

Build 9

Update Details:

** Enhancements

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Accounting Interface

Xero OAuth2: Search for specific Organisation Name when using multiple Organisations

This function adds support for searching for a specific Organisation Name from when configuring Idealpos with a Xero Account that contains multiple Organisations.

This feature can assist with the Xero setup process in Idealpos, especially when setting up Idealpos with a Xero Account that contains numerous Organisations.

To use this function, go to: Setup > Global Options > Accounting

Enter the Organisation into the Organisation Name field, then press the "Get Accounts" button.

The screenshot shows the 'Accounting' interface for 'site 1 (Site 1)'. The 'Accounting Package' is set to 'XERO (OAUTH2)' and the 'Organization Name' is 'San Jose Collections Pty Ltd'. A 'Get Accounts' button is present. The 'Account Codes' section is divided into 'Sales Accounts' and 'Purchase Accounts'.

Sales Accounts		Purchase Accounts	
CASH	101	FOOD	201
EFTPOS	105	BEVERAGE	202
ACCOUNT	N/A	RETAIL	203
AMEX / DINERS	103	GROCERIES	204
LAYBY	805	FUEL	205
CHEQUE		MEMBERSHIPS	206
GIFT VOUCHER		ADMISSIONS	207
CREDIT NOTE		SERVICES	208
ONLINE		LANDSCAPE	209
POINTS	N/A	Other Sales Categories	210
ROOM CHARGE	111	TIPS IN	428
MOTO	112	PAID IN	430
TENDER 13	113	GV PURCHASE	806
TENDER 14	114	RA 4	
TENDER 15	115	TIPS OUT	428
TENDER 16	116	PAID OUT	430
TENDER 17	117	PO 3	
TENDER 18	118	PO 4	
Layby Cancellation Fees	455	Rounding	860
		Variance	451
GST Holding		Layby Adjustments	454
GST Collected		Account Adjustments	452
		Unallocated Payments	804
		FOOD	311
		BEVERAGE	312
		RETAIL	313
		GROCERIES	314
		FUEL	315
		MEMBERSHIPS	318
		ADMISSIONS	319
		SERVICES	
		LANDSCAPE	
		Other Purchase Categories	
		Freight	425
		Admin Fees	405

Automatic Daily End Period Time performed at POS

Enable Global Debtor Export for Cash-Based Accounting

Debtor Code POS Debtor

Clear All

Idealpos will display a Xero login screen via a popup prompting you to enter your Email Address, Password. You will also need to complete two form factor authentication during this process. The entered Organisation Name will be matched with the Organisation in your Xero Account.

Customer Loyalty Points

Option to disable Points Redemptions as Discounts

This function enables the ability to control whether Point Redemptions are treated as discounts or not. By default, this option is enabled and before the ability to control this option was introduced, it was hard-coded as enabled. Therefore, leaving this option enabled will result in the system behaving in the same way as it previously did.

Note that toggling this option does not affect or impact the Customer's ability to redeem points. It is used as a means to alter the way Idealpos reports on Point Redemptions.

When this option is enabled, any Point Redemptions that occur will be treated as a Discount, and therefore when running reports in Idealpos where a Point Redemption took place (e.g. Stock Item Sales Report), the Discount Column will show the redemption as a discount.

If this option is disabled, any Point Redemptions that occur will not be treated as a Discount and when running reports in Idealpos where a Point Redemption took place (e.g. Stock Item Sales Report), the Discount column will not include redemptions.

This function may be beneficial to sites which use an external point system via third-party software and have discounts reimbursed by an external party. Therefore, these types of sites will not want to have redemptions treated as discounts, as this type of reporting alters the actual margins displayed.

To configure and use this function, go to:

Setup > Global Options > Customers > Miscellaneous

Toggle the "Redemptions treated as Discounts" checkbox to enable or disable this function

The screenshot shows the 'global options' window for 'site 1 (Site 1)'. The 'Miscellaneous' tab is selected. In the 'Miscellaneous' section, the 'Points Tender' is set to 'POINTS' and the 'Redemptions treated as Discounts' checkbox is checked. Other options include 'Default Type' set to 'ACCOUNTS', 'Default Credit Limit' at '1000.00', and 'Default Aging Type' set to '30-60-90 / Monthly'. The 'Layby' section shows 'Terms & Conditions' and 'Layby become Sales' set to 'when Started'. The 'User-Defined' section includes 'Text Fields' and 'Yes/No Fields'.

To demonstrate this function, the following examples of the Stock Item Sales Report have been included. The below example shows the Stock Item Sales Report where a Customer redeemed points to purchase 3 COFFEE Items **while the option was enabled**. Take note of the annotated columns. The green annotation represents columns that are unaffected/unchanged by the "Redemptions treated as Discounts". The orange annotation represents columns that will change depending on whether the "Redemptions treated as Discounts" is enabled or disabled.

POS 1(1)		Stock Item Sales Report				Printed 26/05/2020 14:49:42			
		26 May 2020 00:00:00 to 26 May 2020 23:59:59				Page 1 of 1			
		Sales							
		Unit Price inc	Unit Tax	Quantity	Nett ex	Tax	Nett inc	Discounts	Gross inc
COFFEE									
202001	CAPPUCCINO	0.00	0.00	1.0000	0.00	0.00	0.00	3.50	3.50
202002	FLAT WHITE	0.00	0.00	1.0000	0.00	0.00	0.00	3.50	3.50
202004	SHORT BLACK	0.00	0.00	1.0000	0.00	0.00	0.00	3.00	3.00
				3.0000	0.00	0.00	0.00	10.00	10.00
				3.0000	0.00	0.00	0.00	10.00	10.00

The below example shows the Stock Item Sales Report where a Customer redeemed points to purchase 3 COFFEE Items **while the option was disabled**. Take note of the annotated columns. The green annotation represents column that are unaffected/unchanged by the "Redemptions treated as Discounts". The orange annotation represents columns that will change depending on whether the "Redemptions treated as Discounts" is enabled or disabled.

POS 1(1)		Stock Item Sales Report				Printed 26/05/2020 14:55:36			
		26 May 2020 00:00:00 to 26 May 2020 23:59:59				Page 1 of 1			
		Sales							
		Unit Price inc	Unit Tax	Quantity	Nett ex	Tax	Nett inc	Discounts	Gross inc
COFFEE									
202001	CAPPUCCINO	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50
202002	FLAT 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
				3.0000	9.09	0.91	10.00	0.00	10.00

eCommerce Interfaces

Support for Mr Yum eCommerce Interface

This function adds the ability to configure Idealpos with the Mr Yum eCommerce Interface.

Mr Yum is an ordering service which allows customers to place orders from their table using their own smart-phone device.

Each table will contain a QR Code that Customers will scan with their own mobile device.

Their device will then display the menu for your Venue from the Mr Yum site and display the items that you have available to order.

The Customer will select the items they wish to order then they'll pay for them from their device.

Once payment has been processed, the order will be sent to the Kitchen Docket Printer (provided that Automatically Send Orders to Kitchen Printers is enabled), ready for preparation by the Chef.

The order will arrive into the Idealpos terminal as a Web Order and will be displayed at the top of the POS Screen (provided that auto-finalise Pre-Paid Orders is not enabled).

This process is all web-based and the Customer does not need to download or install any app on their device.

For more details about Mr Yum, click [here](#) to visit their website.

This eCommerce Interface is configured via Idealpos Online, and therefore, an Idealpos Online Subscription/Account is required to set this up. In addition, a Mr Yum Account is also required.

As there are a number of steps involved to configure this integration, please refer to the topic in the User Guide by clicking [here](#) which outlines the steps in further detail.

Alternatively, browse to the Idealpos Online eCommerce topic, then select "Configure Mr Yum in Idealpos Online".

In summary, the below is required to setup this interface:

- Idealpos Online Subscription
- Mr Yum Account
- API Key
- Shop Domain
- Idealpos 7.1 Build 9 or higher

Support for Tyro Connect eCommerce Interface

This function adds the ability to configure Idealpos with the Tyro Connect eCommerce Interface.

Tyro Connect is a service provided by Tyro which acts as integration hub by connecting to apps and services of third-party companies such as me&u.

The advantage to utilising this integration is that once you've configured your Idealpos Online eCommerce solution to communicate with Tyro Connect, you will be able to access and utilise the many eCommerce apps or solutions that are offered by Tyro Connect.

In the initial Idealpos Online eCommerce integration with Tyro Connect, we are supporting [me&u](#).

This eCommerce Interface is configured via Idealpos Online, and therefore, an Idealpos Online Subscription/Account is required to set this up. In addition, a Tyro Connect account is also required.

As there are a number of steps involved to configure this integration, please refer to the topic in the User Guide by clicking [here](#) which outlines the steps in further detail.

Alternatively, browse to the Idealpos Online eCommerce topic, then select "Configure Tyro Connect in Idealpos Online".

In summary, the below is required to setup this interface:

- Idealpos Online Subscription
- Tyro Connect Account/me&u Account – Tyro Connect should be able to organise this for you
- API Key
- Shop Domain
- Idealpos 7.1 Build 9 or higher

To utilise me&u with the Tyro Connect Interface, you will also require beacons which will be placed at each table in your venue. Customers will tap their device against the beacon to gain access to the me&u functionality so they can place their order via their smart-phone device.

Payment Interface

Tenerum Payment Interface

This change includes the ability to configure Idealpos with the Tenerum Payment Interface.

The Tenerum Payment Interface is only available to Customers in the United States.

As there are numerous steps involved to setup and configure Tenerum, please refer to the [Tenerum Payment Interface topic](#) in the User Guide for more details about setting up this integration.

In summary, the below points outline the process involved with setting up this Payment Integration:

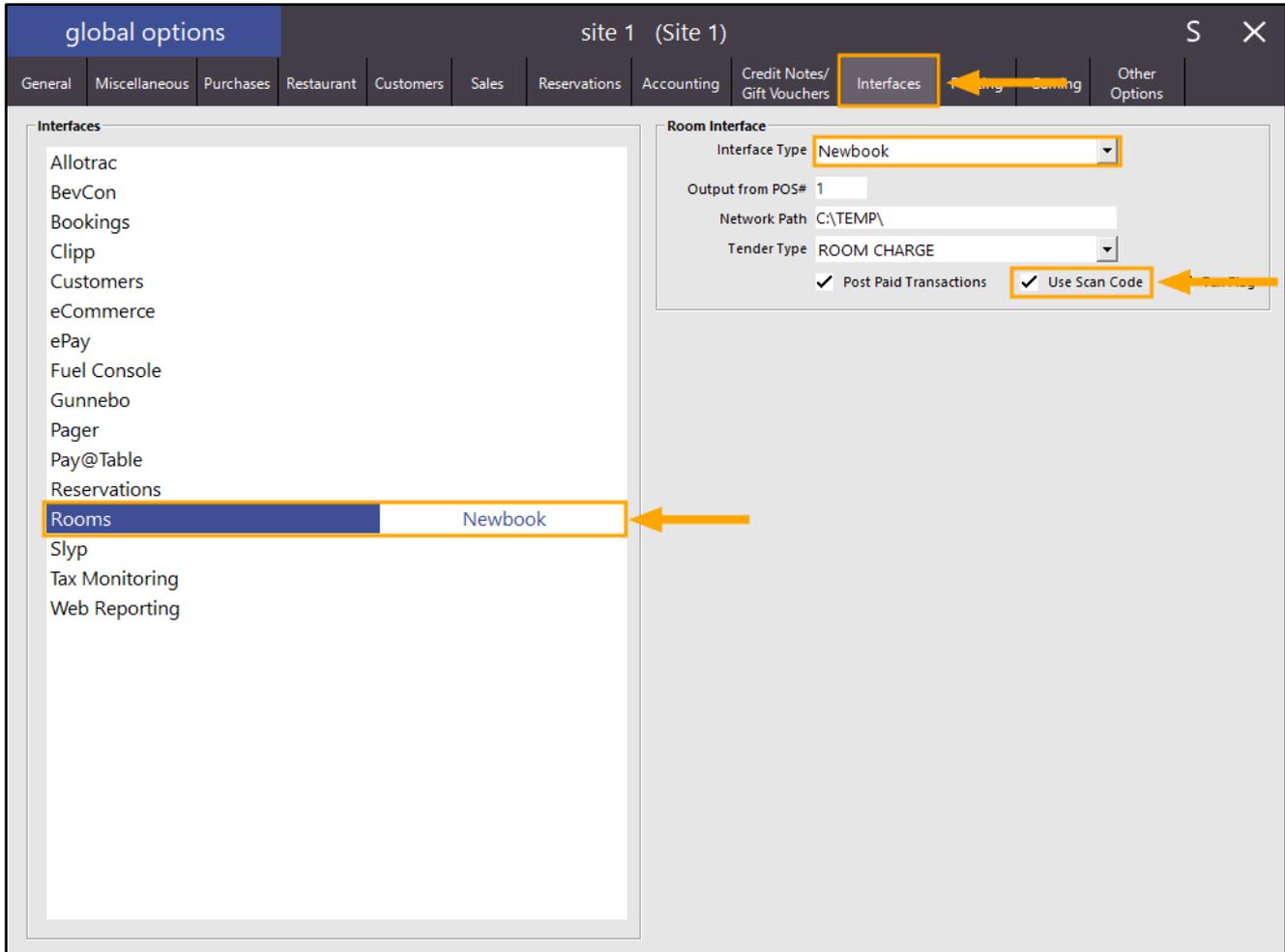
- Ensure that Tenerum has been enabled in the Licence Gateway.
- Connect the Verifone VX805 Payment Terminal (Power and Ethernet Connection is required at each location where the Payment Terminals will be placed).
- Entering Tenerum Settings into Idealpos (these settings will be supplied by Tenerum).
- Configuring Function Descriptor and Tender.
- Printer Configuration (for receipt printer used for issuing receipts if not configured already).

Room Interface

Newbook Interface – Support for multiple scan codes per booking

This function adds the ability to have multiple scan codes/wristbands linked to one guest account in Newbook. The steps required to enable support for this feature are minimal and assume that Newbook is already configured on your system.

To configure and use this function, go to:
Setup > Global Options > Interfaces > Room Interface
Ensure that “Use Scan Code” is enabled.



When multiple wristbands have been linked to one guest account, Newbook will supply a file which includes the wristbands that have been linked to the account. An example of this is shown below:

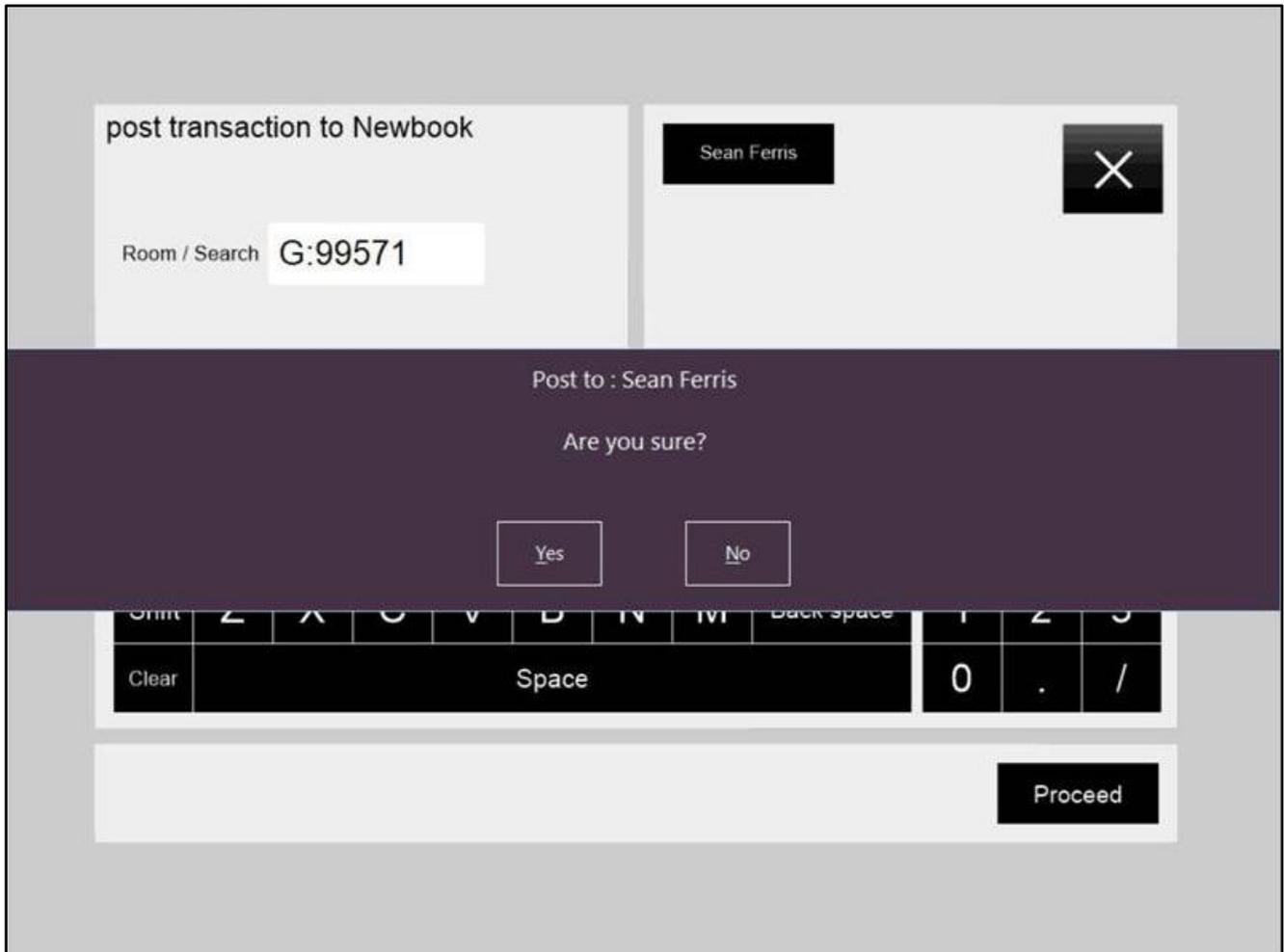
1. 20008
2. 30008
3. 40008

```
SKUNK, Ida Harvey, 999999, 0.00,  
G:99571, Sean Ferris, 999999, 0.00, 20008; 30008; 40008  
G:133431, Karen Sypher, 999999, 0.00, 1361
```

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When a wristband is scanned into the Room/Search box, Idealpos will look up and retrieve the correct room:



Synchronise Database

Synchronise – Option to extract data from selected terminals from single terminal database

Note that the Synchronise feature in Idealpos is an advanced function and should therefore only be utilised by Users who are familiar with it and are aware of what they are doing.

Before using this function, it is important to understand that each Idealpos POS terminal on the network contains sales data that took place on the current terminal as well as sales that took place on other terminals (provided that Packet Filtering hasn't been configured to exclude specific packet types from being transmitted between terminals).

This change adds functionality to the Synchronise function in Idealpos (accessible via Utilities > Synchronize). Previous to this change, an option called "Retrieve Data of All Terminals from a Single POS Terminal" was available and could be enabled. The way this function **previously worked** is outlined as follows:

- If this option was enabled/ticked, the sales data of all other terminals would be retrieved from the single terminal that was selected from the left-hand side list.
E.g. Running the Synchronise function at POS 1 on a network that contains 3 POS Terminals (POS 1, POS 2 and POS 3), only ticking POS 2 and enabling the "Retrieve Data of All Terminals from a Single POS Terminal" would result in POS 2 and POS 3 sales data being removed from POS 1, then the retrieval of POS 2 and POS 3 sales data from POS 2.
- If this option was disabled/unticked, the sales data would be retrieved from the terminals themselves that were selected on the left-hand side list (meaning that the data was pulled from the actual terminals selected in the list) as opposed to only getting the data from a single terminal on the network.
E.g. Running the Synchronise function at POS 1 on a network that contains 3 POS Terminals (POS 1, POS 2 and POS 3), ticking POS 2 and POS 3 and disabling the "Retrieve Data of All Terminals from a Single POS Terminal" would result in POS 2 and POS 3 data being removed from POS 1.
Then POS 2 sales data being retrieved from POS 2 and POS 3 sales data being retrieved from POS 3.

The old checkbox which has been modified is shown below (before the change):

Data to Synchronize

Sales Reports Data

Financial Reports Data

Stock Movement/Transactions Reports Data

Retrieve Data of All Terminals from a Single POS Terminal

Today

From 26 May 2020 00:00:00

To 26 May 2020 23:59:59

The above functionality and User Interface checkbox has now changed and the new functionality is outlined on the next page with examples. This was done to allow further control over which terminal the data was being retrieved from.

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The “Retrieve Data of All Terminals from a Single POS Terminal” has now been renamed to “Extract Data of Selected Terminals from database at” with a dropdown box where a single POS terminal can be chosen from the list.

Using an environment containing 3 POS Terminals as an example, the “Extract Data of Selected Terminals from Database at” works as follows:

- **Scenario:** Running the Synchronise function at POS 1, ticking POS 2 and POS 3 under “Select Terminals to retrieve data from” and enabling the option “Extract Data of Selected Terminals from Database at” with POS 2 as the POS terminal chosen in the dropdown list.

Outcome: Sales Data of POS 2 and POS 3 are removed from POS 1 (the terminal which this Synchronise function is being executed on).

Sales Data of POS 2 and POS 3 is then retrieved from POS 2 (as this is the terminal which was selected from the dropdown box). This received data is used to update POS 1.

The screenshot shows the 'synchronize' dialog box with the following configuration:

- Select Terminals to retrieve data from:**
 - POS 2 : POS 2
 - POS 3 : POS 3
- Data to Synchronize:**
 - Sales Reports Data
 - Financial Reports Data
 - Stock Movement/Transactions Reports Data
 - Extract Data of Selected Terminals from database at (dropdown: POS 2)
- Time Range:**
 - Today
 - From: 26 May 2020 00:00:00
 - To: 26 May 2020 23:59:59
- Synchronization Results:** (Empty)

Buttons at the bottom: Select All, Clear All, Proceed

- **Scenario:** Running the Synchronise function at POS 1, ticking POS 2 and POS 3 under “Select Terminals to retrieve data from” and unchecking the option “Extract Data of Selected Terminals from Database at”.
Outcome: Sales Data of POS 2 and POS 3 are removed from POS 1 (the terminal which this Synchronise function is being executed on). POS 2 Sales Data is retrieved from POS 2 and POS 3 Sales Data is retrieved from POS 3. The retrieved data is used to update POS 1.

The screenshot shows a 'synchronize' dialog box with the following details:

- Select Terminals to retrieve data from:** A list containing two checked items: 'POS 2 : POS 2' and 'POS 3 : POS 3'.
- Data to Synchronize:** Three checked options: 'Sales Reports Data', 'Financial Reports Data', and 'Stock Movement/Transactions Reports Data'. An unchecked option, 'Extract Data of Selected Terminals from database at', is highlighted with a yellow box.
- Date and Time:** 'From' is set to '26 May 2020 00:00:00' and 'To' is set to '26 May 2020 23:59:59'.
- Synchronization Results:** An empty text area for displaying the results of the synchronization process.
- Buttons:** 'Select All', 'Clear All', and 'Proceed' are located at the bottom of the dialog.

Yes/No Options

Yes/No Option: Print Large Delivery Date on Web Orders

This function adds the ability to enable the printing of a large delivery date on Web Orders.

By default, this option is disabled so that the Delivery Date will print in small font type.

When enabled, the Delivery Date printed on Web Order Kitchen Dockets will be printed using the same font size as the Customer Name which is also printed on the Web Order Kitchen Docket.

The pre-requisite for this function is that your system is configured with an eCommerce Integration such as Shopify, Mobi2Go, etc.

The below steps assume that your system is already configured with an eCommerce Integration.

To configure and use this function, go to: Setup > Yes/No Options
Enable "Print Large Delivery Date on Web Orders"

The screenshot shows the 'yes/no options' window. At the top, there is a search bar with the text 'print large' and a search icon. Below the search bar is a navigation menu with categories: Clerks, Confirmation, Customers, Home Screen, Miscellaneous, POS Screen, Receipt / Kitchen, Restaurant, and Stock Control. The 'Receipt / Kitchen' category is selected. Below the navigation menu is a table with columns: ALL, 1, 2, 3. The table has two rows: 'Print Large Delivery Date on Web Orders' and 'Print Large Order Number'. The 'Print Large Delivery Date on Web Orders' row has a checkmark in the 'ALL' column. A yellow arrow points to the search bar, and another yellow arrow points to the checkmark.

	ALL	1	2	3
RECEIPT / KITCHEN				
Print Large Delivery Date on Web Orders	✓			
Print Large Order Number				

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

Order an item from your eCommerce site which is configured to send to the Kitchen Printer(s). After the order has been finalised, it will be sent to your store and the Kitchen Docket will also print. Note that if the option "Automatically Send Orders to Kitchen Printers" is disabled in Setup > Global Options > Interfaces > eCommerce, you will need to manually print the Web Order to the Kitchen Printer. This can be done by clicking on the Web Order button at the top of the POS Screen, selecting the order from the list, then press the "Print Kitchen" button.

WEB ORDERS 1

The screenshot shows a 'Web Orders' window with a search bar at the top. Below the search bar is a table of orders. The first order is selected, and its details are shown on the right side of the window. At the bottom of the window, there are buttons for 'Email', 'Reprint Kitchen', 'Print', and 'Finalize'. A yellow arrow points to the 'Reprint Kitchen' button.

Code	Date	Name	Address	Postcode	Status	Expected
*1003	20 Mar 20	John Smith	1/212 Curtin Ave West Eagle Farm	4009	Paid	20 Mar 20 23:29

John Smith	
STILL MINERAL WATER	4.00
DELIVERY	10.00
	<hr/>
	14.00

Buttons: Email, Reprint Kitchen, Print, Finalize

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The Kitchen Docket will print with the Expected Date in large font type as per the example below:

WEB ORDER 46664506
* PREPAID * * Pickup *
Ordered : 26-May-2020 9:42 am Printed : 9:42 am Expected: 26-May-2020 10:05 am
Cust 0736302455 John Citizen Ph:0736302455
-----BEVERAGE-----
2 x SHORT BLACK