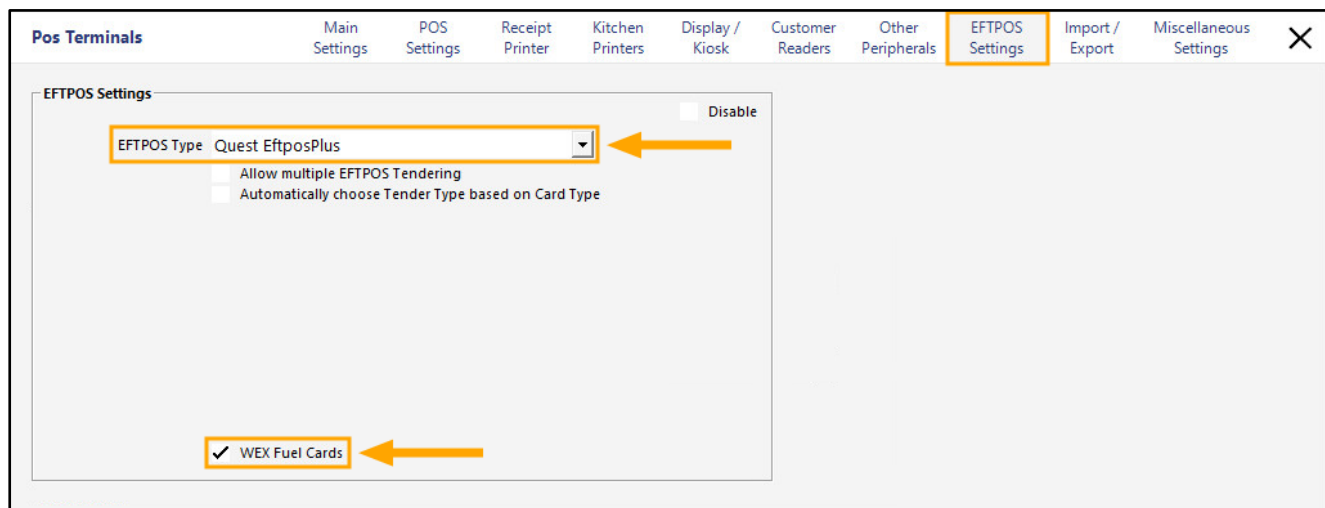
This function adds support for Quest WEX Australia Integrated Fuel Cards to Idealpos.

Before proceeding with the below steps, be aware that you may need to contact Quest so that they can perform any additional configuration on their end to enable Quest WEX Australia Integrated Fuel Cards.

To configure and use this function, ensure that your Quest EFTPOS terminal is configured and communicating with Idealpos.

Then go to: Back Office > Setup > POS Terminals > Select Terminal > Modify.

In the EFTPOS Settings tab, ensure that "WEX Fuel Cards" have been enabled.

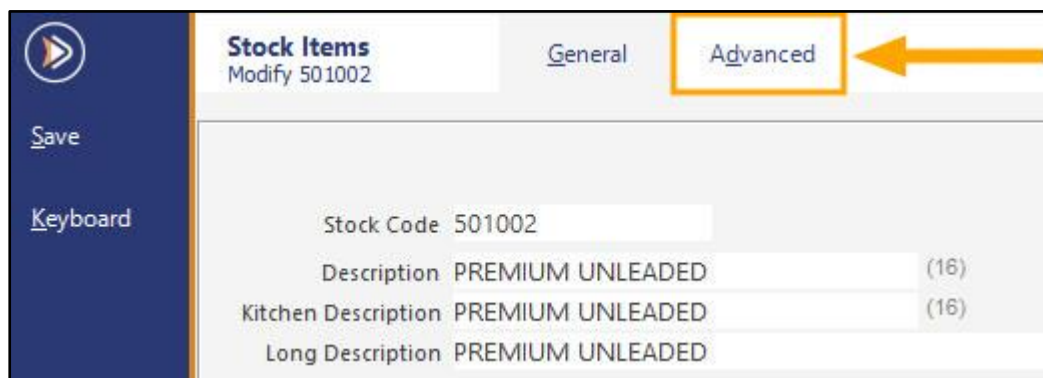


You will also need to ensure that your Stock Items have been mapped to the appropriate Quest Product Code.

Go to: File > Stock Control > Stock Items.

Double-click on an item or select an item and press "Modify".

In the Stock Item window, go to the "Advanced" tab.



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Towards the bottom-right corner of the window, enter the Quest Product Number, then press the "Save" button on the top-left corner of the window.

The Quest Product Number entered below is simply an example; ensure that you refer to your Quest Product Details for the correct number, then enter it into the field shown below.

POS 2
v8 Build 1

Repeat this process for each Stock Item which has a corresponding Quest Product Number.

Once the Quest Product Numbers have been entered for all the applicable items, we recommend restarting Idealpos to ensure that the WEX Fuel Cards setting has been applied.

This concludes the Idealpos configuration for this function.

As noted further above, Quest may need to be contacted so they can perform additional configuration which may be required to enable this functionality.

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IP-4330 – Vault EFTPOS – Support for v4.5 API including Pinpad Tips/Surcharges

This function adds support for the V4.5 API which includes Pinpad Tips and Surcharges.

Pinpad Tips and Surcharges can be configured via the EFTPOS GUI Interface, typically accessible by right-clicking on the Vault icon on the Windows Taskbar.



Export Data

IP-4307 – Support for AutoDiscount field in Customer Export

This function adds the AutoDiscount field to the Customer Export format.

The Auto Discount field stores the automatic percentage discount value that is applied to items purchased by the Customer.

Previous to this change, the AutoDiscount field was only supported when importing Customers, however, the AutoDiscount field was not exported when performing a Customer Export.

There is no additional configuration required to enable the exporting of the AutoDiscount field. The field will be included in the exported data, and if the customer has an Auto Discount entered, this will be included in the exported data.

Go to: File > Customers > Customers

Select a Customer from the list > Modify.

Ensure that a value has been entered into the Auto % Discount field as shown in the below example:

The screenshot shows the 'idealpos' 'Customers Modify 2' form. The 'Sales / Accounting' section is highlighted, showing the 'Auto % Discount' field set to 5, indicated by a yellow box and an arrow. Other fields in this section include 'Price Level' (1), 'Bar Tab' (unchecked), 'Room Interface' (unchecked), 'Account' (unchecked), and 'Credit Limit' (0.00). The form also includes sections for 'Address Details', 'Delivery Address', 'Contact Details', and 'Miscellaneous'.

Field	Value
Code	2
Last Name	Charlton
Given Names	Sarah
Title	Miss
Customer Type	MEMBERS
Scan Code	9850859357357
Auto	Auto
Other Codes	
Address	42 Wallaby Way
Suburb	Hampden
State	NSW
Postcode	
Auto % Discount	5
Price Level	1
Bar Tab	<input type="checkbox"/>
Room Interface	<input type="checkbox"/>
Account	<input type="checkbox"/>
Credit Limit	0.00
Company	
ABN	
Occupation	
Next of Kin	
Contact No	
Birth Date	06/09/1987
Birth Date 2	02/03/2015
Password	
Gender	F
Marital Status	
Mail Out	<input checked="" type="checkbox"/>
Discontinue	<input type="checkbox"/>
Phone	0765536455
Mobile	0499754163
Fax	
Email	
Comments	
Sales Prompt	

idealpos Update History

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Perform a Customer Export by going to: Back Office > Enquiry > Customers
 Press the "Export" button on the bottom-left corner of the Customer Enquiry window.

Customer Enquiry
S X

Code	Last Name	First Name	Type
1	Harrison	Ben	ACCOUNTS
2	Charlton	Sarah	MEMBERS
3	Townsend	Mick	MASTER ACCOUNTS
4	Winters	Charlotte	SUB ACCOUNTS
5	Andrews	Theresa	LAYBYS
6	Graham	Alan	BAR TABS
7	Account Customer		BRONZE MEMBERS
8	Points Customer		MEMBERS
9	Master Account		GOLD MEMBERS
10	Sub Account		SUB ACCOUNTS
11	Layby Customer		LAYBYS
12	Bar Tab Customer		BAR TABS
101	Murray	Steve	BRONZE MEMBERS
102	Brown	Talia	SILVER MEMBERS
103	Singh	Jamal	GOLD MEMBERS
104	Brinkie	Rebecca	PLATINUM MEMBERS
105	Smulders	Ashleigh	LIFE MEMBERS
111	Bronze		BRONZE MEMBERS
112	Silver		SILVER MEMBERS
113	Gold		GOLD MEMBERS
114	Platinum		PLATINUM MEMBERS
115	Life		LIFE MEMBERS
5001	Bar Tab 5001		BAR TABS
5002	Bar Tab 5002		BAR TABS
5003	Bar Tab 5003		BAR TABS
5004	Bar Tab 5004		BAR TABS
5005	Bar Tab 5005		BAR TABS
5006	Bar Tab 5006		BAR TABS
5007	Bar Tab 5007		BAR TABS
5008	Bar Tab 5008		BAR TABS
5009	Bar Tab 5009		BAR TABS
5010	Bar Tab 5010		BAR TABS
5011	Bar Tab 5011		BAR TABS
5012	Bar Tab 5012		BAR TABS
5013	Bar Tab 5013		BAR TABS
5014	Bar Tab 5014		BAR TABS
5015	Bar Tab 5015		BAR TABS
5016	Bar Tab 5016		BAR TABS
5017	Bar Tab 5017		BAR TABS
5018	Bar Tab 5018		BAR TABS
5019	Bar Tab 5019		BAR TABS
5020	Bar Tab 5020		BAR TABS
123456	Customer 123456		ACCOUNTS
888888	Customer 888888		ACCOUNTS
STAFF001	Jeremy (Owner)		STAFF
STAFF002	Melissa		STAFF
STAFF003	Hiroku		STAFF

1 - 9874902100196
 Dr Ben Harrison
 Unit 17
 31 Honeysuckle Ave
 Groundsborough QLD 34

Phone: 0265486874
 Mobile: 0499246317
 Fax:
 Email:

Type: ACCOUNTS
 Credit Limit: 1000.00
 ABN: 564233185

Points:
 Password:
 Price Level: 1
 Dob: 18-Feb-1974 (Age: 47)
 Birth Date 2:
 Company: Harry's Meds

Total	Current	1 month	2 months	3 months+
0.00	0.00	0.00	0.00	0.00

Account Journal Modify

Customer Code > to >

Last Name > to >

Birth Date 2 > to >

Customer Type >

Company

Text Field

Yes/No Field > Discontinued Only

Birth Month > Mail-Out Only

Sales > Total > to >

Points > to >

Department >

Stock Item >

Apply Filter

Export
Email to Clipboard

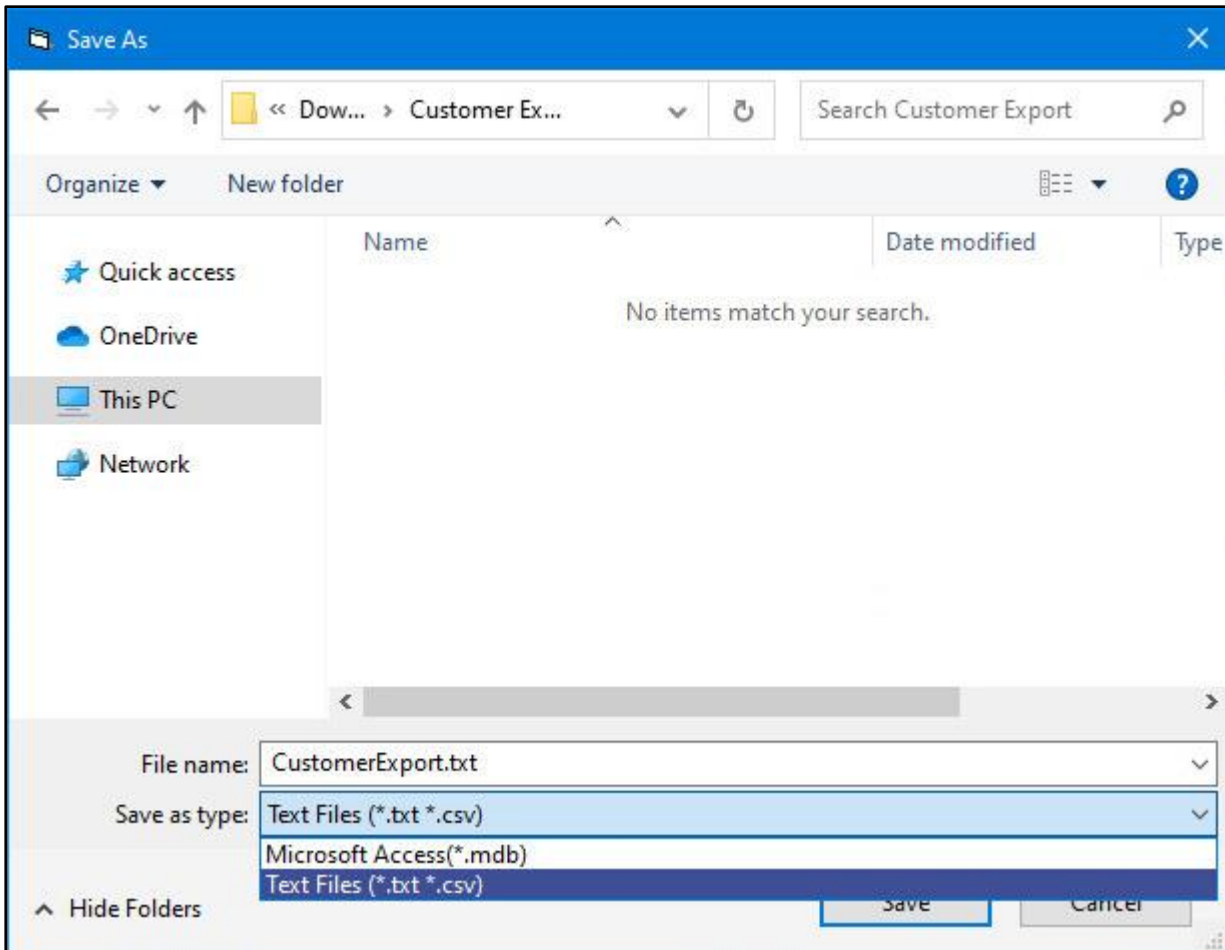
idealpos Update History

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Browse to a folder where you want the data to be exported.

When saving the Customer Export, you can either save it as a Microsoft Access (.mdb) file, or a Text File (.txt).

Enter a File name, then press "Save".



The data will be exported and will include the AutoDiscount field.

The AutoDiscount field is the last field in the Export File:

CODE, LASTNAME, FIRSTNAME, MIDDLENAME, TITLE, ADDRESS1, ADDRESS2, SUBURB, STATE, POSTCODE, PHONE, MOBILE, FAX, EMAIL, GENDER, COMPANY, OCCUPATION, MARITALSTATUS, DOB, DOB2, NEXTOFKIN, CONTACTNO, COMMENTS1, COMMENTS2, TYPE, PASSWORD, MAILOUT, ACCOUNT, CREDITLIMIT, PRICELEVEL, ABN, POINTS, SCAN, SALES PROMPT, UDTEXT1, UDTEXT2, UDTEXT3, UDTEXT4, UDTEXT5, UDTEXT6, UDTEXT7, UDTEXT8, UDTEXT9, UDTEXT10, UDYESNO1, UDYESNO2, UDYESNO3, UDYESNO4, UDYESNO5, **AUTODISCOUNT**

The following line is an extract from the Customer Export file for the Customer shown further above, with the AutoDiscount value highlighted.

```
"      2,"Charlton","Sarah",",", "Miss", "42 Wallaby  
Way", "", "Hampden", "NSW", "", "0765536455", "0499754163", "", "", "F", "", "", "", "06-Sep-1987", "02-Mar-  
2015", "", "", "", "2", "", "1", "0", "0", "1", "", "580", "9850859357357", "", "", "", "", "", "", "", "", "False", "False", "False", "False", "Fa  
lse", "5"
```

Gaming

IP-4402 – Max Gaming – MembershipTypeID support for Promotions

This function only applies to Max Gaming and adds the ability to assign promotions to a Membership Type. The Promotions will then only trigger for members that are in the Membership Type specified within the Promotion. Promotions are assigned to a Membership Type ID via a User-Defined option in the Promotion Advanced tab.

To configure this function, go to: Back Office > File > Sales > Promotions > Promotions.
Select a Promotion from the list > Modify

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

Within the Modify Promotion window, press the "Advanced" tab.

In the User-Defined Text field, enter [MEMBERSHIPTYPEID=ID].

Replace ID with the Membership Type ID from Max Gaming.

E.g. If the Membership Type ID was 123456, you would enter [MEMBERSHIPTYPEID=123456].

Once you have entered the Membership Type ID, either press the "Save" button on the top-left corner of the window (the Save button is only displayed on larger screen resolutions), or close the window.

Promotions

Promotion

Advanced

Other Options

Inhibit Points

User-Defined Text

[MEMBERSHIPTYPEID=123456]

When closing the window without using the Save button, a Save Changes prompt will be displayed. Press "Yes".

Save Changes?

Yes

No

Gift Vouchers

IP-3895 – Gift Voucher – Site Identification

This function adds details to the bottom of the Gift Voucher which identify the Site and POS Terminal which issued the Gift Voucher. If a Site does not have their Gift Vouchers configured correctly or if there is any confusion in regards to where a Gift Voucher was issued, this functionality will enable both the Support Staff and Clerk to easily determine the issuing site.

The Site Name that will be displayed on the bottom of the Gift Voucher is retrieved from the Trading Name in the Idealpos Licence Gateway.


To use this function, ensure that the following conditions are met:

Email is configured in Idealpos

Customer has an email address entered either in their Customer Record or email address is entered when selling the Gift Voucher.

For more details on how to setup and use Gift Vouchers, refer to the Gift Voucher topic in the Idealpos User Guide – <https://userguide.idealpos.com.au>

Once the Gift Voucher is sold and emailed to the Customer as a PDF file, the name of the issuing site will appear at the bottom of the Gift Voucher as per the below example:



Current Balance
As at 06 Aug 2021

\$20.00

Original Value: \$20.00

Issue Date: 06 Aug 2021 16:03:16


Expiry Date: 06 Aug 2022 23:59:59

Recipient: Sarah Charlton

Terms and Conditions
- Vouchers redeemable up to and including the expiry date.
- Vouchers can be redeemed at ANY one of our awesome stores.
- Vouchers cannot be redeemed for cash or other services.

9853135268279

www.idealpos.com.au

Powered by 

← Idealpos user
POS 1(1)

Ideal Kitchen Monitor

IP-4160 – Ideal Kitchen Monitor – Rush Order Function

This function adds the ability to rush or expedite an order sent from Idealpos to Ideal Kitchen Monitor.




This is achieved by adding a Stock Item containing either of the following descriptions:

EXPEDITE ORDER

RUSH ORDER

Any order that is sent to Ideal Kitchen Monitor which contains an item with the above descriptions will trigger that order to be moved to the front of the other orders that have already been placed.

The first rushed/expedited order will appear on the top-left corner of the Ideal Kitchen Monitor and other orders will be moved across as shown in the example below. Any additional rushed/expedited orders that are sent will be displayed next to the first rushed/expedited order.

<p>Table ³⁵ 00:00:39</p> <p>###RUSH ORDER###</p> <p>FOOD 1 BACON & EGGS 1 SCRAMBLED</p>	<p>Table ³¹ 00:07:43</p> <p>FOOD 1 VANILLA SLICE 1 CARROT CAKE SLICE 1 BLACK FORREST CA... BEVERAGE 1 CAPPUCCINO 1 FLAT WHITE 1 SHORT BLACK</p>	<p>Table ³² 00:04:36</p> <p>FOOD 1 PANCAKES 1 CANADIAN PANCAKES 1 WAFFLES 1 CARROT CAKE SLICE</p>	<p>Table ³³ 00:04:07</p> <p>ENTREE 1 PASTA 1 BEEF 1 LAMB 1 DUCK</p>								
<p>Table ³⁴ 00:02:43</p> <p>FOOD 1 CHICKEN BURGER 1 LARGE CHIPS 1 BACON & EGGS 1 SCRAMBLED</p>											
Done	Ready	Rush	Delete	Recall	Undo	Zoom	Print	Previous	Next	Summary	Close

idealpos Update History

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In order to use this function, you must have Ideal Kitchen Monitor 3 installed; this functionality is not available or supported on Ideal Kitchen Monitor versions older than 3.0.0.1.

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

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

Create a new Stock Item with a description of either RUSH ORDER or EXPEDITE ORDER

Enter the description into all description fields (Description, Kitchen Description, Long Description/Description 3).

Note that you do not need to enable the IKM printer in the Printer Settings, however, doing so will not affect this function but rather will also trigger RUSH ORDER to appear as an item within the order sent to Ideal Kitchen Monitor.

Once complete, press the "Save" button on the top-left corner of the window to create the item.

idealpos Stock Items Modify 37 Created 02 Jul 2021 14:12:01 X

General **Advanced** [Printer Settings](#) [Attributes](#)

Save Keyboard

Stock Code: 37 Department: 1003 > INSTRUCTIONS

Description: RUSH ORDER (10) Scan Code: Auto

Kitchen Description: RUSH ORDER (10)

Long Description: RUSH ORDER (10)

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

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: 10 > MISCELLANEOUS

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	0.0000
Last Cost	0.0000
Average Cost	0.0000

Tax Settings (Selling)

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

Attributes

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

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In order to trigger this function, a button will also need to be created on the POS Screen.

Close the Stock Items windows, then go to:

Back Office > Setup > POS Screen > POS Screen Setup > Select POS Screen Layout > Buttons

Code	Description
1	POS SCREEN LAYOUT 1
2	KIOSK
3	Scheduled POS Screen Layout
4	POS Screen Layout 4

Select a suitable POS Screen tab which contains a blank POS Screen button which you'd like to assign to the Rush Order/Expedite Order function.

The below example shows the Admin tab which has several unused blank buttons that can be assigned.

Search Code like				Exclude Barcodes	Price 1	POS SCREEN LAYOUT 1	Copy Formatting	X					
101001	EGGS ON TOAST	BREAKFAST	9.00		RECEIPT	CLERK	7	8	9	CL			
101002	BACON & EGGS	BREAKFAST	10.00		PRICE LEVEL	5% ST DISC							
101003	EGGS BENEDICT	BREAKFAST	13.00		CUSTOMER	5% ITEM	4	5	6	NO SALE			
101004	AVOCADO ON TOAST	BREAKFAST	11.00		BAR TAB	REFUND							
101005	BAKED BEANS & TOAST	BREAKFAST	8.50		PENDING	VOID SALE	1	2	3	X			
101006	PANCAKES	BREAKFAST	9.00		TABLE MAP	VOID	0	.	ENTER				
101007	CANADIAN PANCAKES	BREAKFAST	12.00		PAID IN	PAID OUT	LAYBY	CANCEL	BAR TAB	10% ITEM S'CHARGE	AMOUNT	VOID MODE	
101008	WAFFLES	BREAKFAST	9.00		TIPS IN	TIPS OUT	ACCOUNT	REFUND	BAR TAB	10% ST S'CHARGE	REPLAY	TRANSFER	
101009	WAFFLES CHOCOLATE	BREAKFAST	10.00								UNLOCK	WASTE	
101010	JAM & TOAST	BREAKFAST	5.00								PERMISSION	MODE	
101011	BIG BREAKFAST	BREAKFAST	15.00										
101012	BAKED BEANS & TOAST*COPY*	BREAKFAST	8.50										
102001	EXTRA BACON	BREAKFAST MODS	2.00		DRINKS	CAFE	TAP BEER	SPIRITS	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL	MANAGER
102002	EXTRA EGG	BREAKFAST MODS	1.00			RESTAURANT	BOTTLE BEER & RTD	WINE				SERVICES	ADMIN
102003	EXTRA TOAST	BREAKFAST MODS	0.50										
102004	EXTRA AVOCADO	BREAKFAST MODS	1.00										
102005	EXTRA CHEESE	BREAKFAST MODS	1.00										

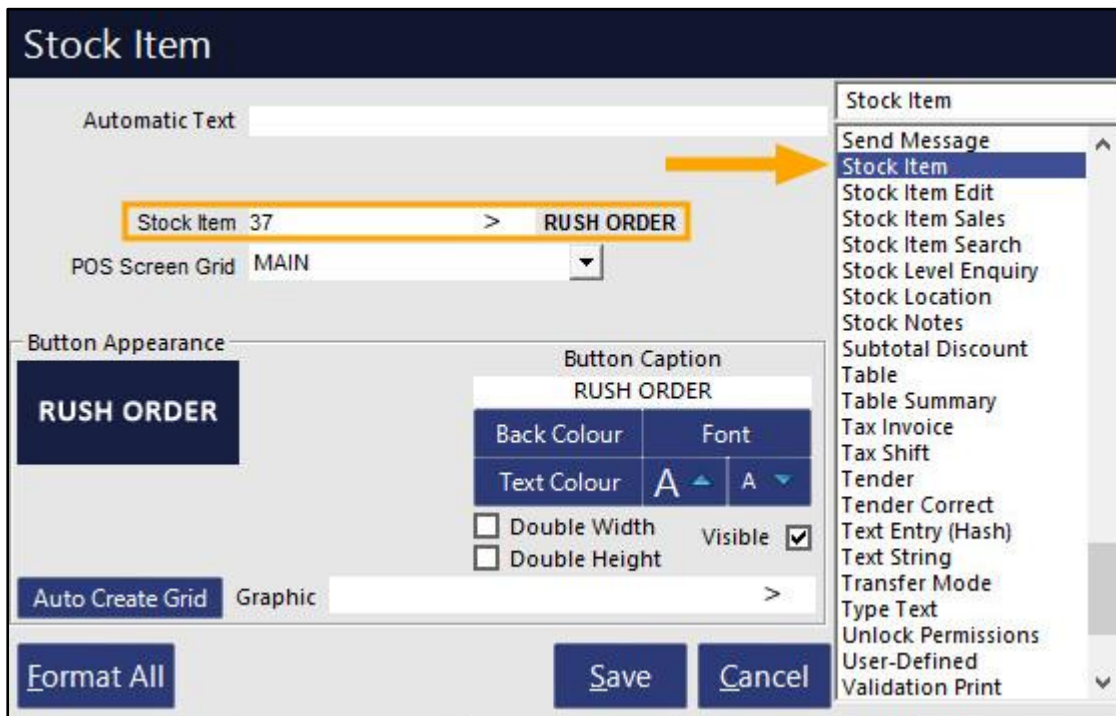
idealpos Update History

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Select a button and link it to the Stock Item function.

In the Stock Item field, press the ">" button and search for the RUSH ORDER/EXPEDITE ORDER Stock Item that was created further above.

Ensure that you press "Save" to create the button on the POS Screen.



Close the POS Screen Layout windows, then return to the POS Screen by pressing the "POS" button on the top-left corner of the Back Office dashboard.

idealpos Update History

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Add the required Stock Items to the sale, then ensure that the "RUSH ORDER" or "EXPEDITE ORDER" button has been pressed. Finally, either save the sale to a table or finalise the order and pay for it.

06 Jul 11:19 Adult ID: 06-Jul-2003
POS 2 Jeremy STANDARD #787
✕

BACON & EGGS 1 10.00							
SCRAMBLED							
RUSH ORDER 1 0.00							
		RECEIPT	CLERK	7	8	9	CL
		PRICE LEVEL	5% ST DISC	4	5	6	NO SALE
		CUSTOMER	5% ITEM				
		BAR TAB	REFUND	1	2	3	X
		PENDING	VOID SALE				
		TABLE MAP	VOID	0	.	ENTER	

2x
\$10.00

PAID IN	PAID OUT		LAYBY CANCEL	BAR TAB PRE AUTH	10% ITEM S'CHARGE	AMOUNT	VOID MODE
TIPS IN	TIPS OUT		ACCOUNT REFUND	BAR TAB PRE AUTH VOID	10% ST S'CHARGE	REPLAY TRANS	TRANSFER MODE
						UNLOCK PERMISSION	WASTE MODE

RUSH ORDER




DRINKS	CAFE	TAP BEER	SPIRITS				RETAIL	MANAGER
	RESTAURANT	BOTTLE BEER & RTD	WINE	COCKTAILS	FRUIT & VEG	GROCERY	SERVICES	ADMIN

idealpos Update History

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The order will be rushed/expedited ahead of the other orders which have already been sent to the Ideal Kitchen Monitor.

In the below example, the order shown on the top-left corner of the Ideal Kitchen Monitor shows "###RUSH ORDER###" in the header and it was the last order that was sent to the IKM (as indicated by the time lapsed shown on the top-right corner of that order).

<p>Table ³⁵ 00:00:39</p> <p>###RUSH ORDER###</p> <p>FOOD</p> <p>1 BACON & EGGS 1 SCRAMBLED</p>	<p>Table ³¹ 00:07:43</p> <p>FOOD</p> <p>1 VANILLA SLICE 1 CARROT CAKE SLICE 1 BLACK FORREST CA...</p> <p>BEVERAGE</p> <p>1 CAPPUCCINO 1 FLAT WHITE 1 SHORT BLACK</p>	<p>Table ³² 00:04:36</p> <p>FOOD</p> <p>1 PANCAKES 1 CANADIAN PANCAKES 1 WAFFLES 1 CARROT CAKE SLICE</p>	<p>Table ³³ 00:04:07</p> <p>ENTREE</p> <p>1 PASTA 1 BEEF 1 LAMB 1 DUCK</p>								
<p>Table ³⁴ 00:02:43</p> <p>FOOD</p> <p>1 CHICKEN BURGER 1 LARGE CHIPS 1 BACON & EGGS 1 SCRAMBLED</p>											
Done	Ready	Rush	Delete	Recall	Undo	Zoom	Print	Previous	Next	Summary	Close

Import Data

IP-4097-Import File Filters – Default includes CSV

This function enhances the Import File window that is used when you are importing data into Idealpos via the Back Office > Utilities > Import Data menu.

Previous to this change, the "Text files" filter would only include files with a .txt file extension.

In order to import a file containing a .csv file extension, you would have to select the File type dropdown box, then select the CSV option. When CSV data is being frequently imported into Idealpos, this would result in an extra step of having to select the dropdown box each time and change to the CSV format.

This change now includes files with extensions of both .txt and .csv.

It is no longer necessary to select the file type dropdown box and specifically choose "CSV".

To use this function, go to: Back Office > Utilities > Import Data.

Select any required option to open the Import data window. For this example, we'll select "Departments".

On the Import Departments window, press the small magnifying glass icon:

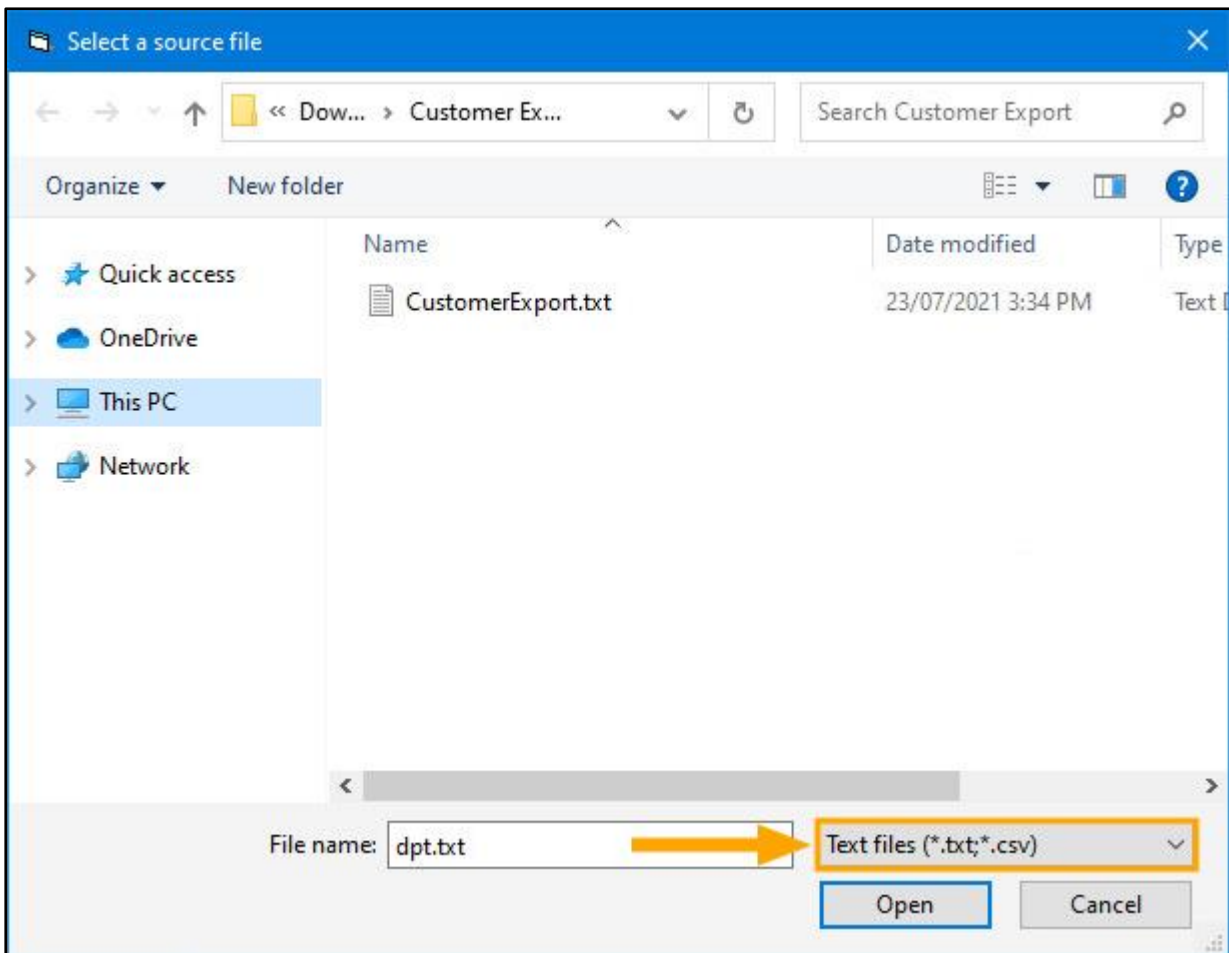


The "Select a source file" window will appear.

The Text files option now includes both .txt and .csv file extension files, making it unnecessary to have to change the file type when importing data.

idealpos Update History

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IPS Client

IP-4262 – IPSClient displays SQL Server version and blocks invalid overwrites

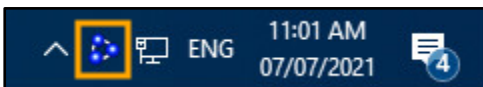
This change adds additional functionality to the IPS Client to assist with the process of identifying terminals at a site that may be running different versions of SQL Server.

As part of this change, the Standard, Filtered and Offline overwrite functions in IPS Client will now block overwrites from being sent to destination terminals which are running an SQL Server version that is older than the SQL Server version installed on the source terminal. This change has been made to prevent issues with data caused by invalid overwrites from occurring. We recommend that all terminals are running matching versions of SQL Server.

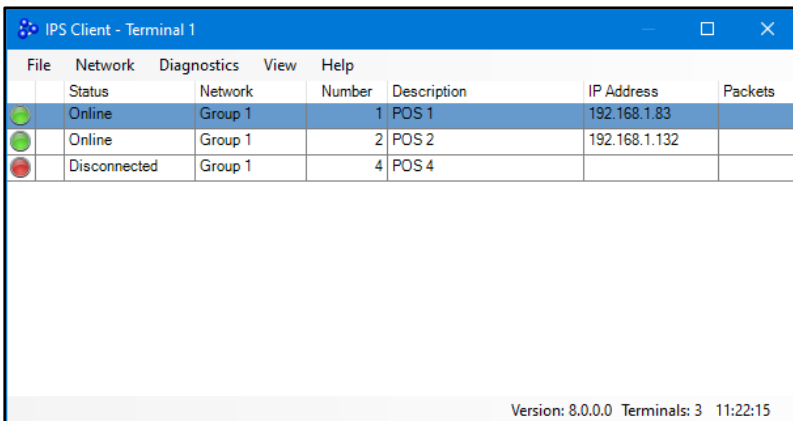
To view SQL Server versions of other terminals in the IPS Client, go to:

Windows System Tray > Click on the IPSClient icon.

If the icon is hidden, you may need to press the up arrow in the system tray to show any hidden icons.

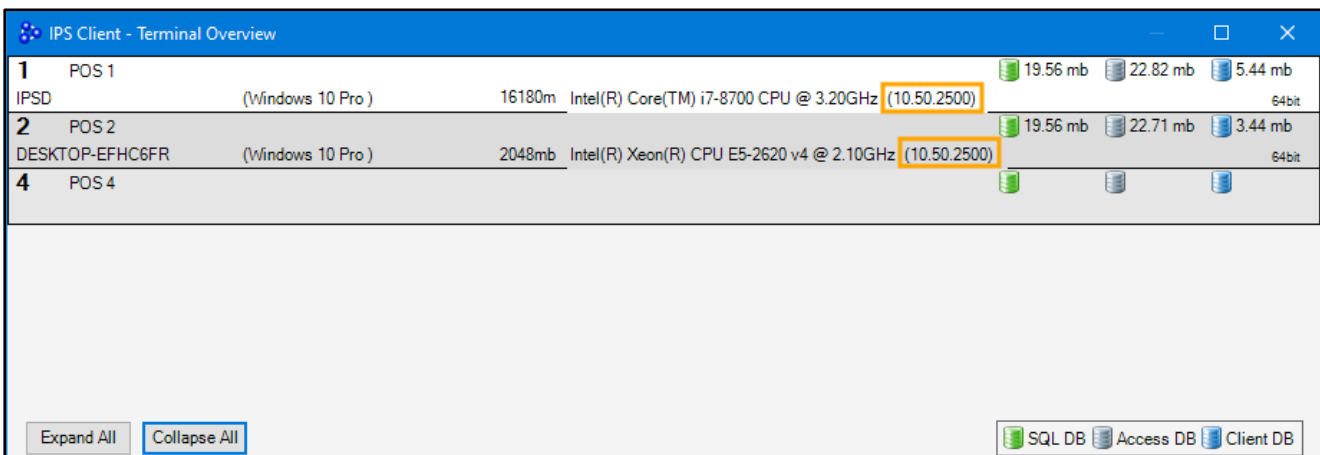


After pressing the IPS Client in the Windows System Tray, the IPSClient window will appear.



Click on any terminal in the list to display the IPS Client – Terminal Overview.

The SQL Server version will appear next to the CPU details as shown in the below example:



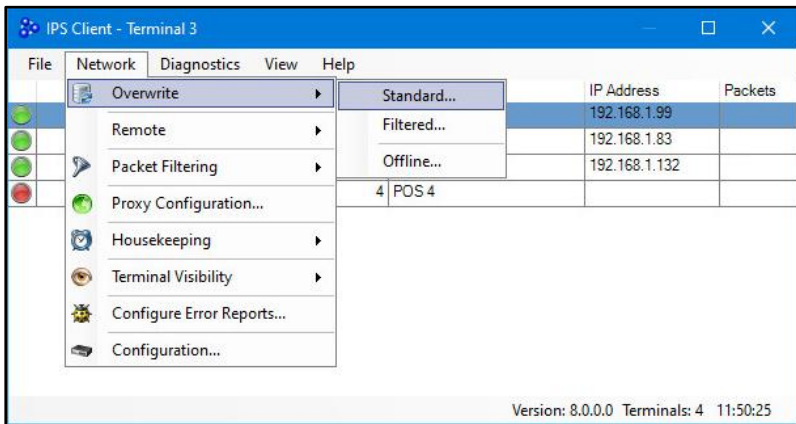
idealpos Update History

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Close the IPS Client – Terminal Overview window.

The Standard, Filtered and Offline overwrite functions will prevent overwrites from being sent to terminals that are running an SQL Server version that is older than the source terminal.

In the IPS Client window, go to: Network > Overwrite > Standard...

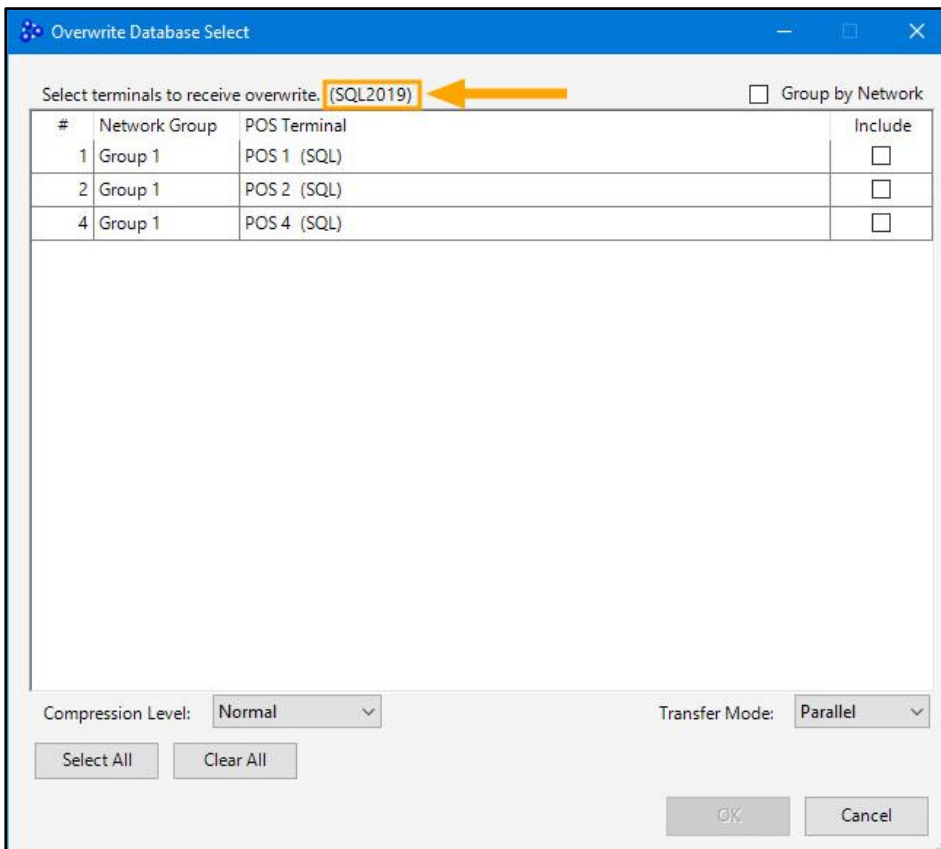


The Overwrite Database Select window will not allow overwrites to be sent to terminals which are running SQL Server versions older than the source terminal. Attempting to enable the "Include" tickbox on terminals running older SQL Server versions will result in nothing happening and the tickbox not being enabled.

This functionality applies to Standard, Filtered and Offline overwrites.

The SQL Server version running on the current terminal that is performing the overwrite is displayed in brackets next to the text "Select terminals to receive overwrite".

The below example shows the source terminal running SQL Server 2019:



Kiosk

IP-3826 – Kiosk Module – Lock Floating Grids in place

This function locks floating grids in place only on the Kiosk module.

As the Kiosk module is a customer-operated function, customers tend to use the system differently to standard clerks. One of the capabilities of the Idealpos POS Screen is the ability to click and hold on the title bar of a floating grid, then drag it anywhere on the screen. This poses a problem on Kiosk terminals as the next time the floating grid is displayed; it reappears in the location where it was moved to by the previous customer.

To prevent customers from moving floating grids around on Kiosks, the ability to move floating grids on Kiosks has been disabled by completely hiding the title-bar of the floating grid.

There is no additional configuration required on terminals running the Kiosk module.

Any standard POS terminals which are not operating in Kiosk mode will still display the title-bar on the floating grid, enabling them to be dragged around, whereas on Kiosk terminals, the title-bar will be hidden, making it impossible to move the floating grid around the screen.

A grid can be set to display as a floating grid by going to: Back Office > Setup > POS Screen > Grids

Select a POS Screen Grid from the list > Modify

Enable the option "Floating Grid with Programmable Size".

Press the "Save" button on the top-left corner of the window to save the change.

idealpos **Pos Screen Grids**
Modify 202

Save

Code 202

Description ELECTRICAL

Fit Grid to POS Screen

Floating Grid with Programmable Size

Width 9 Height 6

Price Level Don't Change

idealpos Update History

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The Floating Grid title bar is displayed on standard POS Screens (non-Kiosk) as per the below example:



The Floating Grid title bar is hidden on Kiosk screens as per the below example:



Licensing

IP-4270 – Licensing – Stock Control Module

This function adds a new Stock Control module to Idealpos Licensing.

In order to access Stock Control functionality, this module will need to be enabled in the Licence Gateway.

In addition to the implementation of Stock Control functionality to the Idealpos Licence Gateway, the following EFTPOS integration names have been updated in the Licence Gateway and the EFTPOS dropdown box in Setup > POS Terminals > Modify > EFTPOS Settings:

- DPS has been renamed to Windcave
- PC-EFTPOS AU has been renamed to Linkly

The Stock Control module will control whether the following options are available or not (when Stock Control is enabled in the licence, the below options and functions will appear, when disabled, the following menus and functions will be hidden and unavailable).

File > Stock Control > Write-Off Categories

File > Stock Control > Stock Items by Location

File > Sales > Stock Item Variants

File > Purchases > Purchase Categories

File > Suppliers > Suppliers

File > Suppliers > Supplier Stock Codes

Enquiry > Suppliers

Transactions > Stock Control > Stock Purchases

Transactions > Stock Control > Stock Write-Offs

Transactions > Stock Control > Stock Transfers

Transactions > Stock Control > Manufacture Items

Transactions > Suppliers > Supplier Payments

Transactions > Suppliers > Supplier Adjustments

Listings > Stock Control > Write-Off Categories

Listings > Purchases > Purchase Categories

Listings > Suppliers > Suppliers

Listings > Suppliers > Supplier Stock Code

Reports > Stock Control > Stock Movement

Reports > Stock Control > Stock Transaction

Reports > Stock Control > Stock Valuation

Reports > Stock Control > Stock Levels by Location

Reports > Stock Control > Stock Transfers

Reports > Stock Control > Stock Write-Offs

Reports > Stock Control > Write-Off Category

Reports > Stock Control > Re-Order

Reports > Stock Control > Stock Ordered

Reports > Stock Control > Price Changes

Reports > Stock Control > Archived Stocktakes

Reports > Purchases > Purchase Category

Reports > Purchases > Stock Purchases

Reports > Purchases > Purchase Orders

Reports > Purchases > Supplier Transaction

Reports > Purchases > Supplier Tax Report

Reports > Purchases > Supplier Trial Balance

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Stocktake > Start Stocktake
Stocktake > Stocktake Forms
Stocktake > Enter Stocktake
Stocktake > Stocktake Variance Report
Stocktake > Stocktake Valuation Report
Stocktake > Generate Stock Transfer
Stocktake > Update Stock Levels
Stocktake > Clear Stocktake

Utilities > Calculate Recommended Stock Levels
Utilities > Export Data > Supplier Invoices and Credits
Utilities > Import Data > Suppliers

Within the Stock Items screen (File > Stock Control > Stock Items), the following functions are also controlled via the Stock Control Module:

Locations/Stock Items by Location
Supplier Codes
Default Supplier
Default Supplier Stock Code
Stock Control checkbox
Variants checkbox and Variants tab
Indirect Item checkbox and Indirect Item tab
Stock Item Manufacturing (Manufactured Item checkbox)

Multi-Site Management - Head Office

IP-3861 – Head Office – Support for Site Groups

This functionality is only available on an Idealpos system which has the Head Office module enabled in the Licence Gateway.

This function adds the ability to group each Site into a maximum of 10 Site Groups.

This can then be used to filter the list of sites by the configured Site Groups when viewing a list of Sites via the Sites function (Setup > Sites) as well as used for filtering sites by Site Group when running reports from the Head Office which support the Sites field.

Each of the 10 Site Groups can be given a name (e.g. State, Region, Location, Brand, Business Type, etc.) of up to 30 characters in length.

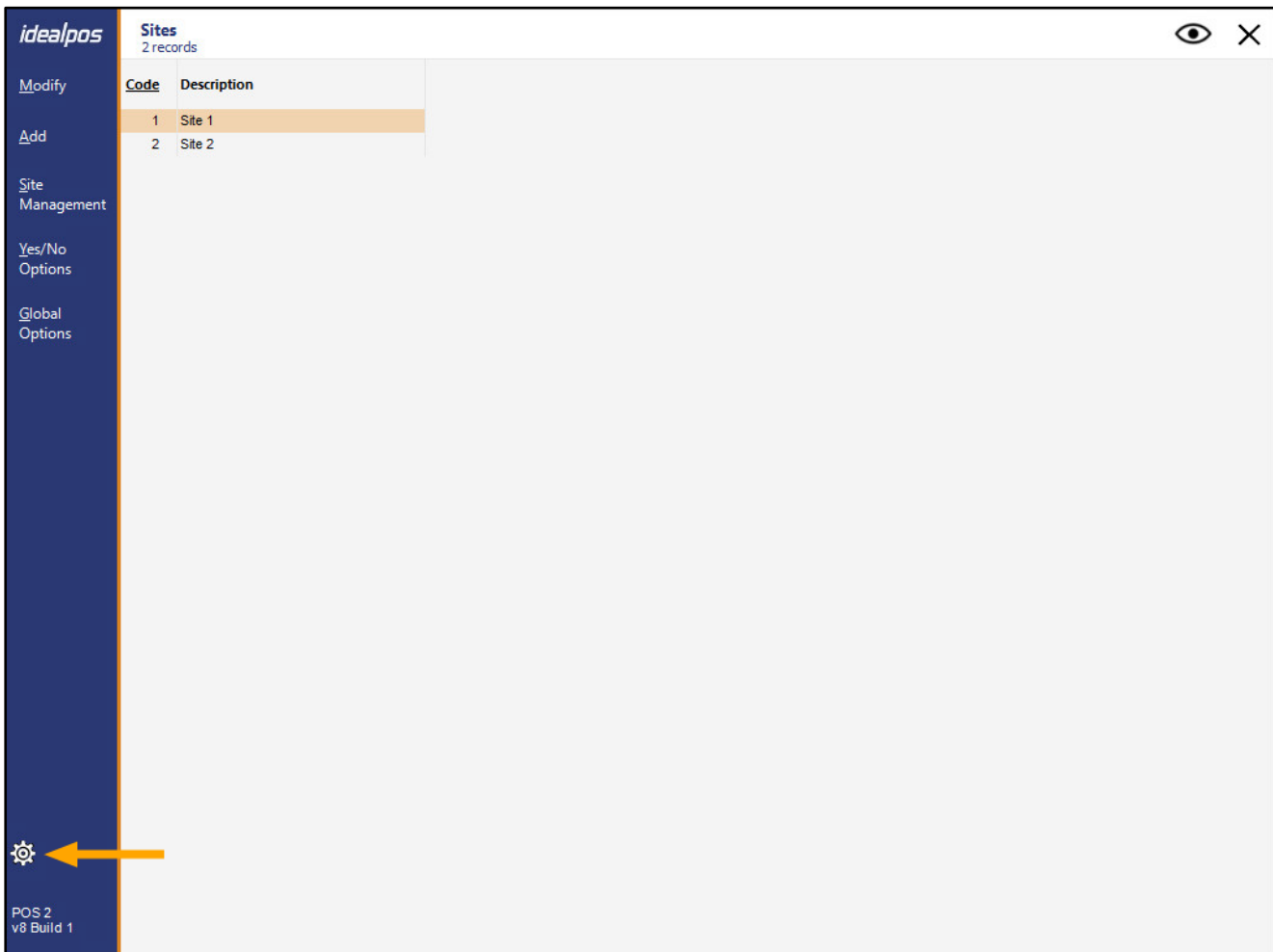
Once the Site Group names have been created, you can then modify each Site and enter the details that pertain to the Site Group name.

E.g. Create or modify a Site and enter "Queensland" into the State field, "Brisbane" into the Region field, "River Mall Shopping Centre" into the Location field, "ACME" into the Brand field and "Restaurant" into the Business Type field. This process can be repeated for each Site in your system, then once they have been configured with this functionality, it will be possible to run reports by Site and filter by Site Group.

To configure and use this function, go to:

Back Office (on a Head-Office system) > Setup > Sites

On the bottom-left corner of the Sites window, press the cog icon:



idealpos Update History

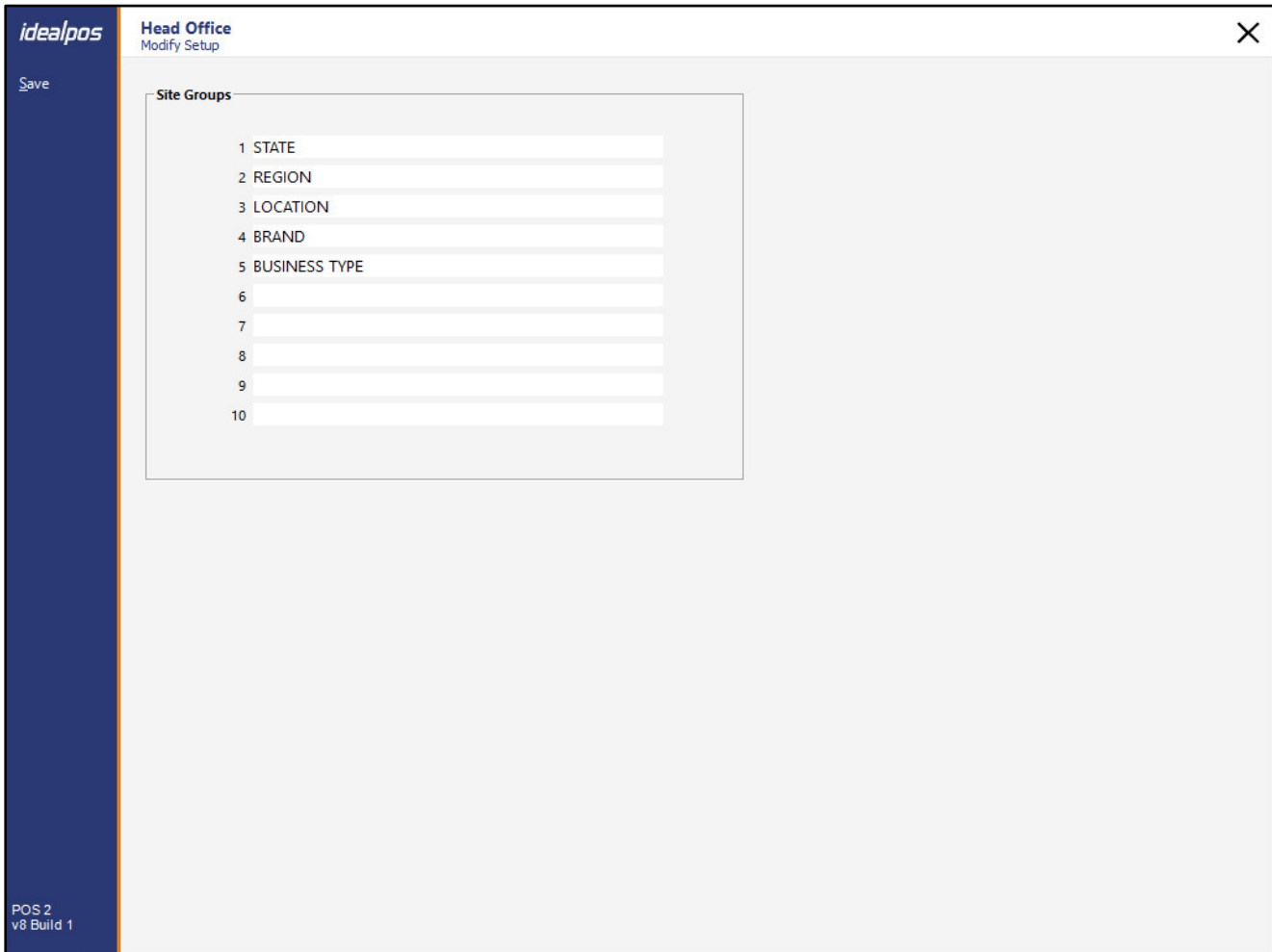
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The Site Groups window is displayed.

Enter the Site Groups that you want to create, then press the "Save" button on the top-left corner of the window. Note that each Site Group is limited to 30 characters. Also note that when you enter details into each of these Site Groups, there is also a 30-character limit

Using all 10 Site Groups is not compulsory. The below example shows the following Site Groups:

- State
- Region
- Location
- Brand
- Business Type

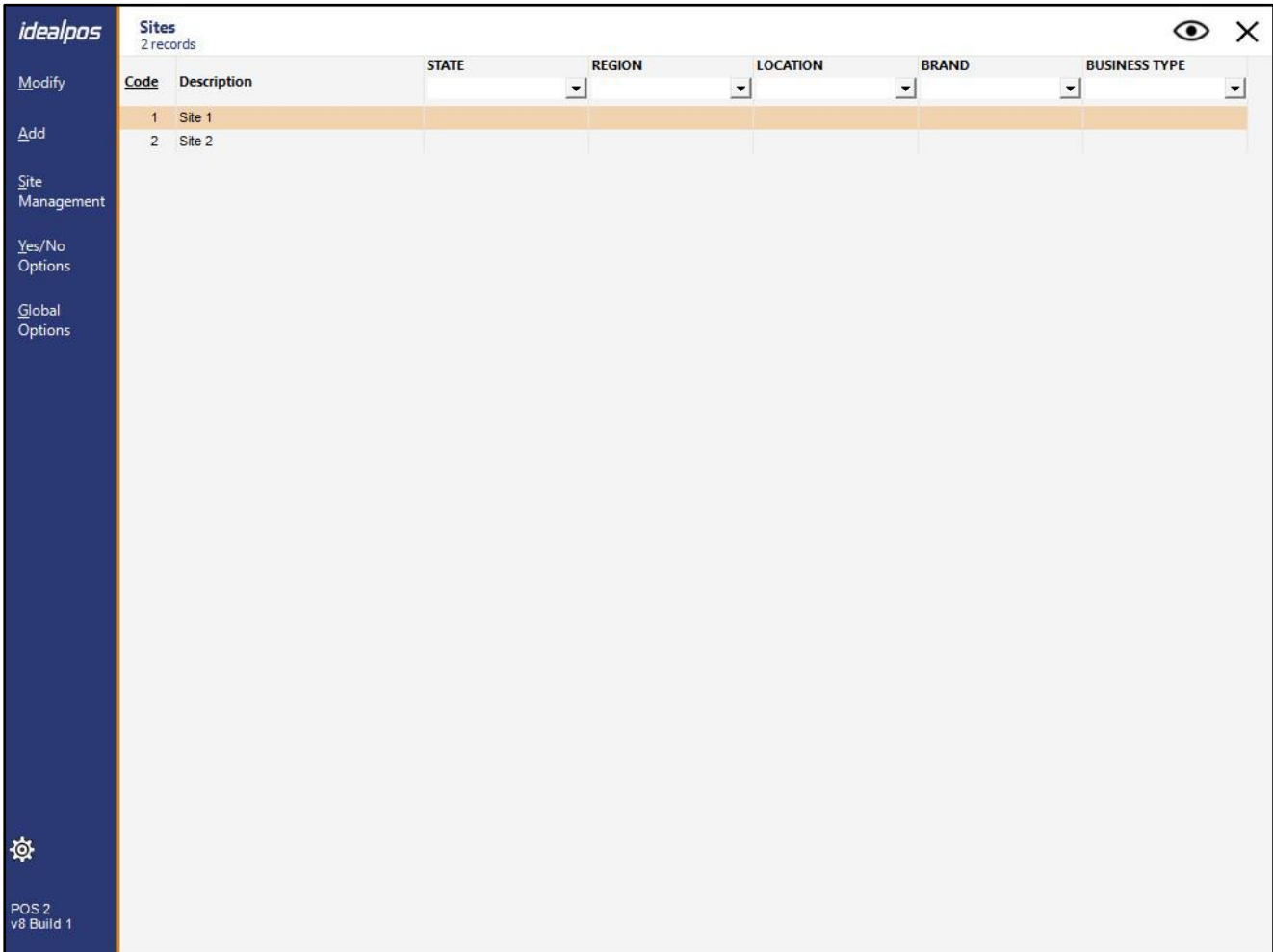


The screenshot shows a software window titled "idealpos Head Office Modify Setup". On the left side, there is a dark blue vertical bar with the "idealpos" logo at the top, a "Save" button, and the text "POS 2 v8 Build 1" at the bottom. The main area of the window is light gray and contains a section titled "Site Groups" with a list of 10 numbered input fields. The first five fields are pre-filled with the text: 1 STATE, 2 REGION, 3 LOCATION, 4 BRAND, and 5 BUSINESS TYPE. Fields 6 through 10 are empty.

idealpos Update History

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After pressing "Save", the Sites window will be displayed and a column for each Site Group will appear at the top of the window.



The screenshot displays the 'idealpos' interface for the 'Sites' window. The window title is 'Sites' with a subtitle '2 records'. On the left, there is a dark blue sidebar with the 'idealpos' logo and several menu items: 'Modify', 'Add', 'Site Management', 'Yes/No Options', and 'Global Options'. At the bottom of the sidebar is a gear icon and the text 'POS 2 v8 Build 1'. The main area contains a table with the following columns: 'Code', 'Description', 'STATE', 'REGION', 'LOCATION', 'BRAND', and 'BUSINESS TYPE'. The 'STATE', 'REGION', 'LOCATION', 'BRAND', and 'BUSINESS TYPE' columns have dropdown arrows. The table contains two records: '1 Site 1' and '2 Site 2'. The first record is highlighted in orange. In the top right corner of the window, there is an eye icon and a close 'X' icon.

Code	Description	STATE	REGION	LOCATION	BRAND	BUSINESS TYPE
1	Site 1					
2	Site 2					

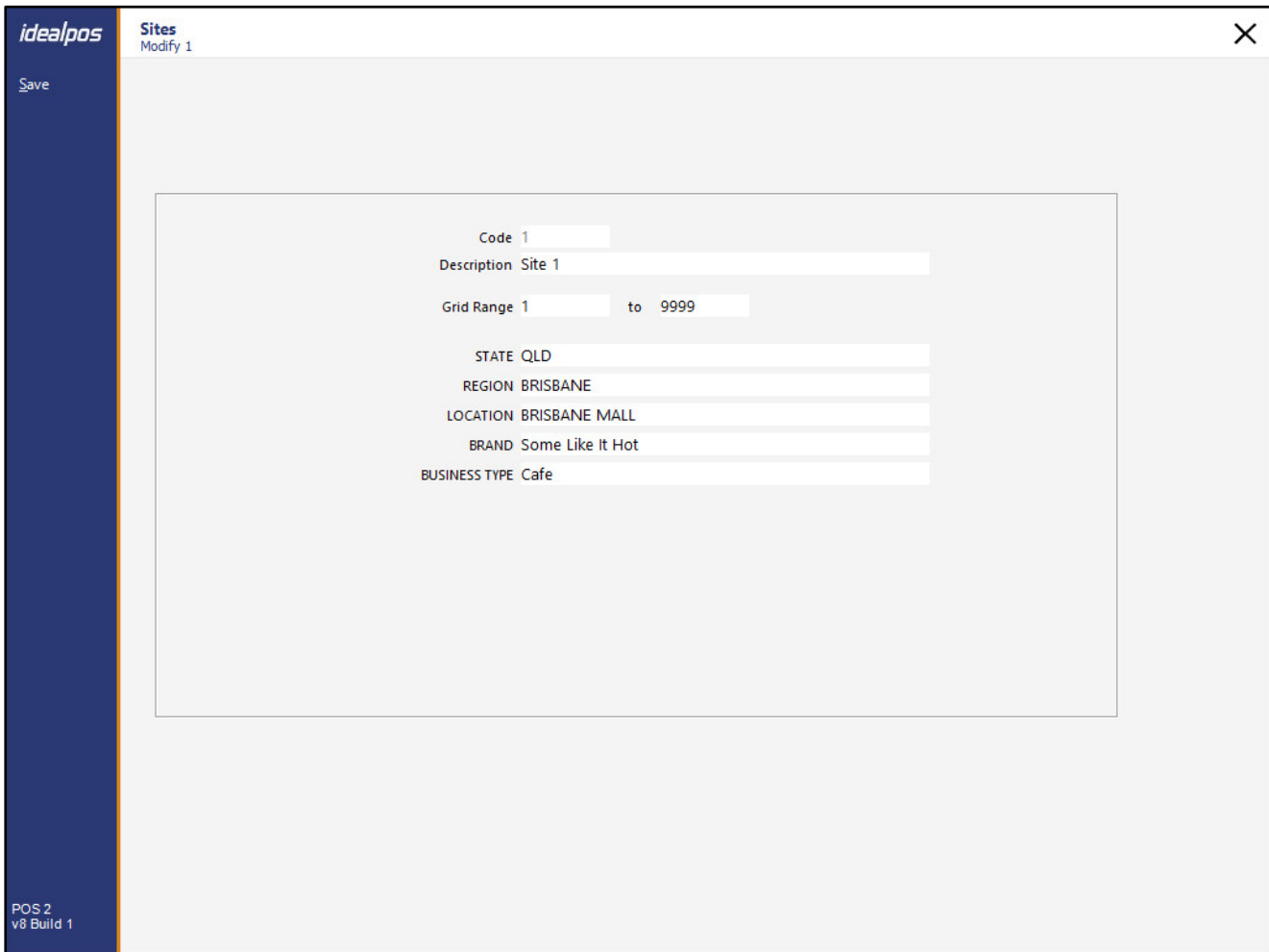
idealpos Update History

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Details can now be recorded against the new Site Groups.

Select a Site from the list then press the "Modify" button on the top-left corner of the window.

Fill in the required details that pertain to the Site into each of the Site Group fields, then press the "Save" button on the top-left corner of the window to save the changes.



The screenshot shows a software window titled "idealpos Sites Modify 1". On the left side, there is a dark blue vertical bar with the "idealpos" logo at the top, a "Save" button, and version information "POS 2 v8 Build 1" at the bottom. The main area of the window is light gray and contains a white-bordered form with the following fields:

- Code 1
- Description Site 1
- Grid Range 1 to 9999
- STATE QLD
- REGION BRISBANE
- LOCATION BRISBANE MALL
- BRAND Some Like It Hot
- BUSINESS TYPE Cafe

Repeat the above step for each site, entering details that are relevant to each site into the Site Group fields.

In order for Site Group filtering to work correctly, ensure that you enter each Site Group name consistently.

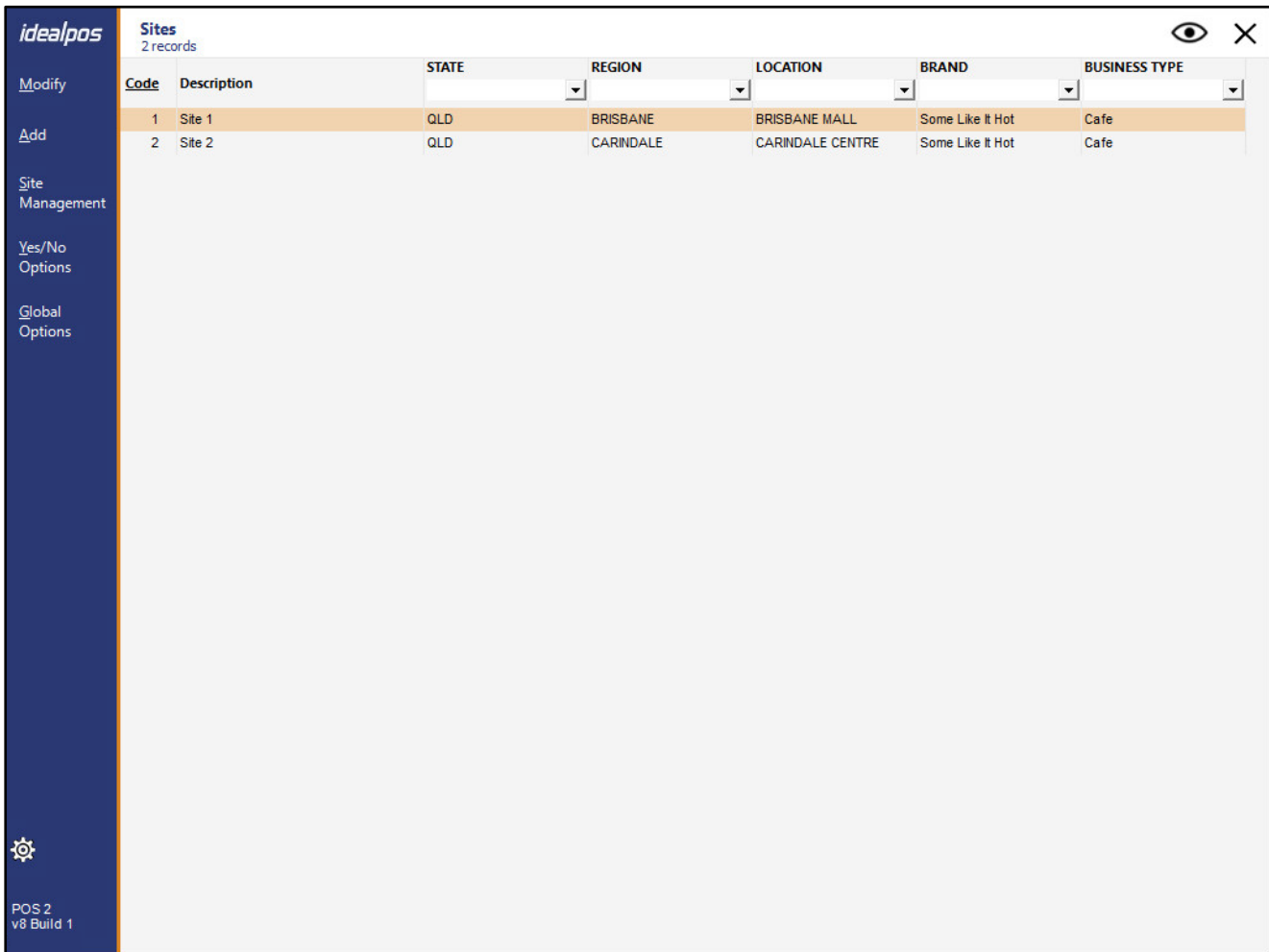
E.g. If you are entering "Bake Shop" into the "Brand" Site Group field, ensure that you consistently enter "Bake Shop" for each site that is part of the "Bake Shop" brand (don't enter "Bakeshop"). Entering inconsistent names for each site will result in each unique variation of the Site Group name appearing in the Site Group dropdown box, defeating the purpose of utilising the Site Groups function.

Press the "Save" button on the bottom-right corner of the window to create a new site.

idealpos Update History

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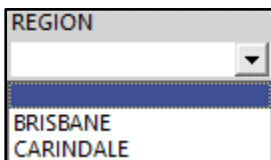
Once the Site Groups have been filled out for each Site in your system, each Site will contain a Site Group and it will be possible to filter the list using the dropdown boxes located at the top of the window.



The screenshot shows the 'idealpos' interface for managing 'Sites'. The title bar indicates '2 records'. The table has columns for Code, Description, STATE, REGION, LOCATION, BRAND, and BUSINESS TYPE. The first record is 'Site 1' in QLD, BRISBANE, at BRISBANE MALL, with brand 'Some Like It Hot' and business type 'Cafe'. The second record is 'Site 2' in QLD, CARINDALE, at CARINDALE CENTRE, with brand 'Some Like It Hot' and business type 'Cafe'. The interface includes a left sidebar with options like 'Modify', 'Add', 'Site Management', 'Yes/No Options', and 'Global Options', and a bottom status bar showing 'POS 2 v8 Build 1'.

Code	Description	STATE	REGION	LOCATION	BRAND	BUSINESS TYPE
1	Site 1	QLD	BRISBANE	BRISBANE MALL	Some Like It Hot	Cafe
2	Site 2	QLD	CARINDALE	CARINDALE CENTRE	Some Like It Hot	Cafe

The below example shows the Region dropdown box which contains a listing of the regions which have been assigned to the Sites



A close-up of a dropdown menu labeled 'REGION'. The menu is open, showing two options: 'BRISBANE' and 'CARINDALE'.

idealpos Update History

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Selecting an option from the dropdown box will filter the results shown:

The screenshot shows the 'idealpos' interface for managing 'Sites'. The title bar indicates '1 record'. The table has columns for Code, Description, STATE, REGION, LOCATION, BRAND, and BUSINESS TYPE. The 'REGION' dropdown is set to 'BRISBANE'. The table contains one record: Code 1, Description Site 1, STATE QLD, REGION BRISBANE, LOCATION BRISBANE MALL, BRAND Some Like It Hot, BUSINESS TYPE Cafe. The left sidebar contains navigation options: Modify, Add, Site Management, Yes/No Options, and Global Options. The bottom left corner shows 'POS 2 v8 Build 1'.

Code	Description	STATE	REGION	LOCATION	BRAND	BUSINESS TYPE
1	Site 1	QLD	BRISBANE	BRISBANE MALL	Some Like It Hot	Cafe

idealpos Update History

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In addition to utilising the Site Groups function for the Sites list (accessible via Back Office > Setup > Sites), it can also be used when running reports that support the Sites field from the Head Office and filtering by Sites.

An example of such a report that allows filtering by Site is the Stock Item Sales Report.

Go to: Back Office > Reports > Sales > Stock Item Sales

In the Site field, click on the ">" button to display the Site list:

idealpos Stock Item Sales S X

View
Print
Save Defaults

POS 2
v8 Build 1

Date Range
Week to Date From 25 Jan 2021 00:00:00 To 29 Jan 2021 23:59:59

Optional Grouping

Group Field	Show Group Label	Totals Only	Totals with Group Label
Department	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Sort Order
 Code
 Description
 Best Quantity
 Worst

Show Stock Items
 Group by Sell Price
 Unit Price is Price 1
 Hide Unit Price/Tax
 Portrait
 Consolidate Site Items
 Consolidate Variants

Selection Range
Price Level All Price Levels
Code > to >
Description > to >
Supplier > to >
Department >
Location >
POS System >
Clerk >
Site >
Attributes > > +
 Show
 Exclude X
Tags

idealpos Update History

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A list of Sites is displayed.

idealpos		Sites 16 records							
Code	Description	STATE	REGION	LOCATION	BRAND	BUSINESS TYPE			
1	Some Like It Hot Cafe BNE	QLD	BRISBANE	XYZ Shopping Centre	Some Like It Hot	Cafe			
2	Some Like It Hot Rst BNE	QLD	BRISBANE	XYZ Shopping Centre	Some Like It Hot	Restaurant			
3	Some Like It Hot Swm BNE	QLD	BRISBANE	ABC Shoppingtown	Some Like It Hot	Swimwear			
4	Farmers Friends Hardware TWMB	QLD	TOOWOOMBA	CDE Marketplace	Farmers Friends	Hardware			
5	Some Like It Hot Cafe TWMB	QLD	TOOWOOMBA	CDE Marketplace	Some Like It Hot	Cafe			
6	Some Like It Hot Rstrnt TWMB	QLD	TOOWOOMBA	CDE Marketplace	Some Like It Hot	Restaurant			
7	Some Like It Hot Swmwr TWMB	QLD	TOOWOOMBA	CDE Marketplace	Some Like It Hot	Swimwear			
8	Surfs Up Swimwear SRFRS PDSE	QLD	SURFERS PARADISE	SURF MALL	Surfs Up	Swimwear			
9	Surfs Up Surfboards SRFRS PDS	QLD	SURFERS PARADISE	SURF MALL	Surfs Up	Surfboards			
10	Surfs Up Bgie Brds SRFRS PDSE	QLD	SURFERS PARADISE	SURF MALL	Surfs Up	Boogie Boards			
11	Hrbrsde Advntrs Dglt Cmr SYD	NSW	SYDNEY	HARBOUR TOWN CENTRE	Harbourside Adventures	Digital Cameras			
12	Hrbrsde Advntrs Svnrs Gfts SYD	NSW	SYDNEY	HARBOUR TOWN CENTRE	Harbourside Adventures	Souvenirs and Gifts			
13	Some Like It Hot Cafe SYD	NSW	SYDNEY	HARBOUR TOWN CENTRE	Some Like It Hot	Cafe			
14	Some Like It Hot Rstrnt SYD	NSW	SYDNEY	HARBOUR TOWN CENTRE	Some Like It Hot	Restaurant			
15	Surfs Up Swimwear BONDI	NSW	BONDI	BONDI CENTRE	Surfs Up	Swimwear			
16	Surfs Up Bgie Brds NOOSA	QLD	NOOSA	NOOSA PARADE	Surfs Up	Boogie Boards			

POS 2
v8 Build 1

idealpos Update History

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Filter the list by selecting one or more options from the dropdown boxes at the top of the window, then press the "Select All" button on the bottom-left corner of the window. This will select all Sites which are currently being displayed by the filter and move them into the Sites field in the report selection criteria.

The screenshot shows the 'idealpos' interface with a 'Sites' list. The list has 8 records and is filtered by 'Some Like It Hot' in the 'BRAND' column. The 'Select All' button is highlighted with a yellow box and an arrow pointing to it from the left. The table below shows the data rows.

Code	Description	STATE	REGION	LOCATION	BRAND	BUSINESS TYPE
1	Some Like It Hot Cafe BNE	QLD	BRISBANE	XYZ Shopping Centre	Some Like It Hot	Cafe
2	Some Like It Hot Rst BNE	QLD	BRISBANE	XYZ Shopping Centre	Some Like It Hot	Restaurant
3	Some Like It Hot Swm BNE	QLD	BRISBANE	ABC Shoppingtown	Some Like It Hot	Swimwear
5	Some Like It Hot Cafe TWMB	QLD	TOOWOOMBA	CDE Marketplace	Some Like It Hot	Cafe
6	Some Like It Hot Rstrnt TWMB	QLD	TOOWOOMBA	CDE Marketplace	Some Like It Hot	Restaurant
7	Some Like It Hot Swmwr TWMB	QLD	TOOWOOMBA	CDE Marketplace	Some Like It Hot	Swimwear
13	Some Like It Hot Cafe SYD	NSW	SYDNEY	HARBOUR TOWN CENTRE	Some Like It Hot	Cafe
14	Some Like It Hot Rstrnt SYD	NSW	SYDNEY	HARBOUR TOWN CENTRE	Some Like It Hot	Restaurant

idealpos Update History

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After pressing "Select All", the Site field will be updated using the range selected. Press the "View" button on the bottom-right corner to run the report:

idealpos Stock Item Sales

View (highlighted with yellow arrow)

Date Range: Week to Date, From: 25 Jan 2021 00:00:00, To: 29 Jan 2021 23:59:59

Optional Grouping:

- Group Field: Department
- Show Group Label:
- Totals Only:
- Totals with Group Label:

Sort Order:

- Code
- Description
- Best
- Worst
- Quantity: [dropdown]

Selection Range:

- Price Level: All Price Levels
- Code: > to >
- Description: > to >
- Supplier: > to >
- Department: >
- Location: >
- POS System: >
- Clerk: >
- Site: 1-3,5-7,13-14 (highlighted with yellow arrow)
- Attributes: [dropdown] [dropdown] +
- Show: Exclude:
- Tags: [input type="text"/>

POS 2 v8 Build 1

The Stock Item Sales Report is displayed and shows the Site Groups that were selected when running the report.

POS 1(1) Stock Item Sales Report Printed 29/01/2021 15:53:34 Page 1 of 1

25 Jan 2021 00:00:00 to 29 Jan 2021 23:59:59

Sites: Some Like It Hot (highlighted with yellow arrow)

	Unit Price inc	Unit Tax	Quantity	Sales				Gros s inc
				Nett e x	Tax	Nett inc	Disc ounts	
LUNCH								
106007 PASTA	11.00	1.00	2.0000	20.00	2.00	22.00	0.00	22.00
			2.0000	20.00	2.00	22.00	0.00	22.00
ENTRÉE								
106001 DUCK	14.00	1.27	2.0000	25.45	2.55	28.00	0.00	28.00
106002 BEEF	13.00	1.18	2.0000	23.64	2.36	26.00	0.00	26.00
106003 LAMB	12.00	1.09	2.0000	21.82	2.18	24.00	0.00	24.00
			6.0000	70.91	7.09	78.00	0.00	78.00
COFFEE								
202001 CAPPUCCINO	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50
202002 FLAT W WHITE	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50
202004 SHORT BLACK	3.00	0.27	1.0000	2.73	0.27	3.00	0.00	3.00
			3.0000	9.09	0.91	10.00	0.00	10.00
			11.0000	100.00	10.00	110.00	0.00	110.00

POS Screen

IP-3805 – Add-On Taxes – Show current Tax Subtotal as sale is entered

This function will display a combined tax total for all Stock Items that have been added to the sale below the sale window.

This functionality only applies to regions that utilise add-on taxes (such as in the USA where the sell price of the item printed on the shelf excludes tax and when the customer pays for the item at the checkout, the tax is then added onto the item). The Tax Rate must also have the "Inc" option unticked, which implies that the tax is not included in the sale price and hence, the tax will be added to the item during payment.

There is no additional configuration required to display the Tax Subtotal when the sale is entered, other than ensuring your Tax Rate is configured so that it is an "Add-On Tax" which adds the tax on when the items are added to a sale. You will also need to ensure that your Stock Items have the applicable tax rates enabled.

To check your Tax Rates, go to: Setup > Global Options > Sales.

Any Tax Rate which has the "Inc" option checked will mean that the tax is already included in the Stock Item Sell Price and will not be added onto the item when it is sold.

Any Tax Rate which has the "Inc" option unchecked will mean that the tax will be added onto the Stock Item when the item is sold.

The screenshot shows the 'Global Options' window for 'Site 1 (Site 1)'. The 'Sales' tab is selected. Under the 'Tax Rates' section, there is a table with columns: Default, Description, Rate, Label, and Inc. The 'Inc' column contains checkboxes for each row. Below the table are two options: '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	7.000	GST	<input type="checkbox"/>
<input type="checkbox"/>	PST	5.000	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"/>
<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

idealpos Update History

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In order for the Tax Rate to apply to an item when the item is sold, the Stock Item must also have the applicable Tax Rate(s) enabled.

Go to: File > Stock Control > Stock Items > Select a Stock Item > Modify (or double-click on the item).

Ensure that the Tax Rates which are applicable to the Stock Item have been enabled.

Check each item's Tax Settings and ensure they're configured as required.

Alternatively, Range Programming can be used to enable the required Tax Settings for a range of items as a batch operation.

Range Programming is available via Back Office > Utilities > Range Programming > Stock Items.

Please use caution when using Range Programming as it is possible to modify all items as a batch operation; any mistakes made when using Range Programming cannot be easily undone.

idealpos Stock Items Modify 202001 General Advanced Indirect Item Variants Last Modified 25 Aug 2021

Stock Code: 202001 Department: 202 > COFFEE
Description: CAPPUCCINO (10) Scan Code: Auto
Kitchen Description: CAPPUCCINO (10)
Long Description: CAPPUCCINO (10)

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

Tax Settings (Selling)

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

POS 2 v8 Build 1

idealpos Update History

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Once the Tax Rates have been configured at the Global Options level and the Stock Item level, open the POS Screen by pressing the "POS" button on the top-left corner of the Back Office Dashboard.

Add Items to the sale.

The Tax will appear on the bottom-left corner of the sale window (\$1.22 in the below example). The Total sale amount shown on the right-hand side of the sale window (\$11.22 in the below example) is inclusive of the \$1.22 Tax amount shown on the bottom-left corner of the sale window.

Aug 25 16:05 Adult ID: Aug-25-2003
POS 2 Jeremy STANDARD #502

CAPPUCCINO (12)	1	3.50							
FLAT WHITE (12)	1	3.50		RECEIPT	CLERK	7	8	9	CL
SHORT BLACK (12)	1	3.00							
				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	

Tax 1.22 \$11.22

3x

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

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After the ENTER button is pressed and the Tender screen is displayed, the Total amount shown remains the same as it did during the sale, as shown in the example below.

Aug 25 16:10 Adult ID: Aug-25-2003
 POS 2 Jeremy STANDARD #502

×

CAPPUCCINO (12) 1 3.50 FLAT WHITE (12) 1 3.50 SHORT BLACK (12) 1 3.00 GST 0.71 PST 0.51		RECEIPT	CLERK	7	8	9	CL
		PRICE LEVEL	5% ST DISC	4	5	6	NO SALE
		CUSTOMER	5% ITEM				
		BAR TAB	REFUND	1	2	3	X
		PENDING	VOID SALE				
		TABLE MAP	VOID	0	.	ENTER	

Tax 1.22
 3x

\$11.22

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

11.20

Balance 11.20

idealpos Update History

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IP-3602 – POS Screen support for 1366 x 768 resolution

This function adds the ability to set the POS Screen Resolution to 1366 x 768.

When using this POS Screen Resolution, the Sale Details area of the screen appears as a taller portrait-type area which enables the Clerk to see a longer list of items that have been added to the sale.

The screenshot displays the POS interface with the following components:

- Receipt List (Left):** A list of items with quantities and prices:

CAPPUCCINO	1	3.50
FLAT WHITE	1	3.50
SHORT BLACK	1	3.00
PASTA	1	11.00
BEEF	1	13.00
LAMB	1	12.00
DUCK	1	14.00
HAHN LIGHT SCH	1	5.50
CARLTON MID SCH	1	6.00
XXXX GOLD SCH	1	6.00
CARLTON DRAUGHT SCH	1	7.00
XXXX BITTER SCH	1	7.00
TOOHEYS NEW SCH	1	7.00
VB SCH	1	7.00
NEWSTEAD PALE ALE SCH	1	7.50
NEWSTEAD AMBER ALE SCH	1	7.50
HOLGATE TEMPTRESS SCH	1	7.50
TWO BIRDS SUNSET SCH	1	7.50
GB WAYFARER USA SCH	1	7.50
4 PINES KOLSCH SCH	1	7.50
- Summary (Bottom Left):** Total amount: **\$150.50**, zoom level: 20x.
- Navigation (Top Center):** RECEIPT, CLERK, 7, 8, 9, CL.
- Navigation (Middle Left):** PRICE LEVEL, 5% ST DISC, 4, 5, 6, NO SALE.
- Navigation (Middle Center):** CUSTOMER, 5% ITEM, BAR TAB, REFUND, 1, 2, 3, X.
- Navigation (Middle Right):** PENDING, VOID SALE, TABLE MAP, VOID, 0, ., ENTER.
- Navigation (Bottom Center):** DRINKS, CAFE, TAP BEER, SPIRITS, COCKTAILS, FRUIT & VEG, GROCERY, RETAIL, MANAGER, RESTAURANT, BOTTLE BEER & RTD, WINE, SERVICES, ADMIN.
- Menu Grid (Center):**

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
- Brand Logo (Right):** idealpos

idealpos Update History

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To use this POS Screen Resolution, go to:

Setup > POS Terminals > Select the POS Terminal that you want to apply the resolution to > Modify

idealpos Pos Terminals
3 records

Code	Description	Location	Site
1	POS 1	Location 1	Site 1
2	POS 2	Location 1	Site 1
3	POS 3	Location 1	Site 1

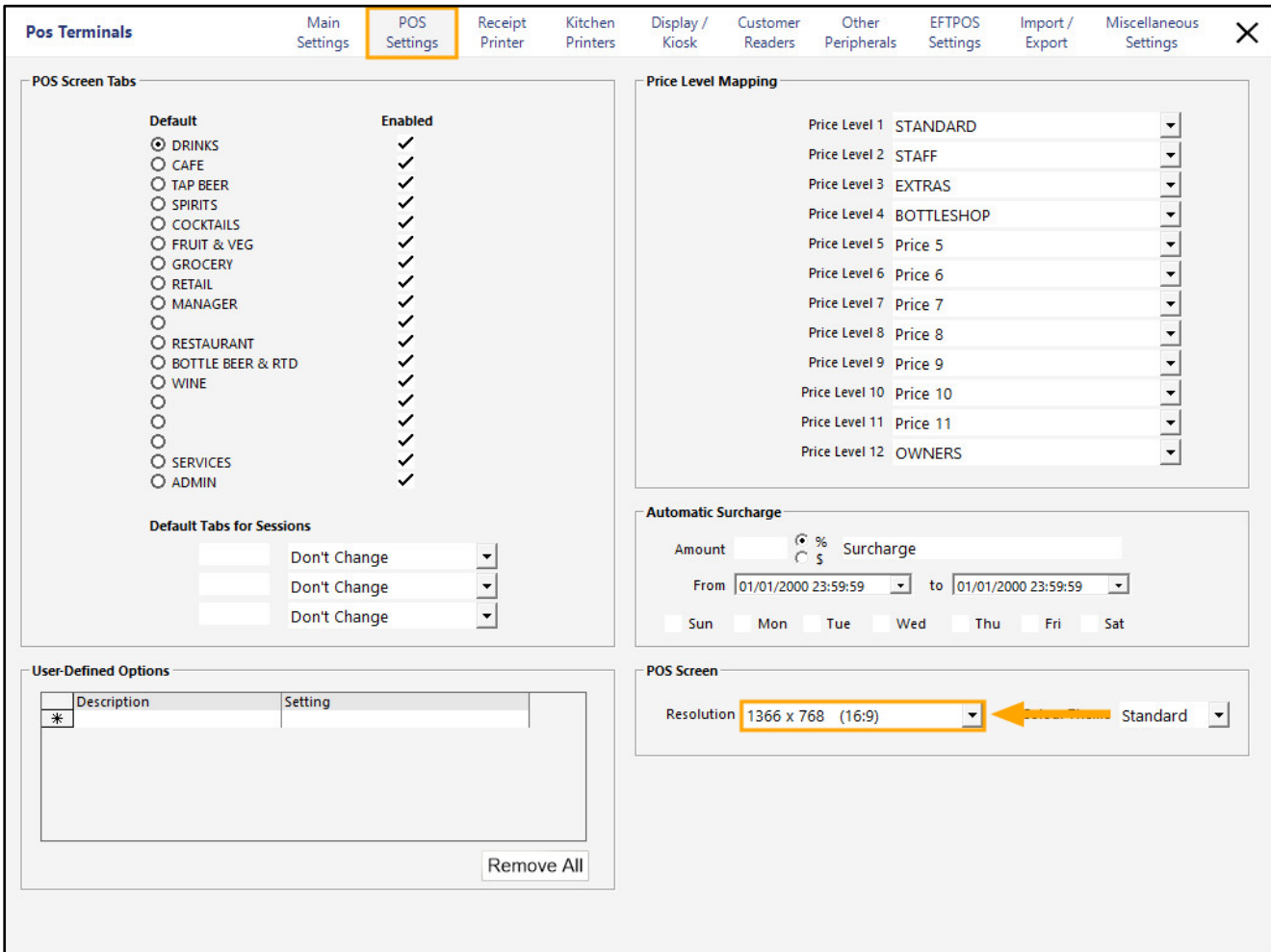
Modify
Add
Delete
Copy settings from POS 1
Versions

POS 2
v8 Build 1

idealpos Update History

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Go to the POS Settings tab, then from the POS Screen section, select resolution '1366 x 768 (16:9)' from the Resolution dropdown box.



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

- POS Screen Tabs:** A list of categories with radio buttons and a 'Default' column. 'DRINKS' is selected. A 'Default Tabs for Sessions' section has three dropdown menus, all set to 'Don't Change'.
- Price Level Mapping:** A list of 12 price levels, each with a dropdown menu. The values are: STANDARD, STAFF, EXTRAS, BOTTLESHOP, Price 5, Price 6, Price 7, Price 8, Price 9, Price 10, Price 11, and OWNERS.
- Automatic Surcharge:** Fields for Amount (with % and \$ icons), Surcharge, From (01/01/2000 23:59:59), and to (01/01/2000 23:59:59). Weekday checkboxes (Sun-Sat) are all unchecked.
- User-Defined Options:** A table with columns 'Description' and 'Setting'. One row contains an asterisk (*). A 'Remove All' button is at the bottom right.
- POS Screen:** A dropdown menu for 'Resolution' is highlighted with a yellow box and a yellow arrow. The selected value is '1366 x 768 (16:9)'. Another dropdown menu next to it is set to 'Standard'.

Close the POS Terminals window to apply the change.

If the POS Screen Resolution was changed for another POS Terminal, the POS Screen on the modified terminal may need to be closed then opened again in order to apply the change.

idealpos Update History

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The POS Screen will now use the selected resolution:

29 Apr 15:49 Adult ID: 29-Apr-2003
POS 1 Jeremy STANDARD #2109

idealpos [®]	RECEIPT	CLERK	7	8	9	CL	idealpos [®]			
	PRICE LEVEL	5% ST DISC	4	5	6	NO SALE				
	CUSTOMER	5% ITEM	1	2	3	X				
	BAR TAB	REFUND	0	.	ENTER					
	PENDING	VOID SALE								
	TABLE MAP	VOID								
        		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		
\$0.00	DRINKS	CAFE RESTAURANT	TAP BEER BOTTLE BEER & RTD	SPIRITS WINE	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL SERVICES	MANAGER ADMIN	

idealpos Update History

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IP-3963 – POS Screen support for 1920 x 1080 resolution

This function adds the ability to set the POS Screen Resolution to 1920 x 1080.

For optimum sizing and appearance, this POS screen resolution requires Windows screen scaling to be set to 125%. POS hardware that is being supplied by Idealpos which supports 1920x1080 will also have a Windows recommended screen scaling setting of 125%.

This type of scaling is recommended on POS Screens at this resolution as POS Terminals typically have smaller screen sizes compared to standard desktop PCs.

The screenshot displays the Idealpos POS interface at 1920x1080 resolution. It features a menu on the left with items like Cappuccino, Flat White, and Short Black. A receipt is visible in the top right, showing a total of \$125.50. The main area is a grid of buttons for various products and functions, including coffee options, sugar levels, and beverage categories.

Item	Qty	Price	Receipt	Clerk	7	8	9	CL
CAPPUCCINO	1	3.50	RECEIPT	CLERK	7	8	9	CL
FLAT WHITE	1	3.50	PRICE LEVEL	5% ST DISC	4	5	6	NO SALE
SHORT BLACK	1	3.00	CUSTOMER	5% ITEM	1	2	3	X
LATTE	1	3.50	BAR TAB	REFUND	0	.	ENTER	
CHAI	1	4.00	PENDING	VOID SALE	[Coffee Images]			
LONG BLACK	1	3.50	TABLE MAP	VOID	CAPPUCCINO	FLAT WHITE	LATTE	CHAI
MOCHA	1	3.50			EXTRA HOT	SKINNY	DECAF	1 SUGAR
HOT CHOC	1	3.50			EXTRA CHOC	SOY	WEAK	2 SUGAR
MUD CAKE SLICE	1	7.50			NO CHOC	ALMOND	DOUBLE SHOT	3 SUGAR
LEMON TEA CAKE SLICE	1	7.50						
VANILLA SLICE	1	7.50						
CARROT CAKE SLICE	1	7.50						
BLACK FORREST CAKE SLICE	1	7.50						
CANADIAN PANCAKES	1	12.00						
WAFFLES	1	9.00						
WAFFLES CHOCOLATE	1	10.00						
BIG BREAKFAST	1	15.00						
JAM & TOAST	1	5.00						
EGGS ON TOAST	1	9.00						
SCRAMBLED								
\$125.50			DRINKS	CAFE	TAP BEER	SPIRITS	COCKTAILS	FRUIT & VEG
			RESTAURANT	BOTTLE BEER & RTD	WINE		GROCERY	RETAIL
								MANAGER
								SERVICES
								ADMIN

idealpos Update History

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To use this POS Screen Resolution, go to:

Setup > POS Terminals > Select the POS Terminal that you want to apply the resolution to > Modify

The screenshot shows the 'idealpos' application window titled 'Pos Terminals' with 3 records. The interface includes a left sidebar with navigation options: 'Modify' (highlighted with a blue box and an orange arrow), 'Add', 'Delete', 'Copy settings from POS 1', and 'Versions'. The main area contains a table with the following data:

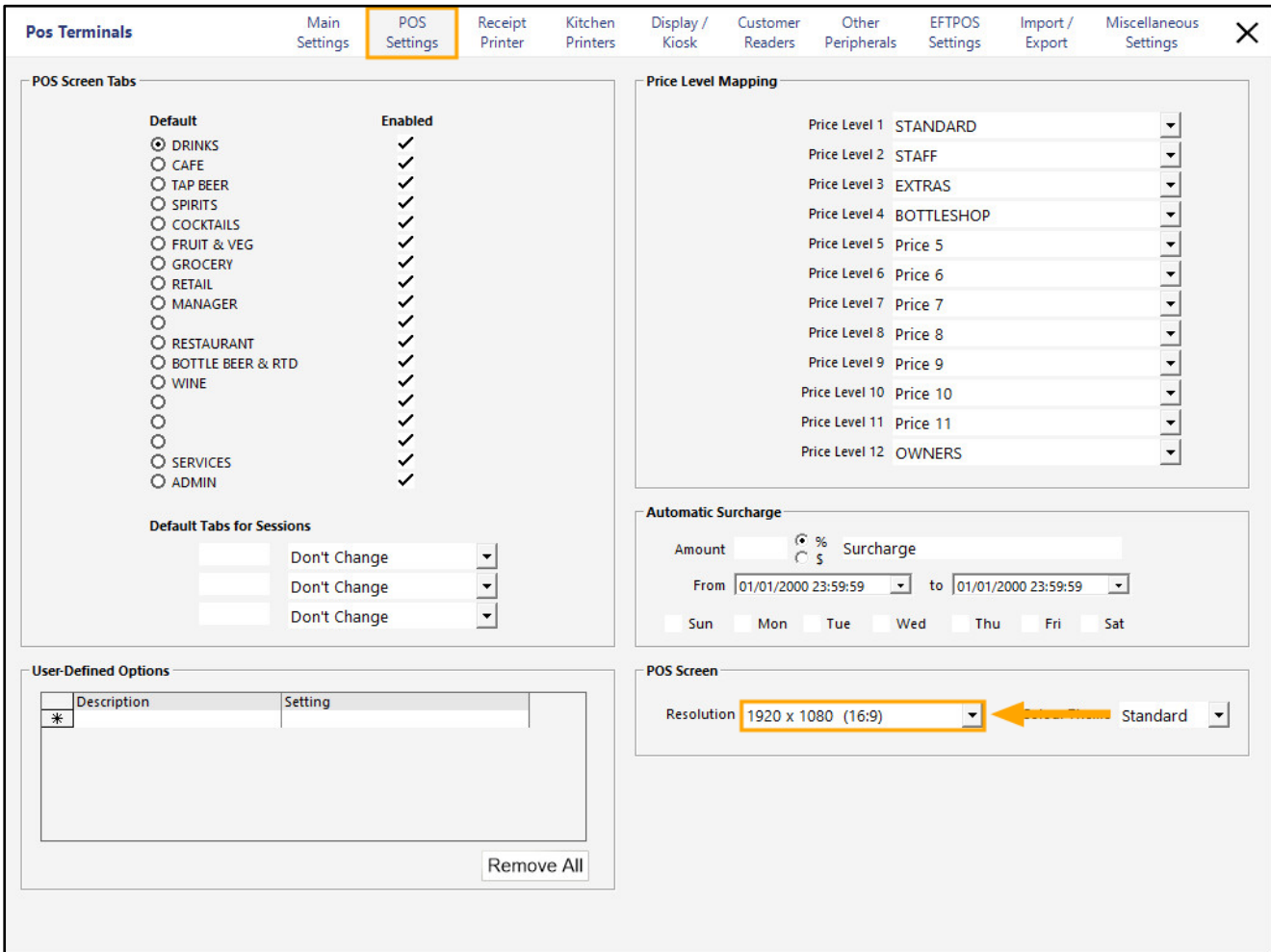
Code	Description	Location	Site
1	POS 1	Location 1	Site 1
2	POS 2	Location 1	Site 1
3	POS 3	Location 1	Site 1

The first row of the table is highlighted in orange, and a yellow arrow points to it from the right. The bottom left corner of the window displays 'POS 2 v8 Build 1'. The top right corner of the window has icons for visibility, search, and close.

idealpos Update History

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Go to the POS Settings tab, then from the POS Screen section, select resolution '1920 x 1080 (16:9)' from the Resolution dropdown box.



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

- POS Screen Tabs:** A list of categories with radio buttons and a column of checkmarks under 'Enabled'. Categories include DRINKS, CAFE, TAP BEER, SPIRITS, COCKTAILS, FRUIT & VEG, GROCERY, RETAIL, MANAGER, RESTAURANT, BOTTLE BEER & RTD, WINE, SERVICES, and ADMIN.
- Default Tabs for Sessions:** Three dropdown menus, all set to 'Don't Change'.
- User-Defined Options:** A table with columns for 'Description' and 'Setting'. A single row with an asterisk (*) is visible. A 'Remove All' button is at the bottom right.
- Price Level Mapping:** A list of 12 price levels, each with a dropdown menu. The values are: Price Level 1: STANDARD, Price Level 2: STAFF, Price Level 3: EXTRAS, Price Level 4: BOTTLESHOP, Price Level 5: Price 5, Price Level 6: Price 6, Price Level 7: Price 7, Price Level 8: Price 8, Price Level 9: Price 9, Price Level 10: Price 10, Price Level 11: Price 11, Price Level 12: OWNERS.
- Automatic Surcharge:** Fields for 'Amount' (with % and \$ icons), 'Surcharge', 'From' (01/01/2000 23:59:59), and 'to' (01/01/2000 23:59:59). Weekday checkboxes for Sun, Mon, Tue, Wed, Thu, Fri, Sat are present.
- POS Screen:** A dropdown menu for 'Resolution' is highlighted with a yellow box and a yellow arrow. The selected value is '1920 x 1080 (16:9)'. Another dropdown menu for 'Standard' is visible to its right.

Close the POS Terminals window to apply the change.


If the POS Screen Resolution was changed for another POS Terminal, the POS Screen on the modified terminal may need to be closed then opened again in order to apply the change.

idealpos Update History

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The POS Screen will now use the selected resolution:

29 Jun 11:08 Adult ID: 29-Jun-2003
POST Jeremy STANDARD #527




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


\$0.00




CAPPUCCINO




FLAT WHITE




LATTE




CHAI




SHORT BLACK




LONG BLACK



MOCHA



HOT CHOC



TEA

EXTRA HOT

EXTRA CHOC

NO CHOC

SKINNY

SOY

ALMOND

DECAF

WEAK

DOUBLE SHOT

1 SUGAR

2 SUGAR

3 SUGAR

TAKEAWAY

MARSH MALLOW

EQUAL

SMALL

MEDIUM

LARGE

ICED DRINK

SMOOTHIE

WATER

JUICE

SOFTDRINK

KEYBOARD

ORDER NUMBER

REWARDS ENQUIRY

DRINKS

CAFE

TAP BEER

SPIRITS

COCKTAILS

FRUIT & VEG

GROCERY

RETAIL

MANAGER

RESTAURANT

BOTTLE BEER & RTD

WINE

SERVICES

ADMIN

idealpos Update History

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IP-4123 – POS Screen support for 1920 x 1080 Retail Layout

This function adds the ability to set the POS Screen Resolution to 1920 x 1080 (Retail Layout).

This layout includes a sale window that occupies the entire width of the POS screen, allowing long Stock Item Descriptions to be displayed (when the Yes/No Option "[Stock Item Long Descriptions on POS Screen](#)" is enabled).

For optimum sizing and appearance, this POS screen resolution requires Windows screen scaling to be set to 125%. POS hardware that is being supplied by Idealpos which supports 1920x1080 will also have a Windows recommended screen scaling setting of 125%.

This type of scaling is recommended on POS Screens at this resolution as POS Terminals typically have smaller screen sizes compared to standard desktop PCs.

The screenshot displays the POS interface with a list of items and a grid of buttons. The top bar shows the date and time: 29 Jun 10:46, Adult ID: 29-Jun-2003, POS 1 Jeremy STANDARD #523. The list of items includes:

ID	Description	Qty	Price	Total
202001	CAPPUCCINO	1	\$3.50/ea	3.50
202002	FLAT WHITE	1	\$3.50/ea	3.50
202004	SHORT BLACK	1	\$3.00/ea	3.00
101002	BACON & EGGS	1	\$10.00/ea	10.00
1002002	SCRAMBLED			
101003	EGGS BENEDICT	1	\$13.00/ea	13.00
101001	EGGS ON TOAST	1	\$9.00/ea	9.00
1002002	SCRAMBLED			
115001	MUD CAKE SLICE	1	\$7.50/ea	7.50
115004	LEMON TEA CAKE SLICE	1	\$7.50/ea	7.50
115003	VANILLA SLICE	1	\$7.50/ea	7.50
115002	CARROT CAKE SLICE	1	\$7.50/ea	7.50
115005	BLACK FORREST CAKE SLICE	1	\$7.50/ea	7.50

The bottom section shows a grid of buttons for item selection and modifiers. The total amount is \$79.50. The buttons include:

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

The grid also includes various modifiers and categories like 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

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To use this POS Screen Resolution, go to:

Setup > POS Terminals > Select the POS Terminal that you want to apply the resolution to > Modify

idealpos Pos Terminals
3 records

Code	Description	Location	Site
1	POS 1	Location 1	Site 1
2	POS 2	Location 1	Site 1
3	POS 3	Location 1	Site 1

Modify
Add
Delete
Copy settings from POS 1
Versions

POS 2
v8 Build 1

idealpos Update History

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Go to the POS Settings tab, then from the POS Screen section, select resolution '1920 x 1080 (16:9) Retail' from the Resolution dropdown box.

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

- POS Screen Tabs:** A list of categories with radio buttons and a column of checkmarks under 'Enabled'. Categories include DRINKS, CAFE, TAP BEER, SPIRITS, COCKTAILS, FRUIT & VEG, GROCERY, RETAIL, MANAGER, RESTAURANT, BOTTLE BEER & RTD, WINE, SERVICES, and ADMIN. Below this is a section for 'Default Tabs for Sessions' with three dropdown menus, all set to 'Don't Change'.
- Price Level Mapping:** A list of 12 price levels, each with a dropdown menu. The values are: Price Level 1: STANDARD, Price Level 2: STAFF, Price Level 3: EXTRAS, Price Level 4: BOTTLESHOP, Price Level 5: Price 5, Price Level 6: Price 6, Price Level 7: Price 7, Price Level 8: Price 8, Price Level 9: Price 9, Price Level 10: Price 10, Price Level 11: Price 11, Price Level 12: OWNERS.
- Automatic Surcharge:** A section for configuring surcharges. It includes fields for 'Amount' (with % and \$ symbols), 'Surcharge', 'From' (01/01/2000 23:59:59), and 'to' (01/01/2000 23:59:59). There are also checkboxes for days of the week: Sun, Mon, Tue, Wed, Thu, Fri, Sat.
- User-Defined Options:** A table with columns for 'Description' and 'Setting'. A single row with an asterisk (*) is visible. A 'Remove All' button is at the bottom right.
- POS Screen:** A section with a 'Resolution' dropdown menu. The selected option is '1920 x 1080 (16:9) Retail', which is highlighted with a yellow box and a yellow arrow pointing to it. Another dropdown menu is set to 'Standard'.

Close the POS Terminals window to apply the change.

If the POS Screen Resolution was changed for another POS Terminal, the POS Screen on the modified terminal may need to be closed then opened again in order to apply the change.

idealpos Update History

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The POS Screen will now use the selected resolution:

29 Jun 10:53 Adult ID: 29-Jun-2003
X

idealpos[®]

\$0.00

									RECEIPT	CLERK	7	8	9	CL
CAPPUCCINO	FLAT WHITE	LATTE	CHAI	SHORT BLACK	LONG BLACK	MOCHA	HOT CHOC	TEA	PRICE LEVEL	5% ST DISC	4	5	6	NO SALE
EXTRA HOT	SKINNY	DECAF	1 SUGAR	TAKEAWAY	SMALL	ICED DRINK	WATER	KEYBOARD	CUSTOMER	5% ITEM				
EXTRA CHOC	SOY	WEAK	2 SUGAR	MARSH MALLOW	MEDIUM	MILKSHAKE	JUICE	ORDER NUMBER	BAR TAB	REFUND	1	2	3	X
NO CHOC	ALMOND	DOUBLE SHOT	3 SUGAR	EQUAL	LARGE	SMOOTHIE	SOFTDRINK	REWARDS ENQUIRY	PENDING	VOID SALE				
DRINKS	CAFE RESTAURANT	TAP BEER BOTTLE BEER & RTD	SPIRITS WINE	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL SERVICES	MANAGER ADMIN	TABLE MAP	VOID	0	.	ENTER	

idealpos Update History

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IP-4159 – POS Screen – Support for Light Colour Theme

This function adds the ability to change the colour theme used on the POS Screen.

By default, the Standard Colour Theme is used which uses a darker blue colour.

This can be changed to a Light Colour Theme which consists of a much lighter white colour.

This function can be configured on a per-terminal basis, so depending on which area of your venue your POS Terminal is placed, the colour theme can be changed to match the surrounding environment.

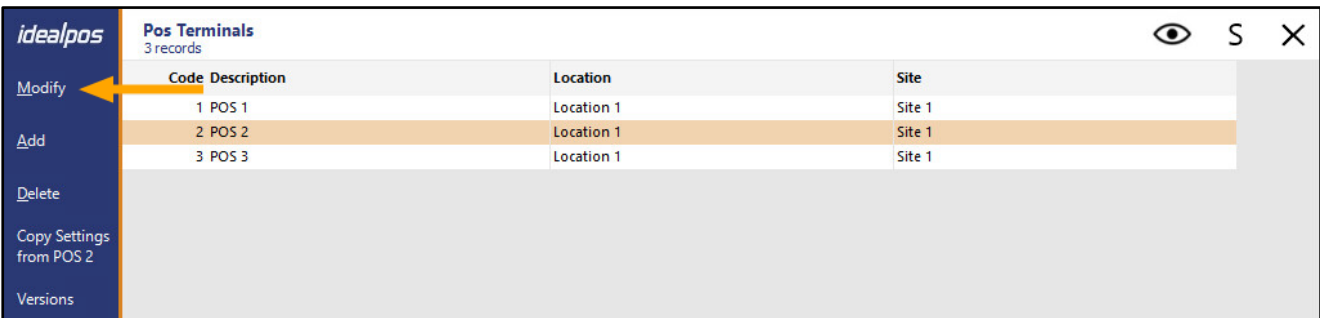
The below examples show the Light and Standard Colour Themes side-by-side:

Light Colour Theme | Standard Colour Theme:



To configure this function, go to:

Setup > POS Terminals > Select POS Terminal > Modify



idealpos Update History

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Within the POS Screen section of the POS Settings tab, set the Colour Theme to Light, then close the POS Terminals window to save the change.

The screenshot shows the 'idealpos' POS Settings window with the 'POS Terminals' tab selected. The window has a navigation bar at the top with tabs: Main Settings, POS Settings (selected), Receipt Printer, Kitchen Printers, Display / Kiosk, Customer Readers, Other Peripherals, EFTPOS Settings, Import / Export, and Miscellaneous Settings. A close button (X) is in the top right corner.

The main content area is divided into four sections:

- POS Screen Tabs:** A list of categories with radio buttons and a column of checkmarks under 'Enabled'.

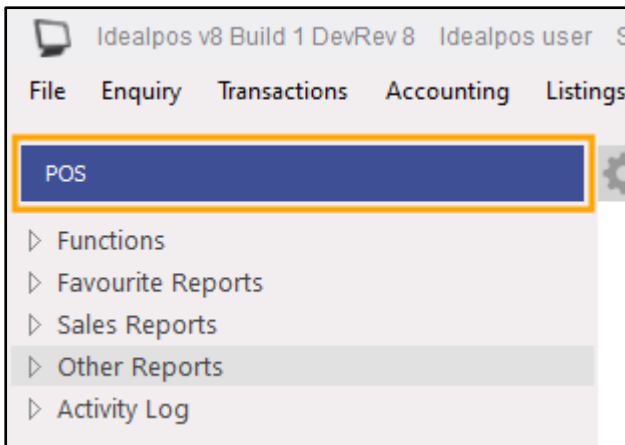
Default	Enabled
<input checked="" type="radio"/> DRINKS	<input checked="" type="checkbox"/>
<input type="radio"/> CAFE	<input checked="" type="checkbox"/>
<input type="radio"/> TAP BEER	<input checked="" type="checkbox"/>
<input type="radio"/> SPIRITS	<input checked="" type="checkbox"/>
<input type="radio"/> COCKTAILS	<input checked="" type="checkbox"/>
<input type="radio"/> FRUIT & VEG	<input checked="" type="checkbox"/>
<input type="radio"/> GROCERY	<input checked="" type="checkbox"/>
<input type="radio"/> RETAIL	<input checked="" type="checkbox"/>
<input type="radio"/> MANAGER	<input checked="" type="checkbox"/>
<input type="radio"/>	<input checked="" type="checkbox"/>
<input type="radio"/> RESTAURANT	<input checked="" type="checkbox"/>
<input type="radio"/> BOTTLE BEER & RTD	<input checked="" type="checkbox"/>
<input type="radio"/> WINE	<input checked="" type="checkbox"/>
<input type="radio"/>	<input checked="" type="checkbox"/>
<input type="radio"/>	<input checked="" type="checkbox"/>
<input type="radio"/>	<input checked="" type="checkbox"/>
<input type="radio"/> SERVICES	<input checked="" type="checkbox"/>
<input type="radio"/> ADMIN	<input checked="" type="checkbox"/>
- Price Level Mapping:** A list of 12 price levels, each with a dropdown menu.

Price Level	Value
Price Level 1	STANDARD
Price Level 2	STAFF
Price Level 3	EXTRAS
Price Level 4	BOTTLESHOP
Price Level 5	Price 5
Price Level 6	Price 6
Price Level 7	Price 7
Price Level 8	Price 8
Price Level 9	Price 9
Price Level 10	Price 10
Price Level 11	Price 11
Price Level 12	OWNERS
- Automatic Surcharge:** Fields for Amount (with % and \$ icons), Surcharge, and a date range (From: 01/01/2000 23:59:59, to: 01/01/2000 23:59:59). Below are checkboxes for days of the week: Sun, Mon, Tue, Wed, Thu, Fri, Sat.
- User-Defined Options:** A table with columns 'Description' and 'Setting'. One row is visible with a '*' in the Description column. A 'Remove All' button is at the bottom right.
- POS Screen:** Fields for Resolution (1024 x 768 (4:3)) and Colour Theme (Light). A yellow arrow points from the Resolution field to the Colour Theme dropdown.

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From the Back Office, press the POS button on the top-left corner to open the POS Screen.



The new Light Colour Theme has now been applied to the POS Screen:



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IP-4269 – POS Screen – 3D button option removed in favour of Flat button performance

3D buttons have been removed in favour of flat button performance.

In previous builds/versions of Idealpos, configuring POS Screen Buttons to display in 3D would result in slower POS screen performance when opening and navigating between POS screens. This is due to embedded/built-in graphics cards in POS Terminals taking longer to render additional button effects.

In order to increase POS Screen performance, 3D buttons have been removed.

There are no additional steps required when upgrading an existing v7 system with 3D buttons to Idealpos v8.

As part of the upgrade, 3D buttons will be automatically set to 2D buttons.

It should also be noted that in Idealpos V7, in order to display PNG images on POS Screen buttons, you needed to have 3D buttons enabled. Therefore, as part of the upgrade process, any PNG images will be converted to JPG format and the button configuration will be automatically updated so that the converted images will be displayed on the POS Screen buttons.

As a result of this change, the POS Button Type configuration option in the General tab of Global Options has been removed.

Go to: Setup > Global Options > General.

The "POS Button Type" configuration option is no longer available:

Global Options
Site 1 (Site 1)

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

General

First Day of Week: Monday

End of Day: 23:59:59

Decimal Places on Quantities: 4

Clerk Timeout: 0 sec Floating Clerks

Reset Finalized Sale Time: 0 sec

Unlock Permissions Timeout: sec

Tender Grid Button Height: 200

Tender Grid Font Size: 20

Tender Grid Line Width: 2

Venue ID: NZ EFTPOS 200s

Exit POS Password: Ice Terminal

"Each" item text:

Dynamic Search Delay: 50 ms

Safe Drop Warning Threshold:

Adult ID Age: 18

Adult Restriction Question Age: 25

Report Printer: Windows Default Printer

Company Logo Graphic: idealpos RPT Logo.jpg (pictures folder) (max pixel size 330w x 90h)

Invoice Footer Graphic: Tax Invoice Footer.png (pictures folder) (max pixel size 710w x 192h)

Printer Logo Download Utility: C:\Program Files\SEWOO\LogoSetup 2.34\NVUpI

Label Printing Software Override: >

Fast Cash Buttons

Amount 100 Show on button
Graphic: 100NoteAUS.jpg >

Amount 50 Show on button
Graphic: 50NoteAUS.jpg >

Amount 20 Show on button
Graphic: 20NoteAUS.jpg >

Amount 10 Show on button
Graphic: 10NoteAUS.jpg >










Amount 5 Show on button
Graphic: 5NoteAUS.jpg >

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POS Screen buttons will appear in 2D format as shown in the example below:

16 Jun 14:18 Adult ID: 16-Jun-2003
POS 2 Jeremy STANDARD #689
✕

					RECEIPT	CLERK	7	8	9	CL
					PRICE LEVEL	5% ST DISC	4	5	6	NO SALE
					CUSTOMER	5% ITEM	1	2	3	X
					BAR TAB	REFUND				
					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		

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IP-4291 – Customer Display – Support for 1280x800 resolution

This function adds support for Customer Displays running at a screen resolution of 1280x800.

This resolution is enabled by selecting the new resolution from the resolution dropdown box in the Display/Kiosk tab of the POS Terminal settings.

To enable this function, go to:

Back Office > Setup > POS Terminals > Select POS Terminal > Modify > Display/Kiosk

Select the '1280x800' option from the Resolution dropdown box.

Select the required format from the Display Format dropdown box.

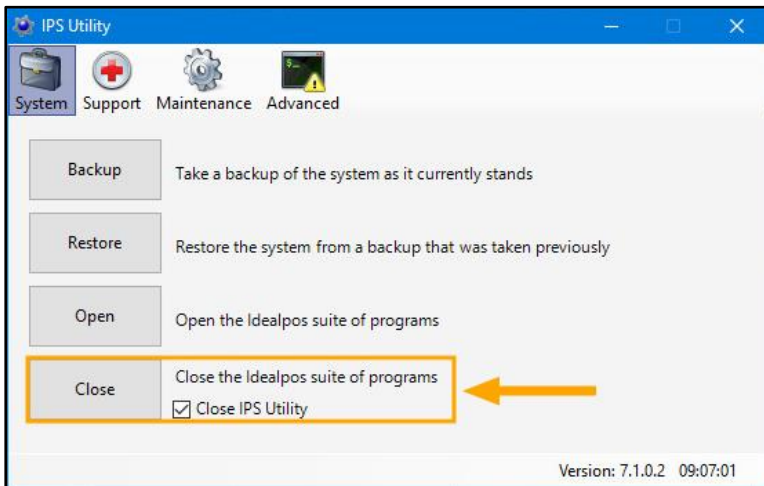
The screenshot shows the 'Pos Terminals' settings window with the 'Display / Kiosk' tab selected. The 'Customer Display Screen' section has 'Resolution' set to '1280 x 800' and 'Display Format' set to 'Half Sales / Half Advertising'. A preview window displays a 'LARGE BURGER MEAL' advertisement with a price of '\$18.50' and a subtotal of '\$23.75'. The 'Two-Line Customer Display' section is also visible, showing options for 'Type', 'Connection', and 'Display Text'. The 'Image Options' section includes 'Skip Images Larger than 500 KB', 'Seconds between images 5', and 'Stretch images to fit' checked. The 'Kiosk' section includes 'Top Image Location', 'Bottom Image', 'Home Screen Image', and 'Clerk' set to 'Kiosk'. The 'Enable Customer Display Tipping' section is also visible, showing 'Tip %' set to 10 and 'RA Function' set to 'TIPS IN'.

Once the required selections have been made, close the POS Terminal window to save the change.

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A Close Suite/Open Suite will also be required.
Go to Start > Idealpos > IPSUtils > Close



Start Idealpos either via the Idealpos Desktop Shortcut, or go to: Start > Idealpos > Idealpos.
When the POS Screen is displayed, the Customer Display will appear using the selected screen resolution.



IP-4331 – Dynamic POS Menus by Attributes

This function adds the ability to create and display dynamic POS Screen Menus by utilising the existing Stock Item Attribute Types function. When a POS Screen button has been linked to one or more attribute types (a maximum of three Attribute Types can be linked to the POS button) and the clerk presses the POS Screen button, a dynamic POS Screen Menu will be displayed. The menu will contain a list of all the Stock Items that are linked to the Stock Item Attributes which were configured on the POS Screen button.

A dropdown box for each Attribute Type linked to the button will be displayed at the top of the POS Screen menu. The dropdown boxes can be used to filter the list down to the individual Attribute.

The process for configuring this function may vary depending on whether or not you already have the required Attribute Types/Attributes created and assigned to your items.

For the purpose of demonstrating this function, each step required to configure this function is outlined below, using Soft Drinks as an example (Attribute Types: Container Type and Sugar Free?).

However, you can use this function for any other items such as wine

The first step to setting up this function is ensuring that you have the required Stock Item Attributes in your system. Go to: Back Office > File > Sales > Stock Item Attributes.

The Attribute Types are shown on the left-hand side column, and the Attributes for the currently selected Attribute Type will be shown on the right-hand side column.

For the purposes of demonstrating this function, we will create two Attribute Types –

- Container Type – Used to filter the list by container type/size of container
- Sugar Free – Used to filter the list by whether or not the item is sugar free (e.g. Diet Soft Drinks)

Press the “Add New Attribute Type” button on the top left-hand side of the window, then enter a description for the Attribute Type (e.g. Container Type or Sugar Free); Press “Save” on the top-left corner.

After creating a new Attribute Type, it will be highlighted automatically – Press the “Add New Container Type” or “Add New Sugar Free?” button on the top-left corner to add new Attributes to the Attribute Type.

E.g. For Container Types, create attributes such as 600ml Bottle, 1L Btl, etc.

For Sugar Free?, create attributes Yes and No.

Take note of the Type Code shown next to the Attribute Type and the Code shown next to the Attribute (these will be used later when creating a POS Screen button).

The below example shows the Container Type Attribute Type on the left, with each Container Type on the right.

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idealpos Stock Item Attributes S X

Type Code	Attribute Types	Available in Columns	Code	Container Type (9)
1	Container Type	ALL	1	Can
2	Stock Item Type	ALL	2	Stubby
3	Spirit Varietal	ALL	3	600ml Bottle
4	Wine Varietals	ALL	4	1.25L Bottle
5	Country of Origin	ALL	5	2L Bottle
6	Dietry	ALL	6	Keg
9	Restricted Items	ALL	7	250ml Bottle
10	Sugar Free?	ALL	9	1L Btl
			10	Bladder

Modify
Add New Attribute Type
Add New Container Type
Delete

POS 2
v8 Build 1

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The below example shows the Sugar Free Attribute Type on the left, with the No and Yes Attributes on the right.

idealpos Stock Item Attributes S X

Type Code	Attribute Types	Available in Columns	Code	Sugar Free? (2)
1	Container Type	ALL	58	No
2	Stock Item Type	ALL	59	Yes
3	Spirit Varietal	ALL		
4	Wine Varietals	ALL		
5	Country of Origin	ALL		
6	Dietry	ALL		
9	Restricted Items	ALL		
10	Sugar Free?	ALL		

Modify
Add New Attribute Type
Add New Sugar Free?
Delete

POS 2
v8 Build 1

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Once Attribute Types and Attributes have been created, Stock Items will need to be assigned to the corresponding Attribute Types and Attributes (e.g. COKE 2L will need to be linked to Container = 2L Bottle, Sugar Free? = No).

Go to: File > Stock Control > Stock Items

Search for the required items (e.g. by Department), select the required item from the Stock Items grid > Modify.

From the Attributes section on the bottom-right corner of the window, select the Attribute Type from one of the first dropdown boxes on the left (e.g. Container Type), then select the Attribute from the corresponding dropdown box on the right (e.g. 2L Bottle).

Take note that when configuring Attribute Types, you may want to ensure that you always assign the same Attribute Type to the same Attribute Slot across all your items (e.g. Attribute 1 for Container Type, Attribute 2 for Sugar Free?, etc.). This is not explicitly required for this function; however, it will be beneficial utilising the same Attribute Slots for the purpose of filtering the Stock Items grid by Attributes.

idealpos Stock Items
Modify 205401

General | **Advanced** | Improved View | Settings

Last Modified 21 Jul 2021

Save
Keyboard

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)

	Price	Profit%
STANDARD	3.50	74.65
STAFF	1.75	49.30
EXTRAS	1.90	53.40
BOTTLESHOP	1.50	40.73
Price 5	1.50	40.73
Price 6	1.60	44.41
Price 7	1.70	47.99
Price 8	1.80	50.85
Price 9	1.90	53.40
Price 10	2.00	55.71
Price 11	2.10	57.80
OWNERS	2.20	59.70

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

Tax Settings (Selling)

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

Attributes

Container Type: 2L Bottle +
Sugar Free?: No +

POS 2
v8 Build 1

Repeat the above process to link other items to the required Attribute Types/Attributes.

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Alternatively, you can utilise the Range Programming function to assign items by range to the required Attributes and Types. However, your items will need to be within a specific range (whether a Code, Description, Department and/or Supplier Range).

Range Programming is an advanced feature and should be used with caution; incorrect use of Range Programming can result in the wrong items being modified.

Range Programming is accessible via Back Office > Utilities > Range Programming > Stock Items

idealpos Range Programming

Proceed

Code > to >
Description > to >
Department > to >
Supplier > to >

Field	▼	=	
Field	▼	=	
Field	▼	=	
Field	▼	=	
Field	▼	=	
Field	▼	=	
Field	▼	=	
Field	▼	=	
Field	▼	=	
Field	▼	=	
Field	▼	=	
Field	▼	=	
Field	▼	=	

POS 2
v8 Build 1

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Once your Stock Items have been linked to the required Attribute Types/Attributes, you will need to create one or more POS Screen buttons.

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

Select a POS Screen Layout > Buttons

On the POS Screen Layout, select a POS Screen tab where you'd like to create the button, then find an unused button and click on it.

A button can be configured in the following ways:

- Display all Stock Items linked to one or more Attribute Types, regardless of their Attribute Code.
E.g. Entering both the Container Type and Sugar Free? Attribute Type codes will show a dynamic POS Screen containing any Stock Items linked to these types, and the menu will allow you to select an Attribute from the Attribute Type dropdown box at the top of the POS menu.

Function: POS Screen Menu

Attribute: T{ENTER ATTRIBUTE TYPE CODE}. Alternatively, press the ">" button to open the Stock Item Attributes window and select the Attribute Type or Attribute. In the Attributes window, you will need to select the required Attribute Type or Attribute, press OK. If additional Attribute Types or Attributes need to be added, press the ">" button again and repeat the process until you have added each of the required Attribute Types/Attributes.

E.g. Enter "T1,T10" into the Attribute field to link to Container Type and Sugar Free (if your system is configured the same as the Stock Item Attributes further above). A maximum of three unique Attribute Types can be entered, separated by commas.

POS Screen Menu: Leave Dropdown option blank (not used for this function)

Button Caption: Container Types

POS Screen Menu

Attribute >

Container Type, Sugar Free?

POS Screen Menu

Button Appearance

Container Types

Button Caption

Container Types

Back Colour Font

Text Colour A

Double Width Double Height Visible

Graphic >

POS Screen Menu

- POS Screen Menu
- Prefix String
- Price Enquiry
- Price Level
- Print Bar Tab Bill
- Print Bar Tab Report
- Print Group Shift
- Promotion Enquiry
- Promotions On/Off
- Quick Stocktake
- Raffles
- Receipt On/Off
- Received on Account
- Refund
- Register Closed Msg
- Remote Assistance
- Replay Transaction
- Reservations
- Restriction Override
- Rewards Enquiry
- Reweigh
- Safe Drop

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- Display Stock Items linked to a specific Attribute.
E.g. Entering the Attribute Code that's linked to the 2L Bottle Attribute will only show a dynamic POS Screen menu containing Stock Items that are 2L Bottles, and the dynamic POS Screen menu will be locked to this Attribute Code.

Function: POS Screen Menu

Attribute: A{ENTER ATTRIBUTE CODE}. Alternatively, press the ">" button to open the Stock Item Attributes window and select the Attribute Type or Attribute. In the Attributes window, you will need to select the required Attribute Type or Attribute, press OK. If additional Attribute Types or Attributes need to be added, press the ">" button again and repeat the process until you have added each of the required Attribute Types/Attributes.

E.g. Enter "A5" into the Attribute field to link to the "2L Bottle" Attribute. A maximum of three unique Attribute Codes can be entered, separated by commas.

POS Screen Menu: Leave Dropdown option blank (not used for this function)

Button Caption: 2L Bottles

POS Screen Menu

Attribute >

POS Screen Menu

Button Appearance

Button Caption >

Back Colour

Text Colour >

Double Width Double Height

Visible

Graphic >

POS Screen Menu

- POS Screen Menu
- Prefix String
- Price Enquiry
- Price Level
- Print Bar Tab Bill
- Print Bar Tab Report
- Print Group Shift
- Promotion Enquiry
- Promotions On/Off
- Quick Stocktake
- Raffles
- Receipt On/Off
- Received on Account
- Refund
- Register Closed Msg
- Remote Assistance
- Replay Transaction
- Reservations
- Restriction Override
- Rewards Enquiry
- Reweigh
- Safe Drop

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- Display Stock Items linked to Attribute Types and Attribute Codes.
E.g. Entering the Attribute Type Code that's linked to the Container Type and entering the Attribute Code that's linked to "Yes" (in the Sugar Free? Attribute Type) will show a dynamic POS Screen menu containing any item that is associated with the Container Attribute Type AND has the Sugar Free? Attribute Type set to "Yes".

Function: POS Screen Menu

Attribute: T{ENTER ATTRIBUTE TYPE CODE},A{ENTER ATTRIBUTE CODE}. Alternatively, press the ">" button to open the Stock Item Attributes window and select the Attribute Type or Attribute. In the Attributes window, you will need to select the required Attribute Type or Attribute, press OK. If additional Attribute Types or Attributes need to be added, press the ">" button again and repeat the process until you have added each of the required Attribute Types/Attributes.

E.g. Enter "T1,A59" into the Attribute field to link to the "Container Type" Attribute Type and to the "Yes" Attribute Code (located in the Sugar Free Attribute Type).

POS Screen Menu: Leave Dropdown option blank (not used for this function)

Button Caption: Sugar Free Container Types

Once the POS Screen buttons have been configured as required, close the POS Screen Layout screens, then open the POS Screen by pressing the "POS" button on the top-left corner of the Dashboard.

Navigate to the POS Screen tab which the button(s) were created, then press them.

Depending on whether the button was linked to an Attribute Type, Attribute Code, or both, the window that appears in the POS Screen will be similar to the below example and will contain a list of items that are associated with the Attribute Types/Attributes linked to the POS Screen button:

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Container Type	Sugar Free?	Stock Level	STANDARD	
COKE 1.25L		13	\$2.00	
COKE 250ML BTL		23	\$3.50	
COKE 2L		19	\$3.50	
COKE 600ML		61	\$5.00	
COKE CAN		61	\$3.50	
COKE ZERO 1.25L		21	\$2.00	
COKE ZERO 250ML BTL		32	\$3.50	
COKE ZERO 2L		36	\$2.50	
COKE ZERO 600ML		21	\$5.00	
COKE ZERO CAN		45	\$3.50	
DIET COKE 1.25L		18	\$2.00	
DIET COKE 250ML BTL		62	\$3.50	
DIET COKE 2L		22	\$2.50	
DIET COKE 600ML		42	\$5.00	
DIET COKE CAN		18	\$3.50	
DRY GINGER 1.25L		32	\$2.00	

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The top-left corner of the window contains a dropdown box for each Attribute Type.

The number of dropdown boxes shown will vary depending on the number of Attribute Types and/or Attribute Codes that were configured, with a maximum number of three dropdown boxes.

The dropdown boxes can be pressed to display a list of all the available Attributes for the Attribute Type.

Selecting an Attribute from the dropdown list will filter the POS Screen Menu so that only items that are associated with the selected Attribute Type will be displayed.

The list can be filtered further by selecting another Attribute option from the remaining dropdown boxes

1.25L Bottle	Sugar Free?	Stock Level	STANDARD	X
COKE 1.25L		13	\$2.00	
COKE ZERO 1.25L		21	\$2.00	
DIET COKE 1.25L		18	\$2.00	
DRY GINGER 1.25L		32	\$2.00	
FANTA 1.25L		41	\$2.00	
LIFT 1.25L		62	\$2.00	
SODA WATER 1.25L		13	\$1.00	
SPRITE 1.25L		36	\$2.00	
TONIC 1.25L		24	\$2.00	

Selecting an item from the list will highlight it.

COKE 1.25L	13	\$2.00
------------	----	--------

Once an item has been selected, additional options (Locations and Sell Item) will be displayed at the bottom of the window. To see the Locations which the item is available, press the "Locations" button on the bottom-left corner of the window. To add the item to the sale, press the "Sell Item" button on the bottom-right corner of the window.

Locations	Sell Item
-----------	-----------

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If an Attribute Code was entered into the POS Screen button configuration, the dropdown box for that Attribute Code will be locked/read-only.

The below example shows the "Sugar Free?" Attribute Type dropdown box locked to the "Yes" Attribute option. The Container Type option is available and can be selected to filter by Container Type.

Container Type	Yes	Stock Level	STANDARD	X
COKE ZERO 1.25L		21	\$2.00	
COKE ZERO 250ML BTL		32	\$3.50	
COKE ZERO 2L		36	\$2.50	
COKE ZERO 600ML		21	\$5.00	
COKE ZERO CAN		45	\$3.50	
DIET COKE 1.25L		18	\$2.00	
DIET COKE 250ML BTL		62	\$3.50	
DIET COKE 2L		22	\$2.50	
DIET COKE 600ML		42	\$5.00	
DIET COKE CAN		18	\$3.50	
SODA WATER 1.25L		13	\$1.00	

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IP-4401 – Tender Finalise warning includes tenders and amounts

This function will display a Tender Finalise warning containing the tender types and amounts that were used to tender the sale. The Tender Finalise warning will be displayed and will show all tender types and amounts used to tender the sale when the Tender Finalise warning has been enabled for at least one of the tender types that were used to tender the sale.

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

In the Search, enter "warning"

Ensure that the Finalise Warning option has been enabled for the Tender Types which you want to receive the warning. As mentioned above, if your sale has been tendered using multiple tender types with at least one tender type having the warning enabled, then the warning will include ALL tender types and amounts that were used to tender the sale.

The screenshot shows the 'Yes/No Options' configuration screen for 'Site 1'. The search bar contains the text 'warning'. The table below lists various 'Finalize Warning' options for different tender types. The 'Finalize Warning - CASH' and 'Finalize Warning - LAYBY' options are checked. A yellow box highlights the 'TENDERS' section of the table. Yellow arrows point to the search bar and the table.

	ALL	1	2
POS SCREEN			
Hide Stock Item Alert Level Warnings			
TENDERS			
Finalize Warning - CASH			✓
Finalize Warning - TENDER 10			
Finalize Warning - TENDER 11			
Finalize Warning - ACCOUNT			
Finalize Warning - TENDER 13			
Finalize Warning - TENDER 14			
Finalize Warning - TENDER 15			
Finalize Warning - TENDER 16			
Finalize Warning - TENDER 17			
Finalize Warning - ONLINE			
Finalize Warning - EFTPOS			
Finalize Warning - AMEX/DINERS			
Finalize Warning - POINTS			
Finalize Warning - TENDER 5			
Finalize Warning - LAYBY			✓
Finalize Warning - GV REDEEM			
Finalize Warning - CREDIT NOTE			
Finalize Warning - CHEQUE			

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Close the Yes/No Options window once the Finalise Warnings have been configured as required.

Go to the POS Screen (press "POS" button on the top-left corner of the dashboard), add items to the sale, then press the "ENTER" button to go to the Tender screen.

To split the payment across multiple tenders, ensure that you enter an amount that is less than the total sale amount, then press a Tender button to tender the entered amount.

09 Sep 15:53 Adult ID: 09-Sep-2003
 POS 2 Jeremy STANDARD #735

<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">CAPPUCCINO</td> <td style="width: 10%; text-align: center;">1</td> <td style="width: 10%; text-align: right;">3.50</td> </tr> <tr> <td>FLAT WHITE</td> <td style="text-align: center;">1</td> <td style="text-align: right;">3.50</td> </tr> <tr> <td>SHORT BLACK</td> <td style="text-align: center;">1</td> <td style="text-align: right;">3.00</td> </tr> </table>	CAPPUCCINO	1	3.50	FLAT WHITE	1	3.50	SHORT BLACK	1	3.00	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="background-color: #2c5e8c; color: white; text-align: center;">RECEIPT</td> <td style="background-color: #2c5e8c; color: white; text-align: center;">CLERK</td> </tr> <tr> <td style="background-color: #e67e22; color: white; text-align: center;">PRICE LEVEL</td> <td style="background-color: #e67e22; color: white; text-align: center;">5% ST DISC</td> </tr> <tr> <td style="background-color: #e67e22; color: white; text-align: center;">CUSTOMER</td> <td style="background-color: #e67e22; color: white; text-align: center;">5% ITEM</td> </tr> <tr> <td style="background-color: #e67e22; color: white; text-align: center;">BAR TAB</td> <td style="background-color: #e67e22; color: white; text-align: center;">REFUND</td> </tr> <tr> <td style="background-color: #e67e22; color: white; text-align: center;">PENDING</td> <td style="background-color: #e67e22; color: white; text-align: center;">VOID SALE</td> </tr> <tr> <td style="background-color: #2c5e8c; color: white; text-align: center;">TABLE MAP</td> <td style="background-color: #e67e22; color: white; text-align: center;">VOID</td> </tr> </table>	RECEIPT	CLERK	PRICE LEVEL	5% ST DISC	CUSTOMER	5% ITEM	BAR TAB	REFUND	PENDING	VOID SALE	TABLE MAP	VOID	<table style="width: 100%; border-collapse: collapse; text-align: center;"> <tr> <td style="width: 12.5%; border: 1px solid black;">7</td> <td style="width: 12.5%; border: 1px solid black;">8</td> <td style="width: 12.5%; border: 1px solid black;">9</td> <td style="width: 12.5%; border: 1px solid black;">CL</td> </tr> <tr> <td style="border: 1px solid black;">4</td> <td style="border: 1px solid black;">5</td> <td style="border: 1px solid black;">6</td> <td style="border: 1px solid black;">NO SALE</td> </tr> <tr> <td style="border: 1px solid black;">1</td> <td style="border: 1px solid black;">2</td> <td style="border: 1px solid black;">3</td> <td style="border: 1px solid black;">X</td> </tr> <tr> <td style="border: 1px solid black;">0</td> <td style="border: 1px solid black;">.</td> <td colspan="2" style="border: 1px solid black;">ENTER</td> </tr> </table>	7	8	9	CL	4	5	6	NO SALE	1	2	3	X	0	.	ENTER	
CAPPUCCINO	1	3.50																																					
FLAT WHITE	1	3.50																																					
SHORT BLACK	1	3.00																																					
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TABLE MAP	VOID																																						
7	8	9	CL																																				
4	5	6	NO SALE																																				
1	2	3	X																																				
0	.	ENTER																																					

3x
\$10.00

<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="background-color: #2c5e8c; color: white; text-align: center; padding: 5px;">CASH</td> </tr> <tr> <td style="padding: 5px;">EFTPOS</td> </tr> <tr> <td style="padding: 5px;">AMEX/DINERS</td> </tr> <tr> <td style="padding: 5px;">POINTS</td> </tr> <tr> <td style="padding: 5px;">LAYBY</td> </tr> <tr> <td style="padding: 5px;">GV REDEEM</td> </tr> <tr> <td style="padding: 5px;">CREDIT NOTE</td> </tr> <tr> <td style="padding: 5px;">ACCOUNT</td> </tr> </table>	CASH	EFTPOS	AMEX/DINERS	POINTS	LAYBY	GV REDEEM	CREDIT NOTE	ACCOUNT	<div style="border: 2px solid yellow; padding: 5px; display: inline-block; font-size: 1.5em; font-weight: bold;">5.00</div> <div style="margin-top: 10px; text-align: center;">Balance 10.00</div> <div style="display: flex; flex-direction: column; align-items: center; margin-top: 10px;"> </div>
CASH									
EFTPOS									
AMEX/DINERS									
POINTS									
LAYBY									
GV REDEEM									
CREDIT NOTE									
ACCOUNT									

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The amount entered will be allocated to the tender pressed, then the remaining due amount will be displayed.

When tendering the sale, ensure that at least one of the tenders used has the finalise warning enabled.

In the below example, \$5.00 has been tendered against Cash, \$5.00 is outstanding which will be tendered against AMEX/DINERS.

The screenshot shows the POS interface with the following details:

- Header:** 09 Sep 16:00 Adult ID: 09-Sep-2003, POS 2 Jeremy STANDARD #735
- Order Summary:**
 - CAPPUCCINO 1 3.50
 - FLAT WHITE 1 3.50
 - SHORT BLACK 1 3.00
- Navigation Panel:** RECEIPT, CLERK, 7, 8, 9, CL, PRICE LEVEL, 5% ST DISC, 4, 5, 6, NO SALE, CUSTOMER, 5% ITEM, BAR TAB, REFUND, 1, 2, 3, X, PENDING, VOID SALE, TABLE MAP, VOID, 0, ., ENTER
- Total:** 3x \$10.00
- Tender Selection:**
 - CASH: 5.00
 - EFTPOS
 - AMEX/DINERS
 - POINTS
 - LAYBY
 - GV REDEEM
 - CREDIT NOTE
 - ACCOUNT
- Balance:** 5.00
- Visuals:** Images of Australian banknotes (100, 50, 20, 10, 5).

If you want to split the remaining amount between more than one tender, ensure that you enter an amount that is less than the remaining amount and press a tender. The entered amount will be tendered against the next selected tender. Repeat the process until the entire sale amount has been tendered.

Once the last outstanding amount has been tendered (and at least one of the tenders used had the finalise warning enabled), the finalise warning will be displayed and will contain a list of all tenders which have been used and their respective amounts.

To finalise the sale, press Yes.

The dialog box displays the following information:

- Finalize ?
- CASH \$5.00
- AMEX/DINERS \$5.00
- (Tendered \$10.00)
- Buttons: Yes, No

POS Screen Setup

IP-4351 – Repeat Item Function

This function will enable you to repeat any item in the sale along with any related instruction items that were added with the item.

This function is useful when multiple customers are placing an order together, one of the customers requests an item with specific instructions, then the next customer in the same group asks “Can I have the same?”. In this scenario, the clerk can select the item that is already listed in the window, then press the “Repeat Item” button. This will add the same item to the sale along with the same set of instructions.

To configure and use this function, go to: Back Office > Setup > POS Screen > POS Screen Setup

Select a POS Screen Layout > Press “Buttons” on the top-left corner of the window.

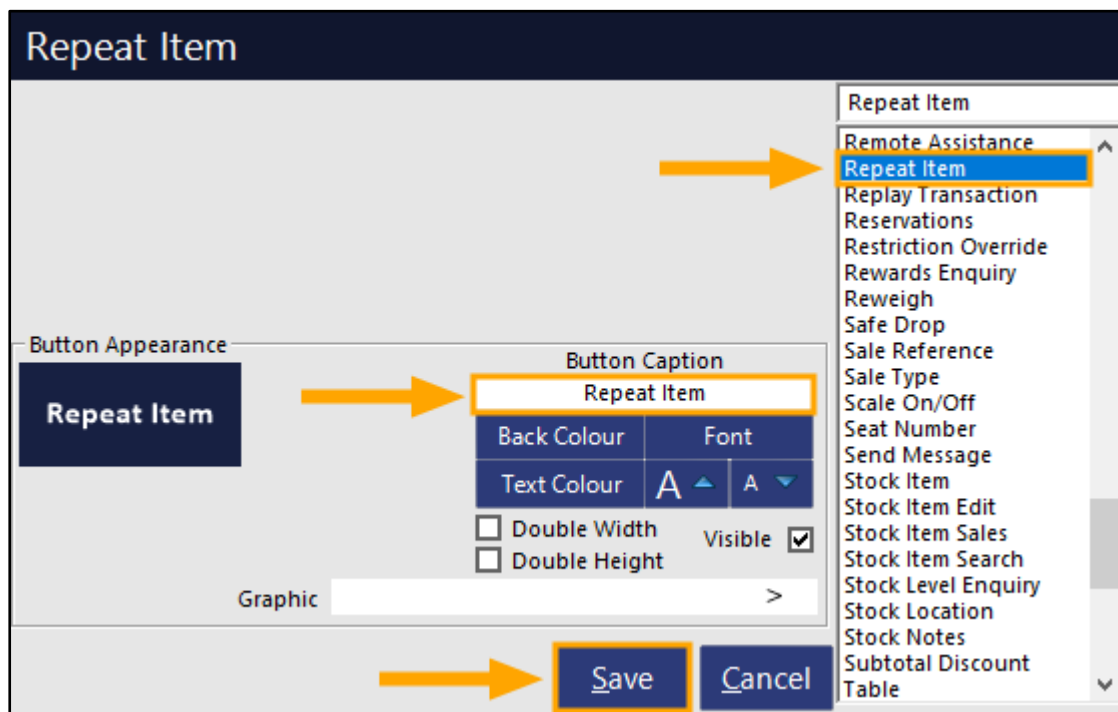
Find a suitable POS Screen tab where you’d like to create the “Repeat Item” button, then find a blank button and select it.

Configure the button as follows.

Function: Repeat Item

Button Caption: Repeat Item

You can enter a different Button Caption and customise the Appearance if required.



Once the button has been configured and saved, close the POS Screen Layout windows and return to the Back Office screen.

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Open the POS Screen by pressing the POS button on the top-left corner of the Back Office Dashboard. Add a Stock Item to the sale along with any required instruction items.

18 Aug 13:00 Adult ID: 18-Aug-2003 POS 2 Jeremy PRICE 1 #833		
CAPPUCCINO	1	3.50
EXTRA HOT		
SKINNY MILK		
DOUBLE SHOT	1	2.00
3 SUGAR		

Select the main item in the sale as shown in the below image, then press the "Repeat Item" button.

18 Aug 13:01 Adult ID: 18-Aug-2003 POS 2 Jeremy PRICE 1 #833		
CAPPUCCINO	1	3.50
EXTRA HOT		
SKINNY MILK		
DOUBLE SHOT	1	2.00
3 SUGAR		

Repeat Item

idealpos Update History

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The item will be repeated in the sale, along with all the instruction items:

18 Aug 13:02 Adult ID: 18-Aug-2003 POS 2 Jeremy PRICE 1 #833		
CAPPUCCINO	1	3.50
EXTRA HOT		
SKINNY MILK		
DOUBLE SHOT	1	2.00
3 SUGAR		
CAPPUCCINO	1	3.50
EXTRA HOT		
SKINNY MILK		
DOUBLE SHOT	1	2.00
3 SUGAR		

POS Terminals

IP-4426 – Support for Idealpos Ark RFID Reader

This function adds RFID reader support for the Idealpos Ark terminal.

To enable the Idealpos Ark RFID Reader, go to:

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

Within the "Customer Readers" tab, select the RFID Reader Type "Idealpos Ark".

Select the type of Connection.

Enable "Clerk Wrist Bands" and/or "Customers", depending on what function you want the RFID reader to be used for. Clerk Wrist Bands will have unique codes assigned to them.

A Wrist Band can be assigned to a Clerk via the Login Code field which is accessed via Back Office > Setup > Clerks > Add/Modify.

To assign a Wrist Band to a Clerk, ensure that the cursor is currently active in the Login Code field and ensure that there is no old data in the field, then scan the Wrist Band against an RFID reader that has been configured. The Wrist Band Code/Data will be entered into the Login Code field and the Clerk will be able to login to a POS Terminal, providing that the "Clerk Wrist Bands" option has been enabled as shown in the example below.

The screenshot shows the 'RFID Reader' configuration window in the 'Customer Readers' tab. The 'Type' dropdown menu is set to 'Idealpos Ark' and is highlighted with an orange arrow. Below it, the 'Connection' dropdown is set to 'COM2'. The 'Settings' field contains '9600,n,8,1'. There are two checkboxes: 'Clerk Wrist Bands' which is checked, and 'Customers' which is unchecked. A 'Test' button is located to the right of the 'Type' dropdown.

Once the setting has been configured, you may need to restart Idealpos for this change to take effect.

Reports

IP-4290 – Stock Levels by Location Report – Save Defaults functionality

This function adds the ability to Save Defaults on the Stock Levels by Location Report.

Previous to this change, default options could not be applied to this report and the report would always pre-populate each dropdown box using the first fourteen Locations, regardless of whether or not you wanted them.

The ability to save default options enables the user to apply the options they want to be selected by default each time the Stock Levels by Location Report is opened.

To use this function, go to: Back Office > Reports > Stock Control > Stock Levels by Location

idealpos Stock Levels By Location ✕

View
Print
Save Defaults

Sort Order
 Code
 Description

Group by
 Department
 Supplier
[Dropdown]

Options

Location 1 [v]	Location 2 [v]	Location 3 [v]
Location 4 [v]	Location 5 [v]	Location 20 [v]
[v]	[v]	[v]
[v]	[v]	[v]
[v]	[v]	[v]

Show Value for Each Location
 NOT show zero qty items
 Hide Cost Prices

Selection Range

Code	>	to	>
Description	>	to	>
Department	>	to	>
Supplier	>	to	>

Attributes [v] [v] +

Show
 Exclude ✕

POS 2
v8 Build 1

idealpos Update History

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Select the options that you want to be used each time the report is opened, then press the "Save Defaults" button located on the top-left corner of the window.

idealpos **Stock Levels By Location** [X]

View
Print
Save Defaults

Sort Order
 Code
 Description

Group by
 Department
 Supplier

Options
Location 1 Location 2 Location 3
Show Value for Each Location
 NOT show zero qty items
 Hide Cost Prices

Selection Range
Code > to >
Description > to >
Department 205 > to 205 >
Supplier > to >
Attributes +
 Show
 Exclude

POS 2
v8 Build 1

A confirmation prompt of "Defaults Saved" will appear.
Press "OK" to continue.

Defaults Saved

OK

idealpos Update History

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You may confirm that the new defaults are used by closing the Stock Levels By Location window, then opening it again by going to: Back Office > Reports > Stock Control > Stock Levels by Location

The new default will now be used each time the report is opened on the current terminal.

Note that each Terminal/Back Office has its own Report Defaults.

idealpos Stock Levels By Location

View
Print
Save Defaults

Sort Order
 Code
 Description

Group by
 Department
 Supplier

Options

Location 1 Location 2 Location 3

Show Value for Each Location
 NOT show zero qty items
 Hide Cost Prices

Selection Range

Code > to >
Description > to >
Department 205 > to 205 >
Supplier > to >

Attributes > > +
 Show
 Exclude

POS 2
v8 Build 1

IP-4385 – Improved Date Range drop-down boxes

This function improves the drop-down boxes that are displayed on the Idealpos Report screens.

Previous to this change, the report drop-down boxes would only occupy a small portion of the entire window, with scroll-bars displayed to scroll down through the available options.

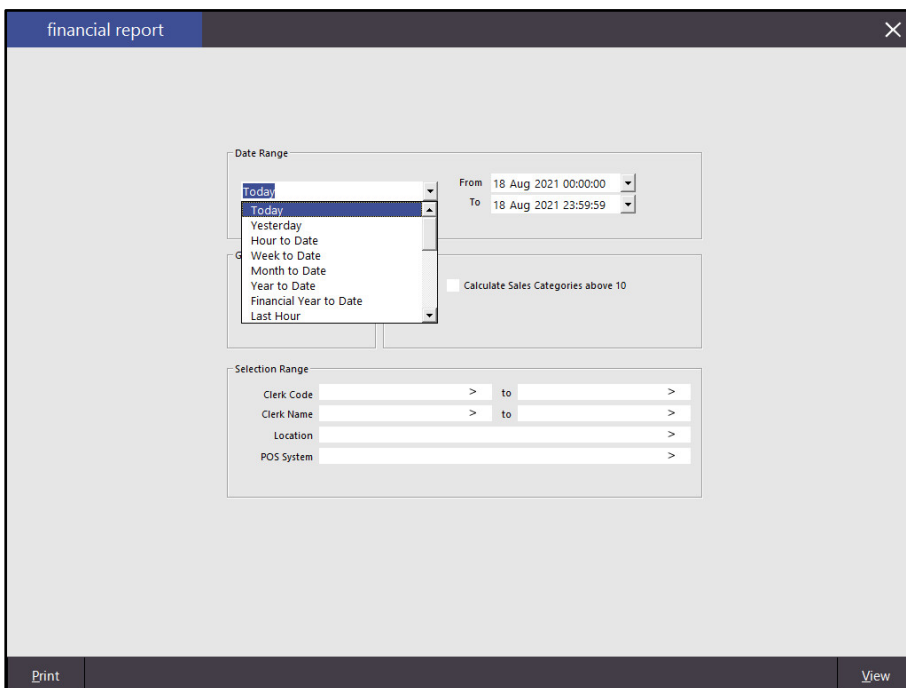
This function has been improved so that the date range drop-down boxes will now occupy the available space, enabling the quick selection of the required period without having to use scroll-bars to view all available date ranges.

This change is available on many screens in Idealpos which has the option to select a date range from a drop-down box. Some examples of the many available screens which have a date range drop-down box are:

- Back Office > Enquiry > Stock Items, Customers, Suppliers, Journal History, Activity Log
- Back Office > Reports
- Back Office > Enquiry > Journal History

To compare the Date Range dropdown box between v7 and v8, see examples below.

The first image is taken from Idealpos v7.1, the second image is taken from Idealpos v8.



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The screenshot displays the 'idealpos Financial Report' window. On the left, there is a dark blue sidebar with the 'idealpos' logo and two menu items: 'View' and 'Print'. The main content area is light gray and contains a 'Date Range' dropdown menu that is currently open, showing a list of options including 'Today', 'Yesterday', 'Hour to Date', 'Week to Date', 'Month to Date', 'Year to Date', 'Financial Year to Date', 'Last Hour', 'Last Week', 'Last Two Weeks', 'Last Month', 'Last Year', 'Last Financial Year', 'All Dates', 'Custom Date', 'Breakfast', 'Morning Tea', 'Lunch', 'Afternoon Tea', 'Dinner', 'Last Two Months', 'Last Three Months', and 'Last Six Months'. The 'Today' option is highlighted. To the right of the dropdown, there are two date input fields: 'From 18 Aug 2021 00:00:00' and 'To 18 Aug 2021 23:59:59'. Below these fields is a button labeled 'Calculate Sales Categories above 10'. At the bottom left of the window, the text 'POS 2 v8 Build 1' is visible.

Reservations

IP-4318 – Reservations – User Permission support for modifying Customer Types

This function adds the ability to control whether or not a User can modify a Customer's Customer Type during the process of booking a reservation.

This function leverages the existing "Modify Customer Type" User Permission option.

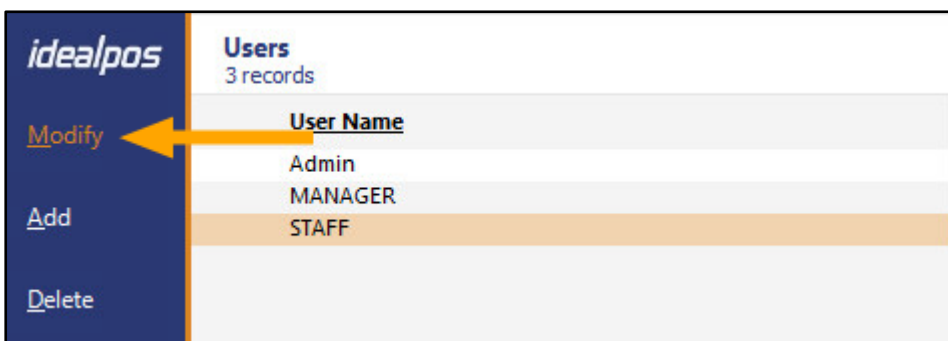
If you've already configured access to the "Modify Customer Type" permission as required, no additional configuration steps are required, as the system will use the current configuration to either allow or deny a user to modify Customer Types as part of the reservation booking process.

To configure this function, go to: Back Office > Setup > Users.

Select a User from the list, then press the "Modify" button on the top-left corner.

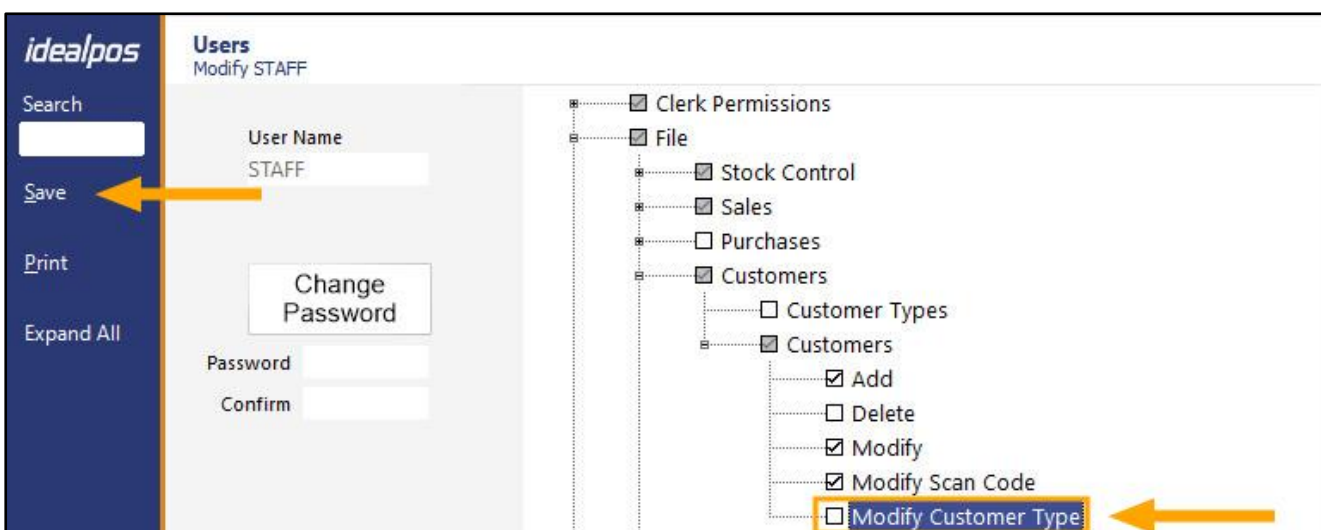
Note that the Reservations function can be accessed from both the Back Office and the POS Screen (provided that the User has permission to access the Reservations module).

Therefore, ensure that you configure this permission for Users which login to the Back Office as well as Users which are linked to Clerks (so that access to this function is controlled for the required Clerks).



In the tree view, toggle "Modify Customer Type" which is located under File > Customers > Customers.

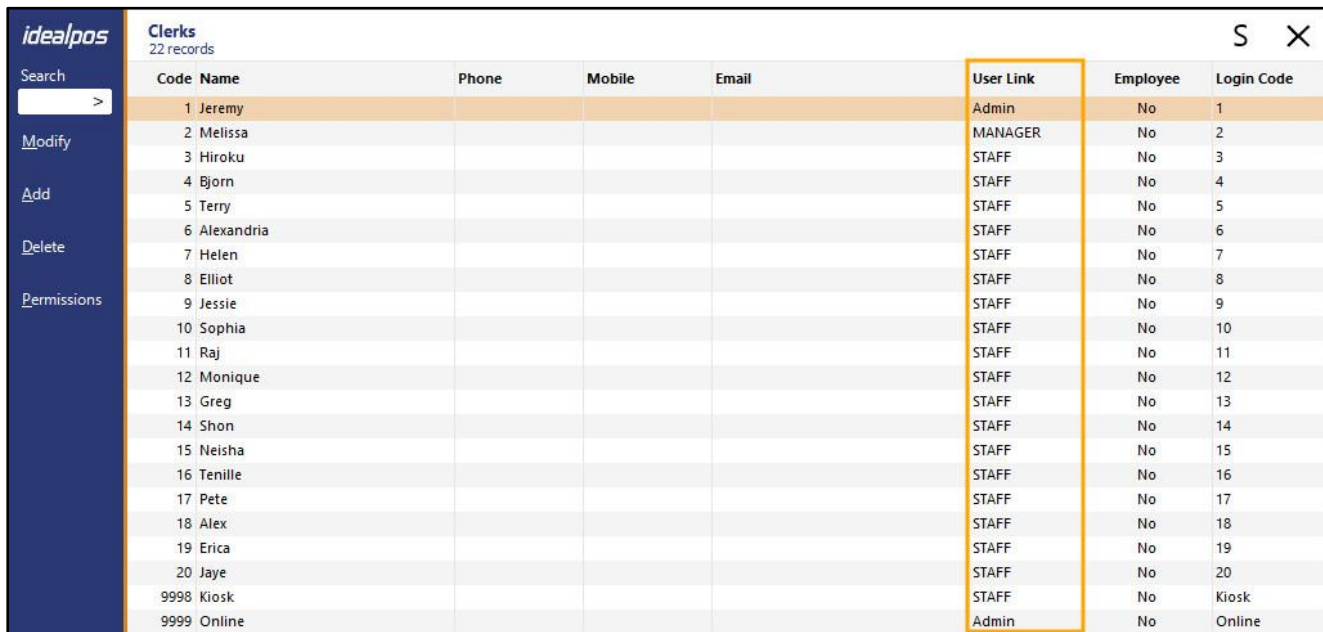
Press "Save" on the top-left corner to save the change.



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To check which User a Clerk is linked to, go to: Setup > Clerks.
The User Link column will show the User each Clerk is linked to:



Code	Name	Phone	Mobile	Email	User Link	Employee	Login Code
1	Jeremy				Admin	No	1
2	Melissa				MANAGER	No	2
3	Hiroku				STAFF	No	3
4	Bjorn				STAFF	No	4
5	Terry				STAFF	No	5
6	Alexandria				STAFF	No	6
7	Helen				STAFF	No	7
8	Elliot				STAFF	No	8
9	Jessie				STAFF	No	9
10	Sophia				STAFF	No	10
11	Raj				STAFF	No	11
12	Monique				STAFF	No	12
13	Greg				STAFF	No	13
14	Shon				STAFF	No	14
15	Neisha				STAFF	No	15
16	Tenille				STAFF	No	16
17	Pete				STAFF	No	17
18	Alex				STAFF	No	18
19	Erica				STAFF	No	19
20	Jaye				STAFF	No	20
9998	Kiosk				STAFF	No	Kiosk
9999	Online				Admin	No	Online

You can modify which User a Clerk is linked to by selecting the Clerk from the list, pressing the “Modify” button on the top-left corner of the window:



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Then select the User from the User Permissions Link dropdown box that you want to link the Clerk to:

The screenshot shows the 'idealpos Clerks' window. At the top, there are fields for 'Code 3', 'Name Hiroku', 'Login Code 3', and a 'Discontinue?' checkbox. The form is divided into three main sections: 'Personal', 'Employee', and 'POS'. The 'Personal' section includes fields for Address, Suburb, State, Post Code, Phone, Mobile, Fax, Email, Birth Date, Birth Date 2, Next of Kin, and Contact No. The 'Employee' section includes a 'Use Employee Log' checkbox, Password, Sales Prompt, and Commission % 0. The 'POS' section includes a 'User Permissions Link' dropdown menu (highlighted with a yellow box and an arrow), 'Default Price Level' (with options Admin, MANAGER, STAFF), 'Use POS', 'Site 1', 'Use Drawer 2' checkbox, and 'Comments'.

If required, you can then return to the User Permissions window (Setup > Users > Select User > Modify) to configure access to the “Modify Customer Type” option for any other remaining Users which are linked to Clerks.

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Once the User permission configuration has been completed, go to either:

Back Office > Reservations > Reservations

OR

POS Screen > Table Map > Reservations



Select a block of time for any table, then press the “Reserve” button on the bottom-right corner of the window.

Calendar > Brekky Lunch Dinner Bar Area < > ✕

Tables Runsheet TODAY - Friday, 23 July 2021 13:42

Table	Covers	Area	Priority	12pm	12:30	1pm	1:30	2pm	2:30	3pm	3:30	4pm	4:30	5pm	5:30	6pm	6:30	7pm	7	Pending	ALL	12pm	
1	2	Bar Area	0																		ADD NEW	1	12:30
2	2	Bar Area	0																			2	1pm
3	2	Bar Area	0																			3	1:30
4	2	Bar Area	0																			4	2pm
5	2	Bar Area	0																			5	2:30
6	2	Bar Area	0																			6	3pm
7	2	Bar Area	0																			7	3:30
8	4	Bar Area	0																			8	4pm
9	4	Bar Area	0																			9	4:30
10	4	Bar Area	0																			10	5pm
11	4	Bar Area	0																			11+	5:30
12	8	Bar Area	0																				
13	8	Bar Area	0																				

Change Layout 2pm 2 Covers Table 6 Reserve

idealpos Update History

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Enter an existing Customer's Surname, select the Customer from the list on the right-hand side, then press "Use This Customer".

Table 6 ✕

Covers

Arrival Duration Departure

Last Name OB830
NT
BDAY

First Name

Email

Phone

DOB

Comments

Confirmed

That's 2 people at 2:00 pm on Friday 23 July

Search Code

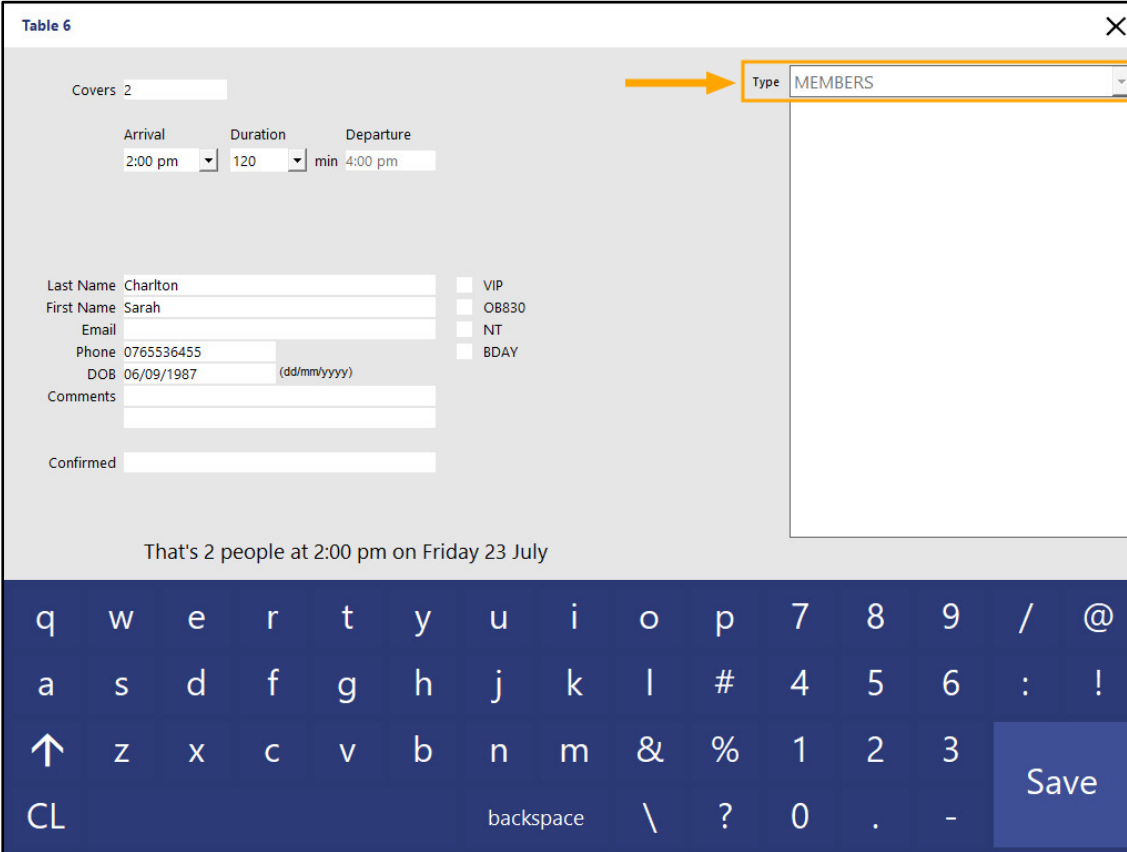
q w e r t y u i o p 7 8 9 / @
a s d f g h j k l # 4 5 6 : !
↑ z x c v b n m & % 1 2 3
CL backspace \ ? 0 . -

idealpos Update History

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The User Permission “Modify Customer Type” that was configured in the above steps will control whether or not the Customer Type is read-only or not.

The below example shows the Customer Type dropdown box as read-only (greyed out).



The screenshot displays a form titled "Table 6" with a close button (X) in the top right corner. The form contains several input fields and a dropdown menu. An orange arrow points to the "Type" dropdown menu, which is currently set to "MEMBERS" and is highlighted with an orange border, indicating it is read-only. The form includes the following fields:

- Covers: 2
- Arrival: 2:00 pm
- Duration: 120 min
- Departure: 4:00 pm
- Last Name: Chariton
- First Name: Sarah
- Email: [empty]
- Phone: 0765536455
- DOB: 06/09/1987 (dd/mm/yyyy)
- Comments: [empty]
- Confirmed: [empty]

There are also four checkboxes on the right side of the form:

- VIP
- OB830
- NT
- BDAY

At the bottom of the form, there is a summary line: "That's 2 people at 2:00 pm on Friday 23 July". Below the form is a dark blue keyboard overlay with a "Save" button in the bottom right corner.

The below example shows the Customer Type as editable:

idealpos Update History

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Table 6 ✕

Covers

Arrival Duration min Departure

Last Name VIP
First Name OB830
Email NT
Phone BDAY
DOB (dd/mm/yyyy)

Comments

Confirmed

That's 2 people at 2:00 pm on Friday 23 July

Type

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

Room Interface

IP-3660 – Motelmate – Room Interface Support

This function adds support for the Motelmate Room Interface to Idealpos.

In order to use this function, you will need to have this module enabled in your Licence Gateway.

This interface works similar to the StarFleet Room Interface.

To enable this function, go to:

Setup > Global Options > Interfaces > Rooms.

Select "Motelmate" from the Interface Type.

Enter the POS Number into the Output from POS# field. This is the terminal that produces the output data.

Enter the network path to the database of the Room Interface into the Network Path field.

Select the Tender Type for the Room Charge.

The Tender is configured via Setup > Function Descriptors > Select an unused Tender.

The screenshot shows the 'Global Options' window for 'Site 1 (Site 1)'. The 'Interfaces' tab is active, and the 'Rooms' interface is selected. The 'Room Interface' configuration panel on the right shows the following settings:

- Interface Type: Motelmate
- Output from POS#: 1
- Network Path: (empty field)
- Tender Type: ROOM CHARGE

The left sidebar lists various interfaces, with 'Rooms' highlighted and 'Motelmate' listed next to it. Other interfaces like 'eCommerce' and 'Pay@Table' have checkmarks next to them.

Schedules

IP-4108 – Schedules – Automatic Software Update functionality

This function enables you to create a one-off schedule which will trigger Idealpos to download the latest available build and then install it on all the networked Idealpos terminals.

This will occur automatically at the time which has been specified in the schedule for all the networked Idealpos Terminals/systems.

Note that Software Update Schedules are a once-off schedule and cannot be configured to repeat at any interval. Once the Schedule has been executed, it will be automatically removed from the list of Schedules.

Also note that in order for the Automatic Update Schedule to successfully update Idealpos, the IPS.exe and IPSDeploy.exe must be set to run as Administrator on each POS Terminal/Back Office.

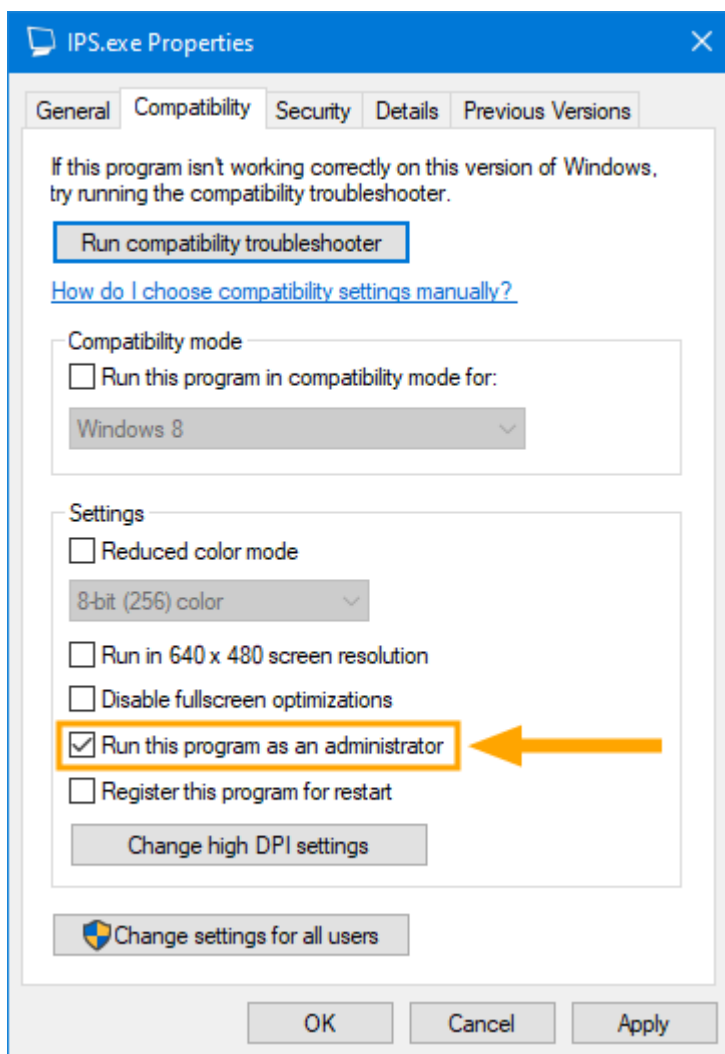
Browse to one of the following locations, then right click on each of these EXEs and select Properties.

64 BIT Versions of Windows - C:\Program Files (x86)\Idealpos Solutions\Idealpos\

32 BIT Versions of Windows - C:\Program Files\Idealpos Solutions\Idealpos\

In the Compatibility tab, ensure that the "Run this program as an Administrator" is enabled.

Once this change has been applied, you will need to ensure that you Close Suite/Open Suite before using the Software Update Schedule functionality outlined further below.

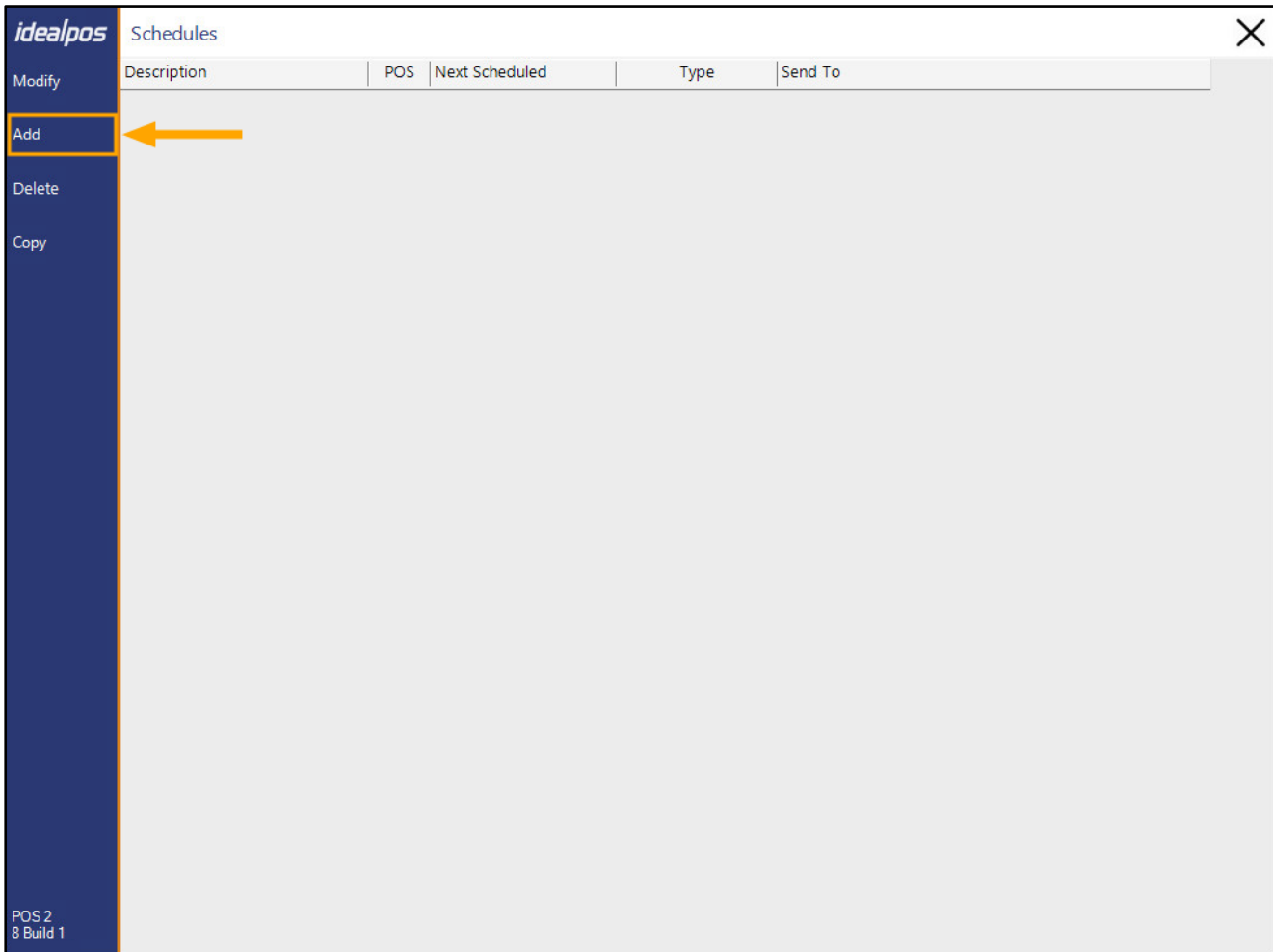


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When the Software Update Schedule is triggered, it will close down Idealpos and automatically commence the update process. Therefore, when creating the schedule, it is important that you choose an appropriate date and time when the POS terminals/systems are not being used. If a terminal is in use when the Software Update Schedule executes, Idealpos will be closed automatically, regardless of whether or not the terminal is in use.

To configure and use this function, go to: Back Office > Setup > Schedules
Press the "Add" button on the top-left corner of the window.



idealpos Update History

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Type – Select “Software Update”

Run next at - Enter the Date/Time that you want the Update Schedule to run.

Ensure that you select a Date and Time when all Idealpos systems/terminals will be switched on and not in use. Choosing a date and time when systems aren't in use is crucial, as Idealpos will be closed on all POS Terminals/Back Offices during this time for the Scheduled Software Update to take place. Idealpos will be unavailable until the update has completed.

From POS – Enter the POS terminal number that will trigger the schedule to run. Note that despite the terminal number entered into this field, all networked POS terminals/Back Offices will receive the Software Update

Email Options (To) – Entering an email address will trigger Idealpos to send an email once the Software Update Schedule has been executed. If using this email function, you will need to ensure that you have configured your email settings in Setup > Global Options > Other Options > Email Settings

idealpos Schedules

Save

Description SOFTWARE UPDATE

Type Software Update

Run next at 28 Apr 2021 12:00

From POS 2

Email Options

To manager@business.com

POS 2
8 Build 1

idealpos Update History

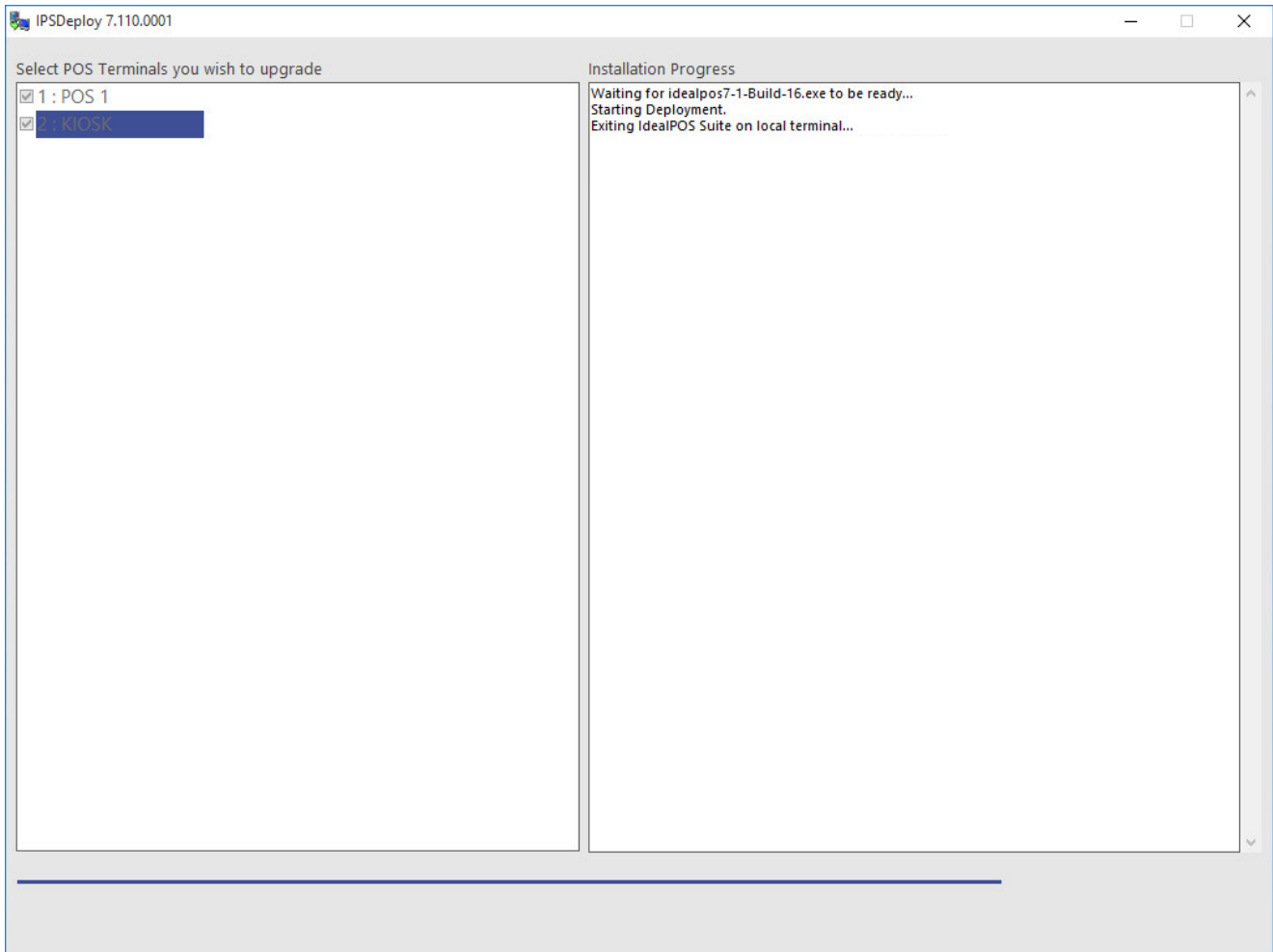
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The Schedule will run at the specified date and time.

When the Schedule runs, Idealpos will close and IPSDeploy will appear on each terminal.

Each POS Terminal/Back Office will download the latest available build from Idealpos and will then install the build silently.

Once the installation has been completed, Idealpos will start automatically, ready for use.



Stock Items

IP-3759 – Stock Item Variants

This function adds the ability to create Variant Stock Items in Idealpos.

The Variants function is used when a Stock Item comes in a variety of colours, sizes, materials and any other options.

An example of this may be a clothing store which sells a particular brand of shirt that comes in various colours, sizes, materials and gender (e.g. some clothing items such as shirts come in a women's variety or men's variety).

Idealpos supports a maximum of three Variant Types per Stock Item (e.g. Colour, Size, Material), however, it is not necessary to use all three Variant Type options in a Stock Item.

To create Variant Stock Items in Idealpos, the Variant Types (Colour, Size, Material, etc.) and Options (Blue, Red, Green, Small, Medium, Large, Wool, Cotton, etc.) need to be created first.

Once the Variant Types and options have been created, the parent or main item (e.g., the shirt) can be created.

The "Has Variants" option can be enabled in the parent item which will enable access to the Variants tab within the Stock Item, from where the Variant Stock Items can be created.

In the Variants tab, you will need to select the Variant Types the item is available in (such as Colour, Size, etc.).

Once the Variant Types have been selected, the options for each Variant Type can be enabled.

A preview of each Variant Stock Item that will be created will appear on-screen. Finally, you can either press the "Create New Variants" button to proceed, or you can uncheck any variant types that are unavailable.

Creation of Variant Items on Site Management terminals that are being managed from a Head Office is not supported. The Head Office must create the Variant Items and choose which Sites to send the Variant Items to.

Go to: Back Office > File > Sales > Stock Item Variants.

This screen is similar to the Attribute Type window, except that it is used for creating and maintaining Stock Item Variants and Variant Options.

The left-hand side column is reserved for displaying the Variant Types (Colour, Size, Material, etc.) and the right-hand side column is reserved for displaying the list of options that are available for the currently selected Variant Type. On a system which hasn't been configured for Variants, both the left-hand side and right-hand side columns will be empty.

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The screenshot shows the 'idealpos Stock Item Variants' window. On the left is a dark blue sidebar with the 'idealpos' logo at the top and four buttons: 'Modify', 'Add', 'Add New', and 'Delete'. The main content area is divided into two columns: 'Variant Types' on the left and 'Variants' on the right. The 'Variants' column has a sub-column for 'Abbreviation'. The window title bar at the top says 'Stock Item Variants' and has 'S' and 'X' icons. The bottom left corner of the window displays 'POS 2 v8 Build 1'.

To begin, press the "Add" button on the left-hand side of the window.

A close-up of the sidebar buttons. The buttons are 'Modify', 'Add', 'Add New', and 'Delete'. The 'Add' button is highlighted with a yellow border.

An "Add Variant Type" field will appear at the bottom of the window.

The screenshot shows a dialog box titled 'Add Variant Type'. It has a light gray background and a close button (X) in the top right corner. The text 'Add Variant Type' is followed by a white text input field.

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Enter a name for the Variant Type (e.g. Colour, Size, Material, or any other Variant Type that you need to create).

×

Add Variant Type

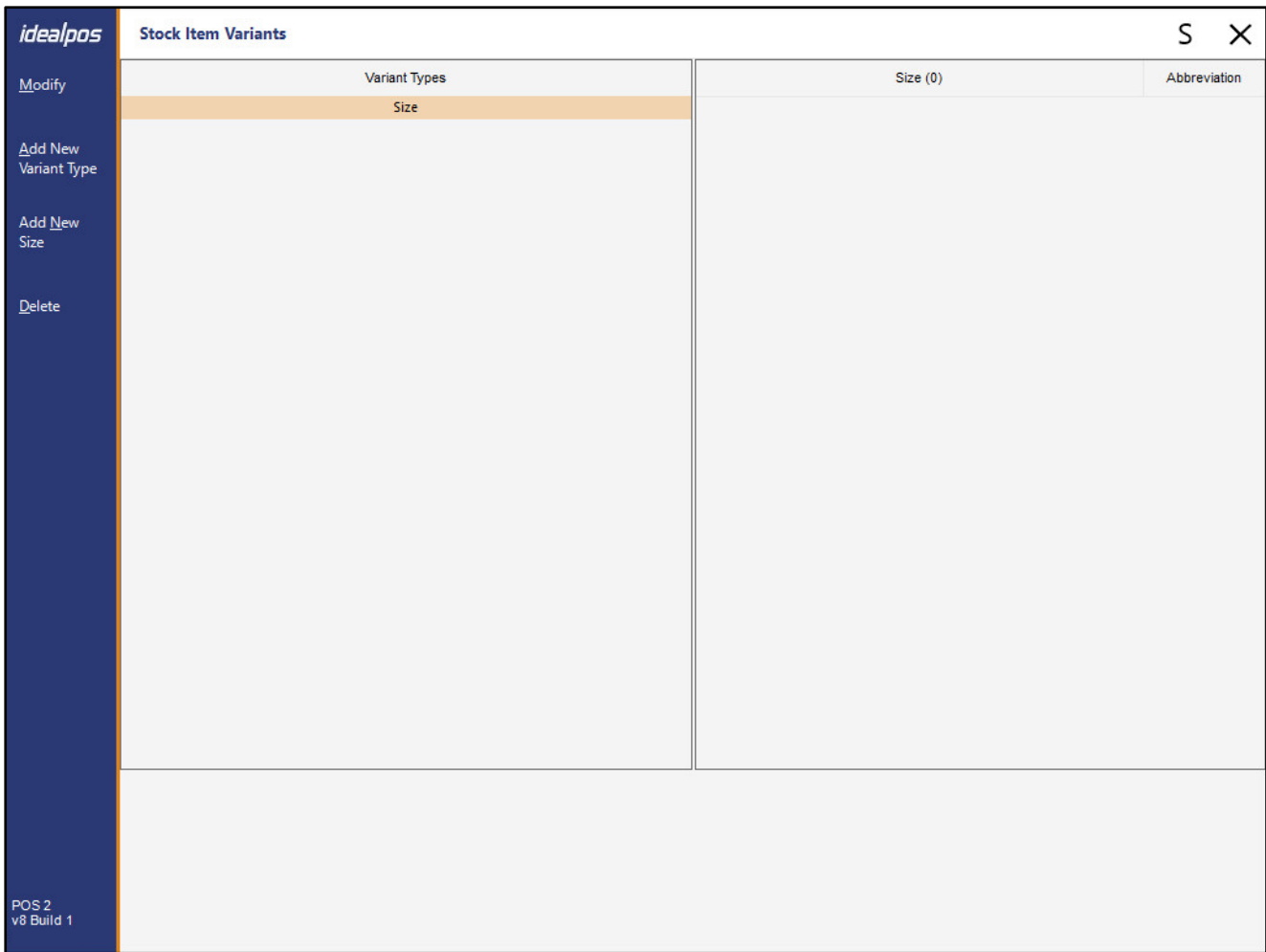
On the top-left corner of the window, press the "Save" button to create it.



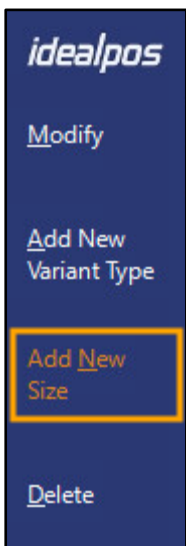
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After the Variant Type has been saved, Idealpos will automatically select it.



To add options to the selected Variant Type, press the "Add New [Variant Type]" button located on the left-hand side of the window. The button in the below example shows "Add New Size" as the Size Variant Type is currently selected.

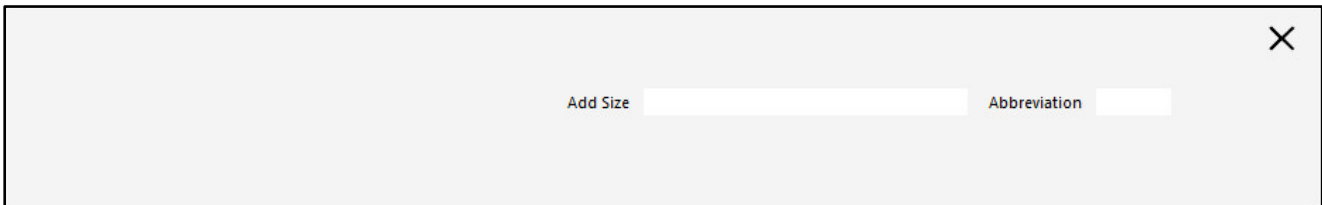


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The two following fields will be displayed:

- **Add [Variant Type]** – Enter the option for the Variant Type (e.g. If you're adding size options to a Variant Type of 'Size', you would enter a size such as Small into this field).
- **Abbreviation** – Enter the abbreviation for the Variant Option into this field. The abbreviated description will be used when creating Variant Stock Items where the long description would result in the description exceeding the maximum allowable length. E.g. If you were creating a size of "Small", you could enter SML as the abbreviation, this is entirely up to you. Idealpos will use the abbreviation when creating child Variant Stock Items.

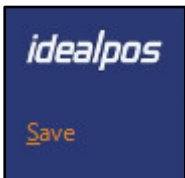


A screenshot of a dialog box titled "Add Size" with a close button (X) in the top right corner. The dialog contains two input fields: "Add Size" and "Abbreviation". Both fields are currently empty.



A screenshot of the same "Add Size" dialog box. The "Add Size" field now contains the text "Small" and the "Abbreviation" field contains the text "SML".

Once the Variant option and Abbreviation has been entered, press the "Save" button located on the top-left corner of the window to create the option.



Repeat the above steps to create the required Variant Types and Options for each Variant Type that you require.

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Close the Stock Item Variants screen.

If you want Idealpos to automatically pre-select specific Variant Types (e.g. Size, Colour, Material) when you're creating new Variant Items, this can be configured in the Global Options. If this is not required, you may skip this step. This is beneficial if all your Variant Stock Items always come in a standard set of Variant Types (e.g. all items have a unique Colour, Size and Material). If you have a wide range of Variant Types that are used for your variants (e.g. Drink Bottle Sizes, Drink Bottle Colours, Sports Bag Sizes, Sports Bag Colours, etc.), it may be necessary to manually select your Variant Types each time you're creating Variant Stock Items from the parent Stock Item.

To set the Default Variant Types, go to: Setup > Global Options > Other Options

Within the Other Options tab, select the Default Variant Types that will be pre-selected when creating Variant Stock Items from the parent Stock Item.

The screenshot shows the 'Global Options' window for 'Site 1 (Site 1)'. The 'Other Options' tab is selected. The 'Default Variant Types' section is highlighted with an orange border and contains three dropdown menus: 'Size', 'Colour', and 'Material'. Other sections include 'Home Screen', 'Email Settings', 'Alerts', 'Mag Card Printing', 'FTP Details', 'Special Attribute Types', 'Attribute Column Headers', and 'Stock Item Descriptions'.

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You can now proceed to creating the parent Stock Item/Variant Stock Items.
Close the Global Options window and go to: File > Stock Control > Stock Items

If you have an existing Stock Item that you want to use as the parent item, you can modify it and enable the "Has Variants" option, then create Variants.

Otherwise, press the "Add" button on the top-left corner of the Stock Items window to create a new Item.

This will be the parent or main Stock Item.

For this example, we'll enter "BOYS SHIRT" into the Description fields.

Whilst in the General tab, enter any other options that are required (Selling/Cost Prices, Tax Settings, Printer Settings, Tax Settings, Purchasing details, Other Options). Note that if your system is integrated with Shopify via Idealpos Online eCommerce, any Variant Stock Items that are created in Idealpos can be exported to Shopify by enabling the "Web Store" checkbox.

If your Variant Stock Items all share the same barcode, enter the Barcode into the Scan Code field in the parent item and leave the Scan Code field as blank on the child items. If each Variant Stock Item has a unique barcode, leave the Scan Code field as blank for the parent Stock Item and enter each item's barcode into the Variant Stock Item in Idealpos that corresponds to the physical item.

When creating the parent Stock Item, ensure that the "Has Variants" option is also enabled. This will enable access to the Variants tab, from where you will create your Variant Stock Items.

The screenshot shows the 'Stock Items' window for item 46, 'BOYS SHIRT'. The 'Variants' tab is selected and highlighted with a yellow box and an arrow. The 'Has Variants' checkbox is checked and also highlighted with a yellow box and an arrow. Other options like 'Stock Control' and 'Non-Accumulating' are also checked. The window includes sections for Selling Prices, Cost Prices, Printer Settings, Purchasing, Tax Settings, and Attributes.

PRICE		Profit%
PRICE 1	20.00	44.99
PRICE 2	0.00	
PRICE 3	0.00	
PRICE 4	0.00	
PRICE 5	0.00	
PRICE 6	0.00	
PRICE 7	0.00	
PRICE 8	0.00	
PRICE 9	0.00	
PRICE 10	0.00	
PRICE 11	0.00	
PRICE 12	0.00	

Standard Cost	Last Cost	Average Cost
10.0000	10.0000	10.0000

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If each of your Variant Items will have the same Recommended Level, Reorder Level and Carton Quantity, it is a good idea to enter these details into the Parent Item. This way, Idealpos will replicate these values to each of the child items, saving you from having to enter these details repeatedly for each child item.

Go to the Advanced tab of the item, then next to the Stock Level field, press the ">>>" button.

idealpos Stock Items Modify 46 General **Advanced** Redirect Item Variants Created 14 May 2021 09:21:51 X

Save
Keyboard

Sales Prompt
Availability Always Available

Link to Menu 0 > MAIN
Link to Grid 0 > MAIN
Link Table 0 >

Amount Override Limits Profit%
Lower Limit 0.00
Upper Limit 0.00

Location 1
Stock Level 0 >>>
Recommended Level 0
Reorder Level 0

Points by Price Level
PRICE 1 0
PRICE 2 0
PRICE 3 0
PRICE 4 0
PRICE 5 0
PRICE 6 0
PRICE 7 0
PRICE 8 0
PRICE 9 0
PRICE 10 0
PRICE 11 0
PRICE 12 0

Points Settings
 Use Special Points : 0
 Inhibit Points Accrual
 Inhibit Purchase With Points
 Print Promotional Ticket

Stock Notes

Miscellaneous
National Product Number 0
Receipt Tabs 0
Weight

POS 2
v8 Build 1

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Enter the Recommended Level, Reorder Level and Carton Quantity and save the change. These values will be replicated down to each of the child variant items.

idealpos **Stock Items By Location** X

Save

Location Location 1

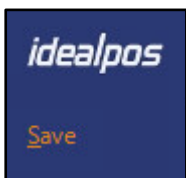
Stock Code **46**
Description **BOYS SHIRT**

Stock Level 0
Recommended Level 10
Reorder Level 2
Carton Quantity 10

Stock Location Location 1

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Press the "Save" button on the top-left corner to save the changes.



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Go to the Variants tab to create the Variant Stock Items (i.e. the child items).

If you configured the Default Variant Types in Global Options, the Variant Type dropdown boxes will be pre-filled as shown in the below example:

The screenshot displays the 'idealpos' interface for managing 'Stock Items'. The 'Variants' tab is active, showing a table titled 'New Variants of BOYS SHIRT'. The table has columns for 'Size', 'Colour', 'Material', 'Stock Code', 'Scan Code', and 'Create'. On the left side, there are three dropdown menus: 'Size' (with options: Extra Large, Large, Medium, Small), 'Colour' (with options: Black, Blue, Brown, Green, Orange, Red, White, Yellow), and 'Material' (with options: Cotton, Silk, Wool). Each dropdown menu is highlighted with an orange box and an orange arrow pointing to it. The 'Stock Code' column in the table has a '+' sign, and the 'Scan Code' column has a '+' sign. The 'Create' column has a checkbox. The top right corner shows 'Created 14 May 2021 09:21:51'. The bottom left corner shows 'POS 2 v8 Build 1'.

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If the Default Variant Types were not configured, each Variant Type dropdown box will be empty and you'll need to manually select the Variant Types from the dropdown boxes that you want to use in this instance to create the Variant Items.

The screenshot displays the 'idealpos' software interface for managing 'Stock Items'. The main window title is 'Stock Items' with a subtitle 'Modify 46'. The 'Variants' tab is active, showing a section titled 'New Variants of BOYS SHIRT'. Below this title, there are three columns: 'Stock Code', 'Scan Code', and 'Create'. The 'Scan Code' column has a '+' icon, and the 'Create' column has a checkbox. On the left side of the interface, there are three empty dropdown menus, each with a checkbox below it, intended for selecting variant types. The top right corner shows the creation date and time: 'Created 14 May 2021 09:21:51'. The bottom left corner of the interface indicates the version: 'POS 2 v8 Build 1'.

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To create the Variant Stock Items, ensure that the required Variant Types have been selected from the drop-down boxes on the left-hand side, then enable the checkboxes for each option that you want to create.

The screenshot shows the 'idealpos' interface for 'Stock Items' (Modify 46) with tabs for 'General', 'Advanced', 'Indirect Item', and 'Variants'. The 'Variants' tab is active, displaying 'New Variants of BOYS SHIRT'. On the left, there are three drop-down menus: 'Size' (with options: Extra Large, Large, Medium, Small), 'Colour' (with options: Black, Blue, Brown, Green, Orange, Red, White, Yellow), and 'Material' (with options: Cotton, Silk, Wool). Each option has a checkbox. An orange arrow points to the 'Size' menu, and an orange box highlights the 'Large' and 'Medium' options. The 'Variants' table has columns for 'Size', 'Colour', 'Material', 'Stock Code', 'Scan Code', and 'Create'. The 'Stock Code' column contains '[auto create]' and the 'Scan Code' column contains '+'. The 'Create' column has checkboxes, with the one for 'Medium' checked. A 'Create New Variants' button is located in the bottom right corner. The bottom left corner shows 'POS 2 v8 Build 1' and the top right corner shows 'Created 14 May 2021 09:21:51'.

Size	Colour	Material	Stock Code	Scan Code	Create
Large			[auto create]	+	<input checked="" type="checkbox"/>
Medium			[auto create]	+	<input checked="" type="checkbox"/>

idealpos Update History

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If you want to enable all options for a Variant Type, you can enable the checkbox that appears next to the Variant Type dropdown box. This will enable all Variant Option checkboxes as shown in the below example:

The screenshot shows the 'idealpos' interface for 'Stock Items' (Modify 46) in the 'Variants' tab. The main heading is 'New Variants of BOYS SHIRT'. On the left, there are dropdown menus for 'Size', 'Colour', and 'Material', each with a checkbox to its right. The 'Size' dropdown is currently set to 'Extra Large' and its checkbox is checked. Below these are lists of options: 'Colour' (Black, Blue, Brown, Green, Orange, Red, White, Yellow) and 'Material' (Cotton, Silk, Wool), each with a column of checkboxes. The main table lists variants with columns for 'Size', 'Colour', 'Material', 'Stock Code', 'Scan Code', and 'Create'. The 'Create' column has checkboxes for each variant. A 'Create New Variants' button is located at the bottom right.

Size	Colour	Material	Stock Code	Scan Code	Create
Extra Large			[auto create]	+	<input checked="" type="checkbox"/>
Large			[auto create]	+	<input checked="" type="checkbox"/>
Medium			[auto create]	+	<input checked="" type="checkbox"/>
Small			[auto create]	+	<input checked="" type="checkbox"/>

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If the Variant Stock Item comes in numerous Variant Types (i.e. various Colours, Sizes, Materials, etc.), then ensure that you select a Variant Type in each of the available dropdown boxes. Note that you have a maximum of three Variant Types that can be selected. When Variant Options have been enabled for multiple Variant Types, Idealpos will build a list of all the possible variations that are available for the enabled selection. A preview of the Stock Items which will be created will be displayed towards the right-hand side of the window as shown below:

The screenshot shows the 'Stock Items' interface with the 'Variants' tab selected. On the left, there are three dropdown menus for 'Size', 'Colour', and 'Material'. The 'Size' dropdown is set to 'Extra Large', 'Colour' to 'Black', and 'Material' to 'Cotton'. The main area displays a table titled 'New Variants of BOYS SHIRT' with columns for Size, Colour, Material, Stock Code, Scan Code, and Create. The table lists 48 variants, each with a unique combination of size, color, and material, and a corresponding 'Create' button.

Size	Colour	Material	Stock Code	Scan Code	Create
Extra Large	Black	Cotton	[auto create]	+	<input type="checkbox"/>
Extra Large	Black	Silk	[auto create]	+	<input type="checkbox"/>
Extra Large	Black	Wool	[auto create]	+	<input type="checkbox"/>
Extra Large	Blue	Cotton	[auto create]	+	<input type="checkbox"/>
Extra Large	Blue	Silk	[auto create]	+	<input type="checkbox"/>
Extra Large	Blue	Wool	[auto create]	+	<input type="checkbox"/>
Extra Large	Brown	Cotton	[auto create]	+	<input type="checkbox"/>
Extra Large	Brown	Silk	[auto create]	+	<input type="checkbox"/>
Extra Large	Brown	Wool	[auto create]	+	<input type="checkbox"/>
Extra Large	Green	Cotton	[auto create]	+	<input type="checkbox"/>
Extra Large	Green	Silk	[auto create]	+	<input type="checkbox"/>
Extra Large	Green	Wool	[auto create]	+	<input type="checkbox"/>
Extra Large	Orange	Cotton	[auto create]	+	<input type="checkbox"/>
Extra Large	Orange	Silk	[auto create]	+	<input type="checkbox"/>
Extra Large	Orange	Wool	[auto create]	+	<input type="checkbox"/>
Extra Large	Red	Cotton	[auto create]	+	<input type="checkbox"/>
Extra Large	Red	Silk	[auto create]	+	<input type="checkbox"/>
Extra Large	Red	Wool	[auto create]	+	<input type="checkbox"/>
Extra Large	White	Cotton	[auto create]	+	<input type="checkbox"/>
Extra Large	White	Silk	[auto create]	+	<input type="checkbox"/>
Extra Large	White	Wool	[auto create]	+	<input type="checkbox"/>
Extra Large	Yellow	Cotton	[auto create]	+	<input type="checkbox"/>
Extra Large	Yellow	Silk	[auto create]	+	<input type="checkbox"/>
Extra Large	Yellow	Wool	[auto create]	+	<input type="checkbox"/>
Large	Black	Cotton	[auto create]	+	<input type="checkbox"/>
Large	Black	Silk	[auto create]	+	<input type="checkbox"/>
Large	Black	Wool	[auto create]	+	<input type="checkbox"/>
Large	Blue	Cotton	[auto create]	+	<input type="checkbox"/>
Large	Blue	Silk	[auto create]	+	<input type="checkbox"/>
Large	Blue	Wool	[auto create]	+	<input type="checkbox"/>
Large	Brown	Cotton	[auto create]	+	<input type="checkbox"/>
Large	Brown	Silk	[auto create]	+	<input type="checkbox"/>
Large	Brown	Wool	[auto create]	+	<input type="checkbox"/>
Large	Green	Cotton	[auto create]	+	<input type="checkbox"/>
Large	Green	Silk	[auto create]	+	<input type="checkbox"/>
Large	Green	Wool	[auto create]	+	<input type="checkbox"/>
Large	Orange	Cotton	[auto create]	+	<input type="checkbox"/>
Large	Orange	Silk	[auto create]	+	<input type="checkbox"/>
Large	Orange	Wool	[auto create]	+	<input type="checkbox"/>
Large	Red	Cotton	[auto create]	+	<input type="checkbox"/>
Large	Red	Silk	[auto create]	+	<input type="checkbox"/>

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If required, you can uncheck any Variant Options that are not required, or you can leave all options enabled to create a child variant item for each possible variant combination.

idealpos Stock Items Modify 46 General Advanced Inventory Items Variants Created 14 May 2021 09:21:51

New Variants of BOYS SHIRT

Size	Colour	Material	Stock Code	Scan Code	Create
Extra Large	Black	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Black	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Black	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Blue	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Blue	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Blue	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Brown	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Brown	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Brown	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Green	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Green	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Green	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Orange	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Orange	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Orange	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Red	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Red	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Red	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	White	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	White	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	White	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Yellow	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Yellow	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Yellow	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Large	Black	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Large	Black	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Large	Black	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Large	Blue	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Large	Blue	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Large	Blue	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Large	Brown	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Large	Brown	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Large	Brown	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Large	Green	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Large	Green	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Large	Green	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Large	Orange	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Large	Orange	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Large	Orange	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Large	Red	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Large	Red	Silk	[auto create]	+	<input checked="" type="checkbox"/>

Size: Extra Large, Large, Medium, Small
 Colour: Black, Blue, Brown, Green, Orange, Red, White, Yellow
 Material: Cotton, Silk, Wool

POS 2 v8 Build 1 Create New Variants

idealpos Update History

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Should you have any existing child items that you want to link to a particular Variant Type, this can be done by pressing the "+" button next to the Variant Type in the Stock Code column, then the Stock Items screen will be displayed from where you can search for the Stock Item.

Any Stock Items that you link will have their Stock Code displayed in the Stock Code field.

Stock Items
Modify 46

General Advanced **Advanced Item** Variants

Created 14 May 2021 09:21:51

Size: Extra Large, Large, Medium, Small

Colour: Black, Blue, Brown, Green, Orange, Red, White, Yellow

Material: Cotton, Silk, Wool

Size	Colour	Material	Stock Code	Scan Code	Create
Extra Large	Black	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Black	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Black	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Blue	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Blue	Silk	[auto create]	+	<input type="checkbox"/>
Extra Large	Blue	Wool	[auto create]	+	<input type="checkbox"/>
Extra Large	Brown	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Brown	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Brown	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Green	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Green	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Green	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Orange	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Orange	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Orange	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Red	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Red	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Red	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	White	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	White	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	White	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Yellow	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Yellow	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Yellow	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Large	Black	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Large	Black	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Large	Black	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Large	Blue	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Large	Blue	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Large	Blue	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Large	Brown	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Large	Brown	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Large	Brown	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Large	Green	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Large	Green	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Large	Green	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Large	Orange	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Large	Orange	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Large	Orange	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Large	Red	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Large	Red	Silk	[auto create]	+	<input checked="" type="checkbox"/>

POS 2 v8 Build 1

Create New Variants

Idealpos will display a confirmation prompt, press "Yes" to continue.

Would you like to Create a Variant by linking an existing Stock Item?

Yes No

idealpos Update History

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Select the item that you want to link to, then press the "OK" button on the top-left corner of the Stock Items window.

idealpos		Stock Items				Multi Select		S X		
Search		Code	Description	Kitchen	Department	Plu Code	Scan Code	Standard Cost	Average Cost	Stock Control
OK		47	BOYS SHIRT XL BLK CTN	BOYS SHIRT XL BLK	SCHOOL CLOTHING	0		10.00	10.00	Yes
New		79	CORONA 375ML	CORONA 375ML	PACK BEER	0	9871058944551	0.00	0.00	Yes
Modify		100	OPEN STOCK ITEM	OPEN STOCK ITEM	GROCERIES	0		0.00	0.00	Yes
Enquiry		1414	BELVEDERE VODKA 1LT	BELVEDERE VODKA	SPIRIT BTL	0		20.00	20.00	Yes
Locations		101001	EGGS ON TOAST	EGGS ON TOAST	BREAKFAST	0		2.50	2.50	No
Promotions		101002	BACON & EGGS	BACON & EGGS	BREAKFAST	0		3.00	3.00	No
Alternate Codes		101003	EGGS BENEDICT	EGGS BENEDICT	BREAKFAST	0		4.50	4.50	No
Copy		101004	AVOCADO ON TOAST	AVOCADO ON TOA	BREAKFAST	0		5.00	5.00	No
Supplier Codes		101005	BAKED BEANS & TOAST	BAKED BEANS & TC	BREAKFAST	0		2.00	2.00	No
Enabled in Location		101006	PANCAKES	PANCAKES	BREAKFAST	0		2.00	2.00	No
Discontinued		101007	CANADIAN PANCAKES	CANADIAN PANCAK	BREAKFAST	0		3.50	3.50	No
		101008	WAFFLES	WAFFLES	BREAKFAST	0		2.50	2.50	No
		101009	WAFFLES CHOCOLATE	WAFFLES CHOCOL	BREAKFAST	0		3.00	3.00	No
		101010	JAM & TOAST	JAM & TOAST	BREAKFAST	0		1.20	1.20	No
		101011	BIG BREAKFAST	BIG BREAKFAST	BREAKFAST	0		5.20	5.20	No
		101012	EGGS ON TOAST*COPY*	EGGS ON TOAST*CI	BREAKFAST	0		2.50	2.50	No
		102001	EXTRA BACON	EXTRA BACON	BREAKFAST MODS	0		0.65	0.65	No
		102002	EXTRA EGG	EXTRA EGG	BREAKFAST MODS	0		0.23	0.23	No
		102003	EXTRA TOAST	EXTRA TOAST	BREAKFAST MODS	0		0.10	0.10	No
		102004	EXTRA AVOCADO	EXTRA AVOCADO	BREAKFAST MODS	0		0.50	0.50	No
		102005	EXTRA CHEESE	EXTRA CHEESE	BREAKFAST MODS	0		0.20	0.20	No
		102006	EXTRA SALMON	EXTRA SALMON	BREAKFAST MODS	0		1.00	1.00	No
		102007	EXTRA JAM	EXTRA JAM	BREAKFAST MODS	0		0.10	0.10	No
		102008	EXTRA MAPLE	EXTRA MAPLE	BREAKFAST MODS	0		0.50	0.50	No
		102009	EXTRA CREAM	EXTRA CREAM	BREAKFAST MODS	0		0.10	0.10	No
		102010	EXTRA SAUCE	EXTRA SAUCE	BREAKFAST MODS	0		0.10	0.10	No
		102011	EXTRA HASHBROWN	EXTRA HASHBROW	BREAKFAST MODS	0		0.05	0.05	No
		102012	WHITE	WHITE	BREAKFAST MODS	0		0.00	0.00	No
		102013	MULTI-GRAIN	MULTI-GRAIN	BREAKFAST MODS	0		0.00	0.00	No
		102014	WHOLEMEAL	WHOLEMEAL	BREAKFAST MODS	0		0.00	0.00	No
		102015	GLUTEN FREE	GLUTEN FREE	BREAKFAST MODS	0		0.25	0.25	No
		102016	TURKISH	TURKISH	BREAKFAST MODS	0		0.20	0.20	No
		102017	BAGEL	BAGEL	BREAKFAST MODS	0		0.20	0.20	No
		103001	GARLIC BREAD	GARLIC BREAD	LUNCH	0		1.50	1.50	No
		103002	COB LOAF	COB LOAF	LUNCH	0		1.80	1.80	No

The Stock Code field will then show the Stock Item Code of the item that was linked:

Variants	
Material	Stock Code
Cotton	[link to 47] +
Silk	[auto create] +
Wool	[auto create] +

You can also view the Stock Item's Description by hovering the mouse cursor over the Stock Code field and the Description will be displayed.

Variants	
Material	Stock Code
Cotton	BOYS SHIRT XL BLK CTN
Silk	[auto create] +
Wool	[auto create] +

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Once you're ready to create the Variant Stock Items, press the "Create New Variants" button located on the bottom-right corner of the window.

The screenshot shows the 'idealpos' interface for 'Stock Items' (Modify 46). The 'Variants' tab is active, displaying a table titled 'New Variants of BOYS SHIRT'. The table has columns for Size, Colour, Material, Stock Code, Scan Code, and Create. The 'Create' column contains a series of checkboxes, with the bottom-right one highlighted by a yellow box and an arrow. The interface also includes filters for Size, Colour, and Material on the left side.

Size	Colour	Material	Stock Code	Scan Code	Create
Extra Large	Black	Cotton	[link to 47]	+	<input type="checkbox"/>
Extra Large	Black	Silk	[auto create]	+	<input type="checkbox"/>
Extra Large	Black	Wool	[auto create]	+	<input type="checkbox"/>
Extra Large	Blue	Cotton	[auto create]	+	<input type="checkbox"/>
Extra Large	Blue	Silk	[auto create]	+	<input type="checkbox"/>
Extra Large	Blue	Wool	[auto create]	+	<input type="checkbox"/>
Extra Large	Brown	Cotton	[auto create]	+	<input type="checkbox"/>
Extra Large	Brown	Silk	[auto create]	+	<input type="checkbox"/>
Extra Large	Brown	Wool	[auto create]	+	<input type="checkbox"/>
Extra Large	Green	Cotton	[auto create]	+	<input type="checkbox"/>
Extra Large	Green	Silk	[auto create]	+	<input type="checkbox"/>
Extra Large	Green	Wool	[auto create]	+	<input type="checkbox"/>
Extra Large	Orange	Cotton	[auto create]	+	<input type="checkbox"/>
Extra Large	Orange	Silk	[auto create]	+	<input type="checkbox"/>
Extra Large	Orange	Wool	[auto create]	+	<input type="checkbox"/>
Extra Large	Red	Cotton	[auto create]	+	<input type="checkbox"/>
Extra Large	Red	Silk	[auto create]	+	<input type="checkbox"/>
Extra Large	Red	Wool	[auto create]	+	<input type="checkbox"/>
Extra Large	White	Cotton	[auto create]	+	<input type="checkbox"/>
Extra Large	White	Silk	[auto create]	+	<input type="checkbox"/>
Extra Large	White	Wool	[auto create]	+	<input type="checkbox"/>
Extra Large	Yellow	Cotton	[auto create]	+	<input type="checkbox"/>
Extra Large	Yellow	Silk	[auto create]	+	<input type="checkbox"/>
Extra Large	Yellow	Wool	[auto create]	+	<input type="checkbox"/>
Large	Black	Cotton	[auto create]	+	<input type="checkbox"/>
Large	Black	Silk	[auto create]	+	<input type="checkbox"/>
Large	Black	Wool	[auto create]	+	<input type="checkbox"/>
Large	Blue	Cotton	[auto create]	+	<input type="checkbox"/>
Large	Blue	Silk	[auto create]	+	<input type="checkbox"/>
Large	Blue	Wool	[auto create]	+	<input type="checkbox"/>
Large	Brown	Cotton	[auto create]	+	<input type="checkbox"/>
Large	Brown	Silk	[auto create]	+	<input type="checkbox"/>
Large	Brown	Wool	[auto create]	+	<input type="checkbox"/>
Large	Green	Cotton	[auto create]	+	<input type="checkbox"/>
Large	Green	Silk	[auto create]	+	<input type="checkbox"/>
Large	Green	Wool	[auto create]	+	<input type="checkbox"/>
Large	Orange	Cotton	[auto create]	+	<input type="checkbox"/>
Large	Orange	Silk	[auto create]	+	<input type="checkbox"/>
Large	Orange	Wool	[auto create]	+	<input type="checkbox"/>
Large	Red	Cotton	[auto create]	+	<input type="checkbox"/>
Large	Red	Silk	[auto create]	+	<input type="checkbox"/>

Idealpos will display a prompt listing the total number of Variants that will be created and will require confirmation to proceed.

A dark blue dialog box with white text. The text reads: 'You are about to create 96 Variants of BOYS SHIRT. Are you sure you wish to proceed?' Below the text are two buttons: 'Yes' and 'No'.

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After pressing "Yes" on this prompt, the creation of the Variant Stock Items will begin. Depending on the number of Variant Stock Items that need to be created, this process may take some time. A progress bar will be displayed at the bottom of the window to show the current progress.

The screenshot shows the 'idealpos' interface for 'Stock Items' with the 'Variants' tab selected. The window title is 'Stock Items Modify 46' and it was created on 14 May 2021 at 09:21:51. The main area displays 'New Variants of BOYS SHIRT' with a table of variants. On the left, there are filters for Size, Colour, and Material. A yellow arrow points to the 'Create New Variants' button at the bottom right.

Size	Colour	Material	Stock Code	Scan Code	Create
Extra Large	Black	Cotton	[link to 47]	+	<input checked="" type="checkbox"/>
Extra Large	Black	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Black	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Blue	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Blue	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Blue	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Brown	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Brown	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Brown	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Green	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Green	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Green	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Orange	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Orange	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Orange	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Red	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Red	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Red	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	White	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	White	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	White	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Yellow	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Yellow	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Extra Large	Yellow	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Large	Black	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Large	Black	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Large	Black	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Large	Blue	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Large	Blue	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Large	Blue	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Large	Brown	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Large	Brown	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Large	Brown	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Large	Green	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Large	Green	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Large	Green	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Large	Orange	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Large	Orange	Silk	[auto create]	+	<input checked="" type="checkbox"/>
Large	Orange	Wool	[auto create]	+	<input checked="" type="checkbox"/>
Large	Red	Cotton	[auto create]	+	<input checked="" type="checkbox"/>
Large	Red	Silk	[auto create]	+	<input checked="" type="checkbox"/>

Once the Variant Stock Items have been created, a prompt will appear to confirm that the creation was successful.

A dark blue dialog box with the text '96 Variants Created.' and an 'OK' button centered below it.

When the child Variant Stock Items are created, they're linked back to the parent Stock Item that they were created from.

You may repeat the above process to create the remaining parent Stock Item/child Variant Items that are required.

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If your Variant Stock Items have Stock Control enabled, you may want to enter the current Stock Level that you have for each child Variant Item. This can either be done using a number of methods. You can manually select the Item from the Stock Items screen, press "Locations", Modify the Location and fill in the Stock Level.

The screenshot displays the 'Stock Items By Location' interface. At the top left, there is a 'Save' button. The main content area contains a form with the following fields:

- Location: Location 1 (dropdown menu)
- Stock Code: 48
- Description: BOYS SHIRT XL BLK SLK
- Stock Level: 5 (input field, highlighted with an orange border)
- Recommended Level: 10
- Reorder Level: 2
- Carton Quantity: 10
- Stock Location: Location 1 (dropdown menu)

At the bottom left of the screen, the text 'POS 2 v8 Build 1' is visible.

You could also create a purchase order by going to Transactions > Stock Control > Stock Purchases, then create a new Stock Purchase and add the Variant Items to the order, along with the Costs and quantities that you're ordering. After this Purchase Order is received into Idealpos, the Stock Levels of all the Variant Stock Items will be updated.

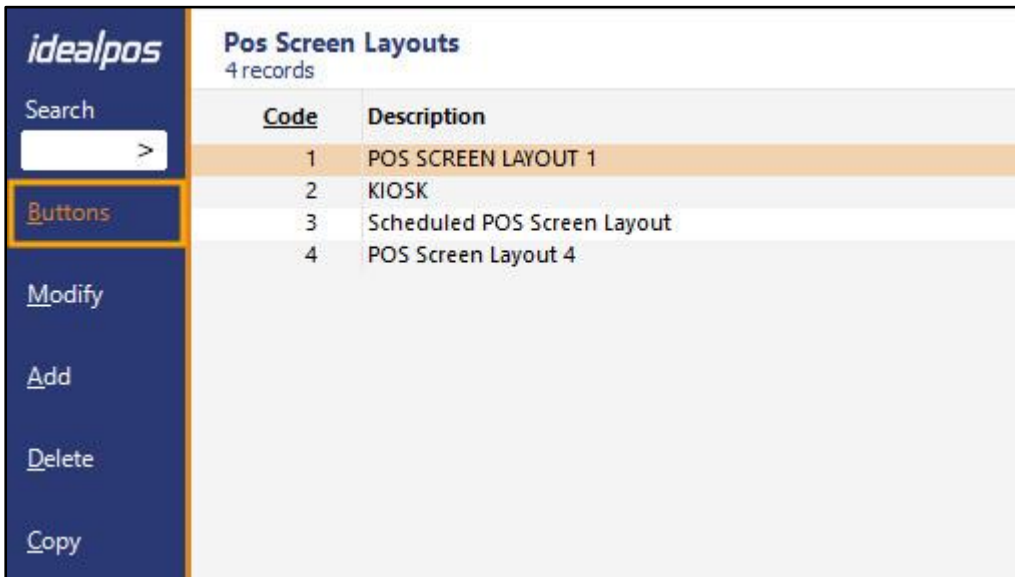
idealpos Update History

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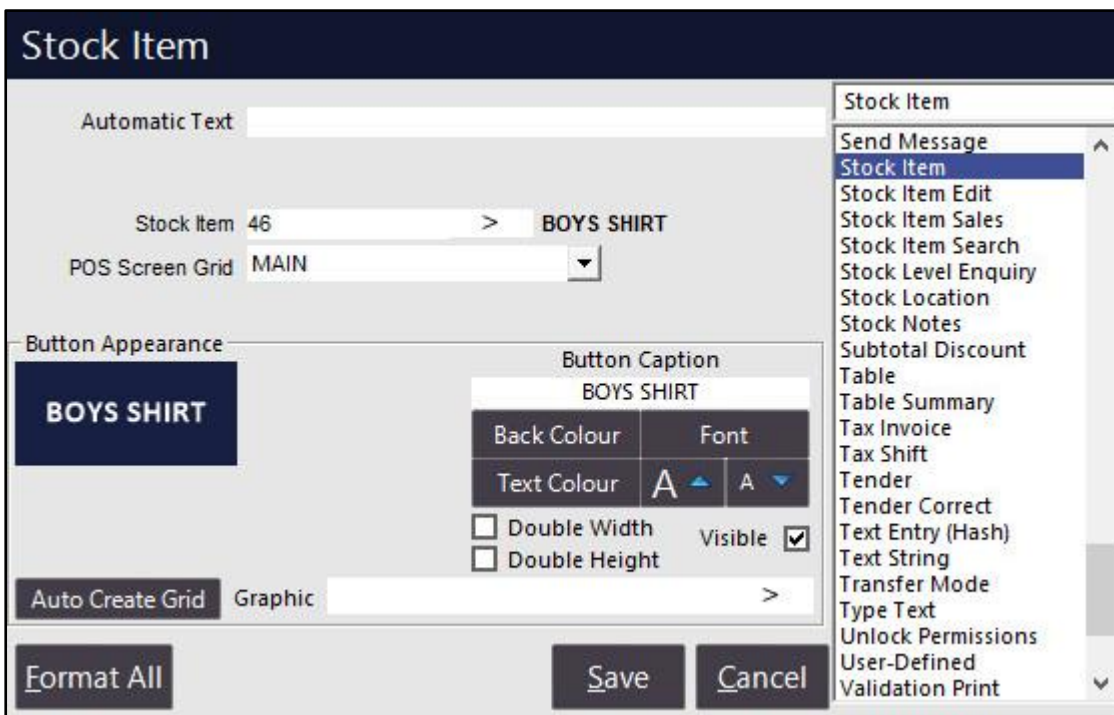
Buttons for Variant Stock Items can be added to the POS Screen, however, this is not necessary if all your Variant Stock Items contain barcodes that will be scanned by the Clerk.

Go to: Setup > POS Screen > POS Screen Setup

Select the POS Screen Layout, then press "Buttons" on the left-hand side of the window.



When creating a button for your Variant Stock Items on the POS Screen, you have the option to create a button that links to the parent Stock Item, or to create multiple buttons and link each of them to the individual child items. The advantage of linking a button to the parent Stock Item is that when the Clerk presses the button for the parent Stock Item, Idealpos will display a list of all the Variant Stock Items that are available, along with their Stock Level. If you link the Stock Item button to the child variant item, you will need to create a separate button for each of the variant Stock Items that are available, occupying more space on the POS Screen and increasing the amount of time spent configuring the POS Screen.



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When selling Variant Stock Items, you have the following options:

- Scan the item using the scanner at the POS terminal (each variant item has a unique barcode). The item will be added to the sale without any additional intervention from the Clerk.

The screenshot shows a POS terminal interface with a dark background and white text. At the top, it displays the date and time '20 May 15:30', the user 'Adult ID: 20-May-2003', the terminal 'POS 2 Jeremy', and the price '#607'. Below this, a table lists the item 'BOYS SHIRT XL BLK CTN' with a quantity of '1' and a price of '20.00'. The item name is highlighted with a light blue bar. At the bottom left, it shows '1x' and at the bottom right, it shows '\$20.00'.

Item	Quantity	Price
BOYS SHIRT XL BLK CTN	1	20.00


1x \$20.00

idealpos Update History

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- Add the item to the sale via a button (button linked to the parent Stock Item) on the POS Screen. Idealpos will display a list of all the available items. The Clerk will need to select the item from the list, then press the "Sell Item" button.

Size	Colour	Material	Stock Level	PRICE 1		
BOYS SHIRT Extra Large Black Cotton					0	\$20.00
BOYS SHIRT Extra Large Black Silk					0	\$20.00
BOYS SHIRT Extra Large Black Wool					0	\$20.00
BOYS SHIRT Extra Large Blue Cotton					0	\$20.00
BOYS SHIRT Extra Large Blue Silk					0	\$20.00
BOYS SHIRT Extra Large Blue Wool					0	\$20.00
BOYS SHIRT Extra Large Brown Cotton					0	\$20.00
BOYS SHIRT Extra Large Brown Silk					0	\$20.00
BOYS SHIRT Extra Large Brown Wool					0	\$20.00
BOYS SHIRT Extra Large Green Cotton					0	\$20.00
BOYS SHIRT Extra Large Green Silk					0	\$20.00
BOYS SHIRT Extra Large Green Wool					0	\$20.00
BOYS SHIRT Extra Large Orange Cotton					0	\$20.00
BOYS SHIRT Extra Large Orange Silk					0	\$20.00
BOYS SHIRT Extra Large Orange Wool					0	\$20.00

Locations  Sell Item

idealpos Update History

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- Add the item to the sale via a button (button linked to the child Stock Item). Idealpos will simply add the item to the sale without any additional prompts.

20 May 15:30 Adult ID: 20-May-2003 POS 2 Jeremy PRICE 1 #607		
BOYS SHIRT XL BLK CTN	1	20.00
1x		\$20.00

idealpos Update History

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In addition to selling Variant Items, Idealpos also has added functionality for Variants in the Stock Item Sales Report. If you want to see each individual child Variant Item on the Stock Item Sales Report, leave the Consolidate Variants checkbox unticked.

The screenshot shows the 'Stock Item Sales' configuration window. On the left sidebar, there are buttons for 'View', 'Print', and 'Save Defaults'. The main area contains several sections:

- Date Range:** Set to 'Today' with a date range from '21 May 2021 00:00:00' to '21 May 2021 23:59:59'.
- Optional Grouping:** Includes 'Group Field' (Department), 'Show Group Label' (checked), 'Totals Only' (checked), and 'Totals with Group Label' (unchecked).
- Sort Order:** Options include Code (selected), Description, Best, and Worst. A 'Quantity' dropdown is also present.
- Checkboxes:** 'Show Stock Items' (checked), 'Group by Sell Price' (unchecked), 'Unit Price is Price 1' (unchecked), 'Hide Unit Price/Tax' (unchecked), and 'Portrait' (checked).
- Consolidate Variants:** A checkbox that is currently checked, highlighted with a yellow box and an arrow pointing to it from the right.
- Selection Range:** Fields for Price Level (All Price Levels), Code, Description, Supplier, Department, Location, POS System, and Clerk, each with a search icon.
- Attributes:** A dropdown menu and a search field.
- Radio Buttons:** 'Show' (selected) and 'Exclude'.
- Tags:** A search field.

Idealpos user
POS 2(2)

Stock Item Sales Report
21 May 2021 00:00:00 to 21 May 2021 23:59:59

Printed 21/05/2021 11:00:20
Page 1 of 1

		Sales							
		Unit Price inc	Unit Tax	Quantity	Nett ex	Tax	Nett inc	Discounts	Gross inc
SCHOOL CLOTHING									
52	BOYS SHIRT XL BLU W L	20.00	1.82	1.0000	18.18	1.82	20.00	0.00	20.00
56	BOYS SHIRT XL GRN CTN	20.00	1.82	1.0000	18.18	1.82	20.00	0.00	20.00
59	BOYS SHIRT XL ORNG CTN	20.00	1.81	1.0000	18.19	1.81	20.00	0.00	20.00
				3.0000	54.55	5.45	60.00	0.00	60.00
				3.0000	54.55	5.45	60.00	0.00	60.00

idealpos Update History

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If you want Variant Stock Items to be consolidated into the parent item, enable the "Consolidate Variants" checkbox.

The screenshot shows the 'Stock Item Sales' window in the idealpos application. The interface includes a sidebar with 'View', 'Print', and 'Save Defaults' options. The main area is divided into several sections: 'Date Range' (set to 'Today' from 21 May 2021 00:00:00 to 21 May 2021 23:59:59), 'Optional Grouping' (with checkboxes for 'Show Group Label', 'Totals Only', and 'Totals with Group Label'), 'Sort Order' (with radio buttons for 'Code', 'Description', 'Best', 'Worst' and a 'Quantity' dropdown), 'Selection Range' (with various filters like 'Price Level', 'Code', 'Description', etc.), and a 'Consolidate Variants' checkbox which is highlighted with a yellow box and an orange arrow. Other checkboxes include 'Show Stock Items', 'Group by Sell Price', 'Unit Price is Price 1', 'Hide Unit Price/Tax', and 'Portrait'.

Idealpos user
POS 2(2)

Stock Item Sales Report

21 May 2021 00:00:00 to 21 May 2021 23:59:59

Printed 21/05/2021 11:01:53
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	Unit Price inc	Unit Tax	Sales						
			Quantity	Nett ex	Tax	Nett inc	Discounts	Gross inc	
SCHOOL CLOTHING									
46 BOYS SHIRT	20.00	1.82	3.0000	54.55	5.45	60.00	0.00	60.00	
			3.0000	54.55	5.45	60.00	0.00	60.00	
			3.0000	54.55	5.45	60.00	0.00	60.00	

IP-4077 – Automatic Stock Item Scan Codes built from Predefined Text File

This function enables Stock Codes to be retrieved from a pre-defined text file and entered into the Stock Code field when the user presses the Auto button on the Create New/Modify Stock Item screen. Once all the Stock Codes from the pre-defined text file have been exhausted, the next time the Auto button is pressed, a prompt will be displayed "No valid Scan Codes remain!".

Either a new file can then be created with a new set of scan codes, or new scan codes can be appended to the bottom of the existing file.

This function is particularly useful if you have a batch of pre-printed scan code labels which you'd like Idealpos to automatically populate into the Scan Code field via the Auto button.

To use this function, create a text file named "AutoScanCodesStockItems.txt" and place it into the following folder:

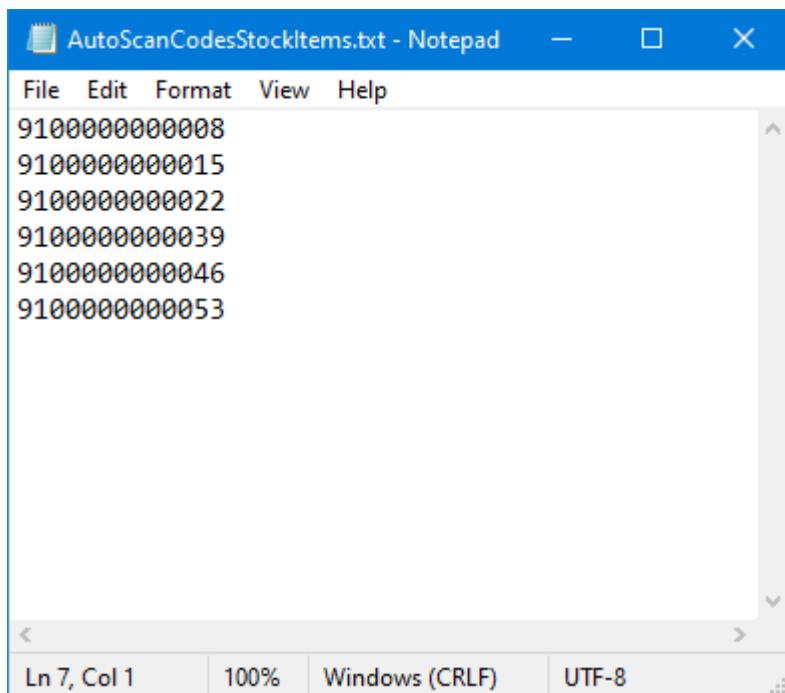
C:\ProgramData\Idealpos Solutions\Idealpos

Each Idealpos terminal that has the Back Office module enabled can have the same file copied to the above location, enabling each terminal to assign scan codes from the same scan code file.

If you prefer to have a unique set of scan codes for each terminal, this can also be achieved by creating a AutoScanCodesStockItems.txt file for each POS terminal and placing the file into the above folder location on each terminal. Ensuring that each file contains a unique set of Scan Codes.

The format of the file should contain a list of Scan Codes, with each Scan Code listed on a separate line without commas. The below is an example list of Scan Codes in the correct format:

```
9100000000008
9100000000015
9100000000022
9100000000039
9100000000046
9100000000053
```



idealpos Update History

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Once the file has been created in the above location, go to: Back Office > File > Stock Control

Either create a new Stock Item by pressing the "Add" button on the top-left corner of the window, or select an existing Stock Item from the list and press Modify.

idealpos	Stock Items						Edit	Multi		
	1632 records						Mgde	Select		
Search	Code	Description	Kitchen	Department	Plu Code	Scan Code	Standard Cost	Average Cost		
Modify	101001	EGGS ON TOAST	EGGS ON TOAST	BREAKFAST	0		2.50	2.50		
Add	101002	BACON & EGGS	BACON & EGGS	BREAKFAST	0		3.00	3.00		
Discontinue	101003	EGGS BENEDICT	EGGS BENEDICT	BREAKFAST	0		4.50	4.50		
Enquiry	101004	AVOCADO ON TOAST	AVOCADO ON TOA	BREAKFAST	0		5.00	5.00		
Locations	101005	BAKED BEANS & TOAST	BAKED BEANS & TC	BREAKFAST	0		2.00	2.00		
Promotions	101006	PANCAKES	PANCAKES	BREAKFAST	0		2.00	2.00		
Alternate Codes	101007	CANADIAN PANCAKES	CANADIAN PANCAK	BREAKFAST	0		3.50	3.50		
Copy	101008	WAFFLES	WAFFLES	BREAKFAST	0		2.50	2.50		
Supplier Codes	101009	WAFFLES CHOCOLATE	WAFFLES CHOCOL	BREAKFAST	0		3.00	3.00		
Variants	101010	JAM & TOAST	JAM & TOAST	BREAKFAST	0		1.20	1.20		
Enabled in Location	101011	BIG BREAKFAST	BIG BREAKFAST	BREAKFAST	0		5.20	5.20		
Discontinued	101012	BAKED BEANS & TOAST*COPY*	BAKED BEANS & TC	BREAKFAST	0		2.00	2.00		
	102001	EXTRA BACON	EXTRA BACON	BREAKFAST MODS	0		0.65	0.65		
	102002	EXTRA EGG	EXTRA EGG	BREAKFAST MODS	0		0.23	0.23		
	102003	EXTRA TOAST	EXTRA TOAST	BREAKFAST MODS	0		0.10	0.10		
	102004	EXTRA AVOCADO	EXTRA AVOCADO	BREAKFAST MODS	0		0.50	0.50		
	102005	EXTRA CHEESE	EXTRA CHEESE	BREAKFAST MODS	0		0.20	0.20		
	102006	EXTRA SALMON	EXTRA SALMON	BREAKFAST MODS	0		1.00	1.00		
	102007	EXTRA JAM	EXTRA JAM	BREAKFAST MODS	0		0.10	0.10		
	102008	EXTRA MAPLE	EXTRA MAPLE	BREAKFAST MODS	0		0.50	0.50		
	102009	EXTRA CREAM	EXTRA CREAM	BREAKFAST MODS	0		0.10	0.10		
	102010	EXTRA SAUCE	EXTRA SAUCE	BREAKFAST MODS	0		0.10	0.10		
	102011	EXTRA HASHBROWN	EXTRA HASHBROW	BREAKFAST MODS	0		0.05	0.05		
	102012	WHITE	WHITE	BREAKFAST MODS	0		0.00	0.00		
	102013	MULTI-GRAIN	MULTI-GRAIN	BREAKFAST MODS	0		0.00	0.00		
	102014	WHOLEMEAL	WHOLEMEAL	BREAKFAST MODS	0		0.00	0.00		
	102015	GLUTEN FREE	GLUTEN FREE	BREAKFAST MODS	0		0.25	0.25		
	102016	TURKISH	TURKISH	BREAKFAST MODS	0		0.20	0.20		
	102017	BAGEL	BAGEL	BREAKFAST MODS	0		0.20	0.20		
	103001	GARLIC BREAD	GARLIC BREAD	LUNCH	0		1.50	1.50		
	103002	COB LOAF	COB LOAF	LUNCH	0		1.80	1.80		
	103003	SOUP OF THE DAY	SOUP OF THE DAY	LUNCH	0		2.20	2.20		
	103004	FISH OF THE DAY	FISH OF THE DAY	LUNCH	0		3.40	3.40		
	103005	STEAK SPECIAL	STEAK SPECIAL	LUNCH	0		6.50	6.50		
	103006	CHICKEN SPECIAL	CHICKEN SPECIAL	LUNCH	0		4.80	4.80		

idealpos Update History

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Pressing the "Auto" button within the Scan Code field will populate the Scan Code field using the first unused Scan Code from the "AutoScanCodesStockItems.txt" file.

Note that when the AutoScanCodesStockItems.txt file exists, pressing the Auto button repeatedly will not keep retrieving the next available Scan Code.

When the file does not exist, the Auto button can be pressed repeatedly and a new code is generated each time.

idealpos Stock Items Add New

General Advanced **Advanced** **Advanced** **Advanced**

Save
Keyboard

Stock Code 37 Department 402 > GROCERIES
Description New Stock Item (14) Scan Code 910000000008 Auto
Kitchen Description New Stock Item (14)
Long Description New Stock Item (14)

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
- 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 0.0000
Last Cost 0.0000
Average Cost 0.0000

Tax Settings (Selling)

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

Attributes

POS 2
v8 Build 1

idealpos Update History

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IP-4369 – Stock Item Search text boxes – Support for On-Screen Keyboard

This function adds the ability to display the On-Screen Keyboard on the Stock Item Search Grid.

This enables the user to enter values into the search fields to search for specific Stock Items on systems such as POS Terminals which do not have a keyboard attached.

This function does not require any configuration to be performed.

Simply double-click or double-tap inside any of the search fields shown at the top of the Stock Items grid to display the on-screen keyboard.

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

Double-click into any of the fields shown at the top of the Stock Item grid.

Code	Description	Kitchen	Department	CDC Restricted	Plu Code	Scan Code	Standard Co
101001	EGGS ON TOAST	EGGS ON TOAST	BREAKFAST	No	0		
101002	BACON & EGGS	BACON & EGGS	BREAKFAST	No	0		
101003	EGGS BENEDICT	EGGS BENEDICT	BREAKFAST	No	0		
101004	AVOCADO ON TOAST	AVOCADO ON TOAST	BREAKFAST	No	0		
101005	BAKED BEANS & TOAST	BAKED BEANS & TOAST	BREAKFAST	No	0		
101006	PANCAKES	PANCAKES	BREAKFAST	No	0		
101007	CANADIAN PANCAKES	CANADIAN PANCAKES	BREAKFAST	No	0		
101008	WAFFLES	WAFFLES	BREAKFAST	No	0		
101009	WAFFLES CHOCOLATE	WAFFLES CHOCOLATE	BREAKFAST	No	0		
101010	JAM & TOAST	JAM & TOAST	BREAKFAST	No	0		
101011	BIG BREAKFAST	BIG BREAKFAST	BREAKFAST	No	0		
101012	BAKED BEANS & TOAST*COPY*	BAKED BEANS & TOAST	BREAKFAST	No	0		
102001	EXTRA BACON	EXTRA BACON	BREAKFAST MODS	No	0		
102002	EXTRA EGG	EXTRA EGG	BREAKFAST MODS	No	0		
102003	EXTRA TOAST	EXTRA TOAST	BREAKFAST MODS	No	0		
102004	EXTRA AVOCADO	EXTRA AVOCADO	BREAKFAST MODS	No	0		
102005	EXTRA CHEESE	EXTRA CHEESE	BREAKFAST MODS	No	0		
102006	EXTRA SALMON	EXTRA SALMON	BREAKFAST MODS	No	0		
102007	EXTRA JAM	EXTRA JAM	BREAKFAST MODS	No	0		
102008	EXTRA MAPLE	EXTRA MAPLE	BREAKFAST MODS	No	0		
102009	EXTRA CREAM	EXTRA CREAM	BREAKFAST MODS	No	0		
102010	EXTRA SAUCE	EXTRA SAUCE	BREAKFAST MODS	No	0		
102011	EXTRA HASHBROWN	EXTRA HASHBROWN	BREAKFAST MODS	No	0		
102012	WHITE	WHITE	BREAKFAST MODS	No	0		
102013	MULTI-GRAIN	MULTI-GRAIN	BREAKFAST MODS	No	0		
102014	WHOLEMEAL	WHOLEMEAL	BREAKFAST MODS	No	0		
102015	GLUTEN FREE	GLUTEN FREE	BREAKFAST MODS	No	0		
102016	TURKISH	TURKISH	BREAKFAST MODS	No	0		
102017	BAGEL	BAGEL	BREAKFAST MODS	No	0		
103001	GARLIC BREAD	GARLIC BREAD	LUNCH	No	0		
103002	COB LOAF	COB LOAF	LUNCH	No	0		
103003	SOUP OF THE DAY	SOUP OF THE DAY	LUNCH	No	0		
103004	FISH OF THE DAY	FISH OF THE DAY	LUNCH	No	0		
103005	STEAK SPECIAL	STEAK SPECIAL	LUNCH	No	0		
103006	CHICKEN SPECIAL	CHICKEN SPECIAL	LUNCH	No	0		

idealpos Update History

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The on-screen keyboard will be displayed.

The screenshot shows the 'idealpos Stock Items' interface. The top header includes 'idealpos', 'Stock Items', and '1631 records'. On the right, there are icons for 'Edit Mode', 'Multi Select', a search icon, and a close icon. A search bar is located at the top left. Below the search bar is a table with columns: Code, Description, Kitchen, Department, CDC Restricted, Plu Code, Scan Code, and Standard Co. The table lists various breakfast items such as 'EGGS ON TOAST', 'BACON & EGGS', and 'EGGS BENEDICT'. A dark blue sidebar on the left contains navigation options: Search, Modify, Add, Discontinue, Enquiry, Locations, Promotions, Alternate Codes, and Copy. At the bottom of the screen, an on-screen keyboard is displayed with a search bar containing a cursor and a close icon. The keyboard includes letters, numbers, symbols, and an 'Enter' button.

Enter the search criteria you want to search for, then press the Enter button.

For this example, we've double-clicked into the Description field, so we'll enter a Stock Item description.

This screenshot shows the on-screen keyboard from the previous image. The search bar at the top now contains the text 'coke' with a cursor at the end. The keyboard layout remains the same, with letters, numbers, symbols, and an 'Enter' button.

idealpos Update History

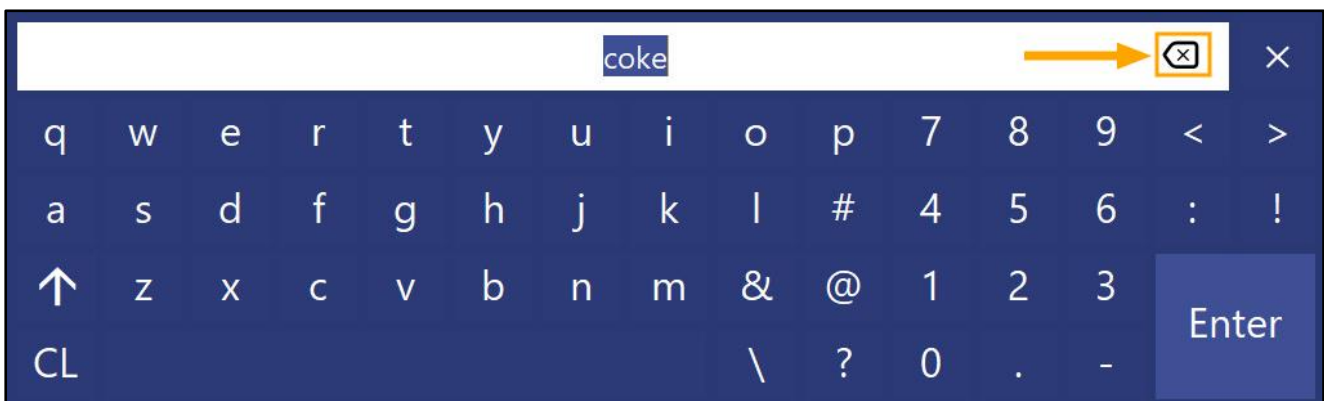
[Return to top](#)

After pressing Enter, the value that you entered with the on-screen keyboard will appear in the field which was double-clicked above and the Stock Items grid will filter the results based on the entered search criteria.

idealpos		Stock Items				Edit Mode	Multi Select	Eye	S	X
Search		Code	Description	Kitchen	Department	CDC Restricted	Plu Code	Scan Code	Standard Cost	
Code >			coke							
Modify		205001	COKE 250ML BTL	COKE 250ML BTL	SOFT DRINK		0	9845369754697	0.9	
		205002	DIET COKE 250ML BTL	DIET COKE 250ML B	SOFT DRINK		0	9807180153165	0.9	
		205003	COKE ZERO 250ML BTL	COKE ZERO 250ML	SOFT DRINK		0	9826013996748	0.9	
Add		205101	COKE CAN	COKE CAN	SOFT DRINK		0	9852975708969	0.9	
		205102	DIET COKE CAN	DIET COKE CAN	SOFT DRINK		0	9844900827241	0.9	
Discontinue		205103	COKE ZERO CAN	COKE ZERO CAN	SOFT DRINK		0	9815373036218	0.9	
		205201	COKE 600ML	COKE 600ML	SOFT DRINK		0	9879776812008	1.1	
Enquiry		205202	DIET COKE 600ML	DIET COKE 600ML	SOFT DRINK		0	9809648507688	1.1	
		205203	COKE ZERO 600ML	COKE ZERO 600ML	SOFT DRINK		0	9833084230350	1.1	
Locations		205301	COKE 1.25L	COKE 1.25L	SOFT DRINK		0	9814998569231	0.7	
		205302	DIET COKE 1.25L	DIET COKE 1.25L	SOFT DRINK		0	9806923687608	0.7	
Promotions		205303	COKE ZERO 1.25L	COKE ZERO 1.25L	SOFT DRINK		0	9878295896575	0.7	
		205401	COKE 2L	COKE 2L	SOFT DRINK		0	9861576846574	0.8	
Alternate Codes		205402	DIET COKE 2L	DIET COKE 2L	SOFT DRINK		0	9805912478340	0.8	
		205403	COKE ZERO 2L	COKE ZERO 2L	SOFT DRINK		0	9857733878816	0.8	
Copy		205501	COKE 15L POSTMIX	COKE 15L POSTMIX	SOFT DRINK	No	0		285.0	
		205502	DIET COKE 15L POSTMIX	DIET COKE 15L POS	SOFT DRINK	No	0		285.0	
		205503	COKE ZERO 15L POSTMIX	COKE ZERO 15L PO	SOFT DRINK	No	0		285.0	
		205601	COKE	COKE POSTMIX	SOFT DRINK	No	0		0.8	
		205602	DIET COKE	DIET COKE POSTMIX	SOFT DRINK	No	0		0.8	
		205603	COKE ZERO	COKE ZERO POSTM	SOFT DRINK	No	0		0.8	
		234001	COKE	COKE ADD	DRINK MODS	No	0		0.8	
		234002	DIET COKE	DIET COKE ADD	DRINK MODS	No	0		0.8	
		234003	COKE ZERO	COKE ZERO ADD	DRINK MODS	No	0		0.8	

If you want to perform additional searching/filtering within any other search fields, double-click into any other field and enter the required search criteria using the on-screen keyboard.

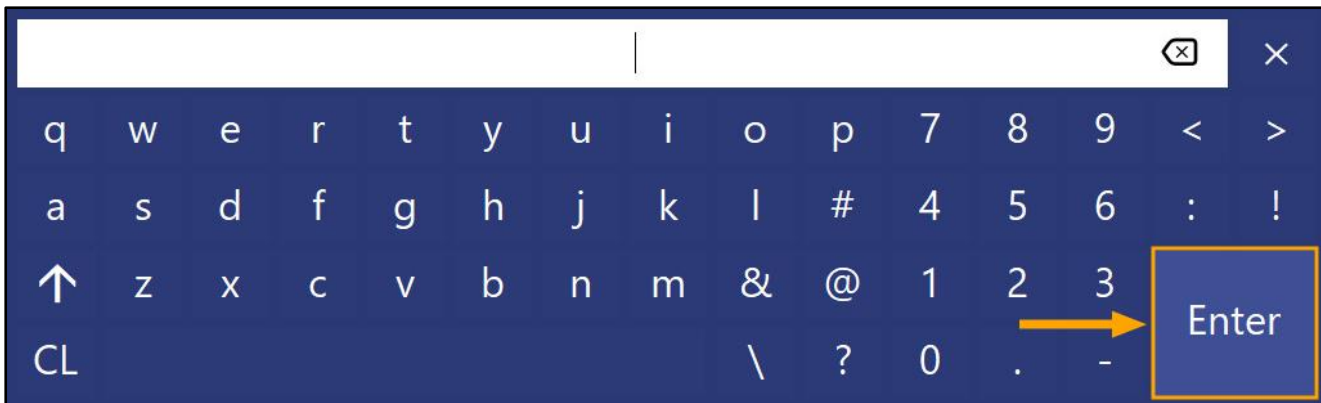
If you want to clear the value that has been entered into a search field, double-click on any field that contains an entered search value and backspace the value.



idealpos Update History

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Press the Enter button on the on-screen keyboard.



The value will then be cleared from the field in the Stock Item grid, expanding the results displayed in the Stock Items grid.

idealpos		Stock Items				Edit	Multi		
		1631 records				Mode	Select		
Search	Code	Description	Kitchen	Department	CDC Restricted	Plu Code	Scan Code	Standard Co	
Modify		205001 COKE 250ML BTL	COKE 250ML BTL	SOFT DRINK	0		9845369754697		
Add		205002 DIET COKE 250ML BTL	DIET COKE 250ML B	SOFT DRINK	0		9807180153165		
Discontinue		205003 COKE ZERO 250ML BTL	COKE ZERO 250ML	SOFT DRINK	0		9826013996748		
Enquiry		205004 SPRITE 250ML BTL	SPRITE 250ML BTL	SOFT DRINK	0		9876566353628		
Locations		205005 DRY GINGER 250ML BTL	DRY GINGER 250ML	SOFT DRINK	0		9845850768417		
Promotions		205006 TONIC 250ML BTL	TONIC 250ML BTL	SOFT DRINK	0		9803451104997		
Alternate Codes		205101 COKE CAN	COKE CAN	SOFT DRINK	0		9852975708969		
Copy		205102 DIET COKE CAN	DIET COKE CAN	SOFT DRINK	0		9844900827241		
		205103 COKE ZERO CAN	COKE ZERO CAN	SOFT DRINK	0		9815373036218		
		205104 SPRITE CAN	SPRITE CAN	SOFT DRINK	0		9880239486599		
		205105 LIFT CAN	LIFT CAN	SOFT DRINK	0		9861334652874		
		205106 DRY GINGER CAN	DRY GINGER CAN	SOFT DRINK	0		9859615686045		
		205107 FANTA CAN	FANTA CAN	SOFT DRINK	0		9862569656415		
		205108 TONIC CAN	TONIC CAN	SOFT DRINK	0		988809984332		
		205201 COKE 600ML	COKE 600ML	SOFT DRINK	0		9879776812008		
		205202 DIET COKE 600ML	DIET COKE 600ML	SOFT DRINK	0		9809648507688		
		205203 COKE ZERO 600ML	COKE ZERO 600ML	SOFT DRINK	0		9833084230350		
		205204 SPRITE 600ML	SPRITE 600ML	SOFT DRINK	0		9860093914537		
		205205 LIFT 600ML	LIFT 600ML	SOFT DRINK	0		9888035856004		
		205206 DRY GINGER 600ML	DRY GINGER 600ML	SOFT DRINK	0		9848579213084		
		205207 FANTA 600ML	FANTA 600ML	SOFT DRINK	0		9889370760551		
		205208 TONIC 600ML	TONIC 600ML	SOFT DRINK	0		9847971196032		
		205301 COKE 1.25L	COKE 1.25L	SOFT DRINK	0		9814998569231		
		205302 DIET COKE 1.25L	DIET COKE 1.25L	SOFT DRINK	0		9806923687608		
		205303 COKE ZERO 1.25L	COKE ZERO 1.25L	SOFT DRINK	0		9878295896575		
		205304 SPRITE 1.25L	SPRITE 1.25L	SOFT DRINK	0		9878953972351		
		205305 LIFT 1.25L	LIFT 1.25L	SOFT DRINK	0		9823247413232		
		205306 DRY GINGER 1.25L	DRY GINGER 1.25L	SOFT DRINK	0		9821628546418		
		205307 FANTA 1.25L	FANTA 1.25L	SOFT DRINK	0		9824582417787		
		205308 TONIC 1.25L	TONIC 1.25L	SOFT DRINK	0		9879957992543		
		205309 SODA WATER 1.25L	SODA WATER 1.25L	SOFT DRINK	0		9808478303415		
		205401 COKE 2L	COKE 2L	SOFT DRINK	0		9861576846574		
		205402 DIET COKE 2L	DIET COKE 2L	SOFT DRINK	0		9805912478340		
		205403 COKE ZERO 2L	COKE ZERO 2L	SOFT DRINK	0		9857733878816		
		205404 SPRITE 2L	SPRITE 2L	SOFT DRINK	0		9840964095909		

idealpos Update History

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IP-4371 – Stock Items Screen – Calculate Price by Profit Amount

This function adds the ability to calculate and view how much profit is being made on an item based on the Cost Price, Sell Price and Tax Settings all within the Modify Stock Item window.

Previous to this change, only a Profit % column was available which could be used to see how much profit as a percentage was being made based on the Sell Price, Cost Price and Tax Settings.

With the addition of the Profit \$ column, you can now see how much profit is being made on an item based on the currently entered Sell Price, Cost Price and Tax Settings.

If you want to make a specific dollar amount of profit on an item, you can enter the profit value you want to make into the Profit \$ field and Idealpos will automatically calculate a Sell Price which achieves the desired profit amount.

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

Open any Stock Item from the Stock Items grid by double-clicking on an item. Alternatively, select a Stock Item, then press the "Modify" button located towards the top-left corner of the Stock Items grid.

The Profit \$ column will be displayed next to the Profit % column and will have a value for each Price Level that's currently populated.

The column will contain the current Profit \$ amount being made. The Profit \$ amount is calculated using the current Sell Price, Cost Price and Tax Settings which have been set for the item.

Stock Items
Modify 205401

General **Advanced** *Advanced View* *Options*

Last Modified 21 Jul 2021

Save

Keyboard

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)

	Price	Profit	
		%	\$
STANDARD	3.50	74.65	2.37
STAFF	1.75	49.30	0.78
EXTRAS	1.90	53.40	0.92
BOTTLESHOP	1.50	40.73	0.55
Price 5	1.50	40.73	0.55
Price 6	1.60	44.41	0.64
Price 7	1.70	47.99	0.74
Price 8	1.80	50.85	0.83
Price 9	1.90	53.40	0.92
Price 10	2.00	55.71	1.01
Price 11	2.10	57.80	1.10
OWNERS	2.20	59.70	1.19

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

Tax Settings (Selling)

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

Attributes

POS 2
v8 Build 1

idealpos Update History

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Modifying the currently enabled checkbox in the Tax Settings section will result in different Profit \$ amounts being displayed.

<p>Selling Prices (inc Tax)</p> <table border="1"> <thead> <tr> <th rowspan="2"></th> <th colspan="3">Profit</th> </tr> <tr> <th></th> <th>%</th> <th>\$</th> </tr> </thead> <tbody> <tr><td>STANDARD</td><td>3.50</td><td>74.65</td><td>2.37</td></tr> <tr><td>STAFF</td><td>1.75</td><td>49.30</td><td>0.78</td></tr> <tr><td>EXTRAS</td><td>1.90</td><td>53.40</td><td>0.92</td></tr> <tr><td>BOTTLESHOP</td><td>1.50</td><td>40.73</td><td>0.55</td></tr> <tr><td>Price 5</td><td>1.50</td><td>40.73</td><td>0.55</td></tr> <tr><td>Price 6</td><td>1.60</td><td>44.41</td><td>0.64</td></tr> <tr><td>Price 7</td><td>1.70</td><td>47.99</td><td>0.74</td></tr> <tr><td>Price 8</td><td>1.80</td><td>50.85</td><td>0.83</td></tr> <tr><td>Price 9</td><td>1.90</td><td>53.40</td><td>0.92</td></tr> <tr><td>Price 10</td><td>2.00</td><td>55.71</td><td>1.01</td></tr> <tr><td>Price 11</td><td>2.10</td><td>57.80</td><td>1.10</td></tr> <tr><td>OWNERS</td><td>2.20</td><td>59.70</td><td>1.19</td></tr> </tbody> </table> <p><input type="checkbox"/> Force Selling Price Entry</p>			Profit				%	\$	STANDARD	3.50	74.65	2.37	STAFF	1.75	49.30	0.78	EXTRAS	1.90	53.40	0.92	BOTTLESHOP	1.50	40.73	0.55	Price 5	1.50	40.73	0.55	Price 6	1.60	44.41	0.64	Price 7	1.70	47.99	0.74	Price 8	1.80	50.85	0.83	Price 9	1.90	53.40	0.92	Price 10	2.00	55.71	1.01	Price 11	2.10	57.80	1.10	OWNERS	2.20	59.70	1.19	<p>Printer Settings</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Receipt Printer <input type="checkbox"/> KITCHEN <input type="checkbox"/> BAR <input type="checkbox"/> COFFEE <input type="checkbox"/> IKM <input type="checkbox"/> Kitchen Printer 5 <input type="checkbox"/> Kitchen Printer 6 <input type="checkbox"/> Kitchen Printer 7 <input type="checkbox"/> Kitchen Printer 8 <input type="checkbox"/> Kitchen Printer 9 <input type="checkbox"/> Kitchen Printer 10 <input type="checkbox"/> Kitchen Printer 11 <input type="checkbox"/> Kitchen Printer 12 	
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<p>Cost Prices (ex Tax)</p> <table border="1"> <tbody> <tr><td>Standard Cost</td><td>0.8100</td></tr> <tr><td>Last Cost</td><td>0.8100</td></tr> <tr><td>Average Cost</td><td>0.8061</td></tr> </tbody> </table>		Standard Cost	0.8100	Last Cost	0.8100	Average Cost	0.8061	<p>Tax Settings (Selling)</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> GST <input type="checkbox"/> GST-Free <input type="checkbox"/> Not Defined <input type="checkbox"/> Not Defined <input type="checkbox"/> Not Defined <input type="checkbox"/> Not Defined 																																																		
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Entering a value directly into the Profit % field will automatically calculate the Sell Price and the Profit \$.

Selling Prices (inc Tax)		Profit	
		%	\$
STANDARD	2.00	50.00	1.00
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	
<input checked="" type="checkbox"/>	Receipt Printer
<input type="checkbox"/>	KITCHEN
<input checked="" type="checkbox"/>	BAR
<input type="checkbox"/>	COFFEE
<input type="checkbox"/>	IKM
<input type="checkbox"/>	Kitchen Printer 5
<input type="checkbox"/>	Kitchen Printer 6
<input type="checkbox"/>	Kitchen Printer 7
<input type="checkbox"/>	Kitchen Printer 8
<input type="checkbox"/>	Kitchen Printer 9
<input type="checkbox"/>	Kitchen Printer 10
<input type="checkbox"/>	Kitchen Printer 11
<input type="checkbox"/>	Kitchen Printer 12

Cost Prices (ex Tax)	
Standard Cost	1.0000
Last Cost	1.0000
Average Cost	1.0000

Tax Settings (Selling)	
<input type="checkbox"/>	GST
<input checked="" type="checkbox"/>	GST-Free
<input type="checkbox"/>	Not Defined
<input type="checkbox"/>	Not Defined
<input type="checkbox"/>	Not Defined
<input type="checkbox"/>	Not Defined

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If you want to make a specific Profit \$, enter the required amount into the Profit \$ field and a Sell Price will be calculated and filled into the Sell Price field automatically.

Selling Prices (inc Tax)			Printer Settings	
			Profit	
			%	\$
STANDARD	3.00	66.67	2.00	
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)		Tax Settings (Selling)	
Standard Cost	1.0000	<input type="checkbox"/> GST	
Last Cost	1.0000	<input checked="" type="checkbox"/> GST-Free	
Average Cost	1.0000	<input type="checkbox"/> Not Defined	
		<input type="checkbox"/> Not Defined	
		<input type="checkbox"/> Not Defined	
		<input type="checkbox"/> Not Defined	

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

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If required, the tax amounts used in the Tax Settings can be configured by going to: Setup > Global Options > Sales > Tax Rates.

The screenshot shows the 'idealpos' interface for 'Global Options' at 'Site 1 (Head Office)'. The 'Sales' tab is selected and highlighted with an orange border. Below the tabs, the 'Tax Rates' section contains a table with the following data:

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

Yes/No Options

IP-1233 – Yes/No Option – Inhibit Refunds in Void Mode

This function adds the ability to control whether or not refunds are inhibited in Void Mode.

By default, this Yes/No Option is enabled, inhibiting refunds from being performed while Void Mode is active on the POS Terminal.

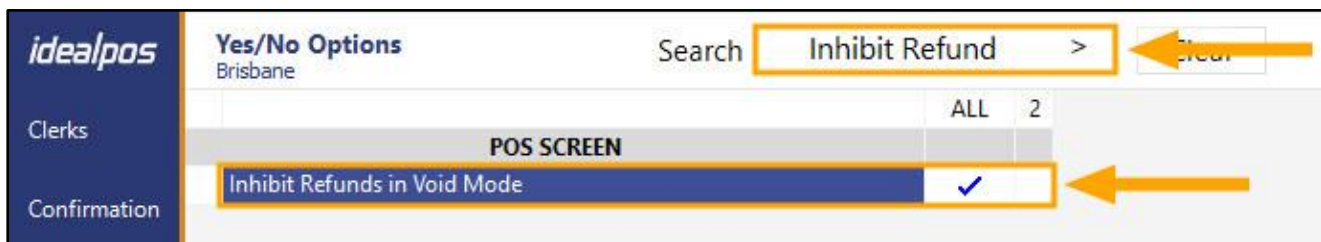
Previous to the implementation of this Yes/No Option, it was possible to perform refunds while the Void Mode was active.

To control whether or not the Inhibit Refunds in Void Mode option is enabled, go to:

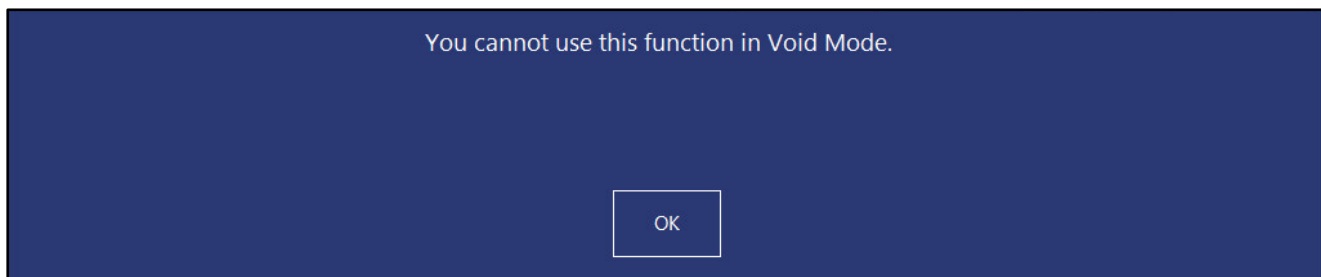
Setup > Yes/No Options

Enter Search: Inhibit Refund

Toggle the option on or off.



When the "Inhibit Refunds in Void Mode" option is enabled (checkbox ticked), Idealpos will display a prompt preventing the use of the Refund function while Void Mode is active. If the Clerk attempts to press the Refund button while Void Mode is active, Idealpos will display a prompt and will prevent the Refund function from being enabled.



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When the "Inhibit Refunds in Void Mode" option is disabled (checkbox unticked), Idealpos will allow the Refund button to be pressed when the Void Mode is active.

10 Aug 14:54 Adult ID: 10-Aug-2003
POS 2 Clerk 1 STANDARD #824
VOID MODE
✕

REFUND - ENTER ITEM

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

\$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		FRUIT & VEG	GROCERY	RETAIL	MANAGER
	RESTAURANT	BOTTLE BEER & RTD	WINE				COCKTAILS	SERVICES

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IP-3920 – Yes/No Option – Table Details Group by Order Time

This function adds the ability to control whether or not Idealpos will group table details by the Order Time.

A new feature (IP-1315 – Table Details screen – Items grouped by Order Time) was introduced in Idealpos 7.1 Build 12, however, this function was hard-coded as always enabled.

With this change, the grouping of table details by Order Time can now be toggled via a Yes/No Option.

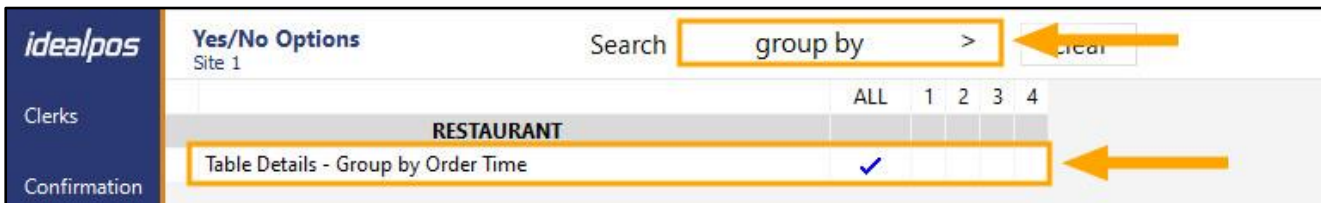
To configure this function, go to: Back Office > Setup > Yes/No Options.

Enter Search: "group by".

Enable or disable the option "Table Details – Group by Order Time".

When enabled, items will be grouped by the time that they were saved to the table.

When disabled, items will be displayed in the order that they were saved to the table.



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

A Close Suite/Open Suite should not be required.

Place multiple orders to a table by adding items to the sale, press the "Table Map" button, select a table and if prompted, enter the number of Covers/Guests.

Repeat the process again, ensuring that you select the same table number.

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If the Yes/No Option is enabled, items will be grouped as per the below example:

TABLE 85		11 min	\$40.00										
4 Covers - Average \$10.00		Amount	Outstanding	Pay	Seat								
Ordered: 11:47am												Jeremy	
CAPPUCCINO		3.50	3.50										
FLAT WHITE		3.50	3.50										
SHORT BLACK		3.00	3.00										
Ordered: 11:58am												Jeremy	
MUD CAKE SLICE		7.50	7.50									Reorder Items	
LEMON TEA CAKE SLICE		7.50	7.50									Hide Paid Items	
VANILLA SLICE		7.50	7.50									Transfer	
CARROT CAKE SLICE		7.50	7.50									Reprint Kitchen	
		-----										Name	
		40.00	40.00									Covers	
												Delete	
Full	1/3	1/5	1/7	1/Covers	Amount							Pay 0.00	
1/2	1/4	1/6	1/8	Quantity	Fraction							Print Bill Select All	

If the Yes/No Option is disabled, items will be displayed in the order they were saved to the table.

TABLE 85		21 min	\$40.00										
4 Covers - Average \$10.00		Amount	Outstanding	Pay	Seat								
CAPPUCCINO		3.50	3.50										
FLAT WHITE		3.50	3.50										
SHORT BLACK		3.00	3.00										
MUD CAKE SLICE		7.50	7.50									Reorder Items	
LEMON TEA CAKE SLICE		7.50	7.50									Hide Paid Items	
VANILLA SLICE		7.50	7.50									Transfer	
CARROT CAKE SLICE		7.50	7.50									Reprint Kitchen	
		-----										Name	
		40.00	40.00									Covers	
												Delete	
Full	1/3	1/5	1/7	1/Covers	Amount							Pay 0.00	
1/2	1/4	1/6	1/8	Quantity	Fraction							Print Bill Select All	

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IP-4146 – Yes/No Option – Show Tender Surcharge Prompts

This function enables the ability to configure whether or not prompts will be displayed on the POS Screen when a surcharge is applied to the tender function that has been selected.

An example of this may include having a surcharge configured on the AMEX/DINERS function and display an on-screen prompt when the AMEX/DINERS function is pressed on the Tender screen.

To configure this function, go to:

Back Office > Setup > Yes/No Options

Enter "surcharge" into the Search field, then toggle the Yes/No Option "Show Tender Surcharge Prompts" depending on whether or not you want Idealpos to display a prompt when a surcharge is applicable to the Tender function selected. When the option is checked, a prompt will appear on the POS Screen when the Clerk selects a Tender function which has a surcharge enabled. When the option is unchecked, all Tender Surcharge prompts will be hidden when selecting a Tender function that has a surcharge enabled.

The screenshot shows the 'Yes/No Options' configuration page for 'Site 1'. A search bar at the top contains the text 'surcharge' and a 'Clear' button. Below the search bar is a table with columns for 'ALL', '1', '2', '3', and '4'. The table is divided into sections: 'POS SCREEN' and 'RESTAURANT'. Under 'POS SCREEN', the option 'Show Tender Surcharge Prompts' is checked with a blue checkmark. A yellow box highlights the search field and the 'Show Tender Surcharge Prompts' row, with yellow arrows pointing to them.

	ALL	1	2	3	4
POS SCREEN					
Inhibit Tax on Item Surcharges					
Show Tender Surcharge Prompts	✓				
Tender Surcharges Not Apply to Tips					
RESTAURANT					
Show Surcharge Totals on Bills					

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Surcharges for Tenders are configured by going to: Back Office > Setup > Function Descriptors.

Select a Tender between 2 and 18, then press the "Modify" button on the top-left corner of the screen.

Enter the Surcharge amount into the Surcharge field, and select the Surcharge Type.

When "%" is selected and a value is entered into the Surcharge field, Idealpos will apply a percent surcharge to the tender. E.g. A \$10.00 sale with a 10% surcharge will result in a surcharge of \$1.00 being added to the total amount, bringing the amount to \$11.00.

When "\$" is selected and a value is entered into the Surcharge field, Idealpos will add the entered \$ value amount to the tender. E.g. A \$10.00 sale with a \$2.00 surcharge will result in a surcharge of \$2.00 being added to the total amount, bringing the amount to \$12.00.

Press the "Save" button on the top-left corner of the Function Descriptors window to save your change.

The screenshot shows the 'Function Descriptors' window for 'TENDER 3' with the description 'AMEX/DINERS'. The 'Surcharge' field is highlighted with an orange box and an arrow pointing to it. The 'Surcharge' amount is 2.50, and the 'Surcharge Type' is set to '%'. The 'Waive Surcharge Threshold' is 0.00. The 'Override Receipt Footer' and 'User-Defined Text' fields are empty. The 'Save' button is visible in the top-left corner of the window.

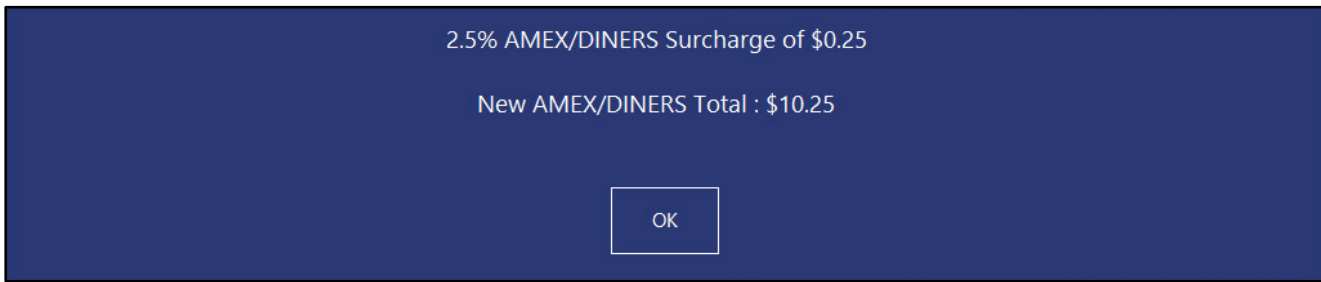
Function	TENDER 3
Description	AMEX/DINERS
# of Receipts	1
Exchange Rate	0
Lower Limit	0.00
Upper Limit	99999.99
Scan Code	
Scan Code Amount	0.00
Surcharge	2.50 %
Waive Surcharge Threshold	0.00

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

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When tendering off a sale with the Y/N Option "Show Tender Surcharge Prompts" enabled, the prompt will appear similar to the below:



When tendering off a sale with the Y/N Option "Show Tender Surcharge Prompts" disabled, the surcharge prompt will not appear and the sale will simply be finalised, displaying an empty sale screen afterwards.



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IP-4188 – Yes/No Option – Stock Item Long Descriptions on POS Screen

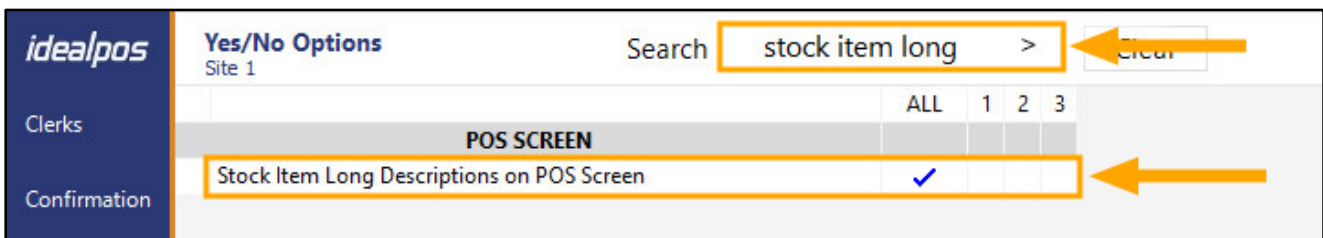
This function enables the ability to view Stock Item Long Descriptions on the POS Screen. In order to take full advantage of this function and display the entire Stock Item Long Description on the POS Screen, the Retail POS Layout should be enabled on your POS Screen. Note that the Retail POS Layout is only available on 1920 x 1080 resolution screens.

To configure this function, go to:

Setup > Yes/No Options > Enter Search: "stock item long"

Enable the option "Stock Item Long Descriptions on POS Screen".

If your venue has a mixture of different sized POS Screens (e.g. traditional 1024 x 768 and the new 1920 x 1080 resolution) and you only want to enable this option for POS terminals that have the larger 1920 x 1080 resolution screens, ensure that you only enable the tickbox for the POS Terminals that support the larger resolution screens.



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Once this option is enabled, ensure that your system is configured to utilise the Retail POS Layout (only available on 1920 x 1080 resolution POS Screens).

To enable the Retail POS Layout, go to:

Setup > POS Terminals > Select the POS Terminal from the list > Modify (or double-click on the POS Terminal to modify it).

From the POS Settings tab, select the resolution labelled as "1920 x 1080 (16:9) Retail".

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

POS Screen Tabs

Default	Enabled
<input checked="" type="radio"/> DRINKS	<input checked="" type="checkbox"/>
<input type="radio"/> CAFE	<input checked="" type="checkbox"/>
<input type="radio"/> TAP BEER	<input checked="" type="checkbox"/>
<input type="radio"/> SPIRITS	<input checked="" type="checkbox"/>
<input type="radio"/> COCKTAILS	<input checked="" type="checkbox"/>
<input type="radio"/> FRUIT & VEG	<input checked="" type="checkbox"/>
<input type="radio"/> GROCERY	<input checked="" type="checkbox"/>
<input type="radio"/> RETAIL	<input checked="" type="checkbox"/>
<input type="radio"/> MANAGER	<input checked="" type="checkbox"/>
<input type="radio"/>	<input checked="" type="checkbox"/>
<input type="radio"/> RESTAURANT	<input checked="" type="checkbox"/>
<input type="radio"/> BOTTLE BEER & RTD	<input checked="" type="checkbox"/>
<input type="radio"/> WINE	<input checked="" type="checkbox"/>
<input type="radio"/>	<input checked="" type="checkbox"/>
<input type="radio"/>	<input checked="" type="checkbox"/>
<input type="radio"/> SERVICES	<input checked="" type="checkbox"/>
<input type="radio"/> ADMIN	<input checked="" type="checkbox"/>

Default Tabs for Sessions

	Don't Change
	Don't Change
	Don't Change

Price Level Mapping

Price Level 1	STANDARD
Price Level 2	STAFF
Price Level 3	EXTRAS
Price Level 4	BOTTLESHOP
Price Level 5	Price 5
Price Level 6	Price 6
Price Level 7	Price 7
Price Level 8	Price 8
Price Level 9	Price 9
Price Level 10	Price 10
Price Level 11	Price 11
Price Level 12	OWNERS

Automatic Surcharge

Amount % Surcharge

From to

Sun Mon Tue Wed Thu Fri Sat

User-Defined Options

Description	Setting
*	

POS Screen

Resolution **1920 x 1080 (16:9) Retail** Colour Theme

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The final step to configuring this function is to ensure that you have Stock Items which contain a Long Description. All your Stock Items should, by default, already contain a description in the Long Description field, however, it will likely be a short description that resembles the same description shown in the Description 1 and/or Description 2 fields. The Long Description field (Description 3 field) supports a maximum limit of 100 characters that can be utilised to fully describe the Stock Item.

This requirement for displaying a long Stock Item Description may be necessary when selling items that cannot be clearly described using the previous limit of 30 characters available in the first description field. Examples of such items may include jewellery that requires a detailed description (due to similar items that have a slight variation of different coloured diamonds, jewels, etc.).

Go to: Back Office > File > Stock Control > Stock Items

Search and select the Stock Item from the list by either double-clicking on it, or select the item and then press the "Modify" button on the top-left corner of the Stock Items window.

Enter a long description into the Long Description/Description 3 field.

Press the "Save" button on the top-left corner of the window to save your change.

You may repeat this process to update the long descriptions for the required items.

idealpos Stock Items Modify 2 Created 29 Mar 2021 09:40:53

Save
Keyboard

Stock Code: 2
 Description: WEDDING RING 14KT GLD & SPHRE (29)
 Kitchen Description: WEDDING RING 14KT GLD & SPHRE (29)
 Long Description: Female Wedding Ring 14kt White Gold & Sapphire in Custom Engraved Ring Box (74)

Department: 1990 > JEWELLERY
 Scan Code: Auto

Selling Prices (inc Tax)

	Price	Profit%
STANDARD	4999.00	99.98
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: 10 > MISCELLANEOUS
 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	1.0700
Last Cost	1.0700
Average Cost	1.0700

Tax Settings (Selling)

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

Attributes

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

POS 2
v8 Build 1

idealpos Update History

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When adding a Stock Item to a sale which contains a long description, the long description will be displayed within the sale window as per the below example:

29 Jun 11:14 Adult ID: 29-Jun-2003
POS 1 Jeremy STANDARD #527

2	Female Wedding Ring 14kt White Gold & Sapphire in Custom Engraved Ring Box	1	\$4999.25/ea	4999.25
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1x
\$4,999.25

									RECEIPT	CLERK	7	8	9	CL
CAPPUCCINO	FLAT WHITE	LATTE	CHAI	SHORT BLACK	LONG BLACK	MOCHA	HOT CHOC	TEA	PRICE LEVEL	5% ST DISC	4	5	6	NO SALE
EXTRA HOT	SKINNY	DECAF	1 SUGAR	TAKEAWAY	SMALL	ICED DRINK	WATER	KEYBOARD	CUSTOMER	5% ITEM				
EXTRA CHOC	SOY	WEAK	2 SUGAR	MARSH MALLOW	MEDIUM	MILKSHAKE	JUICE	ORDER NUMBER	BAR TAB	REFUND	1	2	3	X
NO CHOC	ALMOND	DOUBLE SHOT	3 SUGAR	EQUAL	LARGE	SMOOTHIE	SOFTDRINK	REWARDS ENQUIRY	PENDING	VOID SALE				
DRINKS	CAFE	TAP BEER	SPIRITS	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL	MANAGER	TABLE MAP	VOID	0	.	ENTER	
	RESTAURANT	BOTTLE BEER & RTD	WINE				SERVICES	ADMIN						