

# Idealpos 7.1 Build 12 - Update History

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## Update Details:

<b>ACCOUNTING INTERFACE .....</b>	<b>2</b>
IP-3642 – XERO API – IMPROVED FLOW OF CONNECTION AND DISCONNECTION TO XERO .....	2
<b>GIFT VOUCHERS .....</b>	<b>3</b>
IP-3605 – GIFT VOUCHERS – OPTION TO SET SPECIFIC EXPIRY DATE PER GIFT VOUCHER TYPE.....	3
<b>RANGE PROGRAMMING .....</b>	<b>9</b>
IP-3595 – STOCK ITEM RANGE PROGRAMMING – ADDED CHANGED FIELD .....	9
<b>RESTAURANT AND TABLE MAP .....</b>	<b>17</b>
IP-1315 – TABLE DETAILS SCREEN – ITEMS GROUPED BY ORDER TIME .....	17
IP-2521 – SUPPORT FOR DIRECT TABLE SALES FROM POS SCREEN .....	22
IP-2679 – TABLE DETAILS – WHEN SPLITTING BY QUANTITY, DISPLAY OUTSTANDING QUANTITY .....	29
<b>STOCK PURCHASES .....</b>	<b>34</b>
IP-3550 – STOCK PURCHASES – ABILITY TO MULTI-SELECT ITEMS.....	34
IP-3589 – STOCK PURCHASES – SUPPORT FOR RECEIVING INDIRECT ITEMS .....	39
<b>SUPPLIERS .....</b>	<b>48</b>
IP-3556 – SUPPLIER PAYMENT DUE DATE – OPTION FOR SPECIFIC DAY OF MONTH .....	48
<b>YES/NO OPTIONS .....</b>	<b>51</b>
IP-3596 – YES/NO OPTION – SHOW UNIT PRICE OF ITEMS ON POS SCREEN .....	51

## Accounting Interface

### IP-3642 – Xero API – Improved flow of connection and disconnection to Xero

This function has improved the flow of connection and disconnection to Xero when configuring the Xero OAuth 2.0 Integration with your system.

Changes you will note are new buttons “Connect to Xero” and “Disconnect from Xero”.

Note that the “Get Accounts” button will now appear on the bottom-right corner of the window after your system has been connected to Xero. Also note that after your system has been connected to Xero, the accounts will automatically be retrieved and displayed on the right-hand side.

The “Get Accounts” button can be used in the event that you need to retrieve a list of Accounts at a later date once your system has already been configured. The “Get Accounts” button can also be used to retrieve the latest Accounts from Xero if you’ve just made changes to your Chart of Accounts after connecting Idealpos to Xero. In this case, the “Get Accounts” button can be pressed to retrieve the latest Accounts from Xero.

The process to follow when configuring your system with the Xero OAUTH2 Integration is as follows:

Go to: Setup > Global Options > Accounting > Select XERO (OAUTH2) from the Accounting Package dropdown box > Press “Connect to Xero”

A pop-up window will appear where you will need to login to Xero using your Xero Username and Password.

Once logged in, you will need to select your Organisation.

Once the above steps have been completed, the pop-up window will close and you will return to the Idealpos Global Options window. Shortly thereafter, the list of Accounts will be retrieved and displayed along the right-hand side of the window.

The process from this point on is to assign the Account Codes in Idealpos with the Accounts from Xero.

This is done by dragging the Account code from the right-hand side into the Idealpos Account Codes shown on the left-hand side.

When configuring your system with Xero Accounting, we strongly recommend that you seek professional advice from your Account or Bookkeeper.

Linking the wrong Accounts in Idealpos can result in data being transferred incorrectly.

## Gift Vouchers

### IP-3605 – Gift Vouchers – Option to set specific Expiry Date per Gift Voucher Type

This function adds the ability to specify a specific Expiry Date per Gift Voucher Type. This may be useful at venues where a Gift Voucher is given to new Members when they sign up with the requirement to have all Member's Gift Vouchers expire on the same day of the year (e.g. at the end of the year or end of financial year).

To configure and use this function, go to: Setup > Global Options > Credit Notes/Gift Vouchers  
In the Expiry Days/Date column of the Gift Voucher Type that you want to assign an Expiry Date, enter the Expiry Date. Enter an expiry date in the future using the format either dd/mm/yyyy or mm/dd/yyyy depending on your region.

The date entered will be automatically converted into dd Month YYYY after you click into another field. E.g. For the Australian region, entering 25/12/2020 (dd/mm/yyyy) will result in the Expiry Date appearing as 25 Dec 2020.

Entering a past date will result in the date automatically adjusting to the following year. E.g. If the current date is 14<sup>th</sup> September 2020 and entering a past expiry date of 01/09/2020 (using date format dd/mm/yyyy) will result in the date automatically adjusting to 01 Sep 2021.

Entering an invalid date (e.g. 35/12/2020) will result in the dd portion of the expiry date being converted into 35 expiry days (where the Gift Voucher will expire the number of days after the issue date).

In the below example, we have entered 25/12/2020 using a format of dd/mm/yyyy into Gift Voucher Type 3. You may enter the Expiry Date into the Expiry Days/Date field of the required Gift Voucher Type. If your region uses a different format, enter a date using the format that's specific to your region:

The screenshot shows the 'global options' window for 'site 1 (Site 1)'. The 'Credit Notes/ Gift Vouchers' tab is active. The 'Gift Vouchers' table is as follows:

Gift Voucher Type	Expiry Days/Date	Receipt Printer Logo	PDF Logo
1 Gift Voucher	365	Gift Voucher Receipt.png	Gift Voucher PDF.jpg
2 Birthday Voucher	30	Gift Voucher Receipt.png	Gift Voucher BD PDF.jpg
3 Certificate	25/12/2020	Certificate Receipt.png	Gift Certificate PDF.jpg
4 Birthday Certificate	30	Gift Certificate Receipt.png	Gift Certificate BD PDF.jpg
5 Gift Voucher Type 5	90		
6 Gift Voucher Type 6	90		
7 Gift Voucher Type 7	90		
8 Gift Voucher Type 8	90		
9 Gift Voucher Type 9	90		
10 Gift Voucher Type 10	90		
11 Gift Voucher Type 11	90		
12 Gift Voucher Type 12	90		
13 Gift Voucher Type 13	90		
14 Gift Voucher Type 14	90		
15 Gift Voucher Type 15	90		
16 Gift Voucher Type 16	90		
17 Gift Voucher Type 17	90		
18 Gift Voucher Type 18	90		
19 Gift Voucher Type 19	90		
20 Gift Voucher Type 20	90		

The right-hand configuration panel includes:

- Message:** 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
- Company Logo:** Idealpos\_Gift\_Voucher\_Banner.jpg
- Website:** www.idealpos.com.au
- Checkboxes:**
  - Print Vouchers on Receipt Printer
  - Only Print Voucher if No Email Address
  - Automatically create Gift Voucher codes
  - Gift Vouchers can be redeemed at any Site
  - Gift Vouchers use Customer Code
  - Can Search Gift Vouchers by Name
  - Voucher details shown on Receipts
  - Inhibit ability to add value to existing Gift Vouchers
  - Expire Gift Voucher after a Single Redemption
- Use Programmable Barcodes:**
  - Position: \_\_\_\_\_
  - Length: \_\_\_\_\_
- Amount:** \_\_\_\_\_
- Type:** \_\_\_\_\_

The 'Credit Notes' section at the bottom includes:

- Receipt Message:** [Empty text area]
- Customer Type:** ACCOUNTS
- Expiry Days:** 90
- Reasons:**

1	Item Returned	6	_____
2	Item Damaged	7	_____
3	Product Recall	8	_____
4		9	_____
5		10	_____
- Checkboxes:**
  - Print Credit Notes on Receipt Printer
  - Automatically create Credit Note codes
  - Credit Notes can be redeemed at any Site

# idealpos Update History

[Return to top](#)

To confirm and ensure that the date has been converted correctly, click into any field other than the current Expiry Days/Date field. The Expiry Date will be converted to appear showing the date as a numeric value, the month will appear as text and the year will appear as a numeric value. In our example of 25/12/2020, the date will appear as 25 Dec 2020.

global options
site 1 (Site 1)
S X

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

**Gift Vouchers**

Gift Voucher Type	Expiry Days/Date	Receipt Printer Logo	PDF Logo
1 Gift Voucher	365	Gift Voucher Receipt.png	Gift Voucher PDF.jpg
2 Birthday Voucher	30	Gift Voucher Receipt.png	Gift Voucher BD PDF.jpg
3 Certificate	25 Dec 2020	Certificate Receipt.png	Gift Certificate PDF.jpg
4 Birthday Certificate	30	Gift Certificate Receipt.png	Gift Certificate BD PDF.jpg
5 Gift Voucher Type 5	90		
6 Gift Voucher Type 6	90		
7 Gift Voucher Type 7	90		
8 Gift Voucher Type 8	90		
9 Gift Voucher Type 9	90		
10 Gift Voucher Type 10	90		
11 Gift Voucher Type 11	90		
12 Gift Voucher Type 12	90		
13 Gift Voucher Type 13	90		
14 Gift Voucher Type 14	90		
15 Gift Voucher Type 15	90		
16 Gift Voucher Type 16	90		
17 Gift Voucher Type 17	90		
18 Gift Voucher Type 18	90		
19 Gift Voucher Type 19	90		
20 Gift Voucher Type 20	90		

**Message** 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

**Company Logo** Idealpos\_Gift\_Voucher\_Banner.jpg

**Website** www.idealpos.com.au

- Print Vouchers on Receipt Printer
- Only Print Voucher if No Email Address
- Automatically create Gift Voucher codes
- Gift Vouchers can be redeemed at any Site
- Gift Vouchers use Customer Code
- Can Search Gift Vouchers by Name
- Voucher details shown on Receipts
- Inhibit ability to add value to existing Gift Vouchers
- Expire Gift Voucher after a Single Redemption

Use Programmable Barcodes

	Position	Length
Amount	[ ]	[ ]
Type	[ ]	[ ]

**Customer Type** ACCOUNTS

**Expiry Days** 90

Reason 1	Item Returned	6	[ ]
2	Item Damaged	7	[ ]
3	Product Recall	8	[ ]
4		9	[ ]
5		10	[ ]

**Credit Notes**

**Receipt Message**

- Print Credit Notes on Receipt Printer
- Automatically create Credit Note codes
- Credit Notes can be redeemed at any Site

Idealpos 7.1 Build 12 - Update History

Page 4 of 52

# idealpos Update History

[Return to top](#)

In order to be able to sell the Gift Voucher Type, ensure that you have a Gift Voucher button configured.

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

Locate the POS Screen tab that contains your Gift Voucher button, or locate a POS Screen tab to create the new button. The button can be configured in one of the following ways:

Function: Received on Account

Received on Account: GV Purchase

Gift Voucher Type [Blank] – When this type of button is pressed from the POS screen during a sale, the Gift Voucher Type dropdown box will be available and can be used to select the Gift Voucher Type which the Expiry Date was configured:

The screenshot shows the 'Received on Account' configuration window. The 'Received on Account' dropdown is set to 'GV PURCHASE'. The 'Gift Voucher Type' dropdown is currently empty. The 'Button Appearance' section shows a preview of a 'GIFT VOUCHER' button with settings for back colour, text colour, font, and options for double width, double height, and visible. A list of functions is visible on the right side of the window.

Gift Voucher Type [Type that matches the Gift Voucher which the Expiry Date was set above] –

When this type of button is pressed from the POS screen during a sale, the Gift Voucher Type dropdown box will be greyed out/read-only and locked to the Gift Voucher Type configured for the button:

The screenshot shows the 'Received on Account' configuration window. The 'Received on Account' dropdown is set to 'GV PURCHASE'. The 'Gift Voucher Type' dropdown is set to 'Certificate'. The 'Button Appearance' section shows a preview of a 'GIFT VOUCHER' button with settings for back colour, text colour, font, and options for double width, double height, and visible. A list of functions is visible on the right side of the window.

# idealpos Update History

[Return to top](#)

Note that when you're configuring the Gift Voucher button, once a Gift Voucher type has been selected, it cannot be changed to a blank value. Therefore, if you wish to allow the Clerk to select the Gift Voucher Type when using the Gift Voucher button during a sale, do not select a Gift Voucher Type from the dropdown box. If you accidentally select a Gift Voucher Type during the button configuration and you want to clear the type, you will need to remove the button and create a new Gift Voucher button again.

If your system hasn't previously been used to sell Gift Vouchers, additional setup steps may be required. These include Function Descriptor settings for the Received Account function, Gift Voucher Redemption tender and other additional settings. For a more detailed set of steps to enable the sale of Gift Vouchers in Idealpos, please refer to the [Setting Up Gift Vouchers topic](#) in the Idealpos User Guide for more information. For more general information about Gift Vouchers in Idealpos, please refer to the [Gift Vouchers topic](#) in the Idealpos User Guide.

Once the buttons have been created, go to the POS Screen > Navigate to the Tab containing your GIFT VOUCHER button > Press the "GIFT VOUCHER" button.

Idealpos will display a GIFT VOUCHER sale prompt.

Enter the Gift Voucher Amount, Recipient Name and select the GIFT VOUCHER type which matches Type that the Expiry Date was configured in the above steps.

If you set a Gift Voucher Type during the button configuration, the Gift Voucher Type will be locked to the selected type and the Gift Voucher Type dropdown box will be read-only.

If the Recipient has an Email Address, it may also be entered and the Gift Voucher will be emailed to them. Note that using the Email Address functionality requires that you have setup an Email Account in Idealpos (Setup > Global Options > Other Options > Email Settings). If an Email Account has not been configured in Idealpos and an Email Address for the recipient is entered, they will not receive the Gift Voucher email.

The screenshot displays the 'GIFT VOUCHER Sale' interface. At the top, there is a title bar with a close button. Below it, the form contains the following fields:

- Scan or Enter Voucher Code: 9860086369528
- Amount: 10.00
- Recipient Name: John Smith
- Email Address: (empty)
- GIFT VOUCHER Type: Certificate (indicated by a yellow arrow)

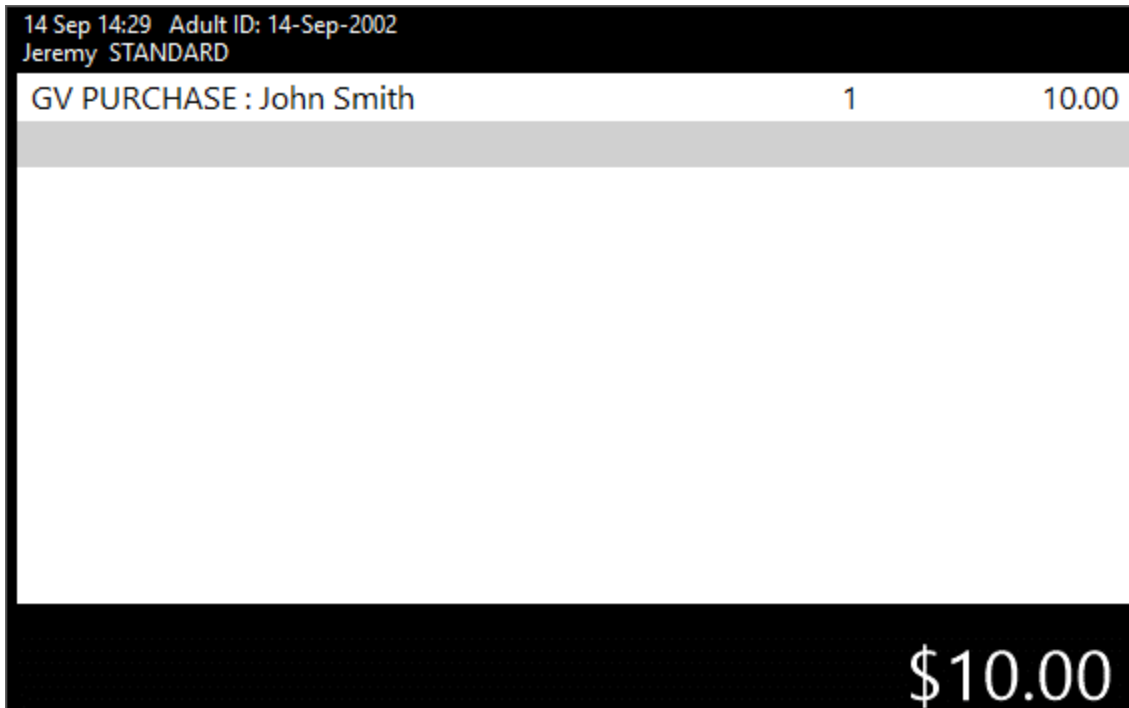
A virtual keyboard is shown at the bottom of the screen, featuring a grid of keys including letters, numbers, symbols, and a blue 'OK' button.

# idealpos Update History

[Return to top](#)

Press the OK button to add the Gift Voucher to the sale.

The Gift Voucher appears in the sale window as per the below example:



The screenshot shows a POS interface with a black header and footer. The header contains the text "14 Sep 14:29 Adult ID: 14-Sep-2002" and "Jeremy STANDARD". The main area is a white table with a grey header row. The table contains one row: "GV PURCHASE : John Smith" with a quantity of "1" and a price of "10.00". The footer displays "\$10.00".

14 Sep 14:29 Adult ID: 14-Sep-2002 Jeremy STANDARD		
GV PURCHASE : John Smith	1	10.00

\$10.00

# idealpos Update History

[Return to top](#)

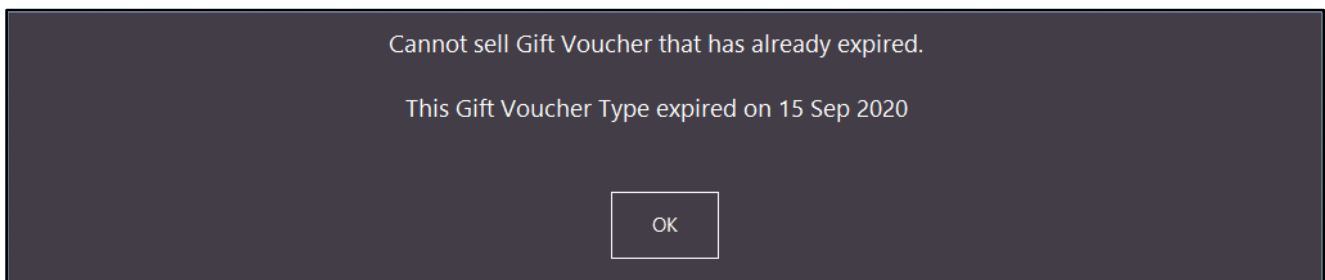
Press the ENTER button then select a Tender Type to finalise the sale.  
If an email address was entered, the Gift Voucher will be emailed to the recipient.  
If no email address was entered, the Gift Voucher will be printed to the receipt printer.

The below is an example of the Gift Voucher printed from the Receipt Printer.



Any Gift Vouchers sold using the selected Gift Voucher Type will all expire on the entered Expiry Date. Note that the Expiry Date which is configured in Setup > Global Options > Credit Notes/Gift Vouchers does not auto-change once the current date is equal to or greater than the Expiry Date. This means that if you attempt to sell the Gift Voucher Type once the current date is greater than or equal to the Expiry Date configured in Global Options, a prompt similar to the below will be displayed.

The date shown in the prompt will be reflective of the Expiry Date for the Gift Voucher Type:



In order to sell the Gift Voucher Type, you will need to go to: Setup > Global Options > Credit Notes/Gift Vouchers Then modify the Expiry Date for the Gift Voucher Type so that it falls on a future date.



## Range Programming

### IP-3595 – Stock Item Range Programming – Added Changed field

This function adds the ability to modify the Changed field via the Range Programming facility.

When Stock Items are modified, a flag is set against the Changed field. The Changed field can then be used to generate Labels for Stock Items which have the Changed field enabled.

With this change, you can perform Range Programming to either enable or disable the Changed flag against Stock Items.

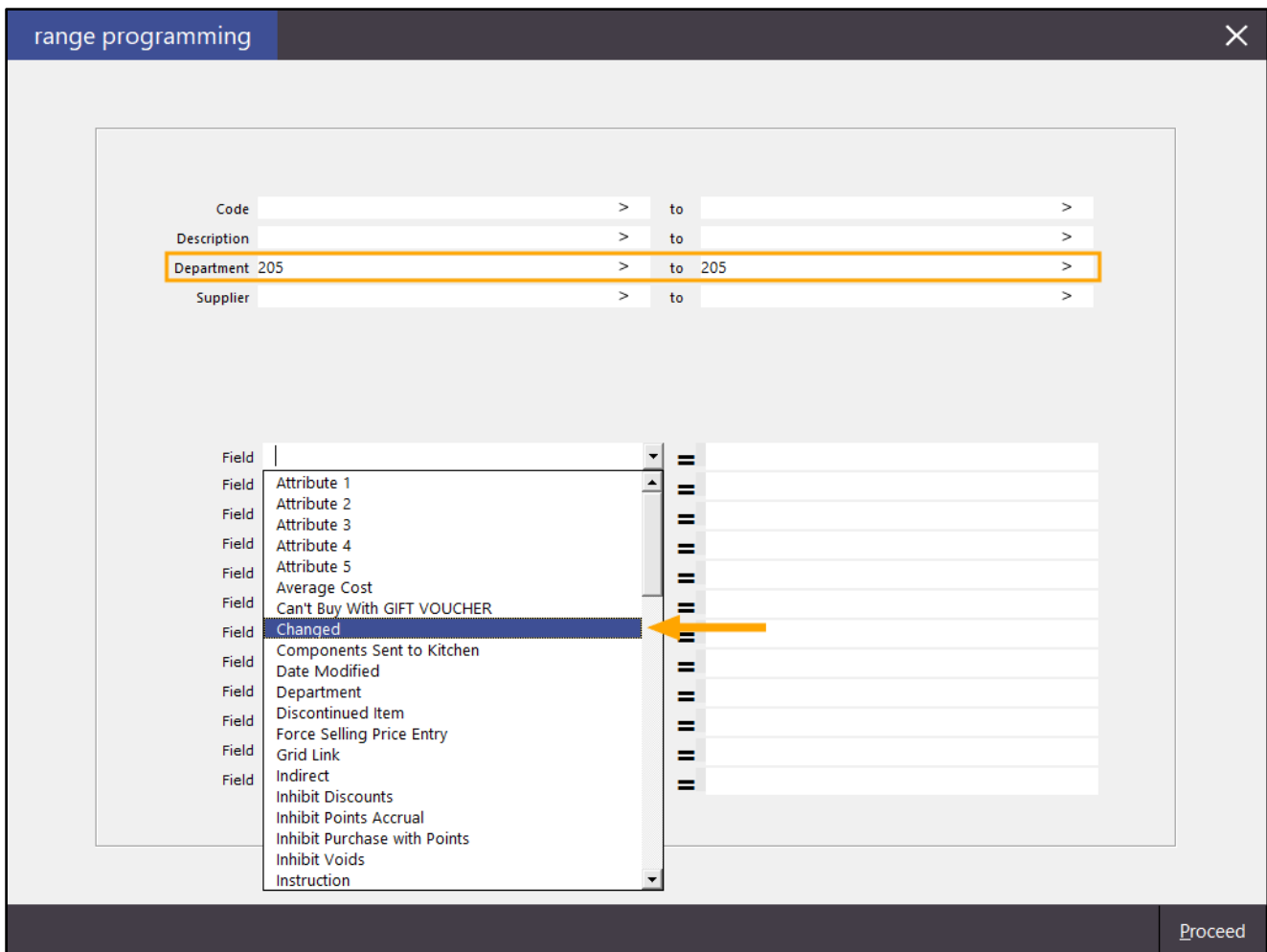
This can be useful in cases where you are performing a range of changes to Stock Items, but then want to disable the Changed flag for those items. In the same way, you may want to manually enable the Changed flag for a range of items and those items which contain an enabled changed flag can then have labels generated/printed.

To use this function, go to: Utilities > Range Programming > Stock Items

Enter the Stock Item Range that you want to apply this change to by entering value(s) into the Code/Description/Department/Supplier fields.

For the purpose of demonstrating this function, we will use the Demo Database and will set the Department to 205 (Soft Drinks).

Then from any of the twelve available Fields, select the “Changed” option.



# idealpos Update History

[Return to top](#)

Once "Changed" has been selected, a blank checkbox field will appear to the right of the "=" symbol. To clear the Changed field so that the Stock Items are marked as unchanged, leave the checkbox blank/unchecked as per the below example:

The screenshot shows a window titled "range programming" with a close button in the top right corner. The main content area contains a search form with the following fields:

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

Below the search form is a table with 13 rows. The first row has the word "Changed" in the first column, a dropdown arrow in the second column, an equals sign "=" in the third column, and a blank checkbox in the fourth column. An orange arrow points to this checkbox. The remaining 12 rows have "Field" in the first column, a dropdown arrow in the second column, an equals sign "=" in the third column, and a blank checkbox in the fourth column.

At the bottom right of the window is a "Proceed" button.

# idealpos Update History

[Return to top](#)

To set all Stock Items as Changed, enable the checkbox as per the below example:

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

Field	Changed	=	<input checked="" type="checkbox"/>
Field		=	<input type="checkbox"/>
Field		=	<input type="checkbox"/>
Field		=	<input type="checkbox"/>
Field		=	<input type="checkbox"/>
Field		=	<input type="checkbox"/>
Field		=	<input type="checkbox"/>
Field		=	<input type="checkbox"/>
Field		=	<input type="checkbox"/>
Field		=	<input type="checkbox"/>
Field		=	<input type="checkbox"/>
Field		=	<input type="checkbox"/>
Field		=	<input type="checkbox"/>
Field		=	<input type="checkbox"/>

Proceed

To demonstrate this function, we will leave the Changed field enabled along with the Department 205 (Soft Drink) set and will press "Proceed" on the bottom-right corner of the window.

A prompt will appear "Are you sure you wish to proceed?". Press "Yes" to continue.

Are you sure you wish to proceed?

Yes No

After programming has been completed, "Programming Completed" will be displayed. Press "OK" to continue:

Programming Completed.

OK

# idealpos Update History

[Return to top](#)

Close the Range Programming window, then go to: Utilities > Labels

In the Labels window, select the desired label format and enable the tickbox "Modified Stock Items Only".

Finally, press "Add to Grid"

labels

Format  
Stock Item Labels

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

Use Stock Code as Barcode  
 Show Print Dialog Box

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

Save Format As Stock Item Labels

Code > to >  
Scan Code > to >  
Description > to >  
Department > to >  
Indirect    
Quantities Match Stock Levels

Code  
Sort by  Department /Description  
 Description

Quantity 1

# idealpos Update History

[Return to top](#)

Stock Items which had the Changed flag enabled will be added below as per the example shown below. The Preview/Print buttons can be used to preview and print the labels. Note that the behaviour of the Print function can vary depending of the Output To setting.

The screenshot shows the 'labels' application window. On the left is a configuration panel with the following settings:

- Format: Stock Item Labels (with a Delete button)
- Data Type: Stock Items
- Output To: Idealpos A4 Labels
- A4 Printer: SHARP MX-2651 PCL6
- Dimensions: 22 labels (2 x 11) Portrait
- Design: Format 1
- Top Margin: 0, Price Level: 1
- Left Margin: 0
- Start Position: 1
- Barcode Type: Auto (selected), with options for EAN 13, EAN 8, UPCE, UPCA, Code 128, and Code 39.
- Use Stock Code as Barcode:
- Show Print Dialog Box:
- Save Format As: Stock Item Labels

On the right is a list of stock items with columns for Code, Description, and Quantity. The list includes:

Code	Description	Quantity
205001	COKE 250ML BTL	1
205002	DIET COKE 250ML BTL	1
205003	COKE ZERO 250ML BTL	1
205004	SPRITE 250ML BTL	1
205005	DRY GINGER 250ML BTL	1
205006	TONIC 250ML BTL	1
205101	COKE CAN	1
205102	DIET COKE CAN	1
205103	COKE ZERO CAN	1
205104	SPRITE CAN	1
205105	LIFT CAN	1
205106	DRY GINGER CAN	1
205107	FANTA CAN	1
205108	TONIC CAN	1
205201	COKE 600ML	1
205202	DIET COKE 600ML	1

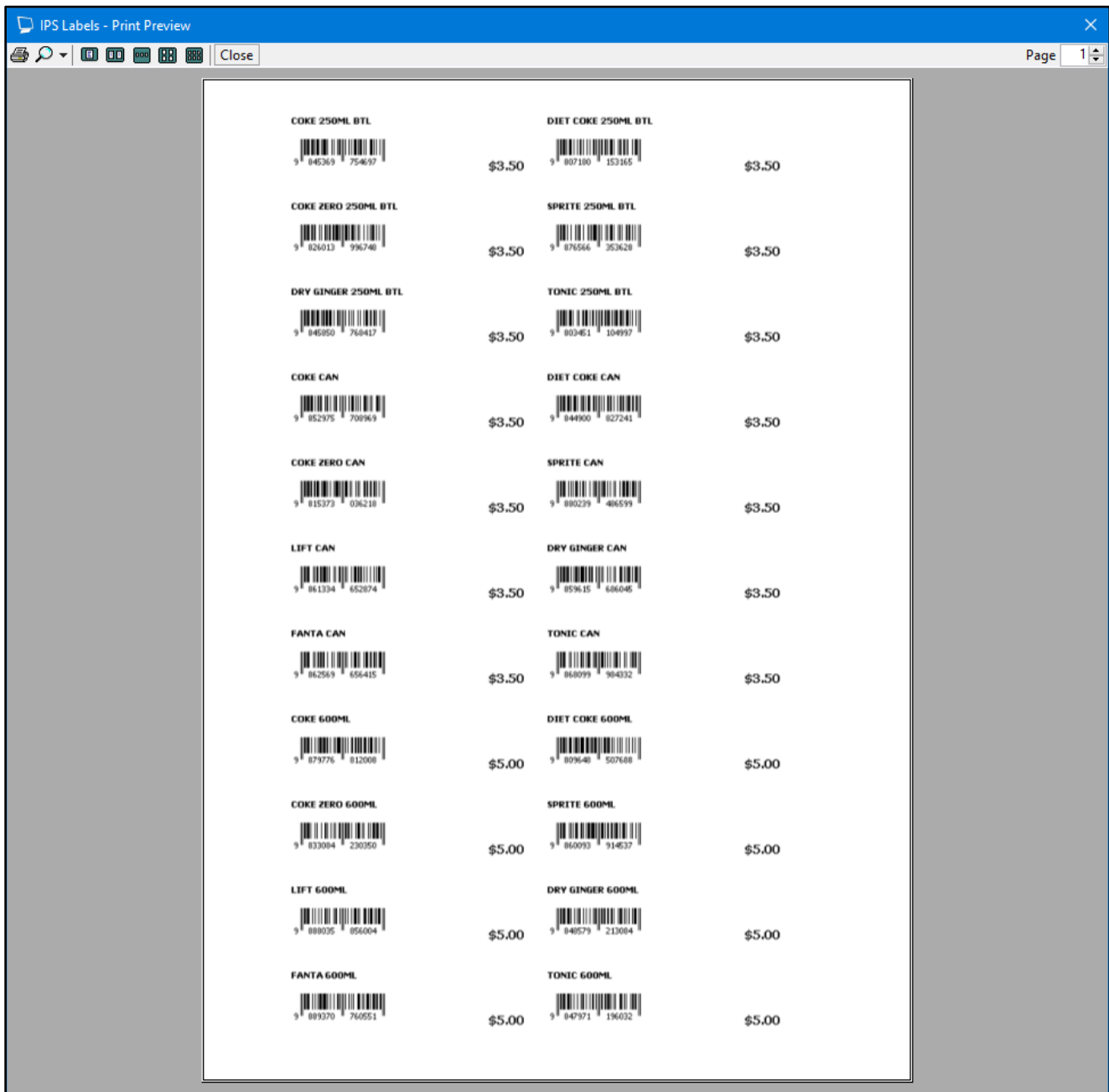
Below the list is a 'Clear' button and a 'Total' of 59. At the bottom right, the 'Preview' and 'Print' buttons are highlighted with a red box and an orange arrow points to them.

# idealpos Update History

[Return to top](#)

When previewing the labels, they will appear in a new window similar to the below.

Labels can also be printed from this window via the Printer button on the top-left corner of the window.



Close the Preview window once labels have been previewed/printed.

The labels window may be minimised within the Idealpos window as per the below example:

If this occurs, double click on the title to display the Labels window.

# idealpos Update History

[Return to top](#)

To Clear the labels, press the "Clear" button.  
The Changed flag will now be set to 0 for the Stock Items which have had labels printed

The screenshot shows the 'labels' application window. On the left, there are configuration options for the label format, including 'Format' (Stock Item Labels), 'Data Type' (Stock Items), 'Output To' (Idealpos A4 Labels), 'A4 Printer' (SHARP MX-2651 PCL6), 'Dimensions' (22 labels (2 x 11) Portrait), 'Design' (Format 1), 'Top Margin' (0), 'Left Margin' (0), 'Start Position' (1), and 'Price Level' (1). There are also checkboxes for 'Use Stock Code as Barcode' and 'Show Print Dialog Box', and a 'Barcode Type' section with radio buttons for Auto, EAN 13, EAN 8, UPCE, UPCA, Code 128, and Code 39.

On the right, there are search filters for Code, Scan Code, Description, and Department, along with an 'Indirect' dropdown. Below these are checkboxes for 'Modified Stock Items Only' and 'Quantities Match Stock Levels', and a 'Quantity' field set to 1. There are also 'Sort by' options (Code, Department /Description, Description) and buttons for 'Multi Select' and 'Add to Grid'.

The main area displays a table of stock items with columns for Code, Description, and Quantity. The items listed are:

Code	Description	Quantity
205001	COKE 250ML BTL	1
205002	DIET COKE 250ML BTL	1
205003	COKE ZERO 250ML BTL	1
205004	SPRITE 250ML BTL	1
205005	DRY GINGER 250ML BTL	1
205006	TONIC 250ML BTL	1
205101	COKE CAN	1
205102	DIET COKE CAN	1
205103	COKE ZERO CAN	1
205104	SPRITE CAN	1
205105	LIFT CAN	1
205106	DRY GINGER CAN	1
205107	FANTA CAN	1
205108	TONIC CAN	1
205201	COKE 600ML	1
205202	DIET COKE 600ML	1

At the bottom of the table, there is a 'Clear' button highlighted with an orange arrow, and a 'Total' of 59. Other buttons include 'Save Format As', 'Preview', and 'Print'.

# idealpos Update History

[Return to top](#)

After pressing Clear, the Labels window will return to a cleared state where no items are shown in the grid.

The screenshot shows the 'labels' window with the following configuration:

- Format:** Stock Item Labels (with a 'Delete' button)
- Data Type:** Stock Items
- Output To:** Idealpos A4 Labels
- A4 Printer:** SHARP MX-2651 PCL6
- Dimensions:** 22 labels (2 x 11) Portrait
- Design:** Format 1
- Top Margin:** 0
- Left Margin:** 0
- Start Position:** 1
- Price Level:** 1
- Barcode Type:** Auto (selected), with options for EAN 13, EAN 8, UPCE, UPCA, Code 128, and Code 39.
- Use Stock Code as Barcode:**
- Show Print Dialog Box:**
- Sort by:** Code (selected), Department /Description, Description
- Quantity:** 1
- Buttons:** Multi Select, Add to Grid, Preview, Print
- Grid:** A table with columns 'Code', 'Description', and 'Quantity'. The grid is currently empty.

You can confirm that the changed flag has been cleared by enabling the "Modified Stock Items Only" checkbox then press "Add to Grid". If no items are added to the grid after pressing "Add to Grid", the Changed flags have been successfully cleared.



## Restaurant and Table Map

### IP-1315 – Table Details screen – Items grouped by Order Time

This function adds an Order Time to the Table Details screen which groups items together using the time that they were saved to the table. When items are saved to a table, they will be grouped based on the time they were saved. If items are saved to the table at different times, multiple groups will appear in the table details screen, each representing the time that the items were saved.

The Order Times can also be clicked on which will select all items that were placed at the selected time.

This function does not need to be configured or enabled as it has been hard-coded so that it will always appear.


To use this function, go to:

POS Screen > Add Items to the sale > Table Map

04 Sep 16:54 Adult ID: 04-Sep-2002  
Jeremy PRICE 1

CAPPUCCINO	1	3.50							
FLAT WHITE	1	3.50	RECEIPT	CLERK	7	8	9	CL	
SHORT BLACK	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		

3x \$10.00



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			CUSTOMERS	SERVICES	ADMIN

# idealpos Update History

[Return to top](#)

Select a Table from the Map > Enter Covers (if prompted) > OK

The screenshot displays a restaurant floor plan interface. A legend in the top right corner defines table statuses: Ready (grey), Seated (red), Ordered (blue), Served (green), Bill Printed (purple), To Clean (yellow), and Reserved (dark green). The floor plan includes a grid of square tables (71-88), a central diamond-shaped table grid (61-65), a bar area (1-7), and a reception desk (2). A pop-up window titled 'Covers - Table 24' is open, showing a numeric keypad with digits 0-9, a 'CL' button, and an 'OK' button. The number '7' is highlighted on the keypad. At the bottom, a row of buttons labeled 'Table Map 4' through 'Table Map 10' is visible, along with a yellow 'Transfer Sale to' button.

# idealpos Update History

[Return to top](#)

Then from the Table Map, double-click on the Table.

Alternatively, select the Table from the Table Map > Press Details from the bottom-left corner of the Table Map

The Table Map Details are displayed which now group items by Order Time:

TABLE 24		18 min		\$10.00				X	
3 Covers - Average \$3.33		Amount	Outstanding	Pay	Seat				
<b>Ordered: 04:43pm</b>						<b>Jeremy</b>			
CAPPUCCINO		3.50	3.50						
FLAT WHITE		3.50	3.50						
SHORT BLACK		3.00	3.00						
		-----	-----						
		10.00	10.00						
						Reorder Items			
						Hide Paid Items			
						Transfer			
						Reprint Kitchen			
						Name			
						Covers			
						Delete			
Full	1/3	1/5	1/7	1/Covers	Amount				
1/2	1/4	1/6	1/8	Quantity	Fraction			Print Bill	Select All
								Pay 0.00	

# idealpos Update History

[Return to top](#)

Additional Items can be saved to the table by repeating the above process.

Every time Items are saved to the table, a new group will be formed which will be reflective of the time they were saved to the table:

TABLE 24		23 min		\$60.00				X		
3 Covers - Average \$20.00		Amount	Outstanding	Pay	Seat					
<b>Ordered: 04:43pm</b>						<b>Jeremy</b>				
CAPPUCCINO		3.50	3.50							
FLAT WHITE		3.50	3.50							
SHORT BLACK		3.00	3.00							
<b>Ordered: 05:07pm</b>						<b>Jeremy</b>				
PASTA		11.00	11.00			Reorder Items				
BEEF		13.00	13.00			Hide Paid Items				
LAMB		12.00	12.00			Transfer				
DUCK		14.00	14.00			Reprint Kitchen				
		-----	-----			Name				
		60.00	60.00			Covers				
						Delete				
Full	1/3	1/5	1/7	1/Covers	Amount			Print Bill	Select All	Pay 0.00
1/2	1/4	1/6	1/8	Quantity	Fraction					

# idealpos Update History

[Return to top](#)

All items that exist within a group can be selected by simply clicking on the time which they're grouped by. Once a selection has been made, the selected items can either be Paid, Deleted, Transferred to another table or Re-Ordered.

For further information about using the Table Details screen, please [click here](#) to visit the topic in the Idealpos User Guide.

TABLE 24		23 min		\$60.00				✕		
3 Covers - Average \$20.00		Amount	Outstanding	Pay	Seat					
<b>Ordered: 04:43pm</b>						<b>Jeremy</b>				
CAPPUCCINO		3.50	3.50							
FLAT WHITE		3.50	3.50							
SHORT BLACK		3.00	3.00							
<b>Ordered: 05:07pm</b>						<b>Jeremy</b>				
PASTA		11.00	11.00	11.00		Reorder Items				
BEEF		13.00	13.00	13.00		Hide Paid Items				
LAMB		12.00	12.00	12.00						
DUCK		14.00	14.00	14.00						
		60.00	60.00	50.00		Transfer				
						Reprint Kitchen				
						Name				
						Covers				
						Delete				
Full	1/3	1/5	1/7	1/Covers	Amount			Print Bill	Select All	Pay 50.00
1/2	1/4	1/6	1/8	Quantity	Fraction					

# idealpos Update History

[Return to top](#)

## IP-2521 – Support for Direct Table Sales from POS Screen

This function adds the ability to open or start Table Sales by simply entering the Table Number and pressing the Table Number button. Any items currently in the sale will be saved to the entered Table Number without having to open the Table Map. This function can either be used before items are added to the sale or it can be used after items have been added to the sale, as outlined in the two bullet points below:

- Method one  
Before adding items to the sale, enter the Table Number > Press Table Map Button > Add Items to sale > Press Table Map button > Enter Covers if prompted > Items are saved to the Table Number
- Method two  
Add Items to the sale > Enter Table Number > Press Table Map button > Enter Covers if prompted > Items are saved to the Table Number

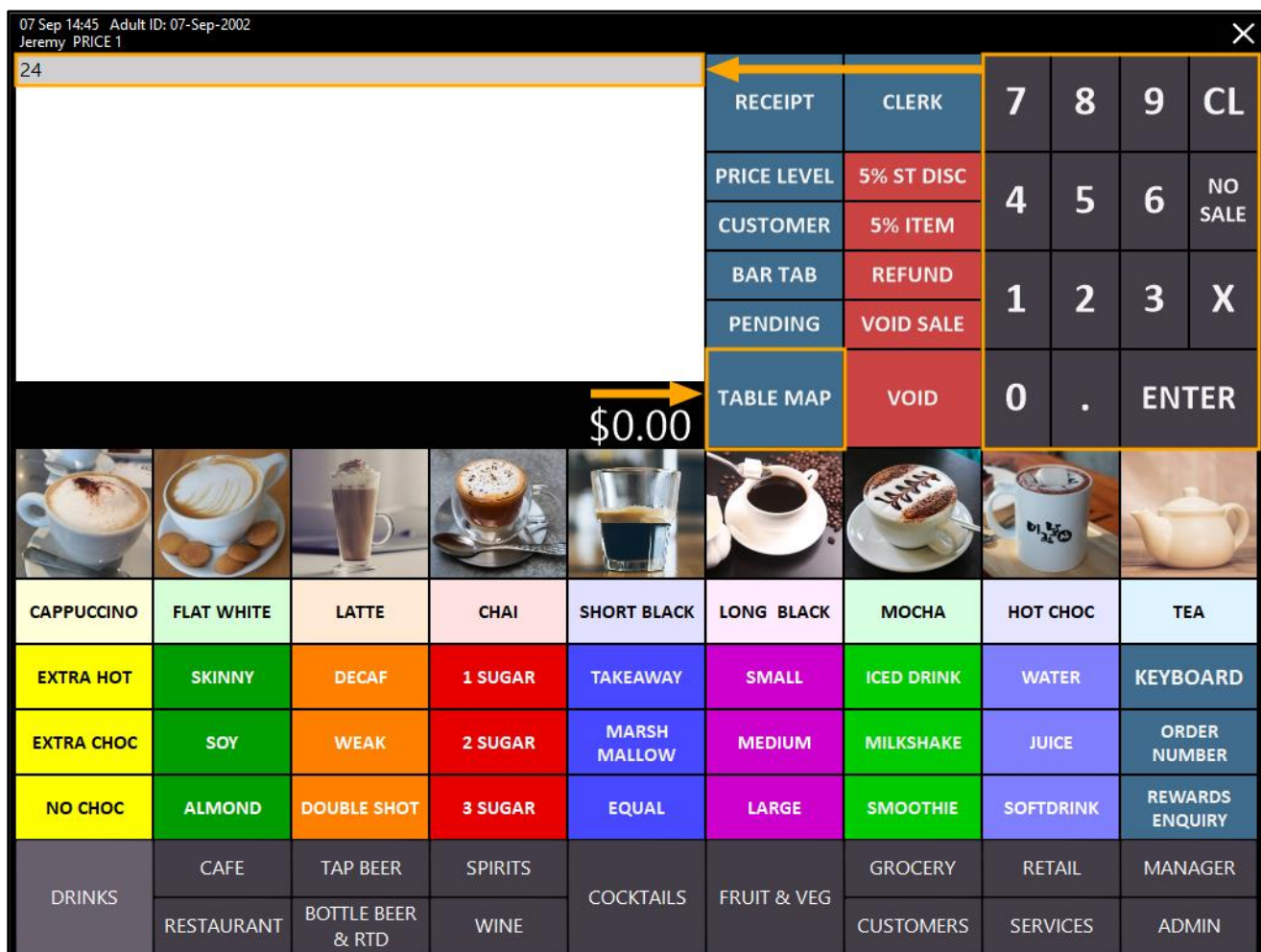
Each of the above methods are outlined below:

To use method one (specifying table number before items are added to the sale), follow the below steps:

From the POS Screen, enter the Table Number you want to save the items to.

The Table Number is shown in the sale screen. If any mistakes are made while entering the Table Number, press the "CL" button on the on-screen numeric keypad.

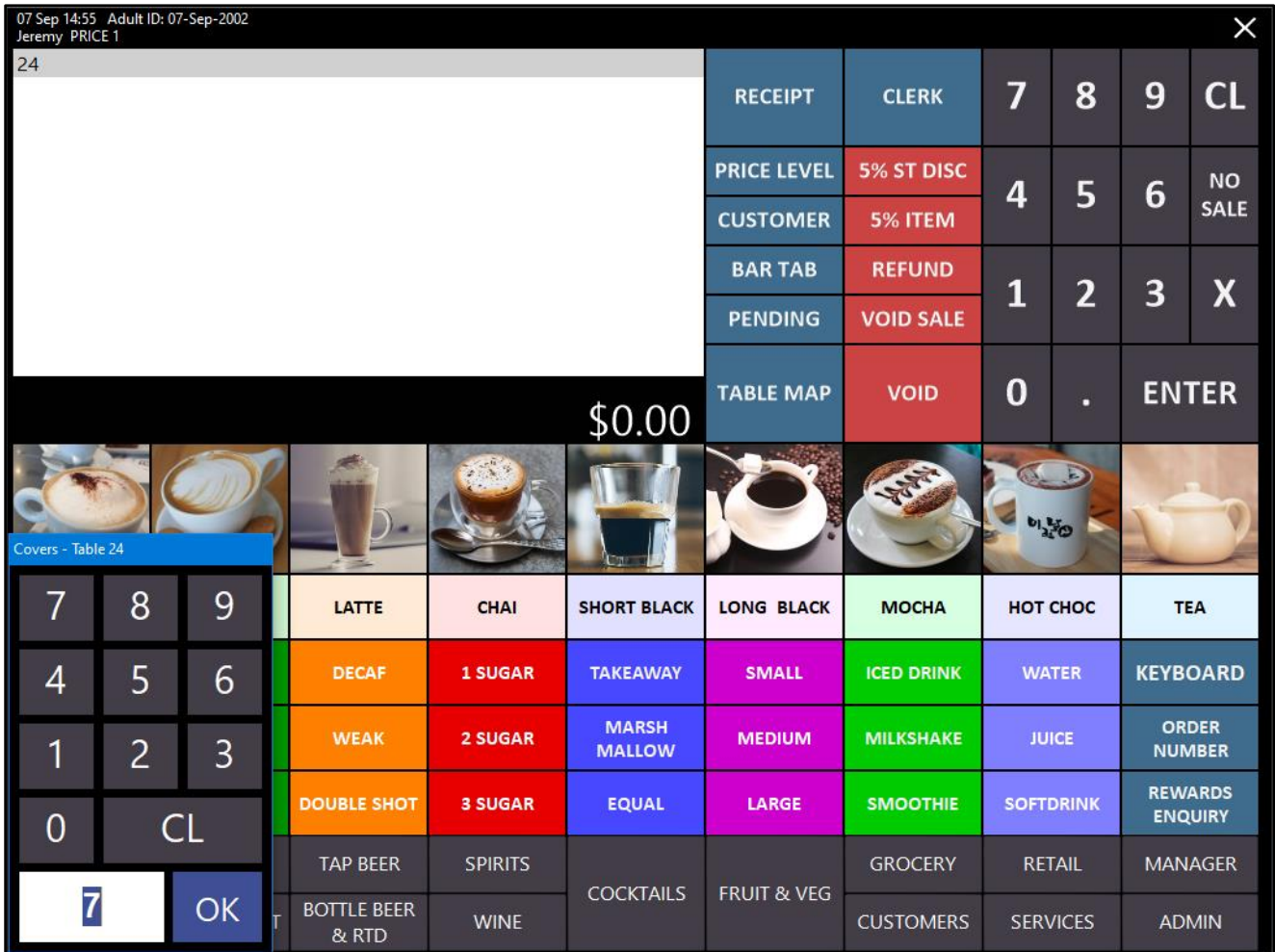
Press the Table Map button:



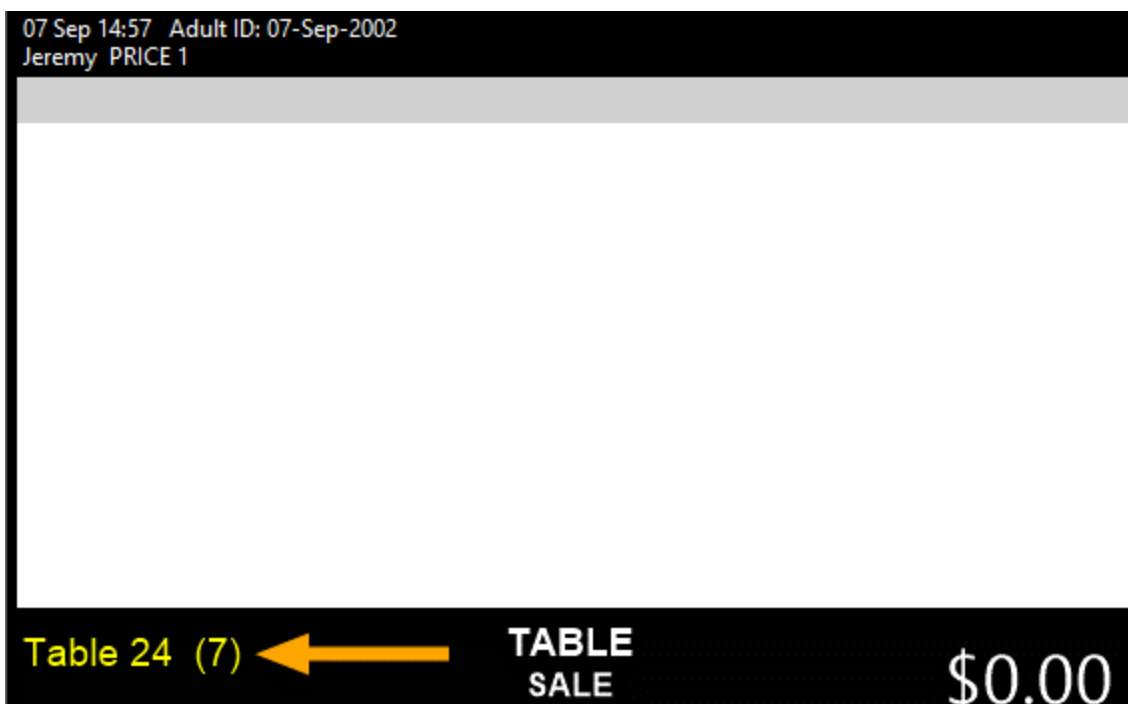
# idealpos Update History

[Return to top](#)

If Prompt for Covers is enabled, a Covers prompt will appear on the bottom-left corner of the POS screen.  
 If Items have already been saved to the entered Table Number, the Covers prompt will not appear.  
 Enter the number of Covers, then press "OK" to continue:



The POS Screen will now show the Table Number along with the number of Covers that were entered:



# idealpos Update History

[Return to top](#)

Now add the required items to the sale.

Once the required items have been added, press the "Table Map" button:










07 Sep 14:58 Adult ID: 07-Sep-2002  
Jeremy PRICE 1

CAPPUCCINO	1	3.50							
FLAT WHITE	1	3.50	RECEIPT	CLERK	7	8	9	CL	
SHORT BLACK	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		

**Table 24 (7)**  
3x

**TABLE SALE**

**\$10.00**

								
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			CUSTOMERS	SERVICES	ADMIN

A confirm prompt may be displayed if enabled in Yes/No Options (Warn when Saving Tables).

Press "Yes" to continue:

Are you sure you wish to save this to Table 24?

Yes

No

Idealpos 7.1 Build 12 - Update History

Page 24 of 52



# idealpos Update History

[Return to top](#)

Idealpos returns to a new sale screen ready for the next sale:



# idealpos Update History










[Return to top](#)

To use method two (specifying table number after items are added to the sale), follow the below steps:  
From the POS Screen, add the items required to the sale:

07 Sep 15:20 Adult ID: 07-Sep-2002  
Jeremy PRICE 1

CAPPUCCINO	1	3.50							
FLAT WHITE	1	3.50							
SHORT BLACK	1	3.00							
			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		

3x \$10.00

								
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			CUSTOMERS	SERVICES	ADMIN

# idealpos Update History

[Return to top](#)

Once the required items have been added to the sale, enter the Table Number.  
 The Table Number entered will appear in the sale screen. If any mistakes are made while entering the Table Number, press the "CL" button on the on-screen numeric keypad and try again.  
 Once the correct Table Number has been entered, press the "Table Map" button:

The screenshot shows the POS interface with the following elements:

- Header:** 07 Sep 15:21 Adult ID: 07-Sep-2002, Jeremy PRICE 1
- Item List:**

CAPPUCCINO	1	3.50
FLAT WHITE	1	3.50
SHORT BLACK	1	3.00
- Table Number:** 24
- Keypad:**

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				
- Table Map Grid:**

3x	\$10.00							
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			CUSTOMERS	SERVICES	ADMIN

A confirm prompt may be displayed if enabled in Yes/No Options (Warn when Saving Tables).  
 Press "Yes" to continue:

Are you sure you wish to save this to Table 24?

# idealpos Update History

[Return to top](#)

If Prompt for Covers is enabled, a Covers prompt will appear on the bottom-left corner of the POS screen.  
 If Items have already been saved to the entered Table Number, the Covers prompt will not appear.  
 Enter the number of Covers, then press "OK" to continue:

07 Sep 15:27 Adult ID: 07-Sep-2002  
 Jeremy PRICE 1

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
24			BAR TAB	REFUND	0	.	ENTER	
			PENDING	VOID SALE				
			TABLE MAP	VOID				

3x \$10.00

Covers - Table 24

7	8	9	LATTE	CHAI	SHORT BLACK	LONG BLACK	MOCHA	HOT CHOC	TEA
4	5	6	DECAF	1 SUGAR	TAKEAWAY	SMALL	ICED DRINK	WATER	KEYBOARD
1	2	3	WEAK	2 SUGAR	MARSH MALLOW	MEDIUM	MILKSHAKE	JUICE	ORDER NUMBER
0	CL		DOUBLE SHOT	3 SUGAR	EQUAL	LARGE	SMOOTHIE	SOFTDRINK	REWARDS ENQUIRY
7	OK		TAP BEER	SPIRITS	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL	MANAGER
			BOTTLE BEER & RTD	WINE			CUSTOMERS	SERVICES	ADMIN

Idealpos returns to a new sale screen ready for the next sale:

07 Sep 15:01 Adult ID: 07-Sep-2002  
 Jeremy PRICE 1

\$0.00

# idealpos Update History

[Return to top](#)

## IP-2679 – Table Details – When splitting by Quantity, display outstanding quantity

This function displays additional details on the Table Details screen when splitting payments by quantity. With this change, Idealpos will display the outstanding or remaining quantity that needs to be paid by the Customer.

This allows the Clerk to inform the customer as to the remaining quantity that is required for payment. This function does not need to be enabled nor does it require additional configuration.

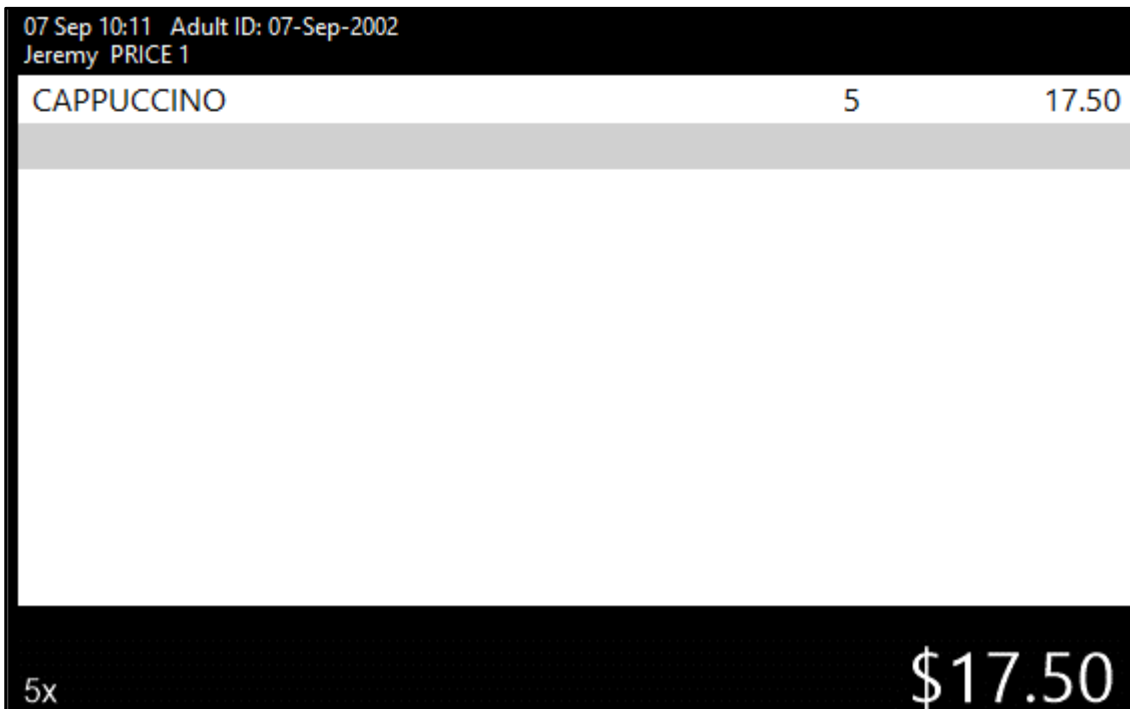
The remaining quantity that requires payment will always be displayed on the Table Details screen when a portion of an item has been paid. Note that the outstanding quantity is displayed as a whole number without decimal places.

E.g. If a table contains 5x Bottle of water valued at \$1.00 each (total \$5.00), should the customer make a 0.50cent payment towards the items, the outstanding quantity will reduce to 4 (as decimal places on the outstanding quantity are not displayed).

To use this function, go to POS Screen, then order at least 2 qty or more of an item.

Enter the QTY to be ordered > Press "X" > Select item from the POS Screen

In this example, we have ordered 5 x Cappuccino:



The screenshot shows a POS interface with a black background and white text. At the top, it displays '07 Sep 10:11 Adult ID: 07-Sep-2002' and 'Jeremy PRICE 1'. Below this is a table with one row: 'CAPPUCCINO' with a quantity of '5' and a price of '17.50'. At the bottom left, it shows '5x' and at the bottom right, it shows '\$17.50'.

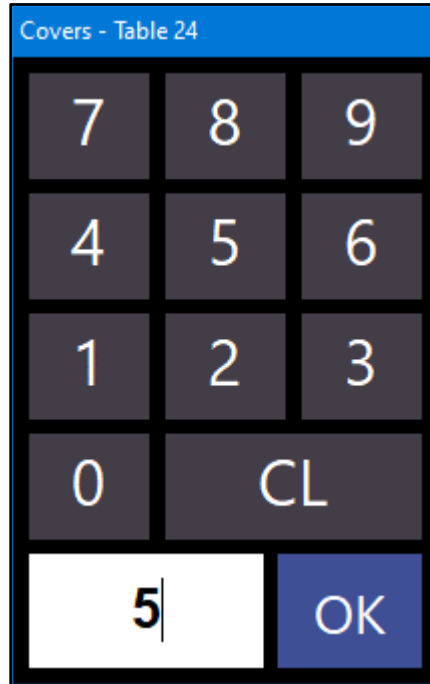
Item	Quantity	Price
CAPPUCCINO	5	17.50

Once the items have been entered into the sale, press the "Table Map" button, then select a Table from the Table Map to save the sale to a Table.

# idealpos Update History

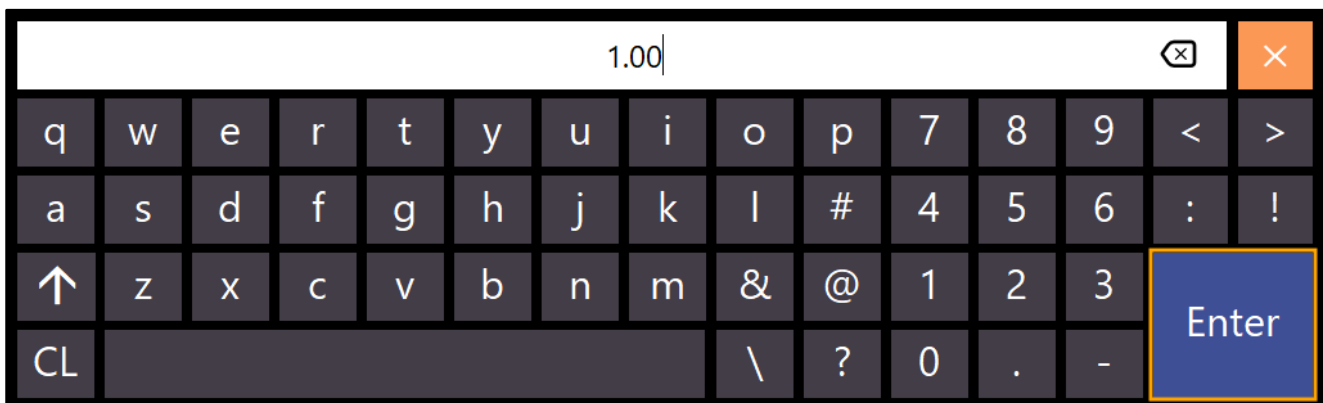
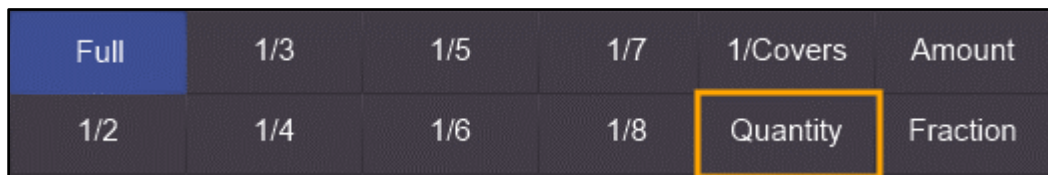
[Return to top](#)

If prompted, enter the number of Covers:



Select the table from the Table Map > Details, or alternatively, double-click on the table from the Table Map to view the Items saved to the table.

Press the "Quantity" button at the bottom of the screen, then enter a Quantity to pay. We'll simply enter a quantity of 1 to pay off a single Cappuccino.



# idealpos Update History

[Return to top](#)

Once the Quantity has been entered, select the item from the Table Details screen, then press "Pay"

TABLE 24		1 min	\$17.50				×	
5 Covers - Average \$3.50		Amount	Outstanding	Pay	Seat			
<b>Ordered: 10:12am</b>								<b>Jeremy</b>
CAPPUCCINO	5	17.50	17.50	3.50			←	
		-----	-----	-----				
		17.50	17.50	3.50				
							Reorder Items	
							Hide Paid Items	
							Transfer	
							Reprint Kitchen	
							Name	
							Covers	
							Delete	
Full	1/3	1/5	1/7	1/Covers	Amount			
1/2	1/4	1/6	1/8	Quantity	Fraction	Print Bill	→ Pay 3.50	

# idealpos Update History

[Return to top](#)

Pay off the item from the Tender screen using the desired tender type.

07 Sep 10:22 Adult ID: 07-Sep-2002  
Jeremy PRICE 1

CAPPUCCINO(part)	1	3.50
------------------	---	------

Balance: \$17.50  
**Table 24 (5)**

**TABLE PAYMENT**


\$3.50

CASH	
EFTPOS	
ACCOUNT	
LAYBY	
GIFT VOUCHER	
CREDIT NOTE	
POINTS	
ROOM CHARGE	
MOTO	

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	

3.50

Balance 3.50







## Stock Purchases

### IP-3550 – Stock Purchases – Ability to Multi-Select items

This function adds the ability to select and add multiple Stock Items to a Purchase Order via the Purchase Order > Stock Items window.

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

Either select an existing Stock Purchase > Modify, or press the “Add” button to create a new Purchase Order or create a new Stock Receive.

Select a Supplier from the Supplier field (this step isn’t necessary, however, by enter in a supplier, you can use the “Supplier Items Only” option when adding items to the order).

The screenshot shows the 'purchase order' form in Idealpos. At the top, the 'Purchase Type' is set to 'Purchase Order' and the 'Location' is 'Location 1'. The 'Supplier' field is highlighted with a yellow box and a multi-select arrow (a small box with a right-pointing arrow). A yellow arrow points from the text 'Supplier' to this field. The 'Purchase Order No' is 'COKE2020083101'. Other fields include 'Order Date', 'Stock Process Date', and 'Due Date', all set to '31/08/2020'. There are 'Enquiry' and 'Prices' buttons. A summary section shows 'Subtotal 0.00', 'Freight 0.00', 'Admin Fee 0.00', and 'Invoice Total 0.00'. At the bottom, there are buttons for 'Generate by Reorder Levels', 'Generate by Supplier', 'Remove Zero Quantity Items', and 'Save'.

Stock Code	Supplier Code	Description	Quantity Ordered	Unit Cost	Disc %	Tax 1	Total	Last Cost
*								

# idealpos Update History

[Return to top](#)

Select a Supplier from the list, then press "OK on the bottom-right corner of the window:

Code	Name	Address	Suburb	Contact	Credit Limit
16	Adam & Eve's Gardenia				0.00
1	Aust Liquor Marketers	111 - 137 Magnesium Drive	Crestmead	Steve Leggars	0.00
13	Ben's Smallgoods			Ben	0.00
4	Bidvest			Charmaine	0.00
18	Bob's Landscapers			Bob	0.00
10	Brannan's Butchery				0.00
5	Campbells Cash & Carry				0.00
14	Campos Coffee				0.00
21	CARLTON UNITED BREWERIES				0.00
8	Chef's Choice				0.00
17	Chino's Imports			Alvin Chinofski	0.00
3	Coca Cola			Anthony Tasker	0.00
2	Dan Murphy's			Heather	0.00
6	Flatters Produce				0.00
12	Independent Fuel Services				0.00
7	KDS Supplies				0.00
9	Master's Meat Supplies				0.00
19	Office Central				0.00
15	Retailers Dreams				0.00
11	Rolls Choice Bakery				0.00
20	Wriddles Uniforms			Terrance Wriddle	0.00

In the Stock Received/Purchase Order, press the dropdown-arrow in the Stock Code field to open the Stock Items window.

Stock Code	Supplier Code	Description	Quantity Ordered	Unit Cost	Disc %	Tax 1	Total	Last Cost
*								

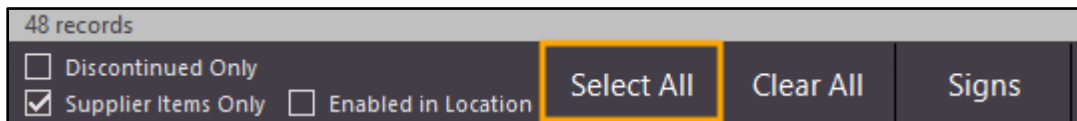
Subtotal: 0.00  
Freight: 0.00  
Admin Fee: 0.00  
Tax: 0.00  
Invoice Total: 0.00

# idealpos Update History

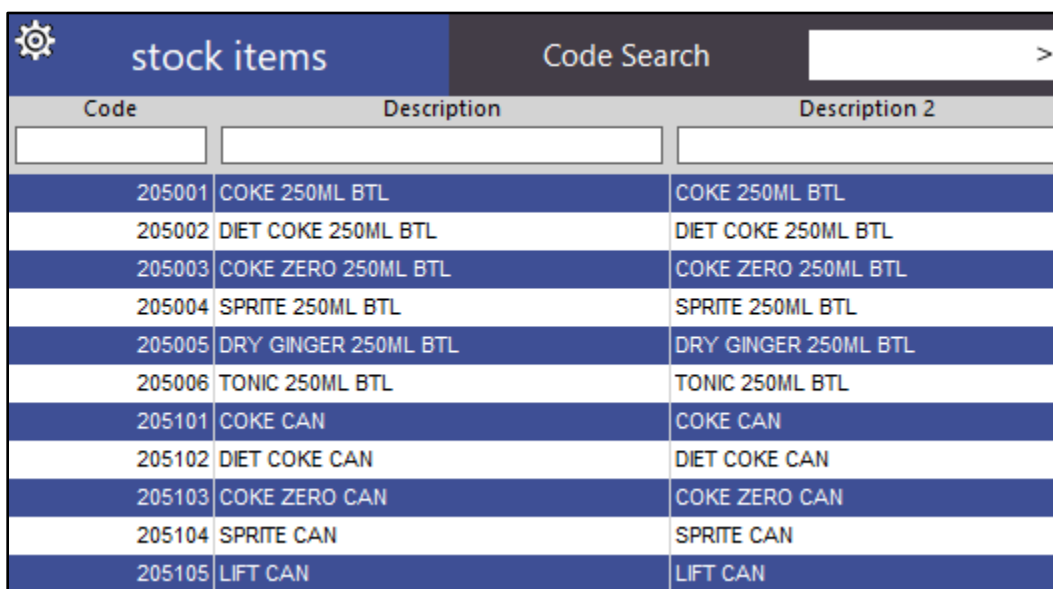
[Return to top](#)

Within the Stock Items window, multiple Stock Items can now be selected. The following methods are available for selecting multiple items at once:

- Select All Items – All Stock Items can be selected via the “Select All” button at the bottom of the window. This button is useful when used in combination with the “Supplier Items Only” checkbox, which can be used to order all items from the selected supplier. This button can also be used when filtering the Stock Items screen to Select All Items shown using the current filter.



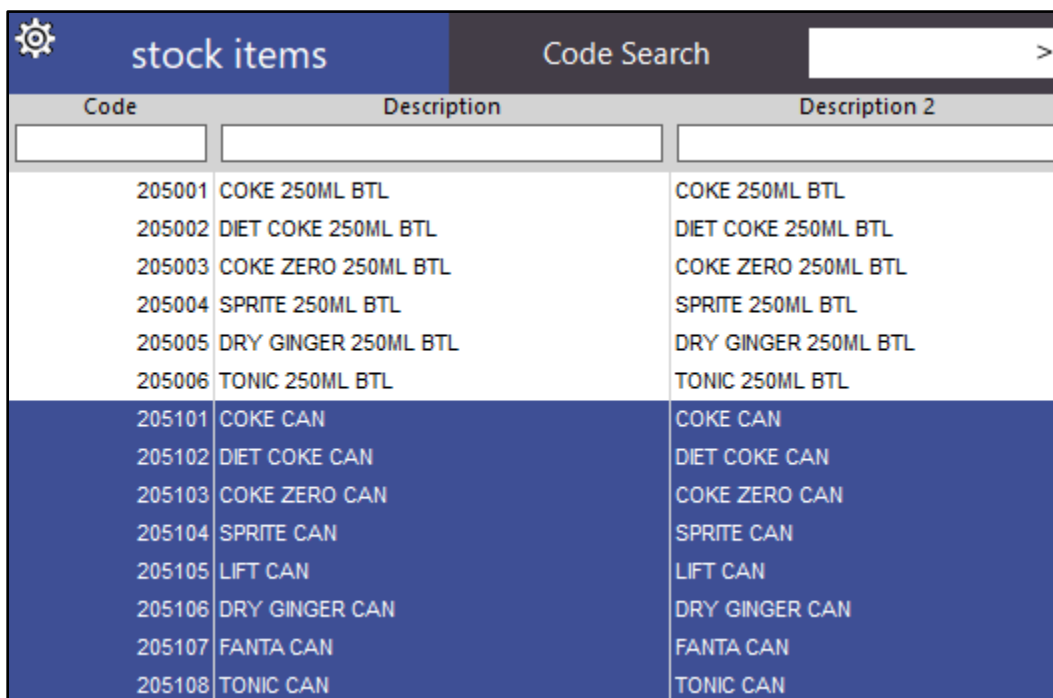
- Select multiple individual items – Multiple individual items can be selected by holding down the CTRL button on your keyboard and clicking on each Stock Item that is required. The items clicked will be highlighted.



A screenshot of the 'stock items' window showing a list of items. The table has three columns: 'Code', 'Description', and 'Description 2'. The rows are highlighted in alternating blue and white colors.

Code	Description	Description 2
205001	COKE 250ML BTL	COKE 250ML BTL
205002	DIET COKE 250ML BTL	DIET COKE 250ML BTL
205003	COKE ZERO 250ML BTL	COKE ZERO 250ML BTL
205004	SPRITE 250ML BTL	SPRITE 250ML BTL
205005	DRY GINGER 250ML BTL	DRY GINGER 250ML BTL
205006	TONIC 250ML BTL	TONIC 250ML BTL
205101	COKE CAN	COKE CAN
205102	DIET COKE CAN	DIET COKE CAN
205103	COKE ZERO CAN	COKE ZERO CAN
205104	SPRITE CAN	SPRITE CAN
205105	LIFT CAN	LIFT CAN

- Select a range of items – A Range of items can be selected all at once. First, click on the first item in the range, then hold down the SHIFT button on your keyboard and press the last item. The first and last items clicked, as well as items in between will be selected.



A screenshot of the 'stock items' window showing a list of items. The table has three columns: 'Code', 'Description', and 'Description 2'. The rows from 205101 to 205108 are highlighted in blue, indicating they are selected.

Code	Description	Description 2
205001	COKE 250ML BTL	COKE 250ML BTL
205002	DIET COKE 250ML BTL	DIET COKE 250ML BTL
205003	COKE ZERO 250ML BTL	COKE ZERO 250ML BTL
205004	SPRITE 250ML BTL	SPRITE 250ML BTL
205005	DRY GINGER 250ML BTL	DRY GINGER 250ML BTL
205006	TONIC 250ML BTL	TONIC 250ML BTL
205101	COKE CAN	COKE CAN
205102	DIET COKE CAN	DIET COKE CAN
205103	COKE ZERO CAN	COKE ZERO CAN
205104	SPRITE CAN	SPRITE CAN
205105	LIFT CAN	LIFT CAN
205106	DRY GINGER CAN	DRY GINGER CAN
205107	FANTA CAN	FANTA CAN
205108	TONIC CAN	TONIC CAN

# idealpos Update History

[Return to top](#)

To demonstrate this function, we will use the "Supplier Items Only" checkbox together with the "Select All" button as per the below example.

Enable the "Supplier Items Only" checkbox and press "Select All" button to add all items from the supplier to the order:

Discontinued Only
  **Supplier Items Only**
 Enabled in Location
 Select All
Clear All
Signs
Items Selected : 48

Code	Description	Description 2	Description 3	Department	Plu Code	Scan Code	Standard Cost	Average Cost	Stock Control	Indirect	PRICE 1
205001	COKE 250ML BTL	COKE 250ML BTL	COKE 250ML BTL	SOFT DRINK	0	9845389754697	0.94	0.94	Yes	No	3.50
205002	DIET COKE 250ML BTL	DIET COKE 250ML BTL	DIET COKE 250ML BTL	SOFT DRINK	0	9871001531055	0.94	0.94	Yes	No	3.50
205003	COKE ZERO 250ML BTL	COKE ZERO 250ML BTL	COKE ZERO 250ML BTL	SOFT DRINK	0	9820011096748	0.94	0.94	Yes	No	3.50
205004	SPRITE 250ML BTL	SPRITE 250ML BTL	SPRITE 250ML BTL	SOFT DRINK	0	9878568353820	0.94	0.94	Yes	No	3.50
205005	DRY GINGER 250ML BTL	DRY GINGER 250ML BTL	DRY GINGER 250ML BTL	SOFT DRINK	0	9848580768417	0.94	0.94	Yes	No	3.50
205006	TONIC 250ML BTL	TONIC 250ML BTL	TONIC 250ML BTL	SOFT DRINK	0	9802451104997	0.94	0.93	Yes	No	3.50
205101	COKE CAN	COKE CAN	COKE CAN	SOFT DRINK	0	9802970709969	0.94	0.97	Yes	No	3.50
205102	DIET COKE CAN	DIET COKE CAN	DIET COKE CAN	SOFT DRINK	0	9844909022241	0.94	0.94	Yes	No	3.50
205103	COKE ZERO CAN	COKE ZERO CAN	COKE ZERO CAN	SOFT DRINK	0	9815373036210	0.94	0.89	Yes	No	3.50
205104	SPRITE CAN	SPRITE CAN	SPRITE CAN	SOFT DRINK	0	9880229486999	0.94	0.91	Yes	No	3.50
205105	LIFT CAN	LIFT CAN	LIFT CAN	SOFT DRINK	0	9861334652874	0.94	0.92	Yes	No	3.50
205106	DRY GINGER CAN	DRY GINGER CAN	DRY GINGER CAN	SOFT DRINK	0	9829616888045	0.94	0.94	Yes	No	3.50
205107	FANTA CAN	FANTA CAN	FANTA CAN	SOFT DRINK	0	9802098984415	0.94	0.94	Yes	No	3.50
205108	TONIC CAN	TONIC CAN	TONIC CAN	SOFT DRINK	0	986809984332	0.94	0.94	Yes	No	3.50
205201	COKE 600ML	COKE 600ML	COKE 600ML	SOFT DRINK	0	9879776812008	1.13	1.05	Yes	No	5.00
205202	DIET COKE 600ML	DIET COKE 600ML	DIET COKE 600ML	SOFT DRINK	0	909646507688	1.13	1.07	Yes	No	5.00
205203	COKE ZERO 600ML	COKE ZERO 600ML	COKE ZERO 600ML	SOFT DRINK	0	9833084232050	1.13	1.13	Yes	No	5.00
205204	SPRITE 600ML	SPRITE 600ML	SPRITE 600ML	SOFT DRINK	0	9800090914537	1.13	1.13	Yes	No	5.00
205205	LIFT 600ML	LIFT 600ML	LIFT 600ML	SOFT DRINK	0	9840033058804	1.13	1.13	Yes	No	5.00
205206	DRY GINGER 600ML	DRY GINGER 600ML	DRY GINGER 600ML	SOFT DRINK	0	9848570210084	1.13	1.13	Yes	No	5.00
205207	FANTA 600ML	FANTA 600ML	FANTA 600ML	SOFT DRINK	0	9889370768561	1.13	1.13	Yes	No	5.00
205208	TONIC 600ML	TONIC 600ML	TONIC 600ML	SOFT DRINK	0	9847971196032	1.13	1.13	Yes	No	5.00
205301	COKE 1.25L	COKE 1.25L	COKE 1.25L	SOFT DRINK	0	9814990898231	0.75	0.75	Yes	No	2.00
205302	DIET COKE 1.25L	DIET COKE 1.25L	DIET COKE 1.25L	SOFT DRINK	0	9869230378900	0.75	0.75	Yes	No	2.00
205303	COKE ZERO 1.25L	COKE ZERO 1.25L	COKE ZERO 1.25L	SOFT DRINK	0	9878290868795	0.75	0.75	Yes	No	2.00
205304	SPRITE 1.25L	SPRITE 1.25L	SPRITE 1.25L	SOFT DRINK	0	9878953972361	0.75	0.75	Yes	No	2.00
205305	LIFT 1.25L	LIFT 1.25L	LIFT 1.25L	SOFT DRINK	0	9823247413232	0.75	0.75	Yes	No	2.00
205306	DRY GINGER 1.25L	DRY GINGER 1.25L	DRY GINGER 1.25L	SOFT DRINK	0	982162048418	0.75	0.75	Yes	No	2.00
205307	FANTA 1.25L	FANTA 1.25L	FANTA 1.25L	SOFT DRINK	0	9204532417787	0.75	0.75	Yes	No	2.00
205308	TONIC 1.25L	TONIC 1.25L	TONIC 1.25L	SOFT DRINK	0	9879957992543	0.75	0.75	Yes	No	2.00
205309	SODA WATER 1.25L	SODA WATER 1.25L	SODA WATER 1.25L	SOFT DRINK	0	9888478303415	0.63	0.63	Yes	No	1.00
205401	COKE 2L	COKE 2L	COKE 2L	SOFT DRINK	0	9098157684874	0.81	0.81	Yes	No	2.50
205402	DIET COKE 2L	DIET COKE 2L	DIET COKE 2L	SOFT DRINK	0	9885912478340	0.81	0.81	Yes	No	2.50
205403	COKE ZERO 2L	COKE ZERO 2L	COKE ZERO 2L	SOFT DRINK	0	9857732878816	0.81	0.81	Yes	No	2.50
205404	SPRITE 2L	SPRITE 2L	SPRITE 2L	SOFT DRINK	0	9840964095909	0.81	0.81	Yes	No	2.50
205405	LIFT 2L	LIFT 2L	LIFT 2L	SOFT DRINK	0	98814117442979	0.81	0.81	Yes	No	2.50
205406	DRY GINGER 2L	DRY GINGER 2L	DRY GINGER 2L	SOFT DRINK	0	9842200894852	0.81	0.81	Yes	No	2.50
205407	FANTA 2L	FANTA 2L	FANTA 2L	SOFT DRINK	0	9835501150425	0.81	0.81	Yes	No	2.50
205408	TONIC 2L	TONIC 2L	TONIC 2L	SOFT DRINK	0	989323939907	0.81	0.81	Yes	No	2.50
205501	COKE 15L POSTMX	COKE 15L POSTMX	COKE 15L POSTMX	SOFT DRINK	0	285.00	285.00	285.00	Yes	No	0.00
205502	DIET COKE 15L POSTMX	DIET COKE 15L POSTMX	DIET COKE 15L POSTMX	SOFT DRINK	0	285.00	285.00	285.00	Yes	No	0.00
205503	COKE ZERO 15L POSTMX	COKE ZERO 15L POSTMX	COKE ZERO 15L POSTMX	SOFT DRINK	0	285.00	279.49	285.00	Yes	No	0.00
205504	SPRITE 15L POSTMX	SPRITE 15L POSTMX	SPRITE 15L POSTMX	SOFT DRINK	0	285.00	276.63	285.00	Yes	No	0.00
205505	LIFT 15L POSTMX	LIFT 15L POSTMX	LIFT 15L POSTMX	SOFT DRINK	0	285.00	285.00	285.00	Yes	No	0.00
205506	DRY GINGER 15L POSTMX	DRY GINGER 15L POSTMX	DRY GINGER 15L POSTMX	SOFT DRINK	0	145.00	145.00	145.00	Yes	No	0.00
205607	FANTA 15L POSTMX	FANTA 15L POSTMX	FANTA 15L POSTMX	SOFT DRINK	0	285.00	285.00	285.00	Yes	No	0.00
205608	TONIC 15L POSTMX	TONIC 15L POSTMX	TONIC 15L POSTMX	SOFT DRINK	0	145.00	145.00	145.00	Yes	No	0.00

Discontinued Only
  **Supplier Items Only**
 Enabled in Location
 Select All
Clear All
Signs
Items Selected : 48
Next OK

# idealpos Update History

[Return to top](#)

Press OK on the bottom-right corner of the window to add the selected items to the order.  
The selected items will now appear in the Purchase Order or Stock Receive:

purchase order

Purchase Type: Purchase Order | Location: Location 1

✕

---

Supplier: 3 >  
**Coca Cola**

Purchase Order No: COKE2020083101  
 Invoice No:                       
 Details:

Order Date: 31/08/2020 | >>>  
 Stock Process Date: 31/08/2020  
 Due Date: 14/09/2020

Tax Inc

---

Stock Code	Supplier Code	Description	Quantity Ordered	Unit Cost	Disc %	Tax 1	Total	Last Cost
205208		TONIC 600ML	1	1.243	0.00	GST	1.24	<input checked="" type="checkbox"/>
205301		COKE 1.25L	1	0.814	0.00	GST	0.81	<input checked="" type="checkbox"/>
205302		DIET COKE 1.25L	1	0.825	0.00	GST	0.82	<input checked="" type="checkbox"/>
205303		COKE ZERO 1.25L	1	0.825	0.00	GST	0.82	<input checked="" type="checkbox"/>
205304		SPRITE 1.25L	1	0.825	0.00	GST	0.82	<input checked="" type="checkbox"/>
205305		LIFT 1.25L	1	0.825	0.00	GST	0.82	<input checked="" type="checkbox"/>
205306		DRY GINGER 1.25L	1	0.825	0.00	GST	0.82	<input checked="" type="checkbox"/>
205307		FANTA 1.25L	1	0.825	0.00	GST	0.82	<input checked="" type="checkbox"/>
205308		TONIC 1.25L	1	0.8248	0.00	GST	0.82	<input checked="" type="checkbox"/>
205309		SODA WATER 1.25L	1	0.6928	0.00	GST	0.69	<input checked="" type="checkbox"/>
205401		COKE 2L	1	0.891	0.00	GST	0.89	<input checked="" type="checkbox"/>
205402		DIET COKE 2L	1	0.891	0.00	GST	0.89	<input checked="" type="checkbox"/>
205403		COKE ZERO 2L	1	0.891	0.00	GST	0.89	<input checked="" type="checkbox"/>
205404		SPRITE 2L	1	0.891	0.00	GST	0.89	<input checked="" type="checkbox"/>
205405		LIFT 2L	1	0.8907	0.00	GST	0.89	<input checked="" type="checkbox"/>
205406		DRY GINGER 2L	1	0.891	0.00	GST	0.89	<input checked="" type="checkbox"/>
205407		FANTA 2L	1	0.891	0.00	GST	0.89	<input checked="" type="checkbox"/>
205408		TONIC 2L	1	0.891	0.00	GST	0.89	<input checked="" type="checkbox"/>
205501		COKE 15L POSTMIX	1	313.5	0.00	GST	313.50	<input checked="" type="checkbox"/>
205502		DIET COKE 15L POSTMIX	1	313.5	0.00	GST	313.50	<input checked="" type="checkbox"/>
205503		COKE ZERO 15L POSTMIX	1	313.5	0.00	GST	313.50	<input checked="" type="checkbox"/>
205504		SPRITE 15L POSTMIX	1	313.5	0.00	GST	313.50	<input checked="" type="checkbox"/>
205505		LIFT 15L POSTMIX	1	313.5	0.00	GST	313.50	<input checked="" type="checkbox"/>
205506		DRY GINGER 5L POSTMIX	1	159.5	0.00	GST	159.50	<input checked="" type="checkbox"/>
205507		FANTA 15L POSTMIX	1	313.5	0.00	GST	313.50	<input checked="" type="checkbox"/>
205508		TONIC 5L POSTMIX	1	159.5	0.00	GST	159.50	<input checked="" type="checkbox"/>

---

Enquiry | Prices

Sales Quantity: ▼ | Week: ▼

Week 4
Week 3
Week 2
Week 1
This Week

**Subtotal** 2035.18

Auto-Allocate:  GST | Freight: 0.00

Auto-Allocate:  GST | Admin Fee: 0.00

Tax: > 203.52

**Invoice Total** 2238.70

---

Generate by Reorder Levels

Generate by Supplier

Remove Zero Quantity Items

Save

The Invoice Number, Invoice Details and any other required details such as Order Date/Process Date/Due Dates can be filled out and once done, press the "Save" button on the bottom-right corner of the window to save the Purchase Order/Stock Receive.

## IP-3589 – Stock Purchases – Support for receiving Indirect Items

This function adds the ability to receive Indirect Items in Idealpos.

When Indirect Items are added to a Stock Receive or Purchase Order, the Cost price is calculated using the price of the “non-indirect item” which the Indirect Item is linked to.

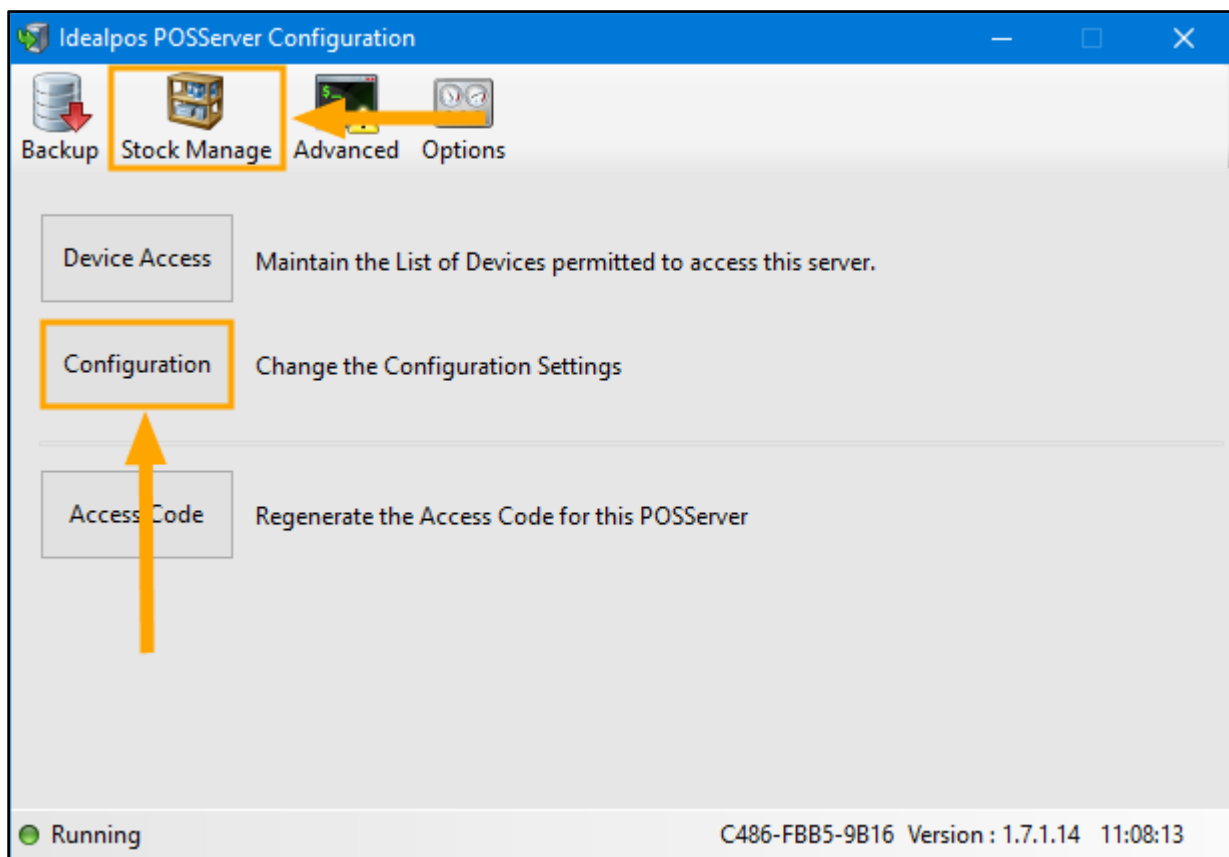
Previous to this change, Indirect Items could be received via the Stock Manage app, however, once the data was imported into Idealpos, the Indirect Items would appear in Stock Received as an “Invalid Item”. In addition, if you previously tried to enter an Indirect Item Stock Code, it could not be added to the Stock Receive or Purchase Order. With the ability to receive Indirect Items in Idealpos being enabled, it is now possible to have those Indirect Items successfully appear in Idealpos when they’ve been received via the Stock Manage app.

If you don’t use the Stock Manage app, you can also add Indirect Items to the Idealpos Stock Receive or Purchase Order screens without Stock Manage.

If you want to add indirect items via Stock Manage, you will need to ensure that the “Indirect” option has been enabled in the Idealpos POSServer Configuration.

To do this, go to: Start > Idealpos Solutions > POSServer > POSServer Configuration

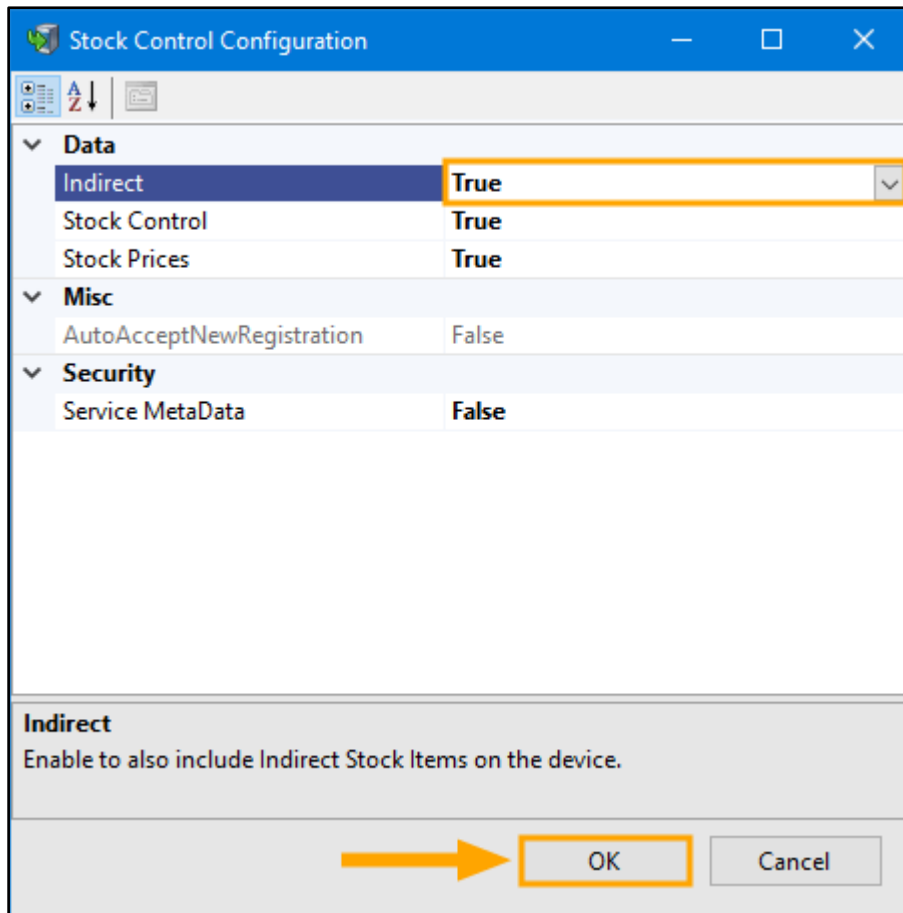
Within the Idealpos POSServer Configuration window, click on the “Stock Manage” option, then press “Configuration” as shown in the below example:



# idealpos Update History

[Return to top](#)

After selecting "Configuration", ensure that "Indirect" is enabled as shown in the example below. If Indirect is set to "False", click into the dropdown box and select "True" from the list, then press "OK" to save changes.



You will need to perform a Download Program Data from the Stock Manage app to download the Indirect Items into the Stock Item data stored in the app.

To do this, open the Stock Manage app on your device, then select "Data Control" and press "Download".

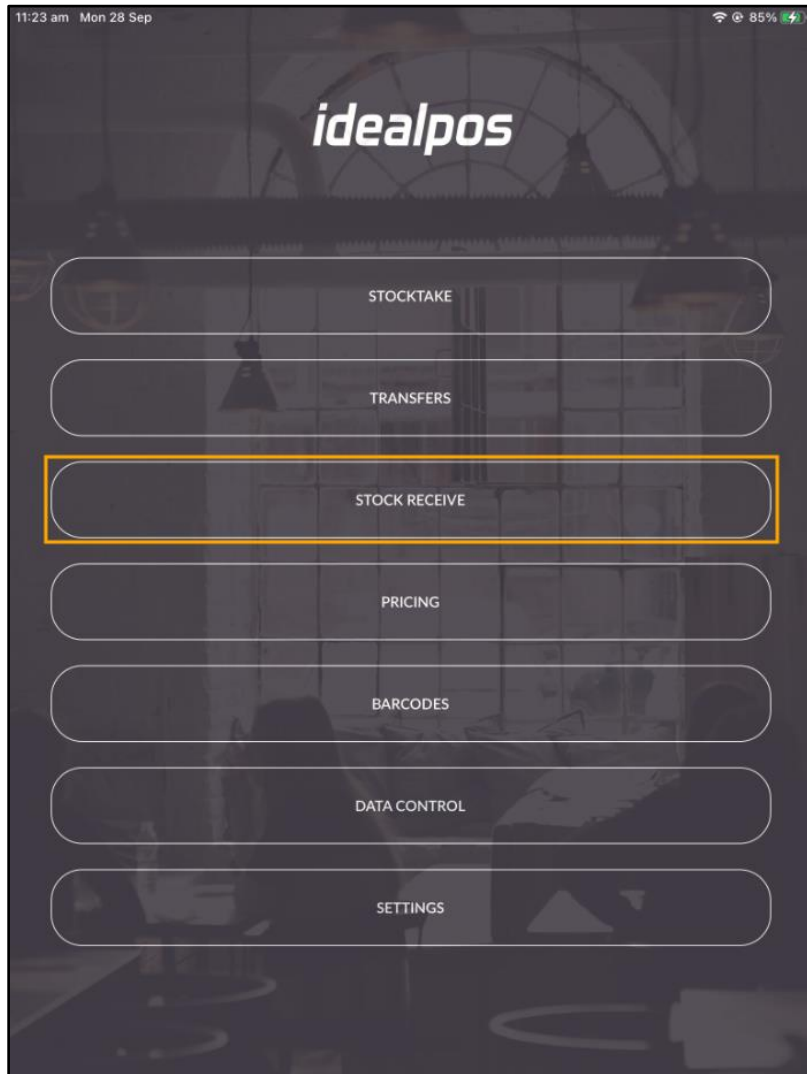
Note that if you have pending data that is waiting to be uploaded, you may see an "Upload" button instead. If required, upload this data, otherwise you may choose the option "Replace existing data".



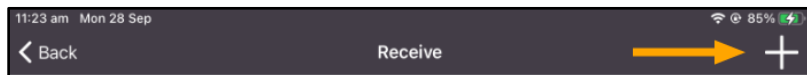
# idealpos Update History

[Return to top](#)

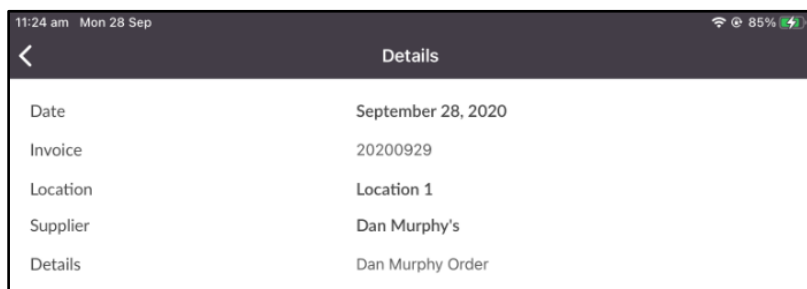
Once the data has been downloaded to the app, you can now add indirect items to a Stock Receive. From the Stock Manage main menu, select "Stock Receive" >



In the Receive Screen, press "+"



In the "Details" screen, fill in the fields as required:



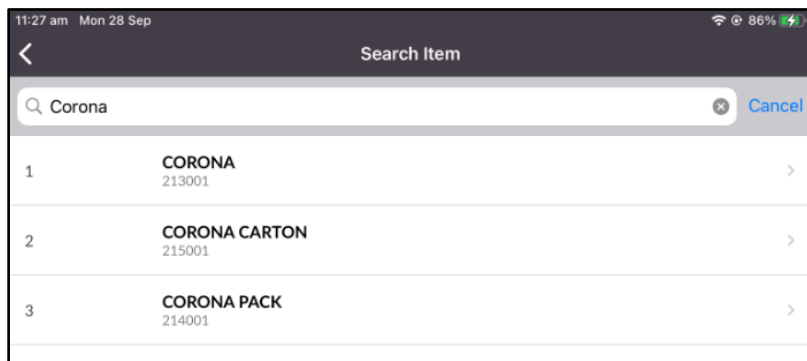
# idealpos Update History

[Return to top](#)

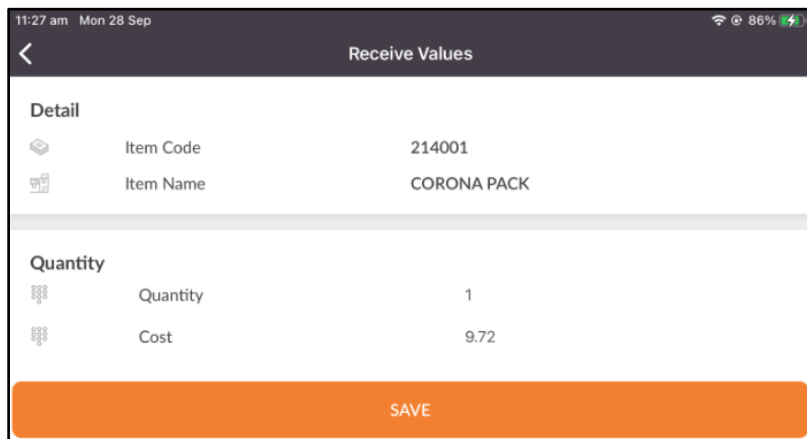
Press the "+" button on the right-hand side to add items to the Stock Receive:



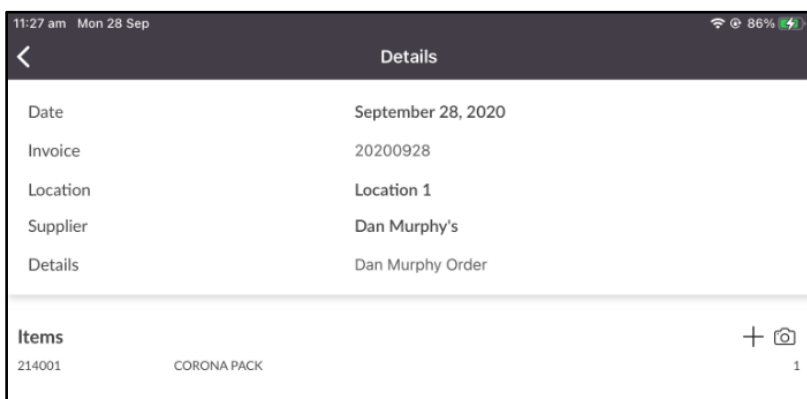
When searching for items, Indirect Items now appear in the search results. Select the Indirect Item. In this example, we'll be selecting "Corona Pack":



Enter a quantity and cost (if the pre-populated cost is incorrect), then press "Save" to add the item to the Stock Receive:



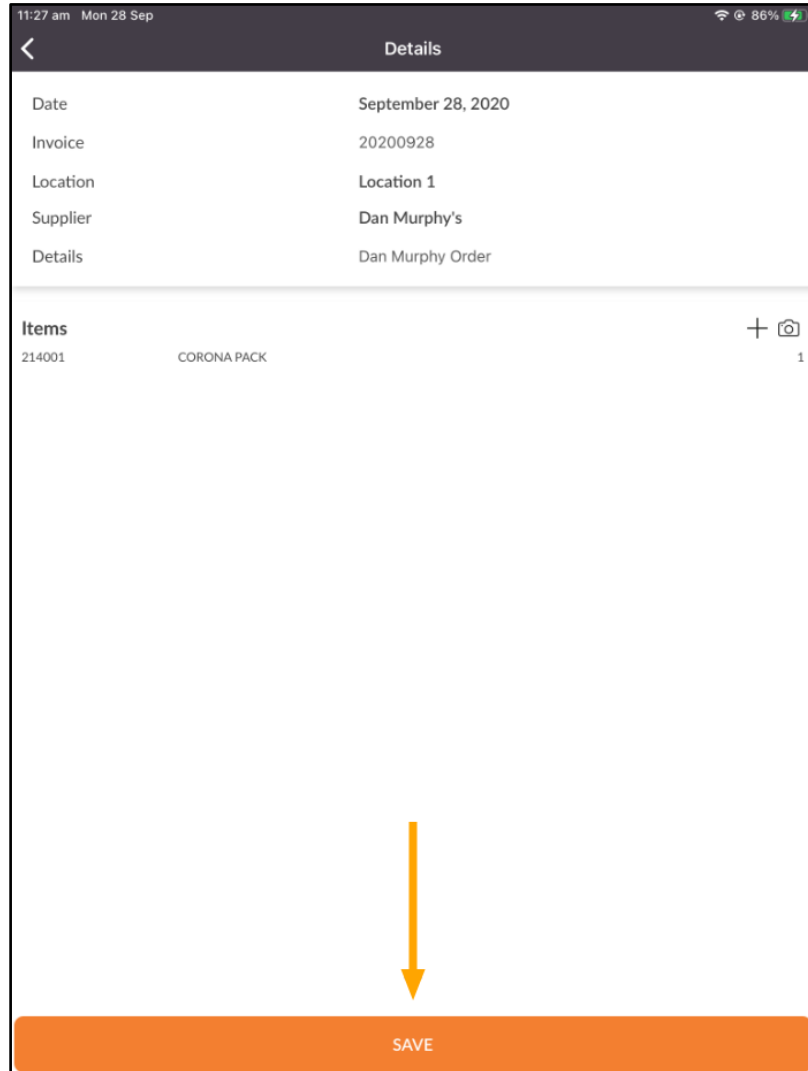
The Indirect Item appears in the Stock Receive:



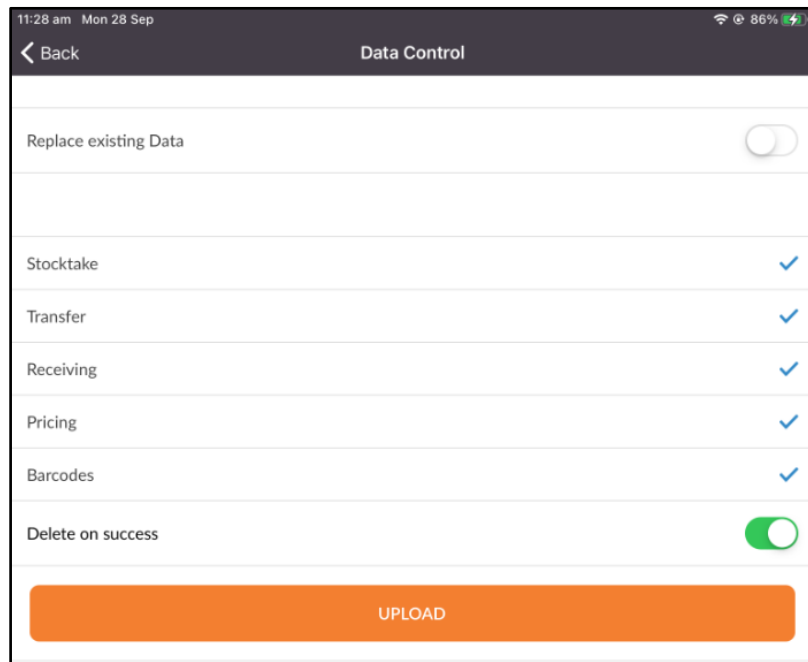
# idealpos Update History

[Return to top](#)

Press the "Save" button at the bottom of the Details screen to save the Stock Receive:



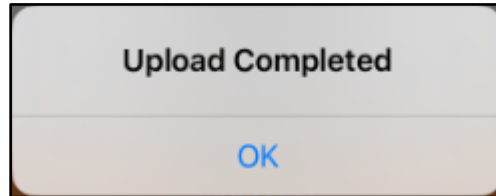
Finally, you can upload the Stock Receive to Idealpos. From the Stock Manage main menu, press "Data Control", then press "Upload".



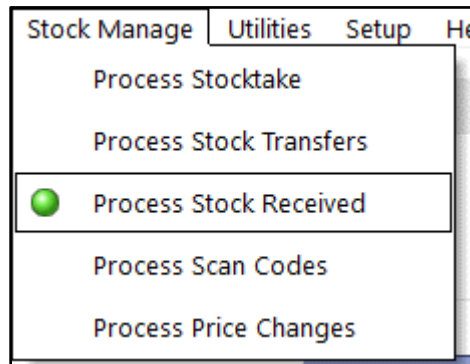
# idealpos Update History

[Return to top](#)

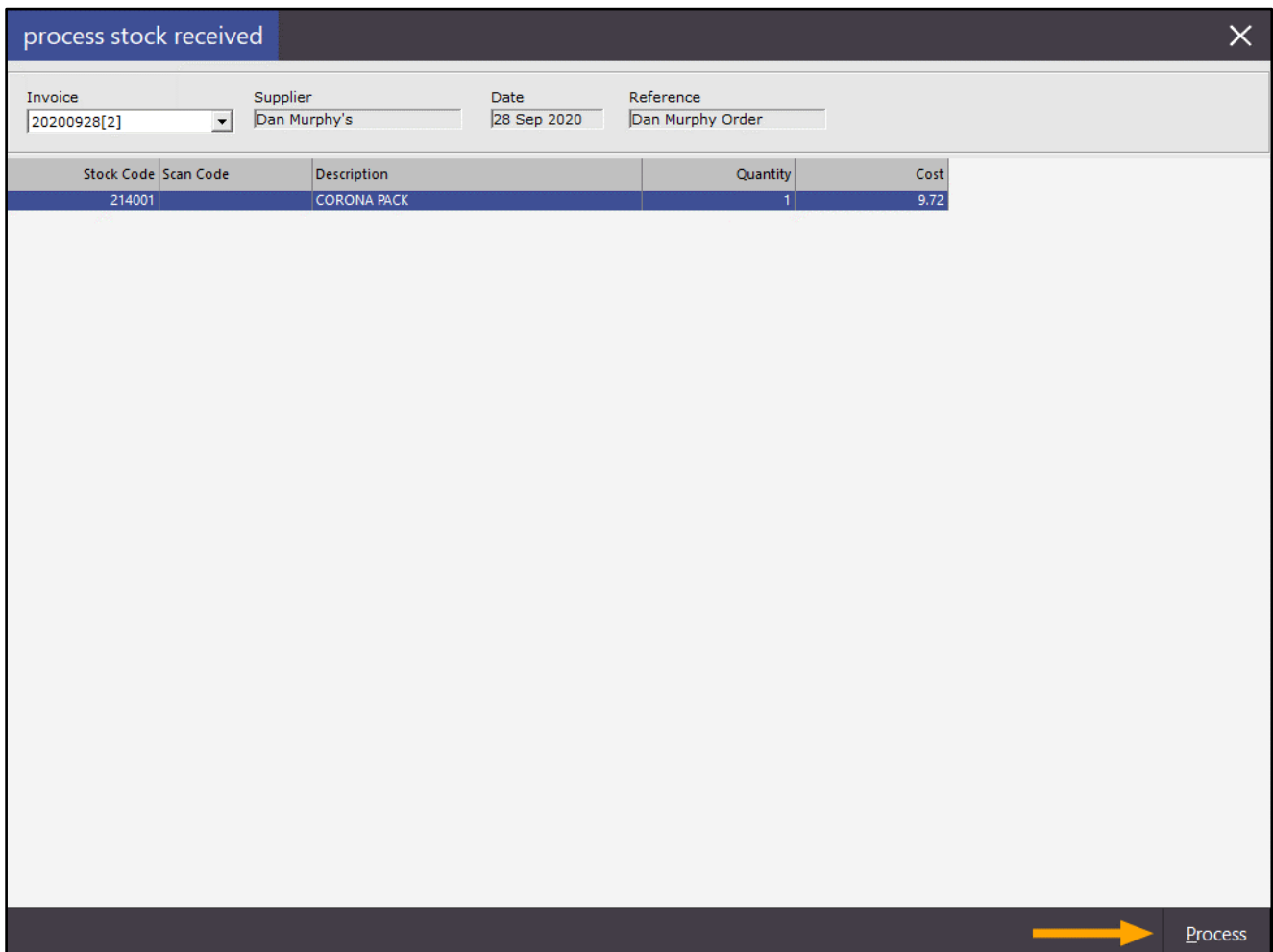
Data Uploaded will be displayed; press "OK" to continue:



From the Idealpos Back-Office, go to: Stock Manage > Process Stock Received:



"Process Stock Received" will be displayed and will contain the items from the Stock Receive. Press "Process" on the bottom-right corner to continue:



# idealpos Update History

[Return to top](#)

The Stock Received window is displayed and the Indirect Item details will also appear.

Prior to this build of Idealpos, the Item Description would previously show "Invalid Item", however, this is now supported as shown in the below example:

stock received
Purchase Type Stock Received
Location Location 1
✕

Supplier 2 >  
**Dan Murphy's**

Purchase Order No   
Invoice No 20200928  
Details

Date of Invoice 28/09/2020  
Stock Process Date 28/09/2020  
Due Date 28/09/2020

>>>  
 Tax Inc

Stock Code	Supplier Code	Description	Quantity	Unit Cost	Disc %	Tax 1	Total	Last Cost
214001		CORONA PACK	1	9.72	0.00	GST	9.72	<input checked="" type="checkbox"/>

**1x CORONA PACK (214001)**  
@ \$9.72 each    2 on Order

Sales Quantity  Week

All Locations

Week 4	Week 3	Week 2	Week 1	This Week
<span style="border: 1px solid black; padding: 0 5px;">0</span>	<span style="border: 1px solid black; padding: 0 5px;">0</span>	<span style="border: 1px solid black; padding: 0 5px;">0</span>	<span style="border: 1px solid black; padding: 0 5px;">0</span>	<span style="border: 1px solid black; padding: 0 5px;">0</span>

**Subtotal** 9.72

Auto-Allocate  GST  Freight 0.00

Auto-Allocate  GST  Admin Fee 0.00

Tax > 0.97

**Invoice Total** 10.69

Save

# idealpos Update History

[Return to top](#)

In addition to using Stock Manage for adding Indirect Items to a Stock Receive, they can also be added manually to a Stock Receive or Purchase Order.

To do this, go to: Idealpos Back-Office > Transactions > Stock Control > Stock Purchases

Within the Stock Purchases window, press the "Add" button on the bottom-left corner of the window.

Fill in the details at the top of the Stock Received/Purchase Order window as required.

Then press the dropdown box in the "Stock Code" field:

A list of Stock Items will be displayed.

In the Stock Items window, you can now search for Stock Items which are Indirect and they will be displayed, making it possible to add them to your Stock Receive or Purchase Order.

Note that Indirect Items will not appear if the "Supplier Items Only" checkbox has been enabled on the bottom-left corner of the Stock Items window.

Code	Description	Kitchen	Department
	Corona		
213001	CORONA	CORONA	SINGLE BEER
214001	CORONA PACK	CORONA PACK	PACK BEER
215001	CORONA CARTON	CORONA CARTON	CARTON BEER
1001101	CORONA STUBBY COOLER	CORONA STUBBY C	MISCELLANOUS

# idealpos Update History

[Return to top](#)

Double-clicking on the "Corona Carton" item will add it to the Stock Receive/Purchase Order:

stock received
Purchase Type Stock Received
Location Location 1
✕

Supplier 2 >  
**Dan Murphy's**

Purchase Order No

Invoice No 2020092805

Details Dan Murphy Order

Date of Invoice 28/09/2020

Stock Process Date 28/09/2020

Due Date 12/10/2020

>>>

Tax Inc

*	Stock Code	Supplier Code	Description	Quantity	Unit Cost	Disc %	Tax 1	Total	Last Cost
*	215001		CORONA CARTON	1	42.768	0.00	GST	42.77	<input checked="" type="checkbox"/>

Enquiry Prices

Sales Quantity  Week

Week 4	Week 3	Week 2	Week 1	This Week
<input style="width: 100%;" type="text" value="0"/>	<input style="width: 100%;" type="text" value="0"/>	<input style="width: 100%;" type="text" value="0"/>	<input style="width: 100%;" type="text" value="0"/>	<input style="width: 100%;" type="text" value="0"/>

<b>Subtotal</b>		38.88
Auto-Allocate <input checked="" type="checkbox"/>	GST <span style="border: 1px solid black; padding: 0 5px;"></span>	Freight <span style="border: 1px solid black; padding: 0 5px;">0.00</span>
Auto-Allocate <input checked="" type="checkbox"/>	GST <span style="border: 1px solid black; padding: 0 5px;"></span>	Admin Fee <span style="border: 1px solid black; padding: 0 5px;">0.00</span>
	Tax <span style="border: 1px solid black; padding: 0 5px;">&gt;</span>	3.89
<b>Invoice Total</b>		<b>42.77</b>

Save

## Suppliers

### IP-3556 – Supplier Payment Due Date – Option for Specific Day of Month

This function adds the ability to set the Supplier Payment Due Date to a Specific Day of Month.

When a Purchase Order is created using a Supplier which has the Payment Due Date set to Specific Day of Month, the Payment Due Date will be automatically set to the specified day of the month for the following month.

E.g. Payment Due Date is set to Day of Month with a value of 15. If a Purchase Order is created on any day in the month of January, the Payment Due Date of the Purchase Order will be set to 15<sup>th</sup> February.

If the Day of Month entered is greater than the number of days in the following month, the Payment Due Date for the Purchase Order will be set to the last day of the following month. E.g. If Payment Due Date is set to 31 Day of Month and a Purchase Order is created in the month of January, the Payment Due Date will be set to 28<sup>th</sup> February (common year) or 29<sup>th</sup> February (leap year).

Access to the original Payment Due Date Days setting is also retained and can continue to be used. The original Payment Due Date Days setting will simply add the number of days in the Payment Due Date Days field to the current date that the Purchase Order was created.

Please note that the Supplier Payment Due Date is only exported and sent to the Xero Accounting package. The Payment Due Date from your Purchase Order will not be sent to any other accounting packages.

To configure and use this function, go to: File > Suppliers > Suppliers

Select a Supplier from the list, then press the "Modify" button on the bottom-right corner of the window.

In the Supplier window, set the Payment Due Date to Day of Month and enter the desired Day of Month that you want to use for your Supplier Payment Due Date. As mentioned above, when Day of Month is used, the Due Date will be set to the entered Day of Month for the next month, meaning that regardless of what date in the month the Purchase Order is created, the Due Date will always be set to the Day of Month entered for the next month.

Press "Save" on the bottom-right corner of the window to save your change and close the Suppliers window.

The screenshot shows the 'suppliers' window with the following fields and settings:

- Supplier Code: 3
- Company Name: Coca Cola
- Address: [Empty]
- Suburb: [Empty]
- State: QLD
- Postcode: [Empty]
- Phone: [Empty]
- Fax: [Empty]
- Mobile: [Empty]
- Contact: [Empty]
- Email: [Empty]
- ABN: 345696880
- Account No: 68114
- Credit Limit: 0.00
- Default Tax Rate: No Default
- Default Tax Inclusive:
- Electronic Invoice Format: (None)
- Default Delivery Method: [Empty]
- Accounting:
- Payment Due Date: 14
- Payment Due Date Options:  Days,  Day of Month

A yellow box highlights the 'Payment Due Date' field and the 'Day of Month' radio button, with a yellow arrow pointing to the 'Day of Month' option.

Save



# idealpos Update History

[Return to top](#)

Close the remaining Supplier window, then go to: Transactions > Stock Control > Stock Purchases > Add  
Set the Purchase Type to either Stock Received or Purchase Order depending on which option is required.  
Then in the Supplier field, press the ">" button to open the Supplier list:

purchase order

Purchase Type: Purchase Order Location: Location 1

Supplier: > Purchase Order No: COKE2020083101 Order Date: 01/09/2020 >>>  
Invoice No: Stock Process Date: 01/09/2020  
Details: Due Date: 01/09/2020  Tax Inc

Stock Code	Supplier Code	Description	Quantity Ordered	Unit Cost	Disc %	Tax 1	Total	Last Cost
*								

Enquiry Prices

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

Auto-Allocate  GST   
Auto-Allocate  GST

Freight: 0.00 Admin Fee: 0.00 Tax >: 0.00

Subtotal: 0.00 Invoice Total: 0.00

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

# idealpos Update History

[Return to top](#)

From the Supplier list, select the Supplier that you set the Payment Due Date to Day of Month, then press "OK" on the bottom-right corner of the window.

The Due Date will be set using the Day of Month setting.

In the below example, the Purchase Order was created on the 1<sup>st</sup> September and the Due Date has been set to the 14<sup>th</sup> October which is the Day of Month for the month after the current Purchase Order.

The screenshot shows the 'purchase order' form in Idealpos. The 'Purchase Type' is 'Purchase Order' and the 'Location' is 'Location 1'. The 'Supplier' is 'Coca Cola' with a code of '3'. The 'Purchase Order No' is 'COKE2020083101'. The 'Order Date' is '01/09/2020' and the 'Stock Process Date' is '01/09/2020'. The 'Due Date' is highlighted in orange and set to '14/10/2020', with a yellow arrow pointing to it from the right. The 'Tax Inc' checkbox is checked. Below the header is a table with columns: Stock Code, Supplier Code, Description, Quantity Ordered, Unit Cost, Disc %, Tax 1, Total, and Last Cost. The table is currently empty. At the bottom right, the 'Subtotal' is 0.00, 'Freight' is 0.00, 'Admin Fee' is 0.00, and 'Invoice Total' is 0.00. The bottom left has buttons for 'Generate by Reorder Levels', 'Generate by Supplier', and 'Remove Zero Quantity Items'. A 'Save' button is at the bottom right.

The remainder of the Purchase Order or Stock Received can be completed as per usual.

For more information about Purchase Orders, click [here](#) to visit the Stock Purchases topic in the Idealpos User Guide.

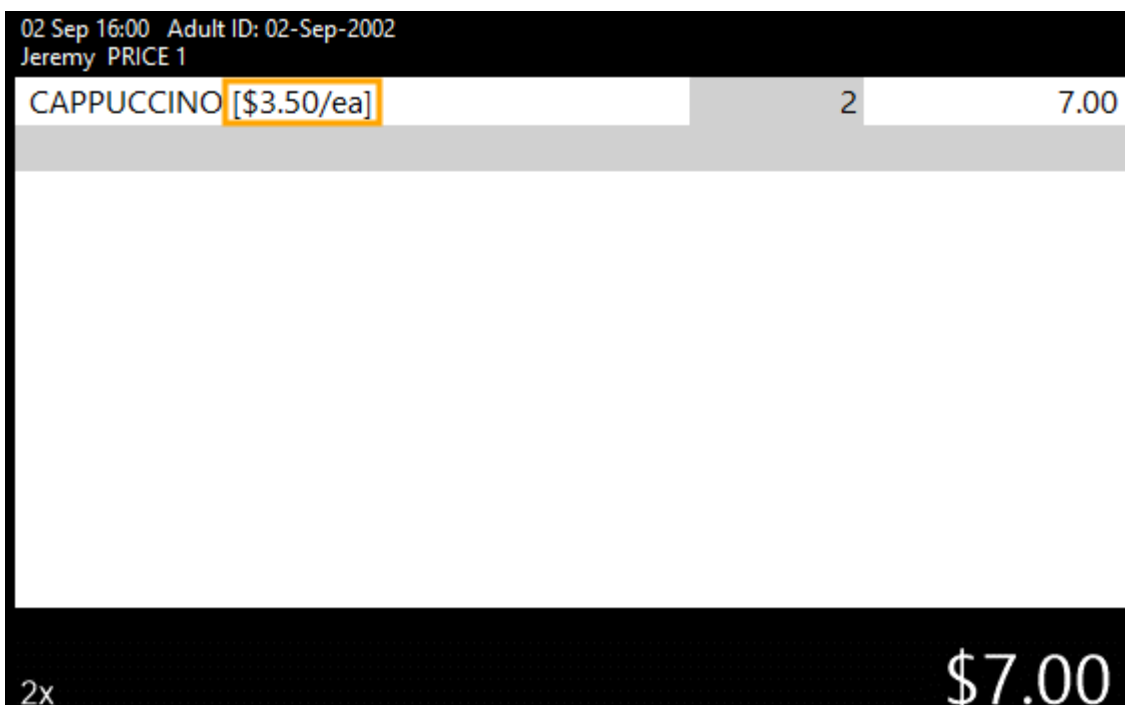
## Yes/No Options

### IP-3596 – Yes/No Option – Show Unit Price of Items on POS Screen

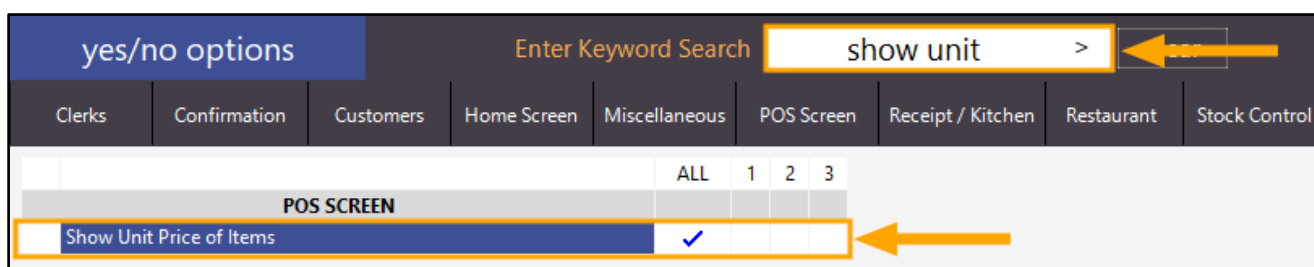
This function adds the ability to control whether or not the Stock Item Unit Price is displayed on the POS Screen when an item is added to the sale in the same way as the Unit Price is printed and shown on the Customer Receipt. The Unit Price is used to convey the price of each unit and is most beneficial when used with Stock Items which have the Non-Accumulating option disabled or when an item is entered using the Quantity button (i.e. multiples of the same Stock Item occupy a single sale line on the POS screen).

By default, this Yes/No option is disabled, however, can be turned on if you require the Unit Price to be displayed on the POS Screen.

An example of the Unit Price being shown on the POS Screen is as follows:



To configure and use this function, go to: Setup > Yes/No Options.  
Enter Keyword Search: "show unit" and enable "Show Unit Price of Items"



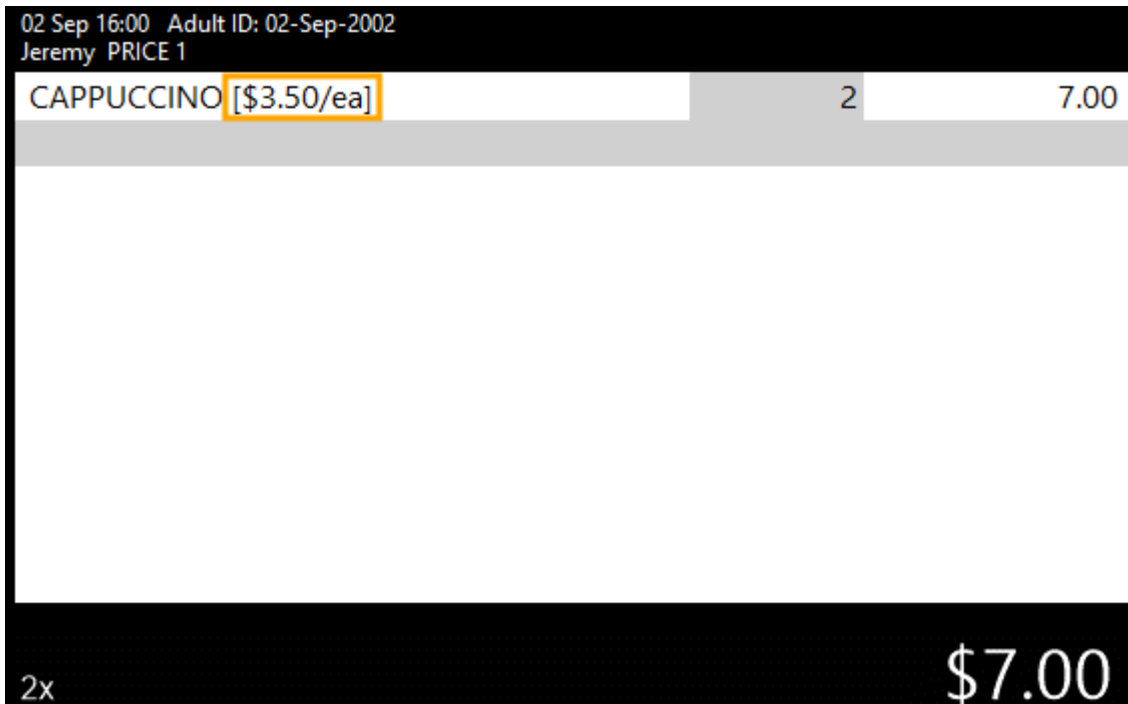
# idealpos Update History

[Return to top](#)

Close the Yes/No Options window, then open the POS Screen.

The Unit Price will appear when adding Stock Items to the sale (either a single item or multiple items).

However, this option provides the most benefit to the Clerk when accumulating items are added to the sale, or when the quantity key is used to enter multiples of the same item.



Note that the Unit Price displayed **does not factor in any discounts which have been applied** and will therefore show the Unit Price pre-discount.

However, when using the Amount Override function to enter a Price for the Stock Item, the Unit Price will be reflective of the overridden price.