idealpos7 Update History

Idealpos 7.1 Build 1

Update Details:

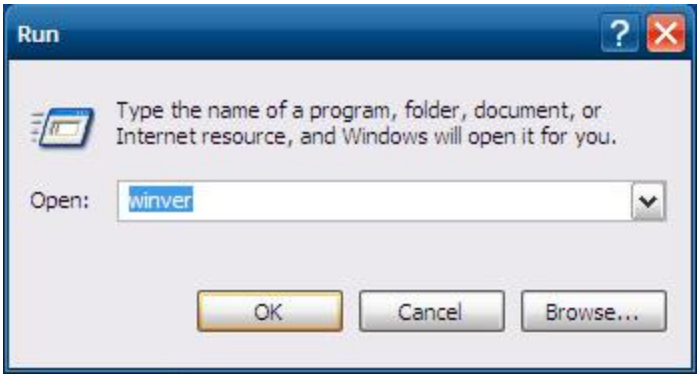
** Enhancements
* [IP-208] - Floating Clerks - Ability for a timeout within active sales
* [IP-209] - Yes/No Option to inhibit returning to Home Screen after each sale
* [IP-1188] - Raffles inhibit redrawing of an already drawn number on multi-draw raffles.
* [IP-1312] - POS will report on mismatched Build Numbers on a network
* [IP-1511] - Pending sales - added Unit Price column
* [IP-2078] - Delete Customer Points when Customer Inactive for a Period
* [IP-2083] - Stock Level Enquiry Function for POS Screen
* [IP-2087] - Yes/No Option - Inhibit selling of items not Enabled in Location
* [IP-2156] - Added new Region setting for India
* [IP-2192] - Gaming - Combine Accounts into One Total excludes zero-value point buckets
* [IP-2195] - User Details Copy function
* [IP-2279] - First American Eftpos Integration
* [IP-2327] - Stock Transfer Reports - User Permission to Show/Hide Cost
* [IP-2341] - Customer Trial Balance - option to Force End of Last Month for Scheduling
* [IP-2346] - Westpac Group Eftpos - POS ID description setting for Pairing
* [IP-2353] - Centralized Customer Account/Layby Transactions retrieved from POSServer
* [IP-2356] - New Yes/No Option - Force Customer Entry On Coupon Redemptions
* [IP-2417] - Table Preview Show Seat Numbers
* [IP-2424] - Table Balance Amount shown on POS Screen
* [IP-2456] - Alternate Codes Modify/Delete User Permissions
* [IP-2477] - "Show Rates next to items on Receipt" option applies to A4 Invoice
* [IP-2485] - Stock Item Sales Report - Group by Sale Type
* [IP-2486] - Stock Item Attribute to Remove Tax on Take-Away Items (Canada/USA)
* [IP-2487] - Option to Show/Hide Customer Phone/Email on Coupons
* [IP-2494] - Increased Limit of number of Standard Promotions allowed
* [IP-2503] - Improved speed for generating Stock Movement Reports
* [IP-2516] - Yes/No Option - Warn when selling Items not enabled in Location
* [IP-2520] - Site Management - filtering Site Items by Scan Code in Stock screen will display Base Item's Scan Code
* [IP-2533] - Price Enquiry Function allows Selling of Item
* [IP-2542] - Layby Descriptor programmable through Function Descriptors
* [IP-2543] - Layby Functions separated from Account Functions
* [IP-2551] - Dashboard - support for 3d Large Pie Chart
* [IP-2574] - Basic Kiosk Functionality
* [IP-2579] - Yes/No Option - Hide Alert Level Warnings
* [IP-2593] - Cash Discount Function
* [IP-2617] - Clerk Buttons can change Clerk for single Sale Line
* [IP-2621] - Alpha-Numeric Tables - support for Ideal Kitchen Monitor
* [IP-2623] - Chinese character support in Stock Manage data uploads
* [IP-2631] - New Login Screen
* [IP-2643] - Larger font for Customer Name on Customer Display
* [IP-2653] - Stock Transfers to Different Items - option to Update Cost based on Source Item
* [IP-2658] - User Permission to Hide Stock Item Sales button on Journal Enquiry function from POS
* [IP-2662] - Send Unprocessed Purchase Orders to Stock Item Labels
* [IP-2668] - POS Button Captions can include Carriage Returns
* [IP-2672] - Ability To Sort Purchase Order By Supplier Code
* [IP-2675] - Wildcard Search Stock Notes as Long Item Descriptions
* [IP-2689] - DOB2 Tag for Stock Item Sales Prompt can handle Specific Date
* [IP-2693] - USA/Canada - Remove Tax based on Customer Type
* [IP-2698] - Gratuity % Functionality
* [IP-2708] - Stock Item Sales Report - Group by Audit
* [IP-2709] - Stock Item Sales Report - Clerk Selection Range
* [IP-2726] - SmartConnect EFTPOS - support for Asynchronous Communications
* [IP-2729] - Canada - "Donut Tax" removes all Tax Rates
* [IP-2734] - Pending Sales report - Includes Total by Sale Type Status
* [IP-2745] - Packet Filtering - Tables option includes Pending Sales packets
* [IP-2752] - MYOB AccountRight - Override IP setting for Desktop Connection

* [IP-2754] - MAXTRIPS tag for Multi-Trip Promotions
* [IP-2764] - POS Description shows on the Reports header

Windows POS Ready 2009 not supported

Please note that Idealpos 7.1 is not supported on Windows POS Ready 2009 systems. Attempting to install it on such systems will result in a non-working installation of Idealpos.

The version of Windows installed on a system can be checked by going to:
Start > Run > Enter "winver" into the run window, then press "OK".



A window will appear and will show the version of Windows that is currently installed on the terminal.
If you see Windows Embedded POSReady 2009, **DO NOT INSTALL IDEALPOS 7.1 ON THE TERMINAL**
You will need to upgrade to a newer version of Windows before installing Idealpos 7.1.

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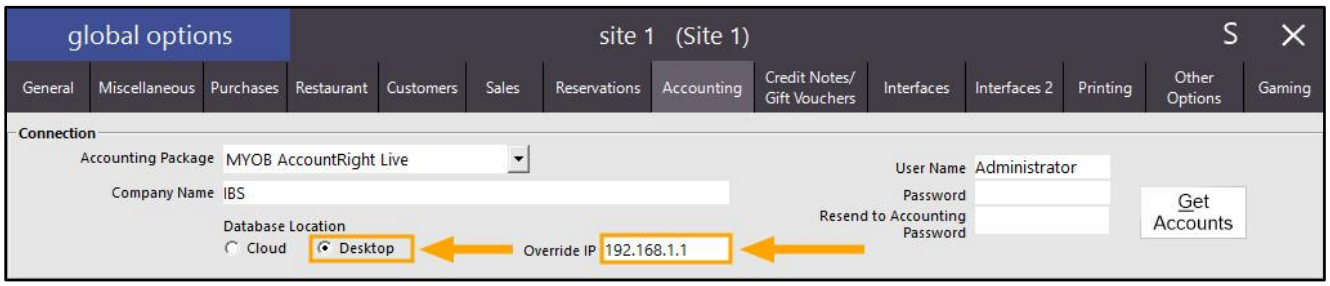
Accounting Interface

MYOB AccountRight Live – Override IP setting for Desktop Connection

This function adds the ability to specify the IP address of the PC which the MYOB AccountRight Live application is installed on when using a Database Location of "Desktop".
This function can be used when the MYOB AccountRight Live application is installed on a system different to the one where Idealpos is installed. When the Override IP field is blank, Idealpos will connect to the MYOB AccountRight Live installation on the local PC. When an IP address is entered into the Override IP field, Idealpos will connect to the MYOB AccountRight Live installation located on the remote PC.

To use this function, go to: Setup > Global Options > Accounting
Ensure that the Accounting Package is set to "MYOB AccountRight Live" and the Database Location is set to Desktop
The Override IP option will be displayed.
Enter the IP address of the system where MYOB AccountRight Live is installed on.
Also ensure that you enter your Company Name, User Name, Password and Resent to Accounting Password.
Finally, press the "Get Accounts" button to retrieve your accounts from MYOB.

The below example shows an Override IP of 192.168.1.1, a User Name of Administrator and blank Passwords.
Ensure that you substitute the details that are relevant to your system configuration.



Back Office

POS will report on mismatched Build Numbers on a network

This function adds the ability for Idealpos to display a prompt which will report when there are mismatched Build Numbers of Idealpos running on a network.
There is no configuration required to enable this feature and the prompt will be displayed automatically in the event that Idealpos detects mismatched Build Numbers running on other terminals configured in Setup > POS Terminals and Setup > Networking. The prompt can also be displayed manually by going to Setup > POS Terminals > Versions

The prompt will only be displayed when the following conditions occur:

- Prompt displayed on systems which are licenced for Back Office and detect other Idealpos systems running mismatched build numbers.
- Prompt will be displayed 10 minutes after starting Idealpos and detecting a mismatched build number
- Once the prompt has appeared and the user has closed the prompt, it will not be displayed again unless Idealpos is restarted

The versions prompt displayed will appear as below and the version numbers displayed in the prompt will be reflective of the versions that were detected:

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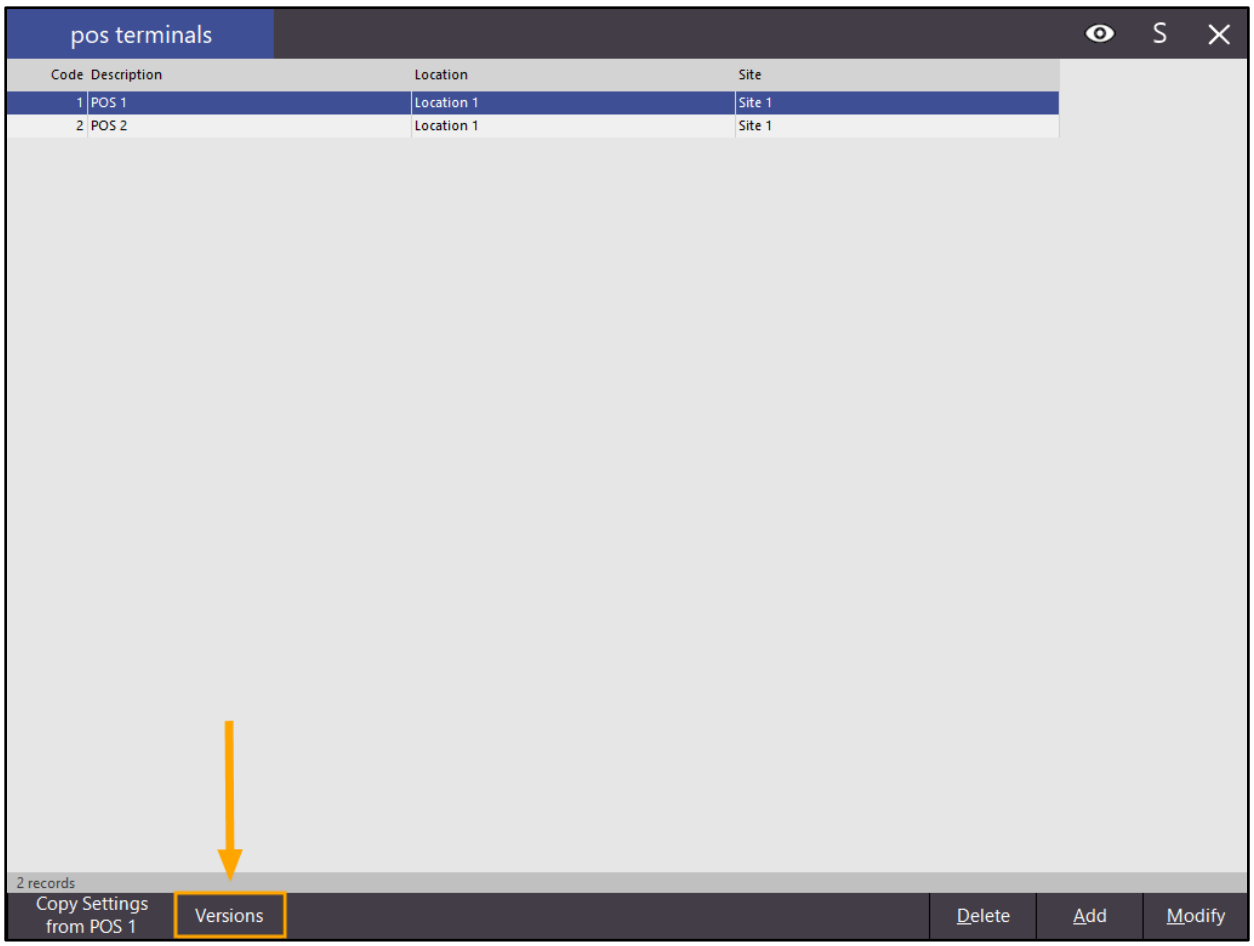
To view the prompt manually, go to Setup > POS Terminals > Versions

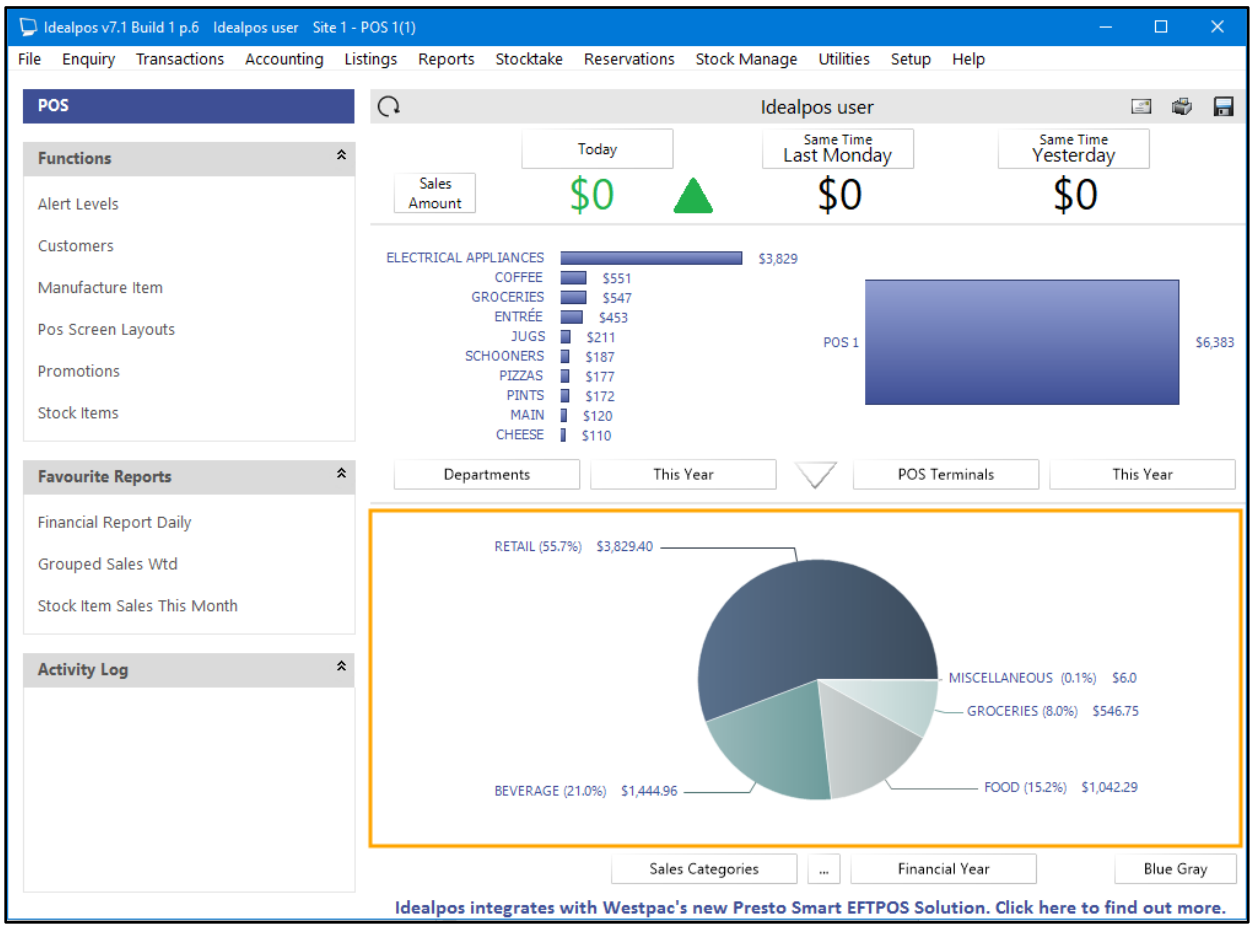


After pressing the “Versions” button, the Versions window will appear as per the example displayed further above.

Dashboard – Support for 3D Large Pie Chart

This function adds the ability to view the Pie Chart that is displayed on the Idealpos Back Office screen as a large 3D Pie Chart. When viewing the graph as a 3D Pie Chart, the chart can dragged/spun around. In addition, when using a mouse with a scroll-wheel, the size of the 3D Pie Chart can be increased/decreased.
This 3D Pie Chart functionality may assist with viewing and representing the data from different perspectives.
In order to view the Pie Chart, the terminal needs to be licenced for Back Office and the Yes/No Option "Show Dashboard" must be enabled for the terminal.

To use this function, go to: Idealpos Back Office screen > Click on the Pie Chart
Click on the Pie Chart as outlined in orange in the below example.



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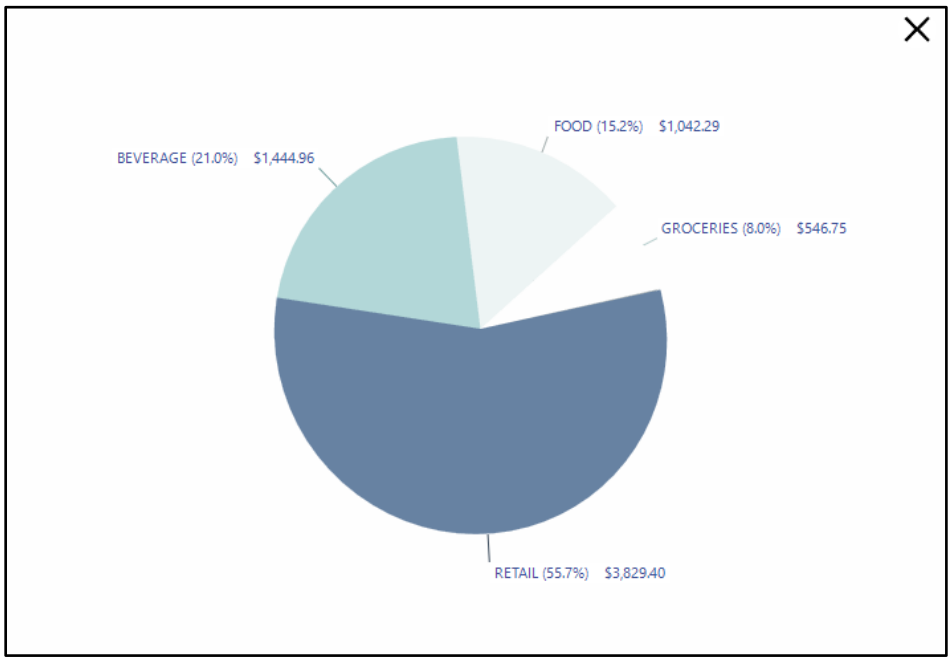
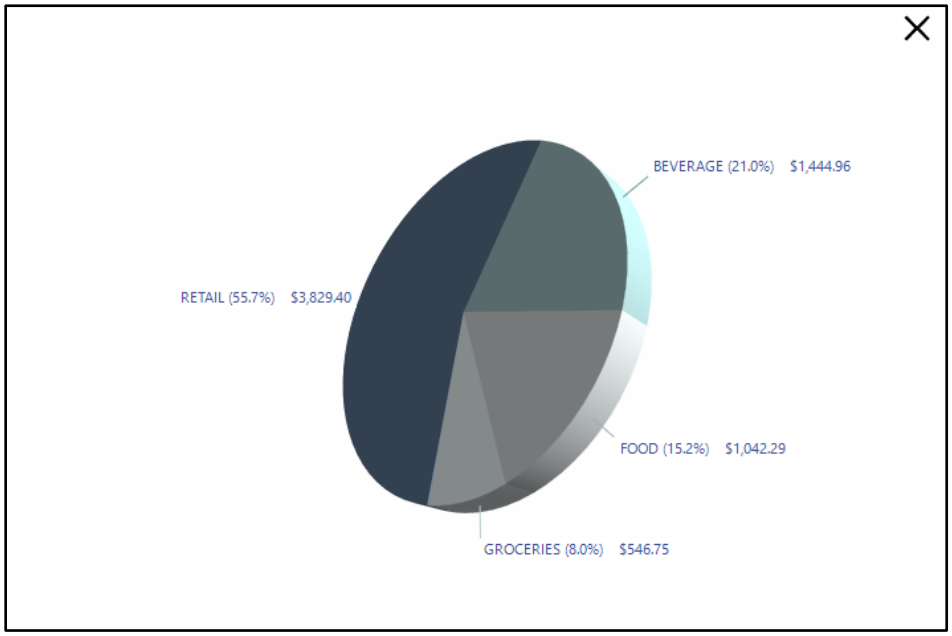
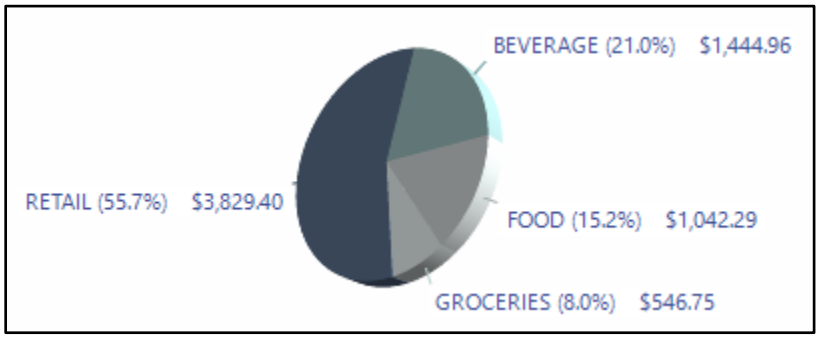
After clicking on the Pie Chart, an enlarged version of the Pie Chart will be displayed.
Note that the enlarged chart might be displayed in 2D view as per the below example:



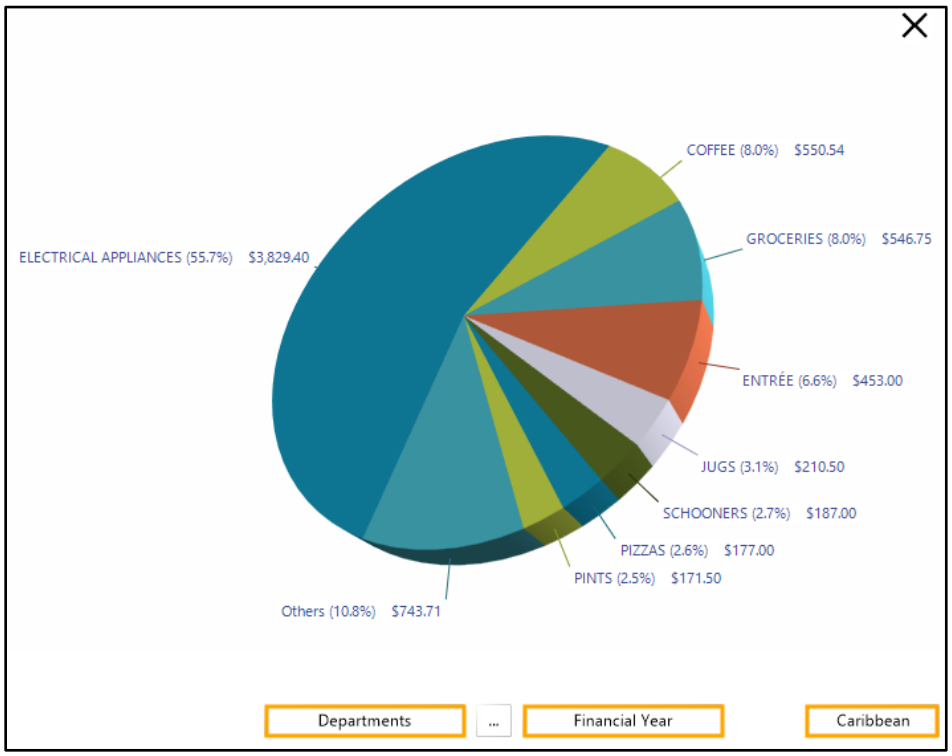
To display the chart in 3D view, hover anywhere over the Pie Chart with the mouse cursor, click and drag the mouse. The chart will move and will be displayed as a 3D chart. You can continue to hold down the mouse button and drag to position the chart as desired.



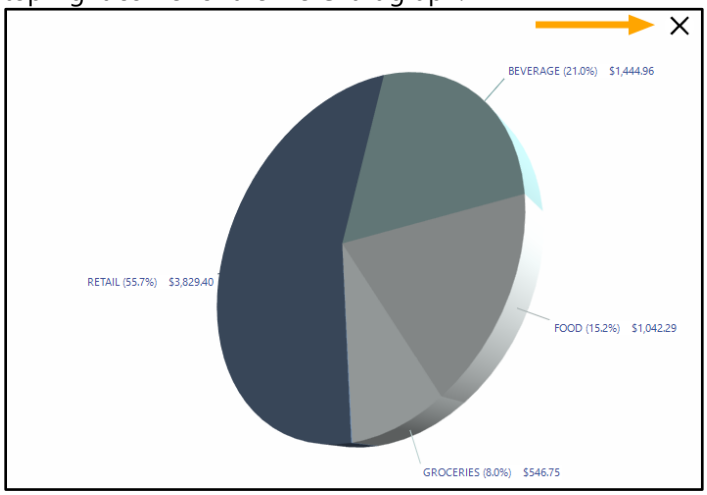
You can also increase/decrease the size of the enlarged chart by hovering the mouse cursor over the chart and scrolling up/down using the mouse scroll-wheel. The 3D chart will increase/decrease in size.



The chart will be updated on-the-fly when using the selection options below the chart. Options available for selection are the type of data being displayed (Sites, Locations, Sales Categories, Hours, Departments, POS Terminals or Tenders), Period (Financial Year, This Year, Last Year, Month) as well as the colour of the chart. These selections can be made using the options outlined in orange in the below example:



Once you have finished viewing the enlarged chart/3D Pie Chart, close it using the "X" button displayed towards the top-right corner of the Pie Chart graph.



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Clerks

Clerk Buttons can change Clerk for single Sale Line

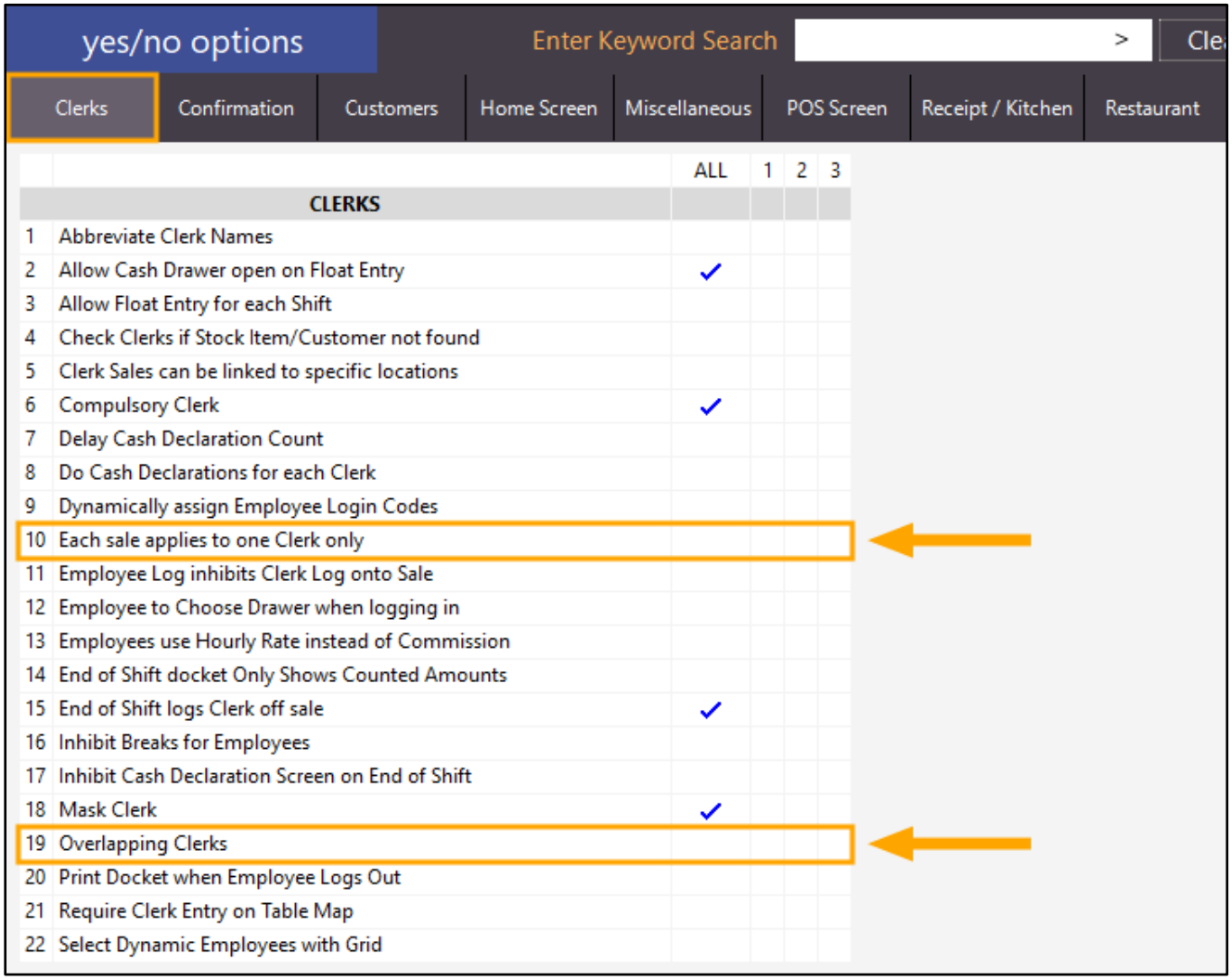
This function adds the ability to change the Clerk for a single line in a sale.
This may be useful in venues where multiple Clerks process a single sale and there is a need to go back and change the Clerk who was either responsible for adding or preparing the item that was added to the sale.

In order to use this function, POS Screen buttons for each Clerk need to be created.
The following Yes/No Options must also be disabled:

- Each sale applies to one Clerk only
- Overlapping Clerks

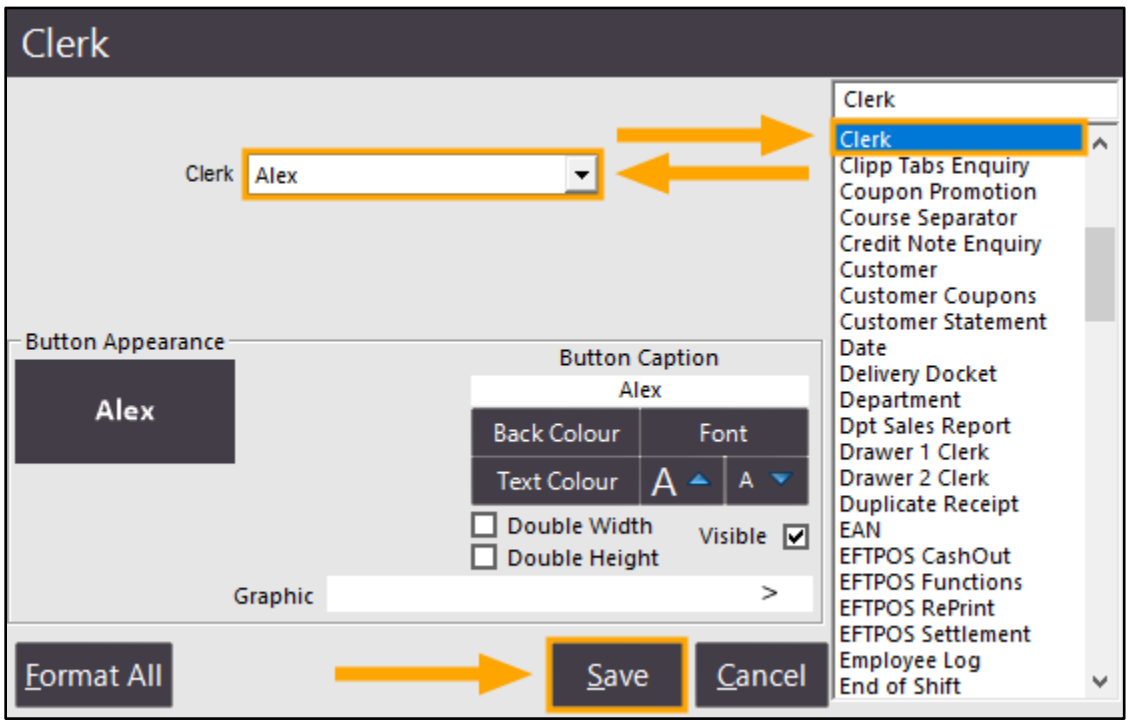
To configure and use this function, follow the below steps:
Go to: Setup > Yes/No Options > Clerks
Disable the following options:

- 10. Each sale applies to one Clerk only
- 19. Overlapping Clerks



In order to use this function, buttons for the required Clerks will need to be created on the POS screen.

Go to: Setup > POS Screen > POS Screen Setup > Select POS Screen Layout > Buttons
Either find and click on a blank tab at the bottom of the POS screen, or select an existing POS screen tab to create the Clerk buttons.
In this example, we will use the RETAIL tab to create the Clerk buttons.
Click on a blank POS screen button, then use the Clerk function to specify the Clerk.
The below shows the Clerk function being used to select the Clerk named "Alex"



Repeat the above process to create POS screen buttons for each required Clerk.

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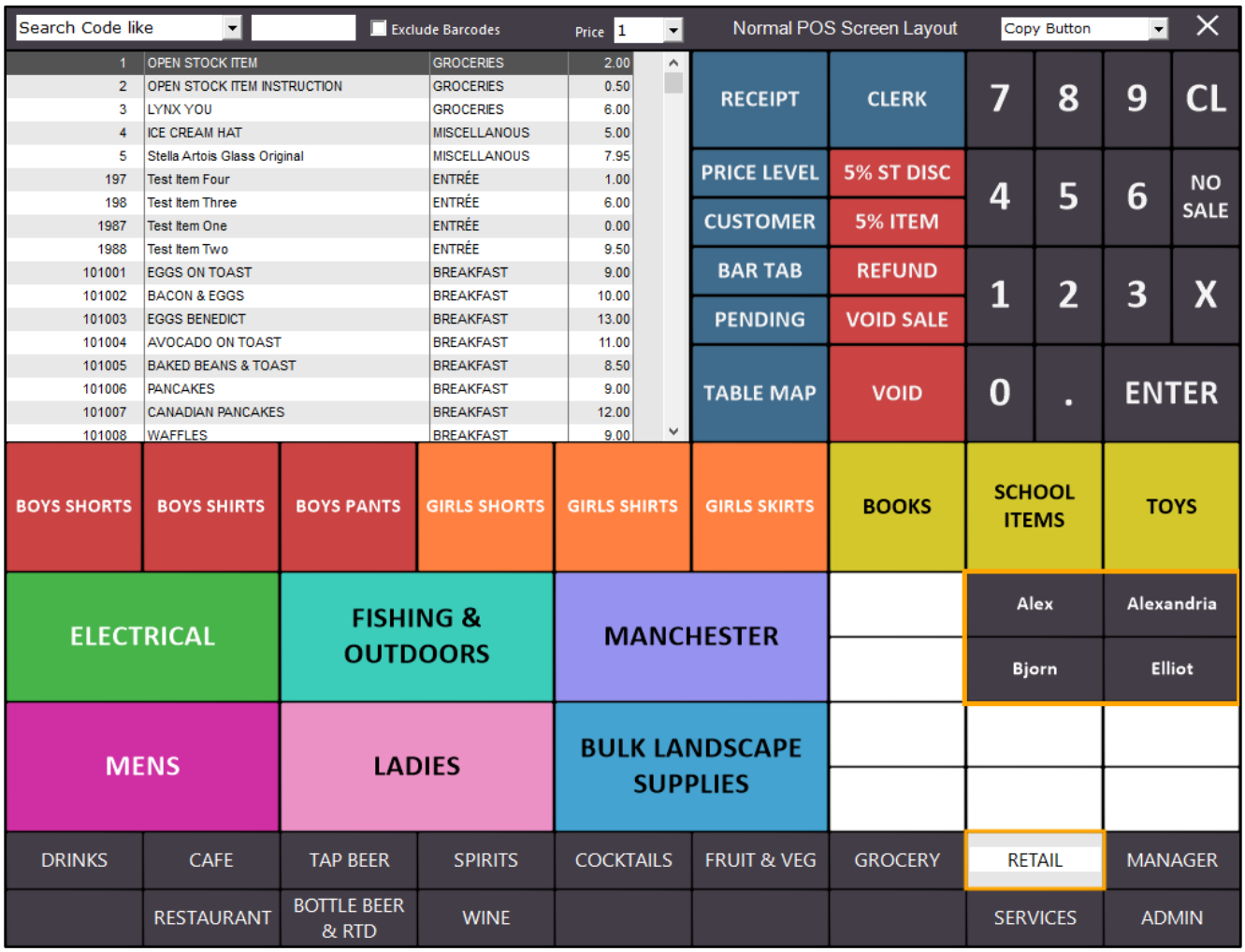
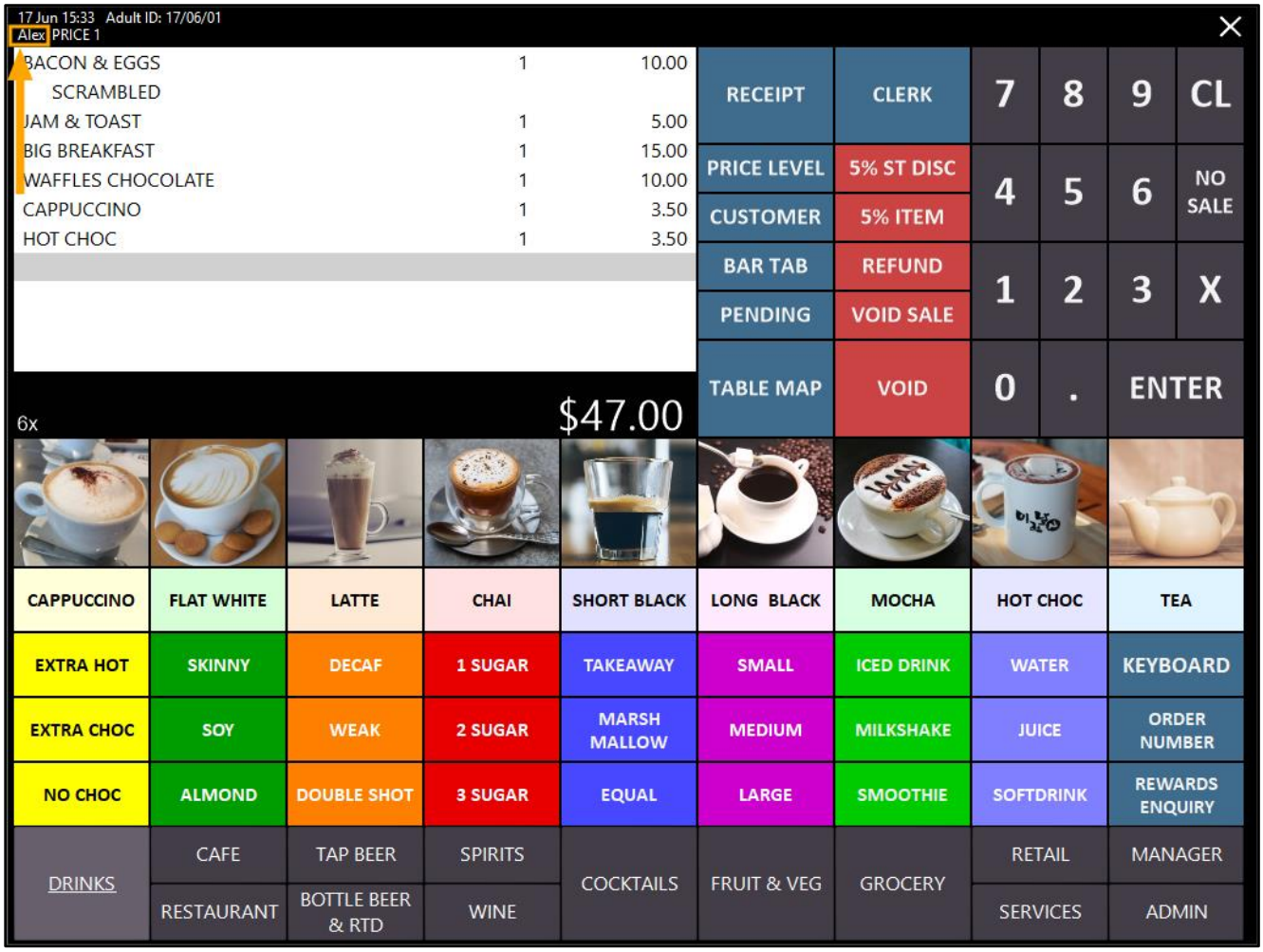
Once completed, you should then see a POS screen button for each Clerk.
The below example shows Clerk buttons created towards the right-hand side of the POS screen.



Close the POS screen layout to save changes.

Then go to the POS screen by pressing the POS button from the main Idealpos Back Office dashboard.
Add items to the sale as required.
The currently logged on Clerk is displayed on the top-left corner of the POS screen



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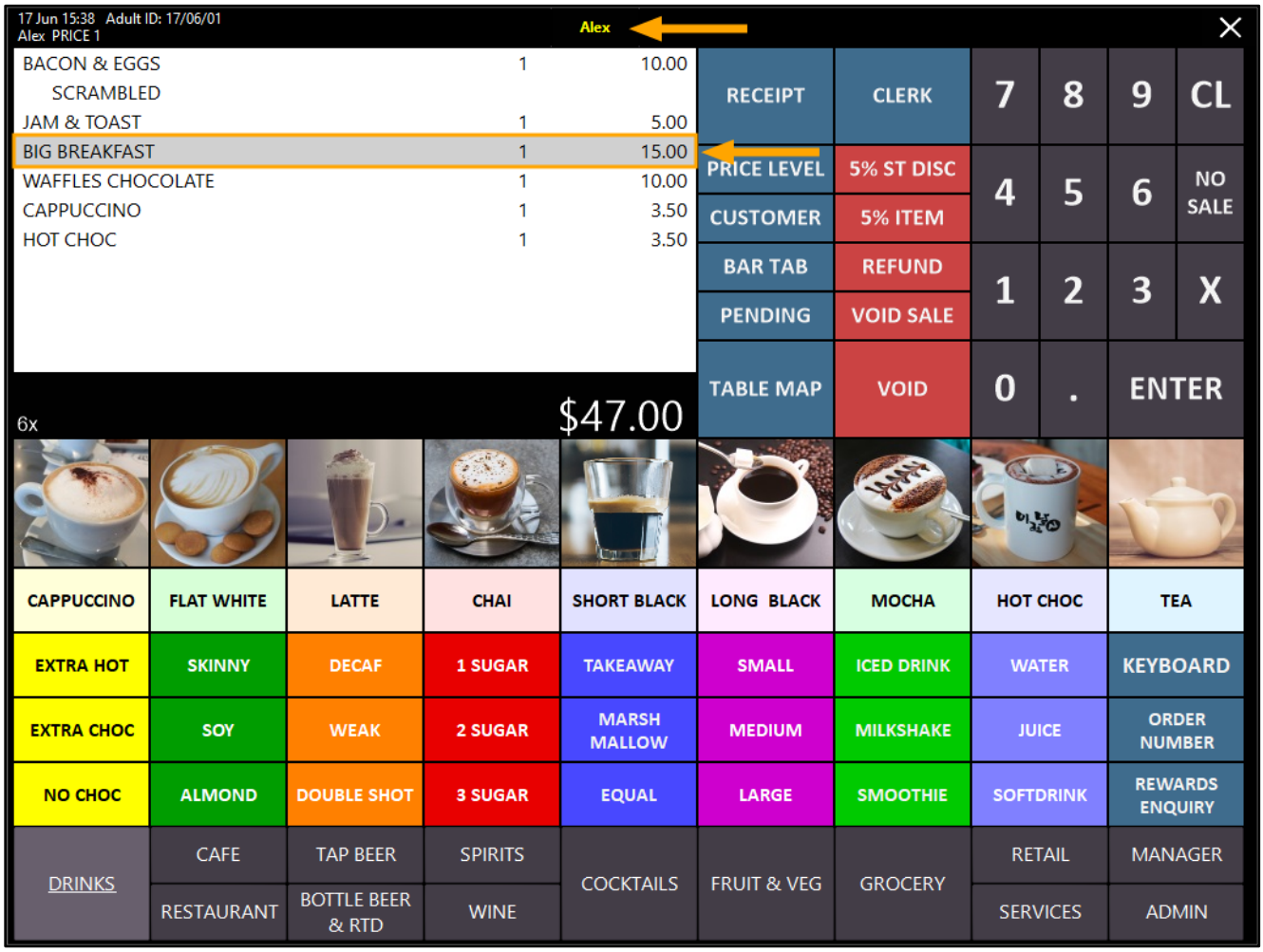
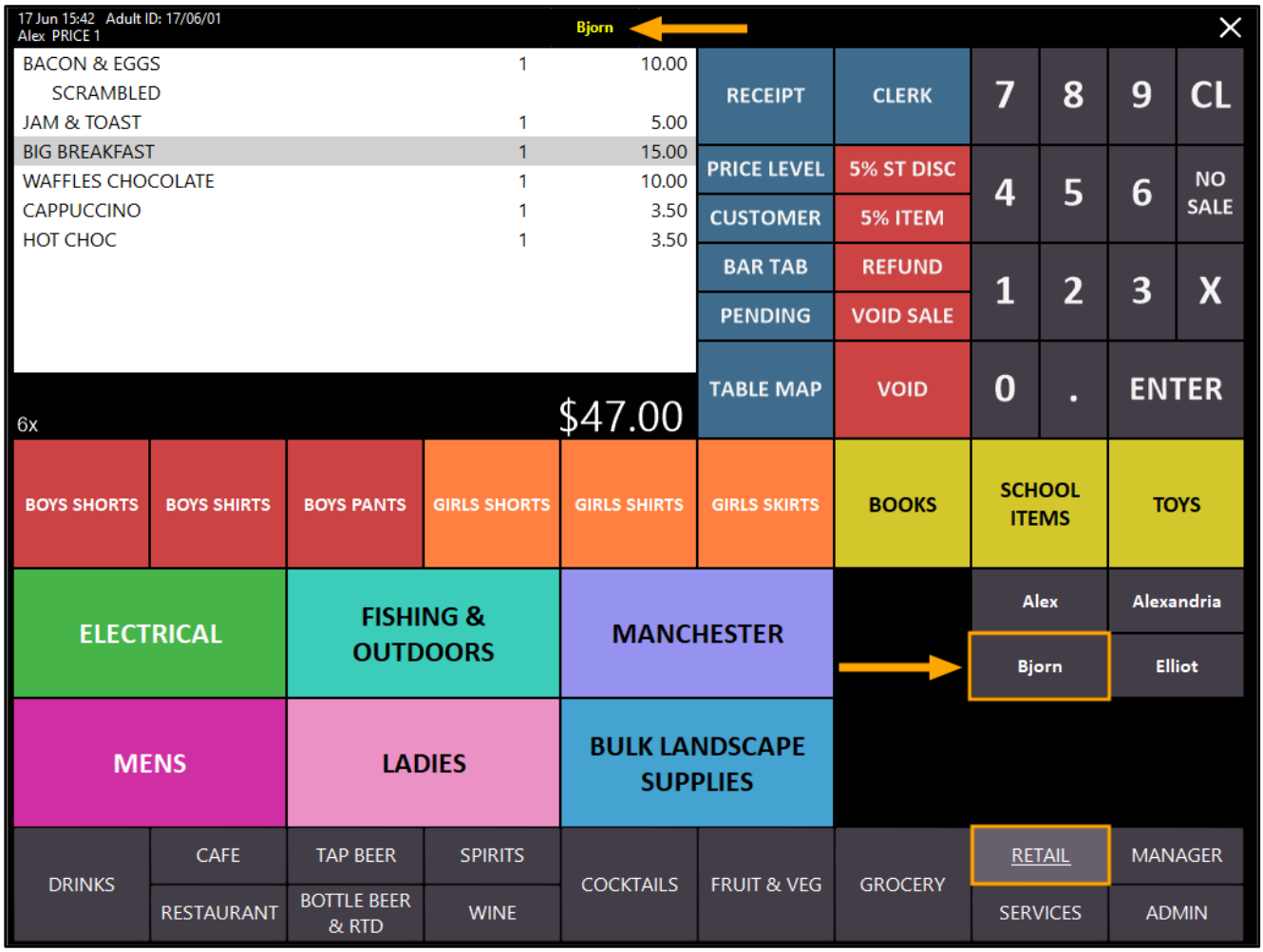
To view the Clerk which added an item to the sale, click on the individual item and the Clerk name will appear at the top of the POS screen in the centre. The below example shows the "BIG BREAKFAST" Stock Item selected in the Sale, with the Clerk name of "Alex" shown in the middle of the POS screen.
This indicates that Alex was the Clerk that added the selected Stock Item to the sale.



To change the Clerk that added the selected item, click on the POS screen tab which contains the Clerk buttons that were added earlier, then click on the Clerk button for the selected Stock Item. The Clerk name will be updated for the selected Stock Item and the new Clerk name will be displayed in the middle of the POS screen.
The below example shows the "BIG BREAKFAST" Stock Item which has been changed to the Clerk "Bjorn" using the Clerk button "Bjorn". This is indicated by the Clerk name displayed in the middle of the POS screen.



You may repeat the above process for each Stock Item in the sale until all Stock Items have been changed to the required Clerk.
The sale can be finalised by pressing the ENTER button, then select the amount/tender type.

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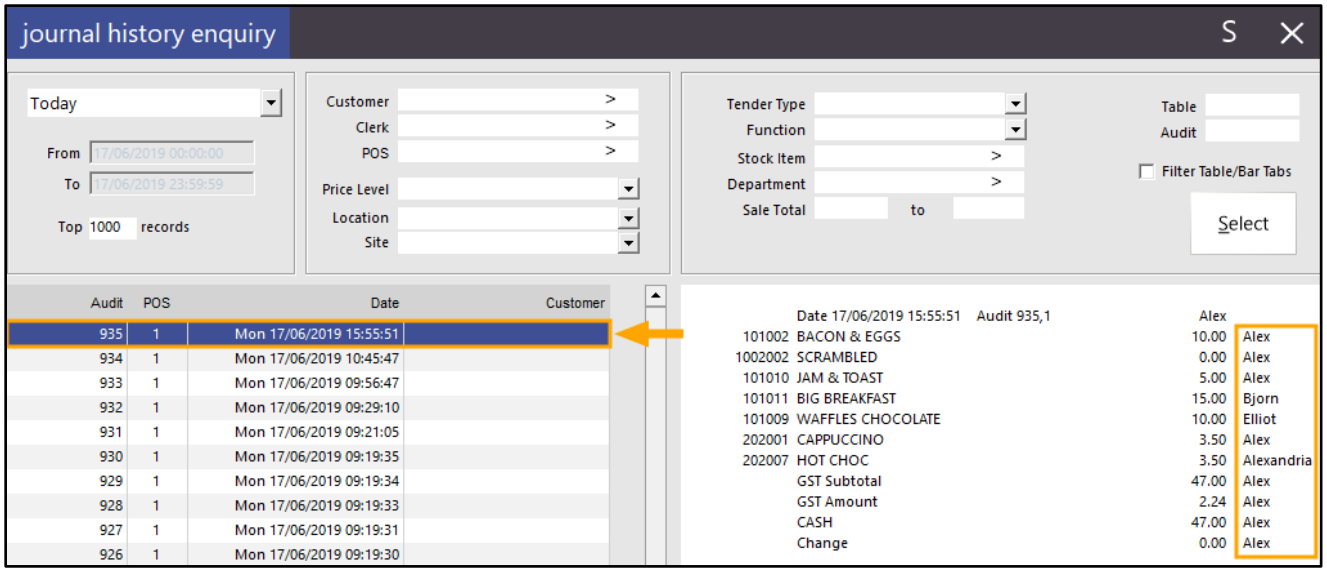
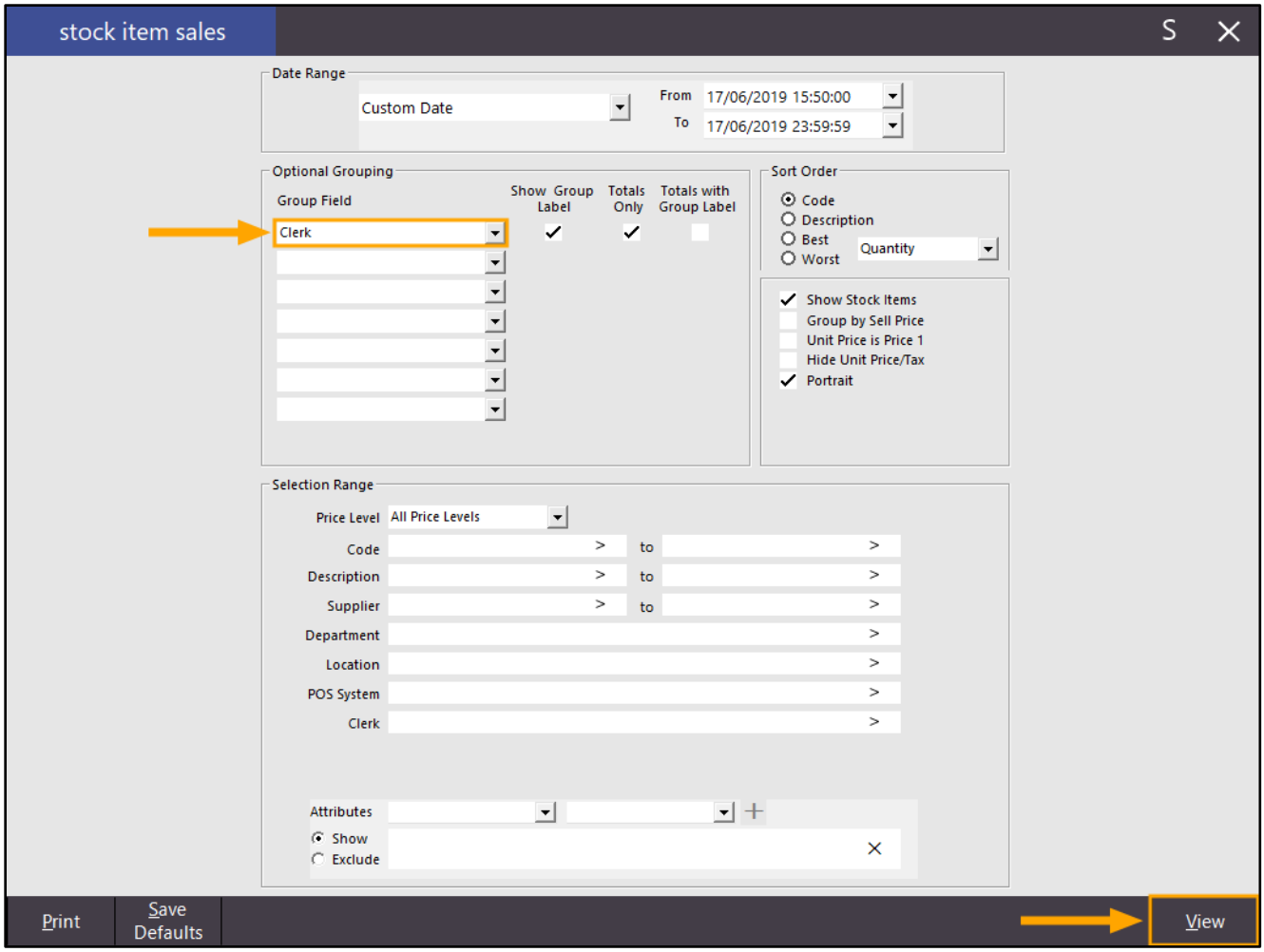
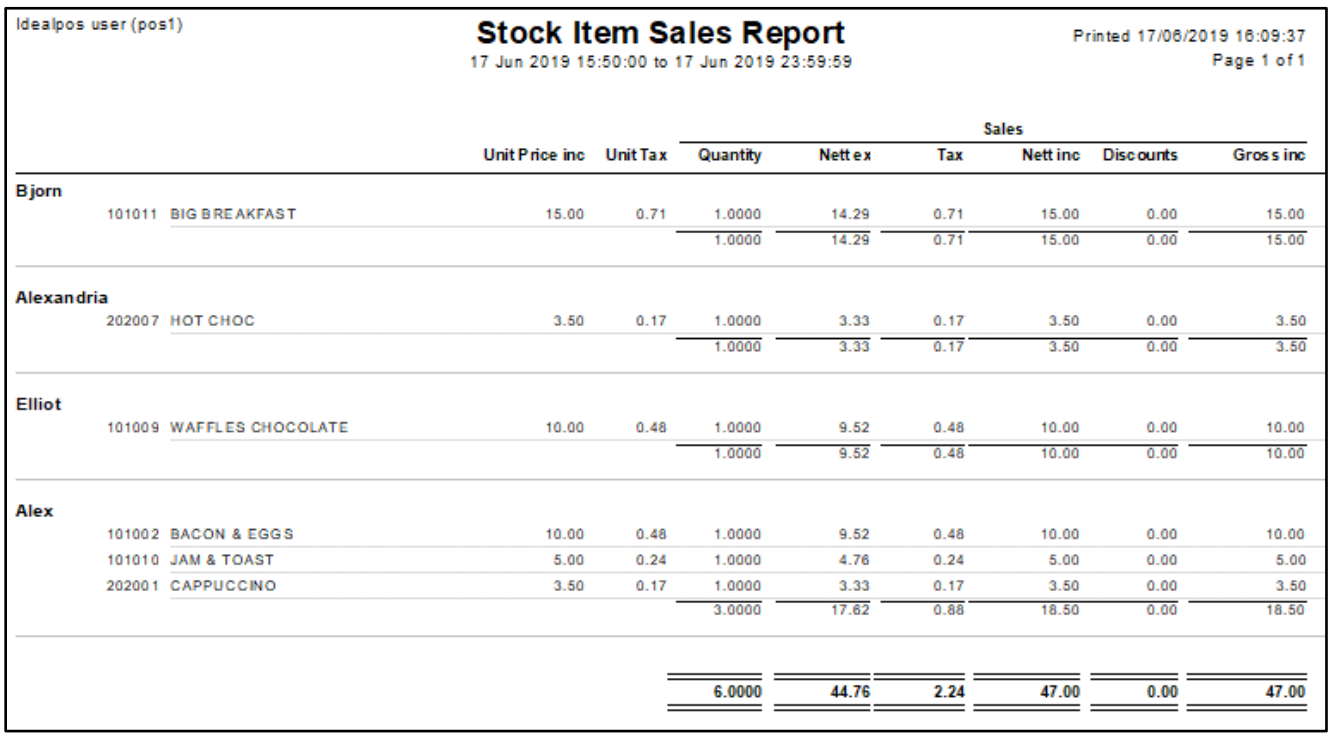
Note that the printed receipt will display the Clerk which was logged into the POS at the time the sale was finalised. However, each Stock Item that was changed to a particular Clerk will be recorded accordingly in Idealpos reports as well as the Journal History Enquiry.
This can be confirmed by going to: Enquiry > Journal History > Select the transaction from the left > Transaction details are displayed on the right, including each item that was changed to another Clerk.



This can also be reported using reports such as the Stock Item Sales Report.
Go to: Reports > Sales > Stock Item Sales
Group by Clerk then press "View"



The Stock Item Sales Report will be broken down by Clerk, showing the Stock Items that each Clerk added to the Sale.



idealpos user (pos1)

Stock Item Sales Report

17 Jun 2019 15:50:00 to 17 Jun 2019 23:59:59

Printed 17/06/2019 16:09:37
Page 1 of 1

			Unit Price inc	Unit Tax	Sales Quantity	Nett ex	Tax	Nett inc	Discounts	Gross inc
Bjorn										
	101011	BIG BREAKFAST	15.00	0.71	1.0000	14.29	0.71	15.00	0.00	15.00
					1.0000	14.29	0.71	15.00	0.00	15.00
Alexandria										
	202007	HOT CHOC	3.50	0.17	1.0000	3.33	0.17	3.50	0.00	3.50
					1.0000	3.33	0.17	3.50	0.00	3.50
Elliot										
	101009	WAFFLES CHOCOLATE	10.00	0.48	1.0000	9.52	0.48	10.00	0.00	10.00
					1.0000	9.52	0.48	10.00	0.00	10.00
Alex										
	101002	BACON & EGGS	10.00	0.48	1.0000	9.52	0.48	10.00	0.00	10.00
	101010	JAM & TOAST	5.00	0.24	1.0000	4.76	0.24	5.00	0.00	5.00
	202001	CAPPUCCINO	3.50	0.17	1.0000	3.33	0.17	3.50	0.00	3.50
					3.0000	17.62	0.88	18.50	0.00	18.50
					6.0000	**44.76**	**2.24**	**47.00**	**0.00**	**47.00**

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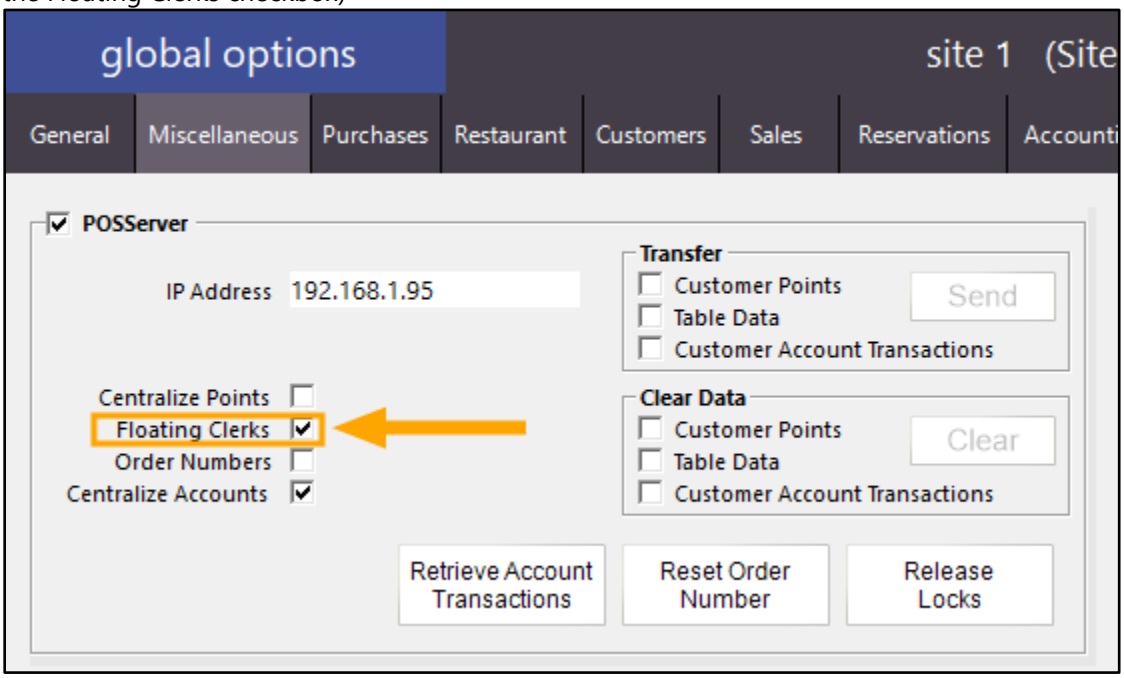
Floating Clerks – Ability for a timeout within active sales

This function adds the ability to have a Clerk Timeout apply within an active sale when using the Floating Clerks feature. When enabling the Floating Clerks checkbox next to the Clerk Timeout setting, the POS will automatically display the ENTER CLERK prompt after the Clerk Timeout period lapses, even if items have been added to the sale. This will then allow the Clerk to sign into another POS terminal and when they do, all the items that were added to the sale will automatically appear on any terminal they sign into.
This function may be useful in butcher shops where the Clerk will frequently move between POS terminals in order to perform tasks such as weighing stock using a scale that may only be available from a specific POS terminal in the store.

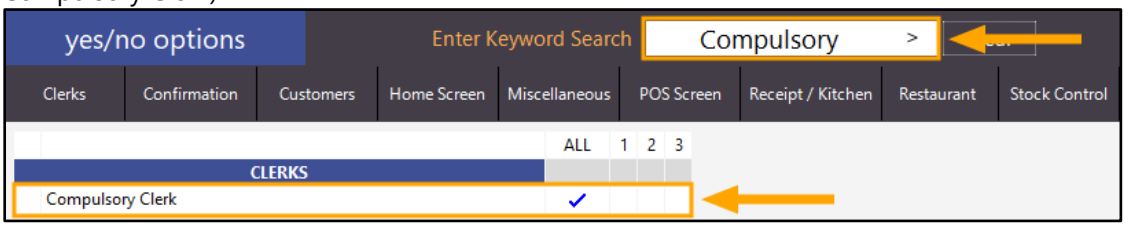
To use this function, the following options must be enabled:

- POSServer must be enabled and running.
  For instructions on configuring the POSServer, refer to the POSServer topic in the User Guide.

- Floating Clerks must be enabled in the POSServer (Go to: Setup > Global Options > Miscellaneous > Enable the Floating Clerks checkbox)

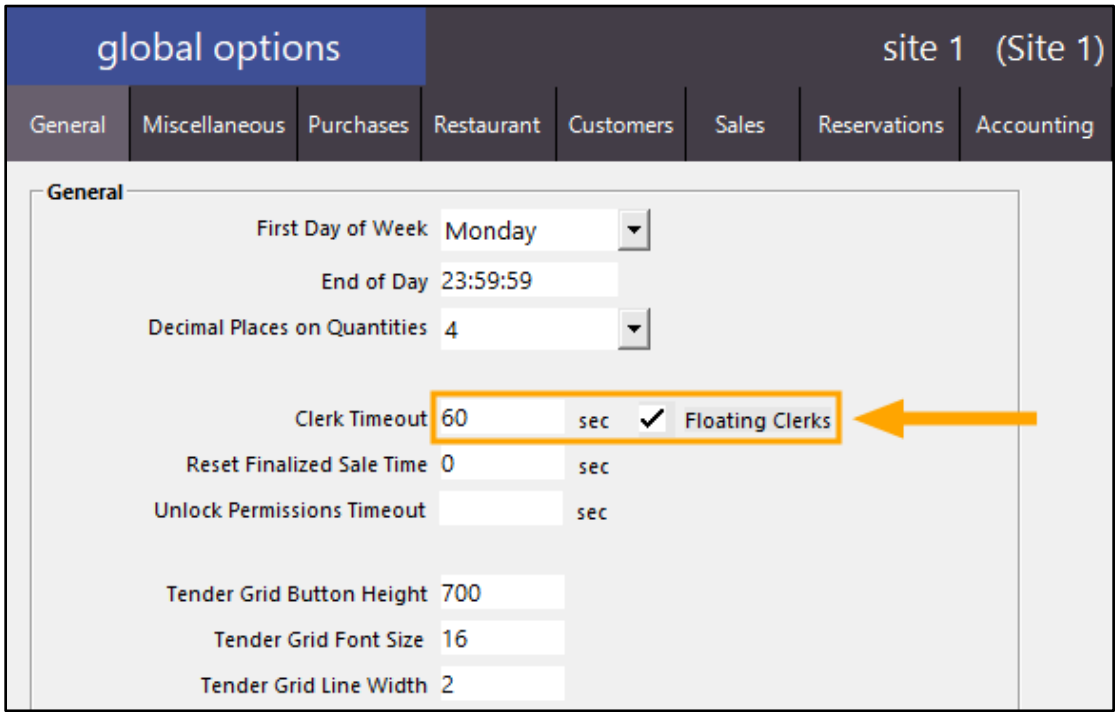


- Compulsory Clerk must be enabled (Go to: Setup > Yes/No Options > Keyword Search: Compulsory > Enable Compulsory Clerk)

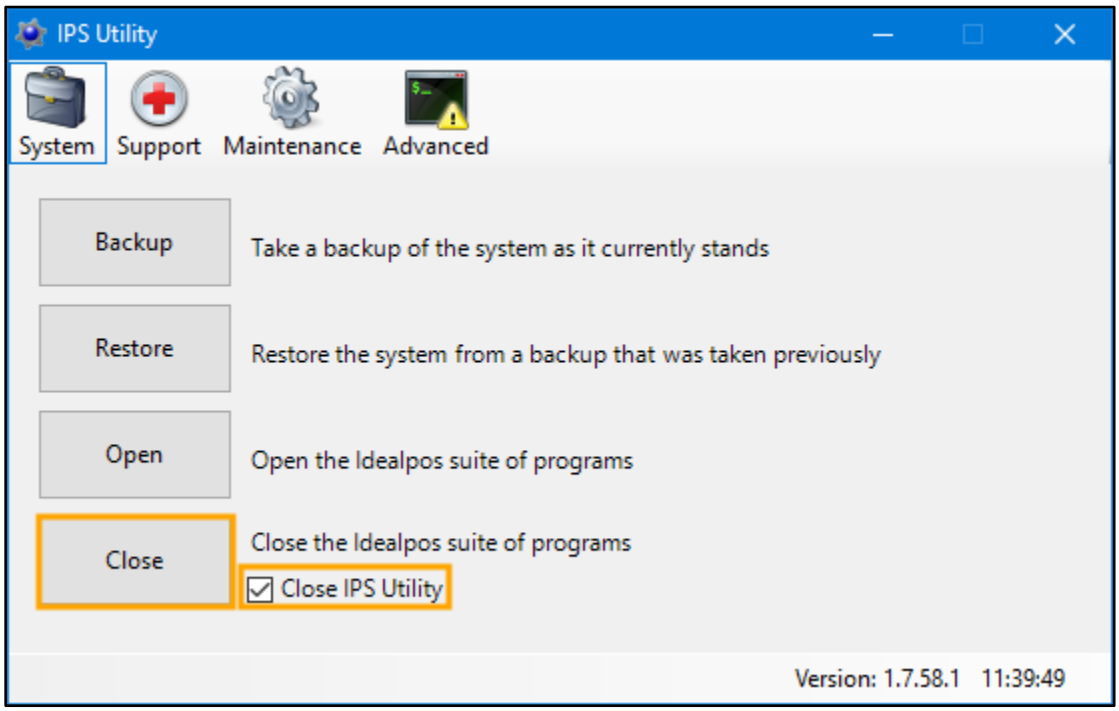


Once the above options have been enabled, you will need to configure the Clerk Timeout Setting and enable the Floating Clerks checkbox next to Clerk Timeout.
Go to: Setup > Global Options > General > Clerk Timeout/Floating Clerks

Enter a value into the Clerk Timeout field in seconds that you'd like to use as a timeout value and enable the Floating Clerks checkbox. The below example shows a Clerk Timeout of 60 seconds (1 minute).



Once the above steps have been completed, Idealpos will need to be restarted in order for the Timeout and Floating Clerk options to take effect. Ensure that Idealpos is restarted on all POS terminals for these settings to apply.
Open IPSUtils (open the Windows Start Menu and search for IPSUtils), tick the option "Close IPS Utility" then press the "Close" button within the IPS Utility.



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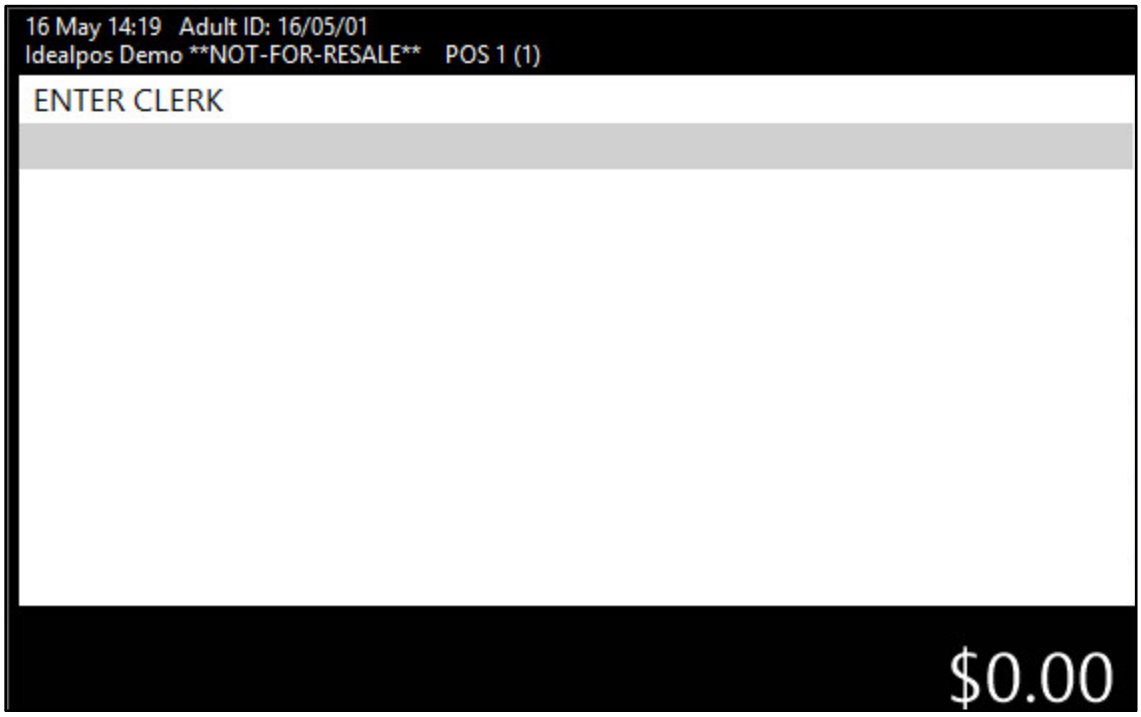
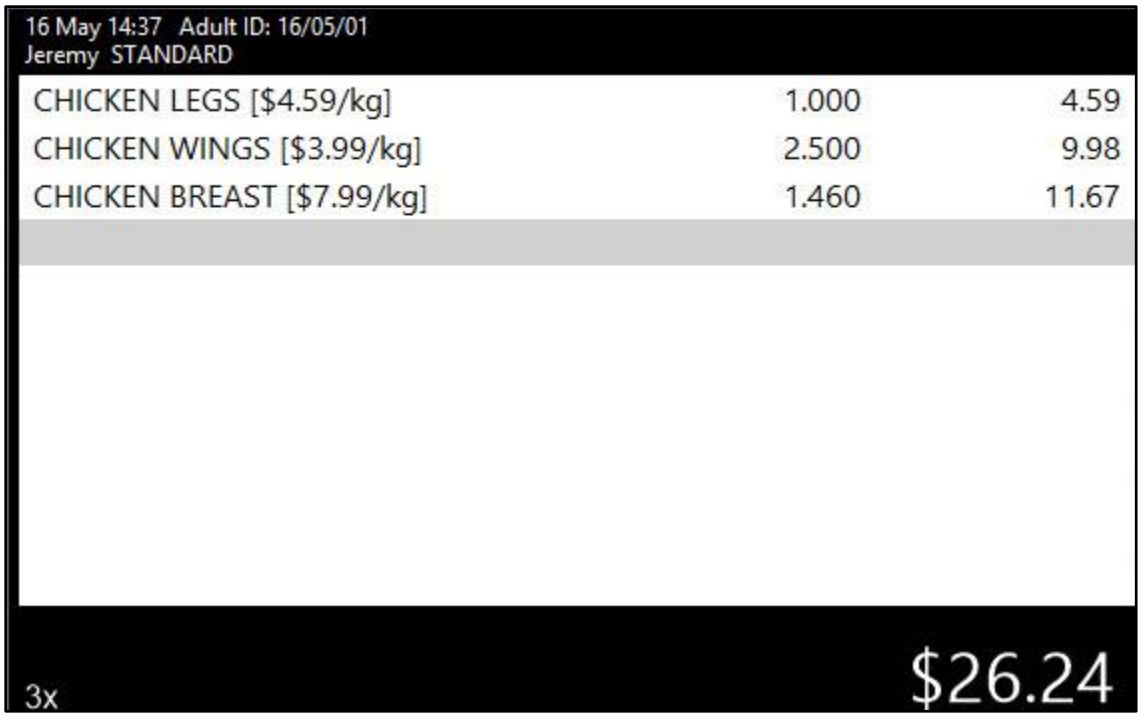
Once Idealpos has closed, you may start Idealpos and the changes will take effect.

When the POS screen opens, the sale screen will show “ENTER CLERK”.
Enter a Clerk ID and press ENTER.



After signing in, the Clerk name will be displayed on the top-left corner.

Add items to the sale as normal.



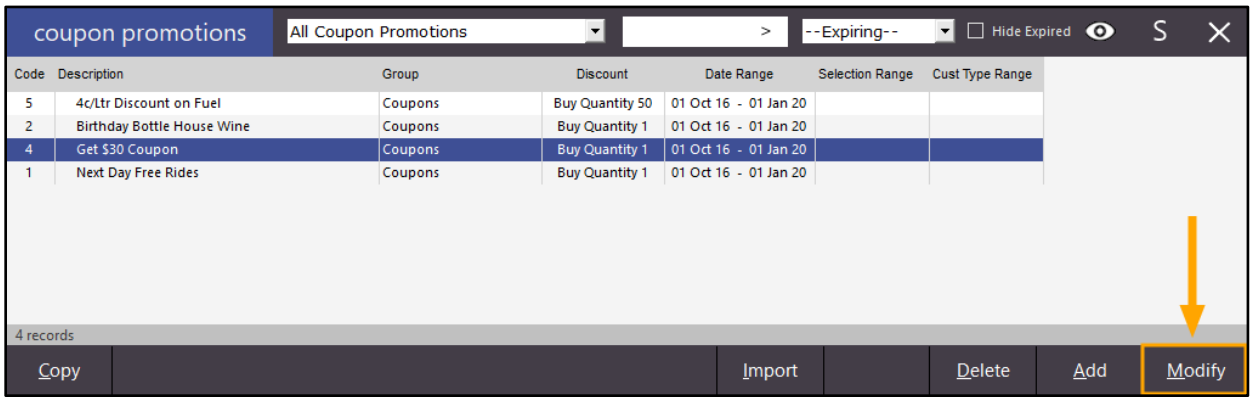
After the timeout period lapses, the sale screen will return to the ENTER CLERK prompt.
The Clerk can sign into any POS terminal by entering their Clerk ID and all the items will appear on the POS terminal. They can continue to add further items to the sale and if they walk away from the POS terminal, the Clerk Timeout period will lapse and they can then continue to sign into the next available POS terminal where they can add additional items to the sale.
Once the Clerk is ready to finalise the sale, they can press the ENTER button to go to the Tender screen and select a Tender Type/Amount to finish the sale.

Coupon Promotions

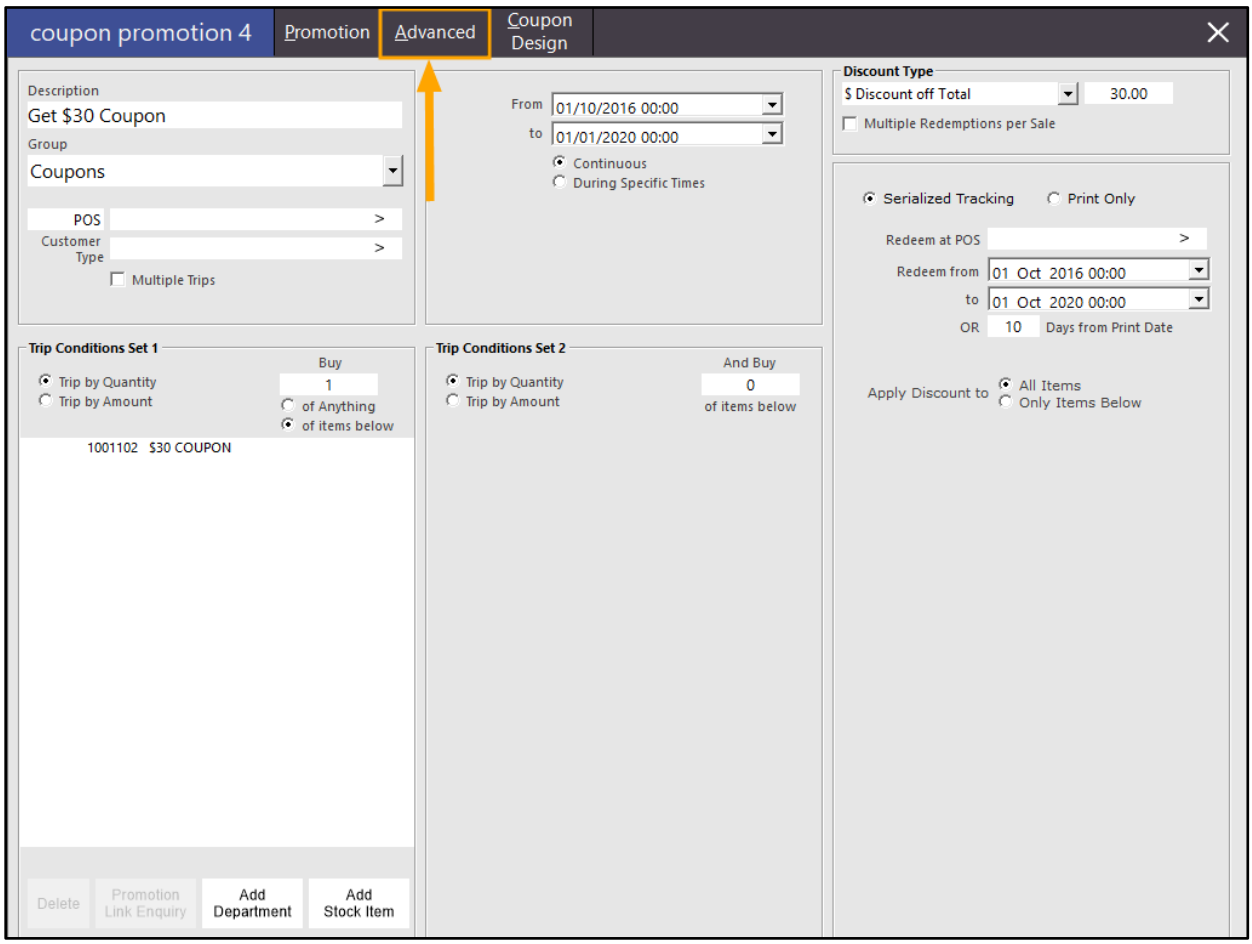
Option to Show/Hide Customer Phone/Email on Coupons

This function adds an option to control whether a Customer's Phone Number and Customer's Email address is shown or hidden when printing Coupons.

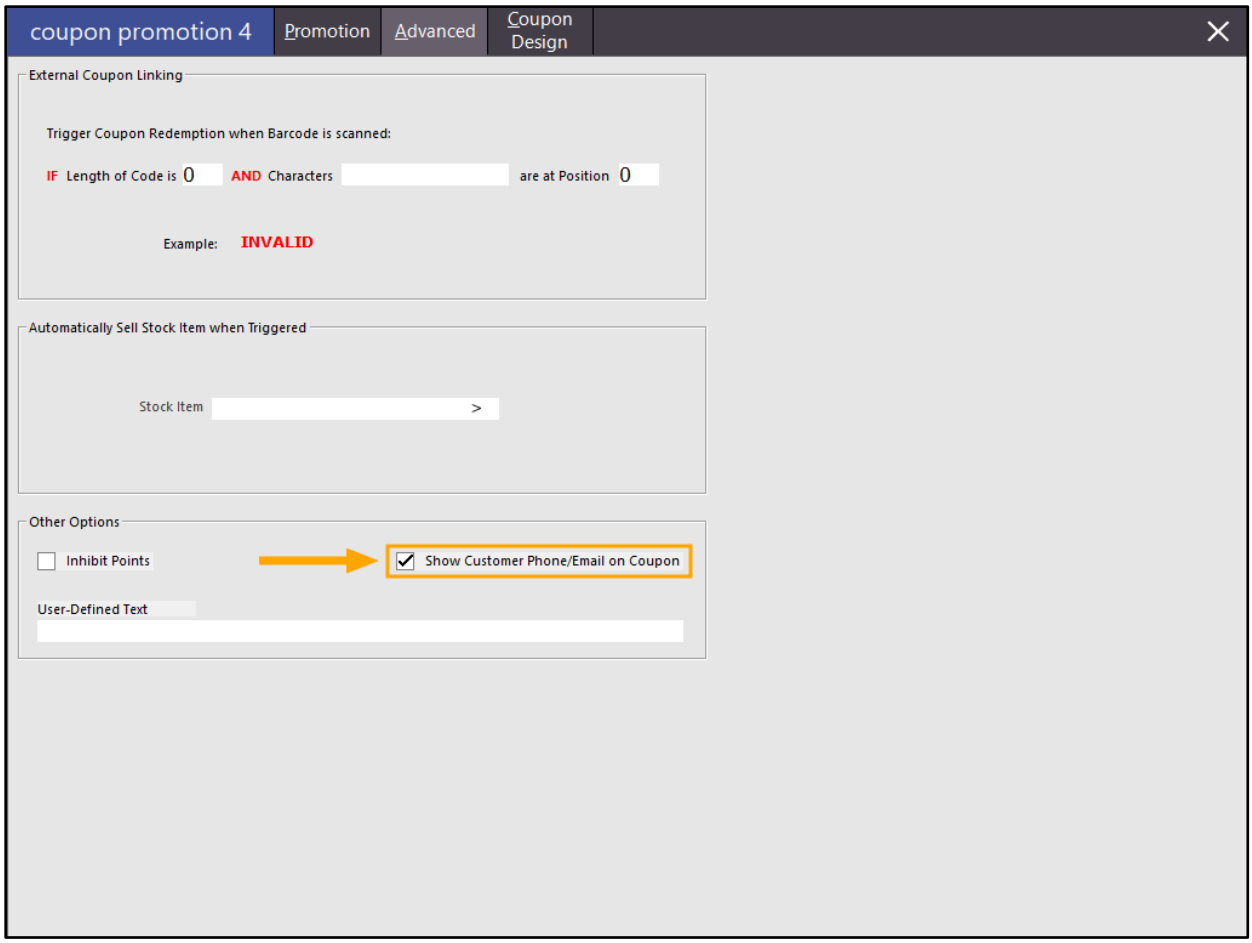
To use this function, go to:
File > Sales > Promotions > Coupon Promotions > Select the Promotion from the list > Modify



From the Coupon Promotion screen, select the Advanced tab.



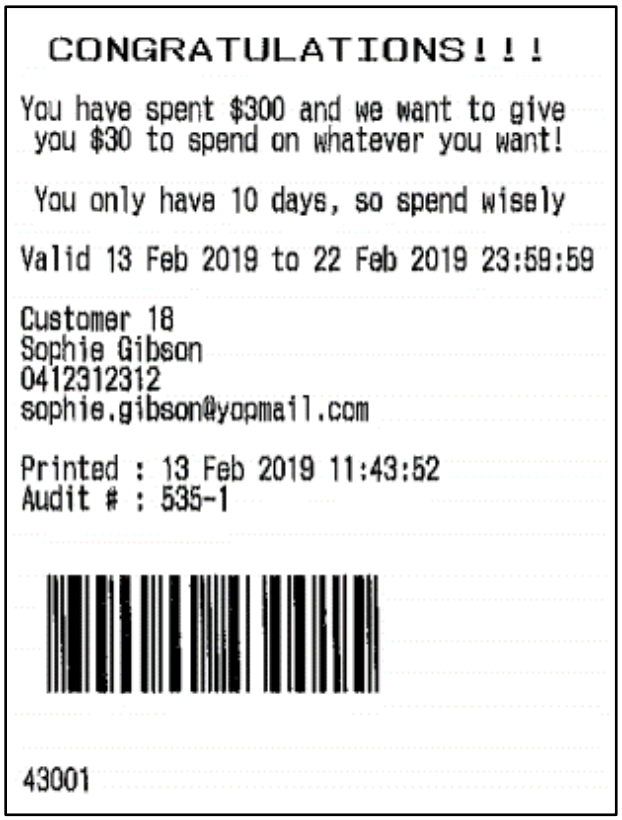
Within the Advanced tab, either tick or untick the "Show Customer Phone/Email on Coupon"



When the Coupon is triggered by the POS transaction, it will either print or hide the Customer Phone/Email on the Coupon, depending on how the above setting has been configured:

Show Customer Phone/Email on Coupon disabled (unticked):

Show Customer Phone/Email on Coupon enabled (ticked):



Customers

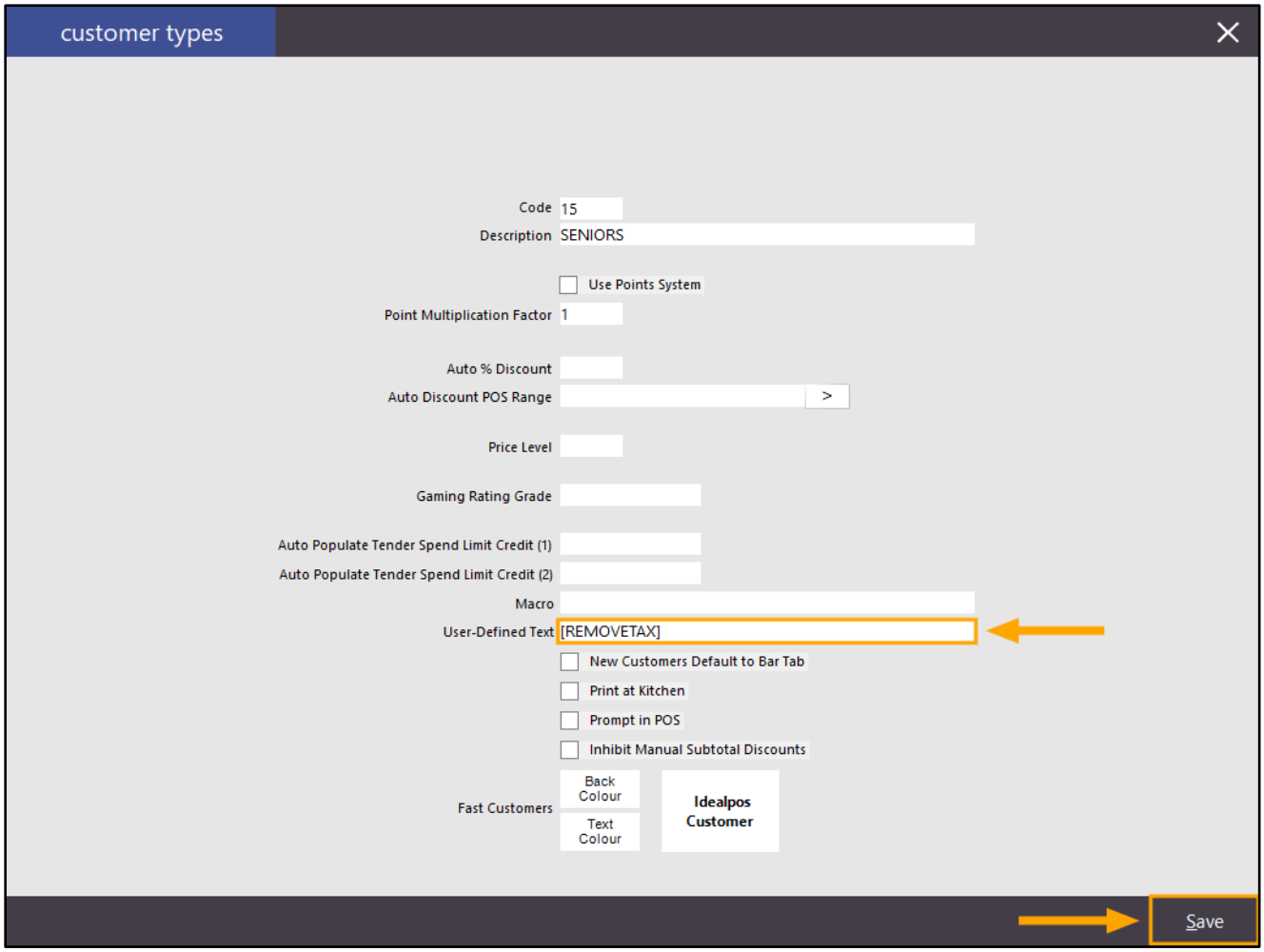
USA/Canada – Remove Tax based on Customer Type

This function adds the ability to remove sales tax for Customers which are linked to a specific Customer Type. In the USA/Canada, some types of Customers are exempt from paying tax and this option allows those Customer Types to be exempt from tax.

This function only applies to Idealpos systems that are configured for the Canada or USA region (Setup > POS Terminals > Modify > User Details > Region > Canada/USA)

To configure this option, go to: File > Customers > Customer Types > Select the Customer Type > Modify

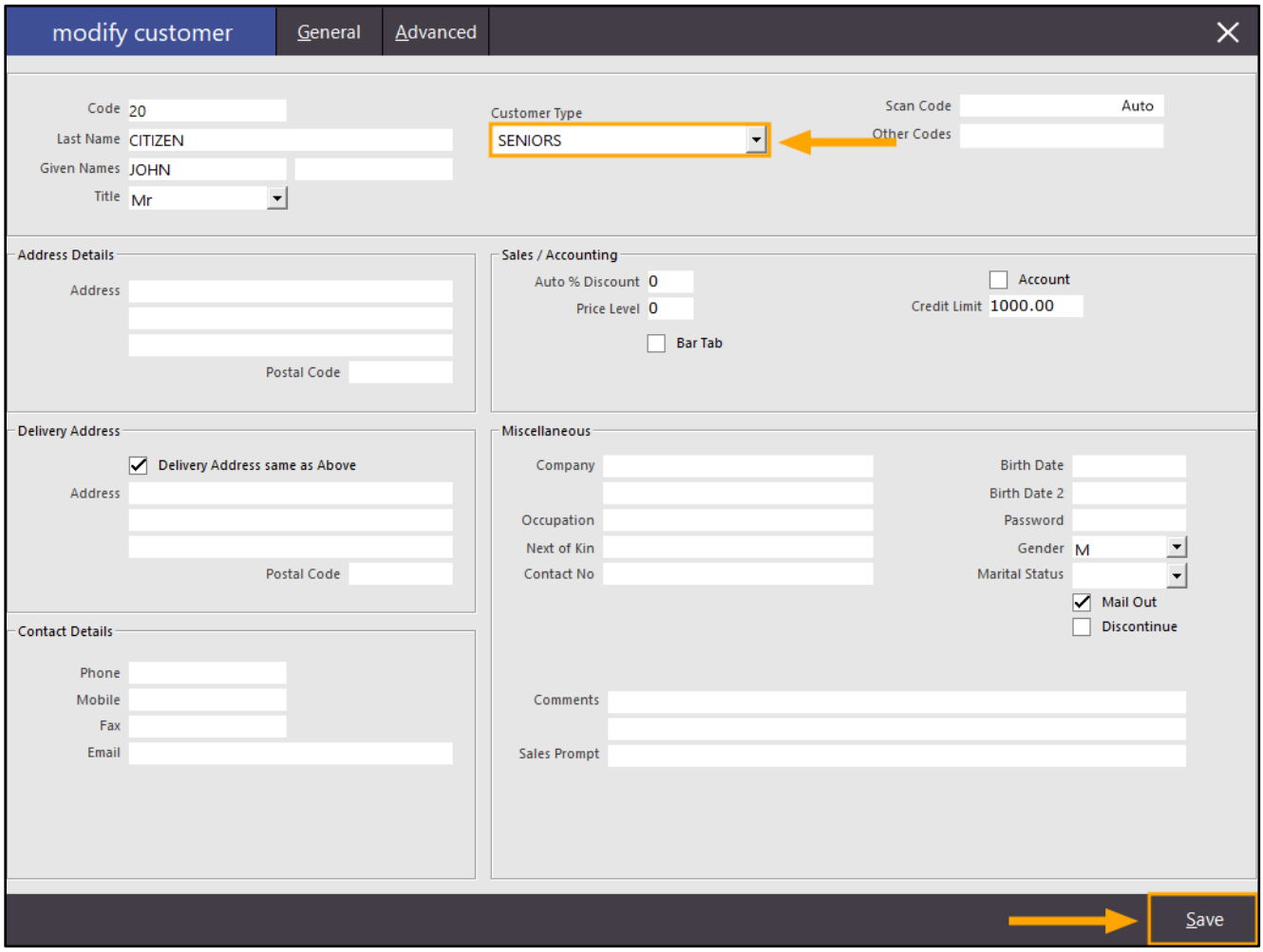
Enter [REMOVETAX] into the User-Defined Text field as per the below example, then press the "Save" button on the bottom-right corner.



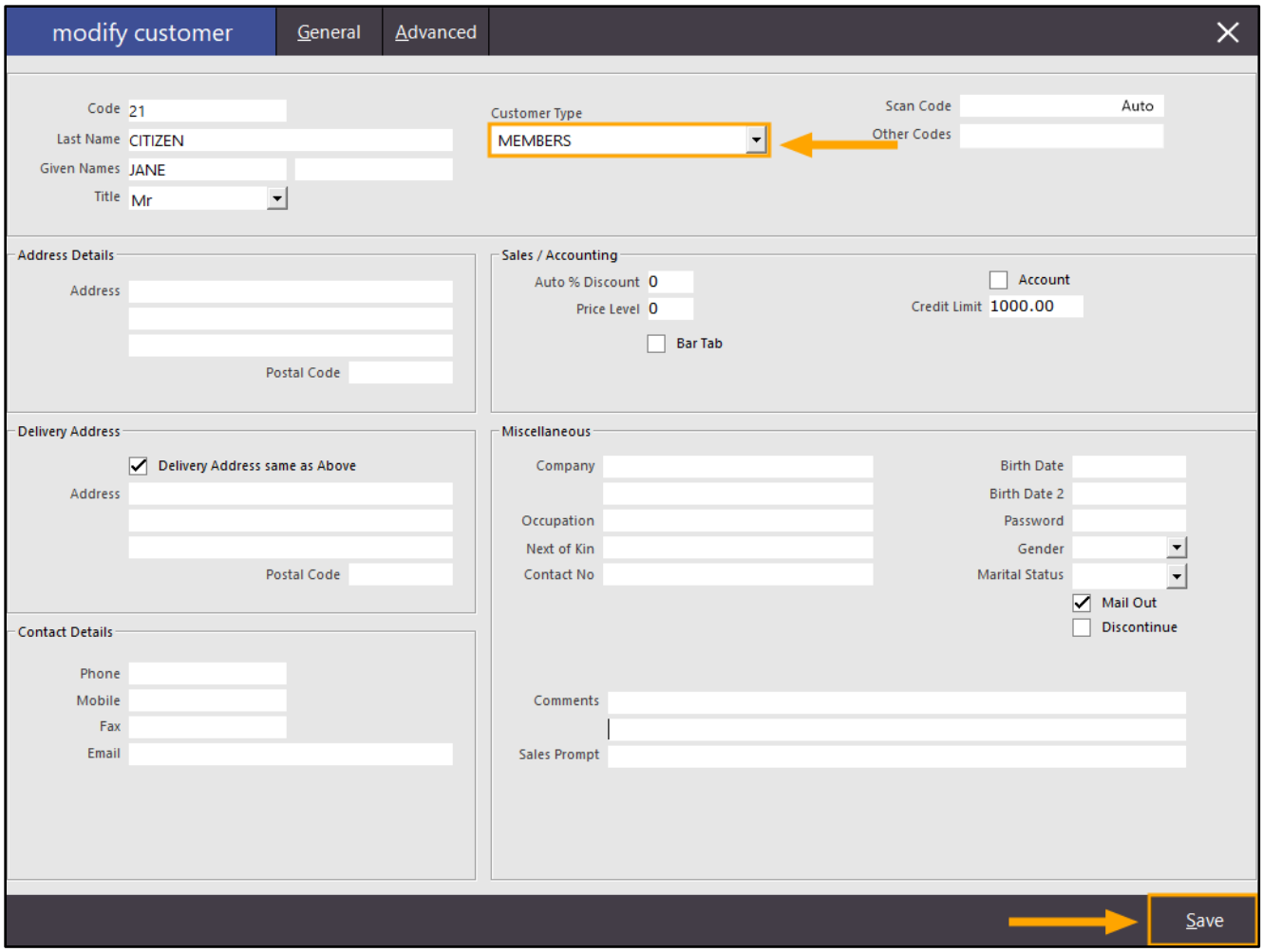
idealpos7 Update History

Go to File > Customers > Customers > Add

Add a Customer and link them to the Customer Type which is exempt from tax as configured above.
Press the “Save” button on the bottom-right corner to save the customer

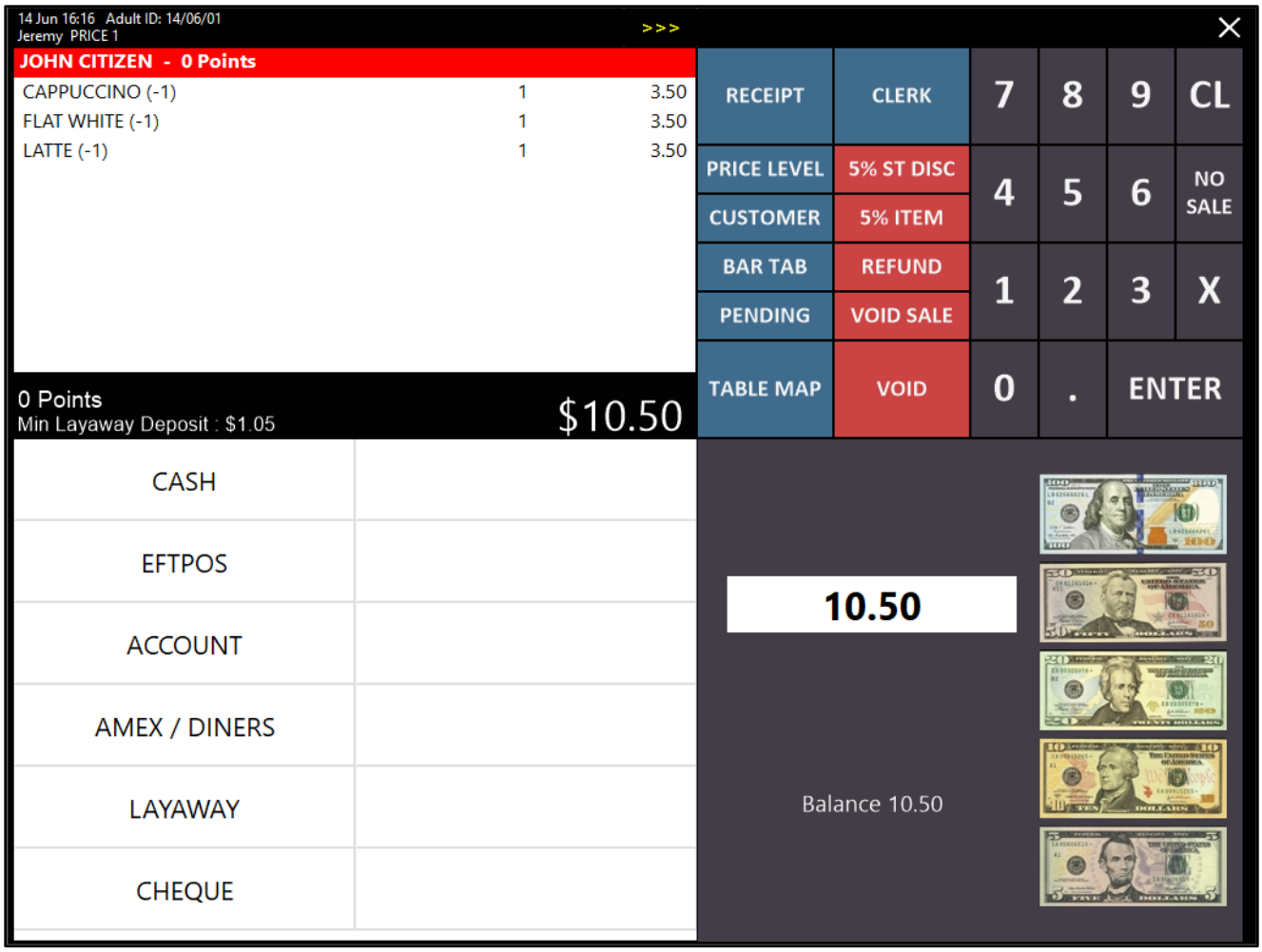


As a point of reference/comparison, create another Customer that is linked to a Customer Type not exempt from tax.

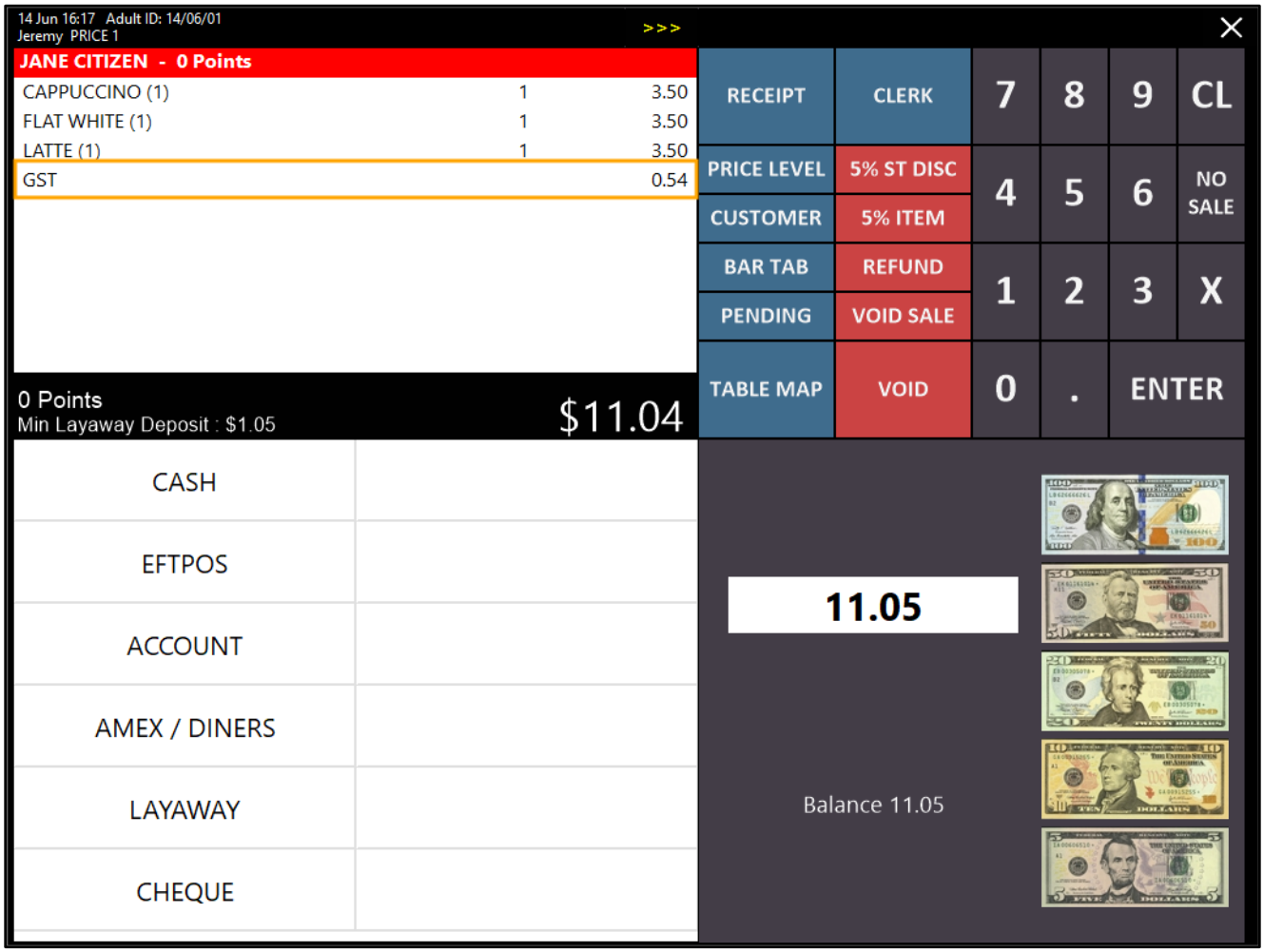


idealpos7 Update History

Go to the POS screen, add the Customer linked to the Customer Type exempt from tax, then add items to the sale which are applicable to tax. Finally, press the “Enter” button to go to the Tender screen.
Tax will be exempt.



As a comparison, adding the same items to the sale for aa Customer linked to a Customer Type that is not exempt from tax will have tax applied.



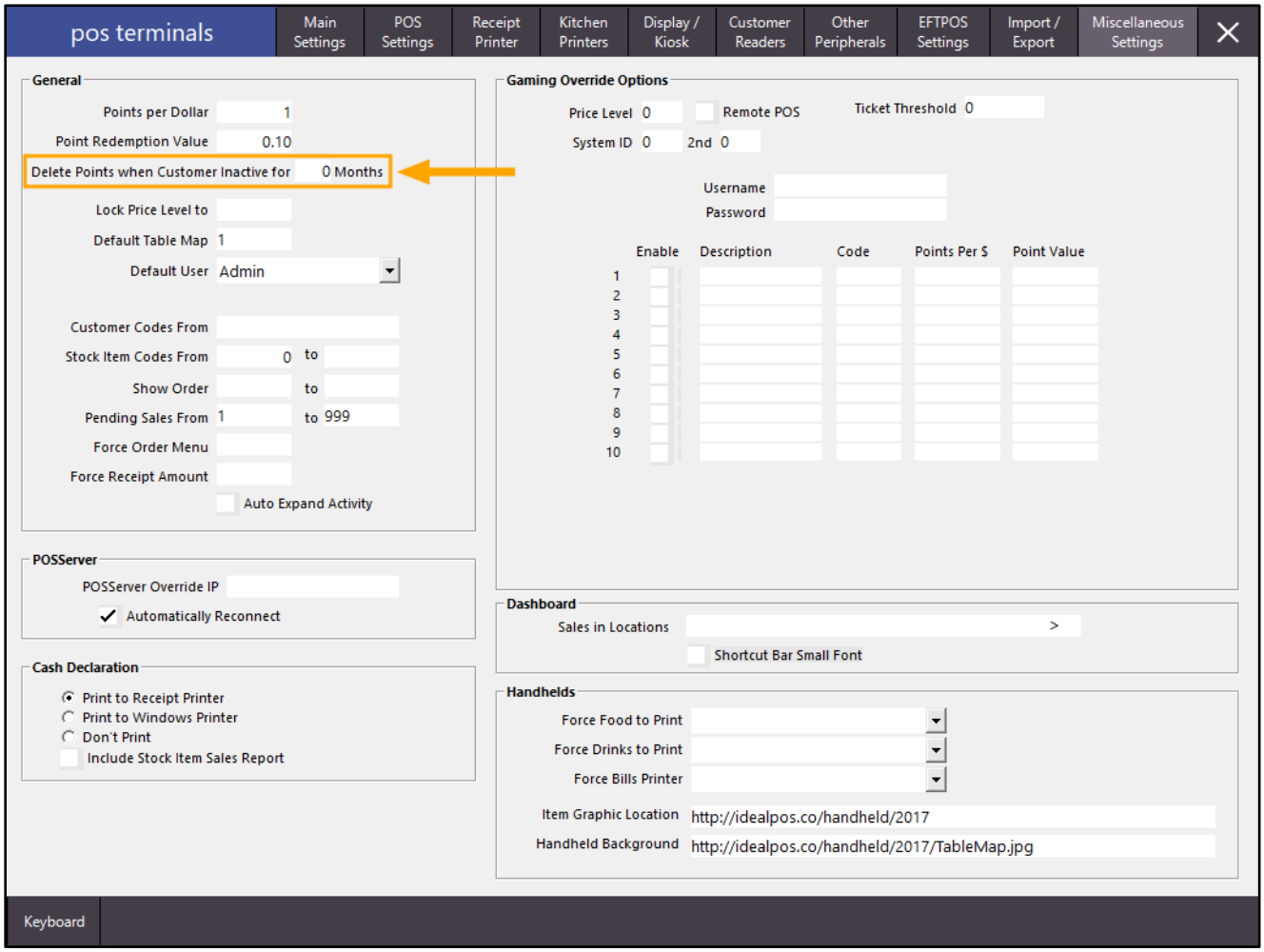
idealpos7 Update History

Delete Customer Points when Customer Inactive for Period

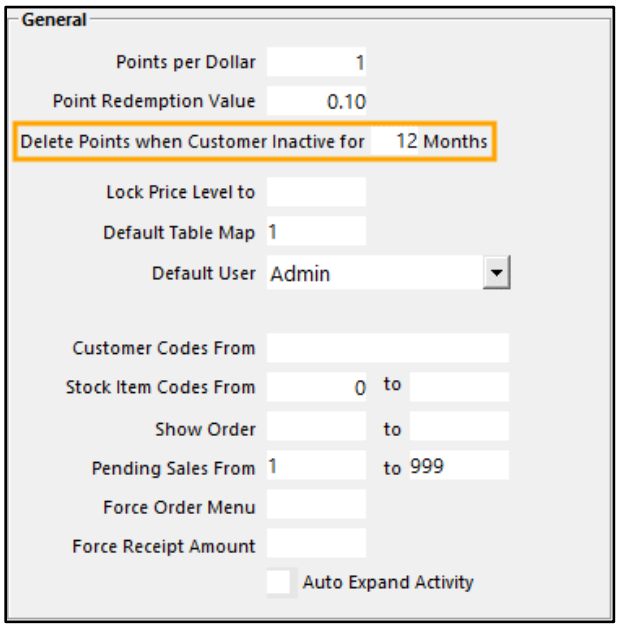
This function adds the option to delete a Customer's points after the Customer has been inactive for a specified period. When this function has been configured, Idealpos will automatically delete any customer's points who have been inactive (not made a transaction) in the configured period. The deleting of inactive Customer points will occur when the Idealpos application is started on the terminal and deleted points will be replicated to other Idealpos terminals that are configured on the same network. By enabling this function, your Customer Points Liability can be maintained as well as encouraging your current and existing customers to remain active so they can retain their points balance. Note too that Customer Transaction History and Journal History will remain; only the Customer Points balances will be deleted for Inactive Customers in the period.

If you would like to use this function and have imported any customer balances, we strongly advise that you at least wait for the desired period of time to lapse before enabling this function.
E.g. If you want to delete Customer Points for any customers who have been inactive for 12 months, please wait at least 12 months after you import Customer balances to allow for those customers to visit your venue and be marked as active. Failing to wait for this period before enabling this setting will result in those Customer's imported points balance being deleted.
The requirement of waiting for the period to lapse is not required if you haven't imported Customer Balances.

To configure and use this function, go to:
Setup > POS Terminals > Select the Primary/Main POS Terminal > Modify > Miscellaneous Settings > General > Delete Points when Customer Inactive for # Months



Enter the desired number of months into the field.
When a value of 0 is entered, this function is disabled and no points will be deleted.
Any other entered value will be used to find customers that were inactive for the specified period and the points balance of those inactive customers will be deleted.



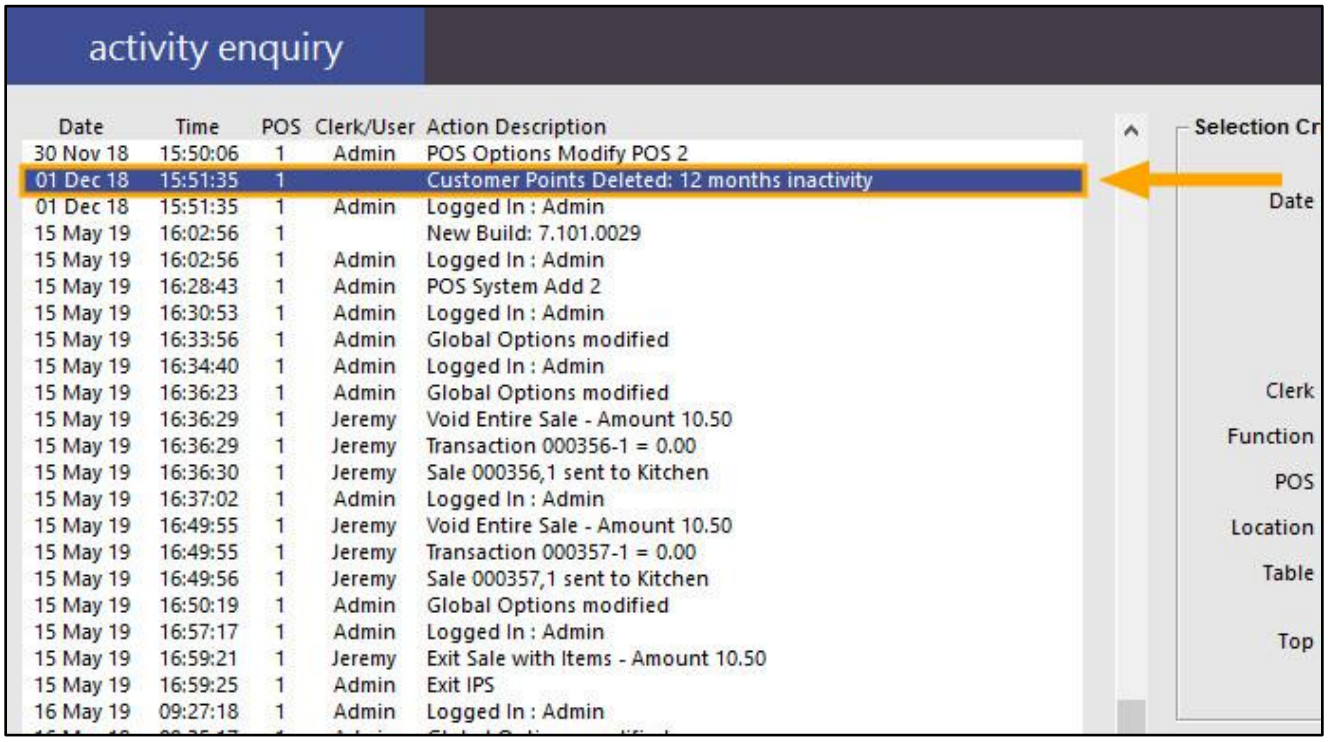
For the setting to take effect, close Idealpos then start it again.
When Idealpos starts on the terminal, Points will be deleted for any Customers which have been inactive for the specified period.

The following explains some important details about how points are deleted when using this function:

- When configuring this function at a venue with multiple terminals networked together, the setting should only be enabled on the main/primary terminal.
  Customer Points of any inactive customers will be deleted on the main/primary POS terminal and the packets of those deleted points will be sent across to other networked Idealpos Terminals. This will ensure that the Customer Balance is consistent across all networked POS terminals.
- Points deletion occurs when this function is enabled and the Idealpos application is started on the configured terminal for the first time in the current month. Points deletion only occurs once each month and once the Points Deletion has run for the current month, it won't run again until the 1st day of the following month.
- Points are deleted on the 1st day of every month (or the first time the POS terminal is turned on for the current month).
- If a venue is closed and the terminals are switched off on the 1st day of the month, points will be deleted the next time the POS terminals are switched on and Idealpos is started
- When points are deleted, the cut-off date is always the current month minus the number of months specified, with the 1st of the Month at exactly midnight (12:00AM) being used as the cut-off date.
  Example Case: Idealpos is configured to delete points when customer inactive for 12 months.
  The current month is June 2019
  The first time Idealpos is started in the current month of June 2019, the system will use a cut-off date of 1st June 2018 12:00:00AM.
  This means that any customers who have not made a purchase after the 1st June 2018 12:00:00AM will have their points deleted. Any customers who have made a purchase after this date will keep their points balance.
- The Customer Points Report (Reports > Customers > Customer Points) will only show current points and any points that have been deleted will not be displayed on the report.
- "Customer Points Deleted: # months inactivity" will be displayed in the Activity Enquiry, where # will be substituted with the number of months that have been configured as the inactivity period.
- Customer Transaction History/Journal History for any customers who have had their points deleted will be retained in the system. Only their points are deleted.

idealpos7 Update History

To confirm that Customer Points have been deleted, open the Activity Enquiry via Enquiry > Activity Log
The line “Customer Points Deleted: # months inactivity” will be displayed.
The below example shows Customer Points Deleted after 12 months of inactivity



EFTPOS

First American EFTPOS Integration

First American EFTPOS Integration has been added to Idealpos and is available to American customers only.
We recommend researching this additional software before attempting to configure it.

First American EFTPOS requires that the following steps to be completed:

- Installing Java Runtime Environment (JRE) 8.0 or higher
- Connecting the First American pinpad to the system
- Installing and configuring the First American 1st Pay mSDK Server/Client
- Licencing First American in Idealpos Licence Gateway
- Enabling the First American EFTPOS in Idealpos POS Terminal settings
- Closing the Idealpos suite then opening it again in order for the changes to take effect
- Setting up the printer

For further information on configuring this EFTPOS integration, please refer to the First American topic in the EFTPOS section of the Idealpos User Guide.

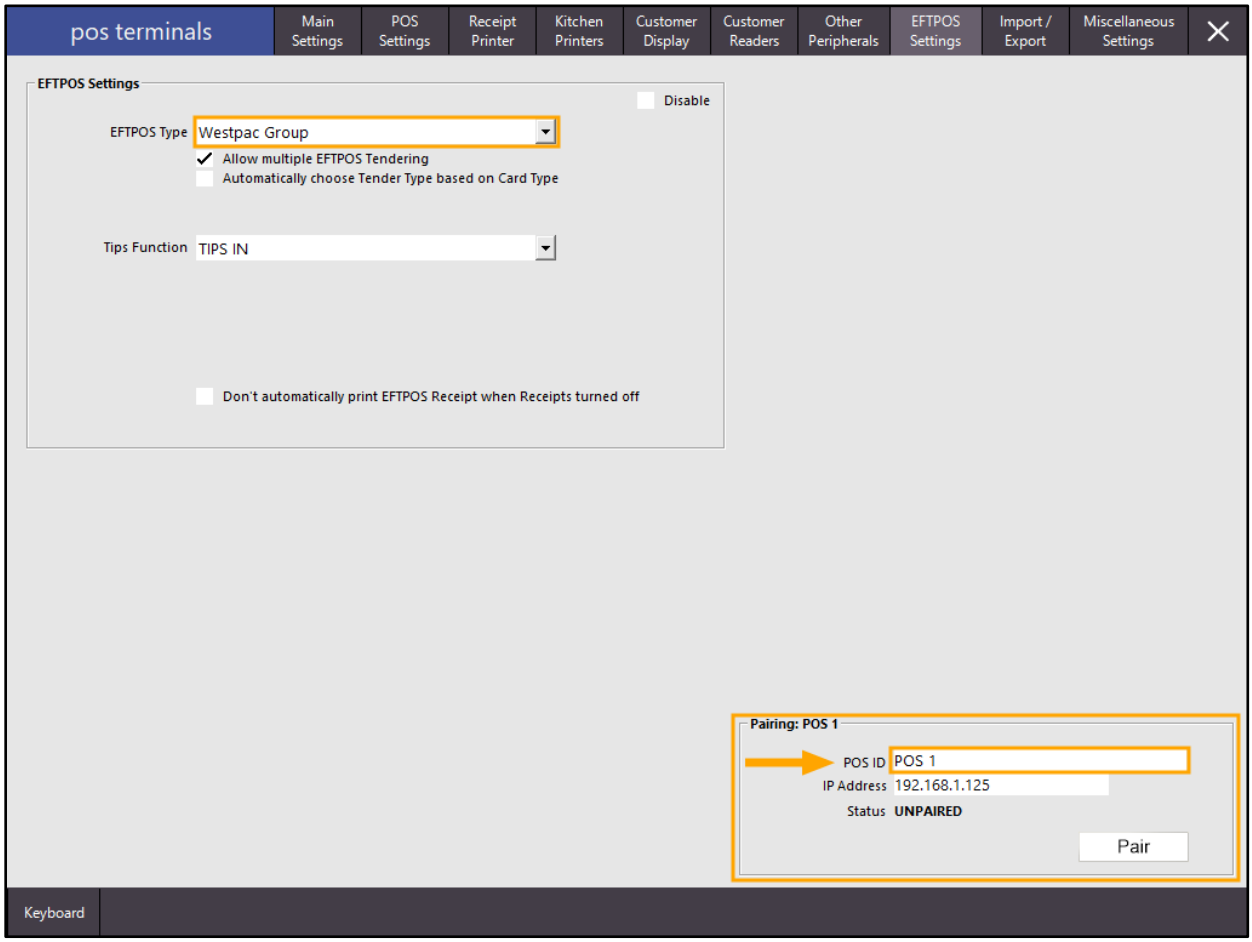
idealpos7 Update History

Westpac Group EFTPOS – POS ID description setting for Pairing

This function allows a Westpac Group EFTPOS pinpad to remain connected to the POS Terminal after changing a POS Terminal's description in Idealpos.
When using previous builds of Idealpos, changing a POS Terminal Description (Setup > POS Terminals > Modify > Description) would result in the pairing status between the Westpac Group EFTPOS Pinpad and Idealpos being lost. You would then have to re-pair the Pinpad with the POS Terminal again after changing the POS Terminal Description. With this enhancement, a new POS ID field has been added to the EFTPOS Settings screen and this POS ID is used to pair the Pinpad with Idealpos instead of the POS Description. This therefore allows the Westpac Group EFTPOS Pinpad to remain paired with the POS Terminal after a POS Terminal's description has been changed.

There is no extra configuration required when upgrading a system that is already configured with the Westpac Group EFTPOS integration as the pinpad will remain paired.
However, when pairing a POS Terminal that hasn't previously been configured with a Westpac Group EFTPOS pinpad, you will need to enter the POS ID as well as the Pinpad IP Address when pairing the Pinpad.

Go to: Setup > POS Terminals > Select terminal > Modify > EFTPOS Settings > EFTPOS Type: Westpac Group > Pairing: POS X > Enter POS ID and IP Address
The POS ID is typically the terminal description. The description entered into the POS ID field will appear on the screen of the pinpad



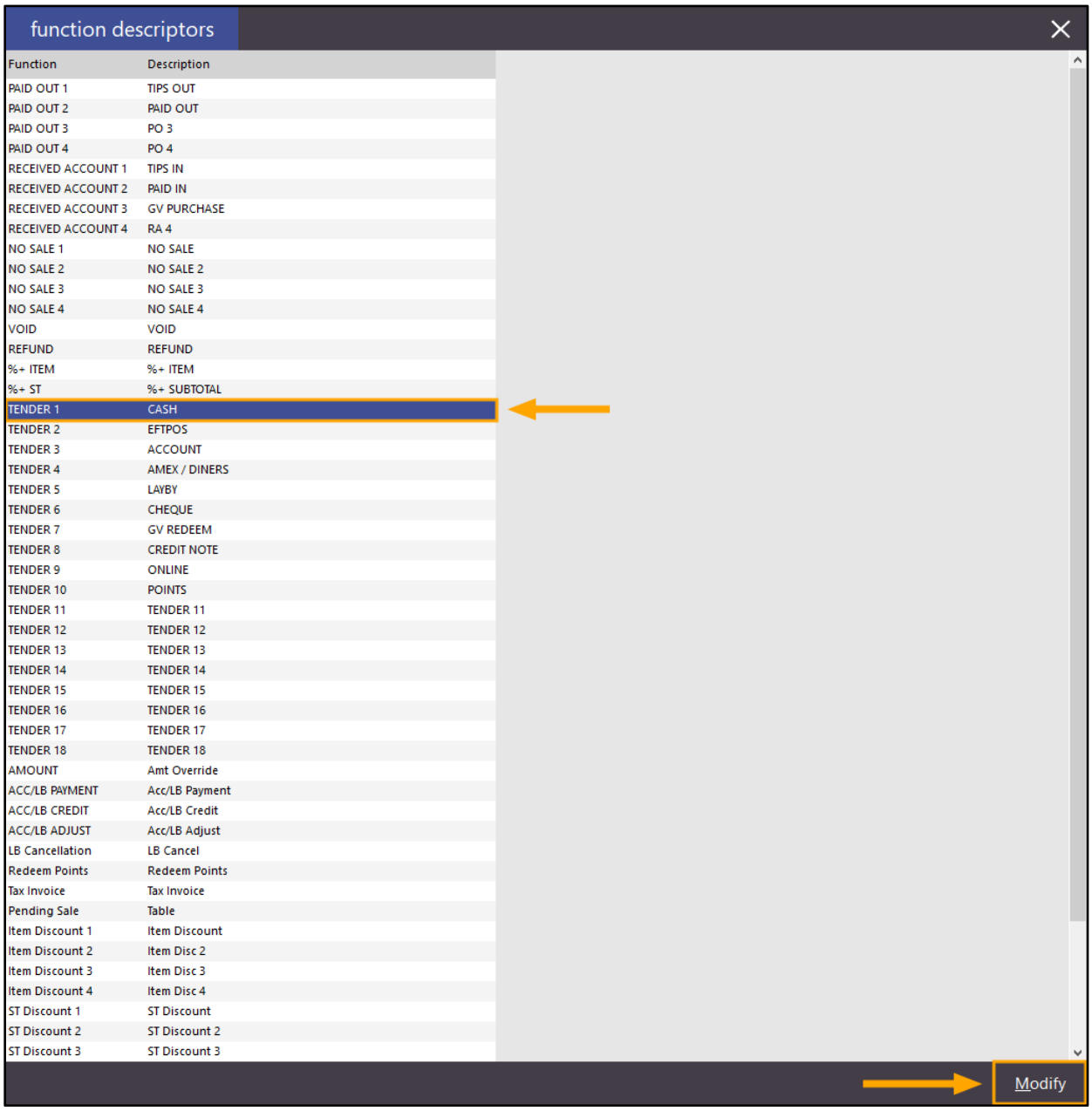
After pairing the pinpad with Idealpos, the POS ID description is displayed on the pinpad.
The pinpad will remain paired with the entered POS ID, even if the POS Terminal description is modified:

Function Descriptors

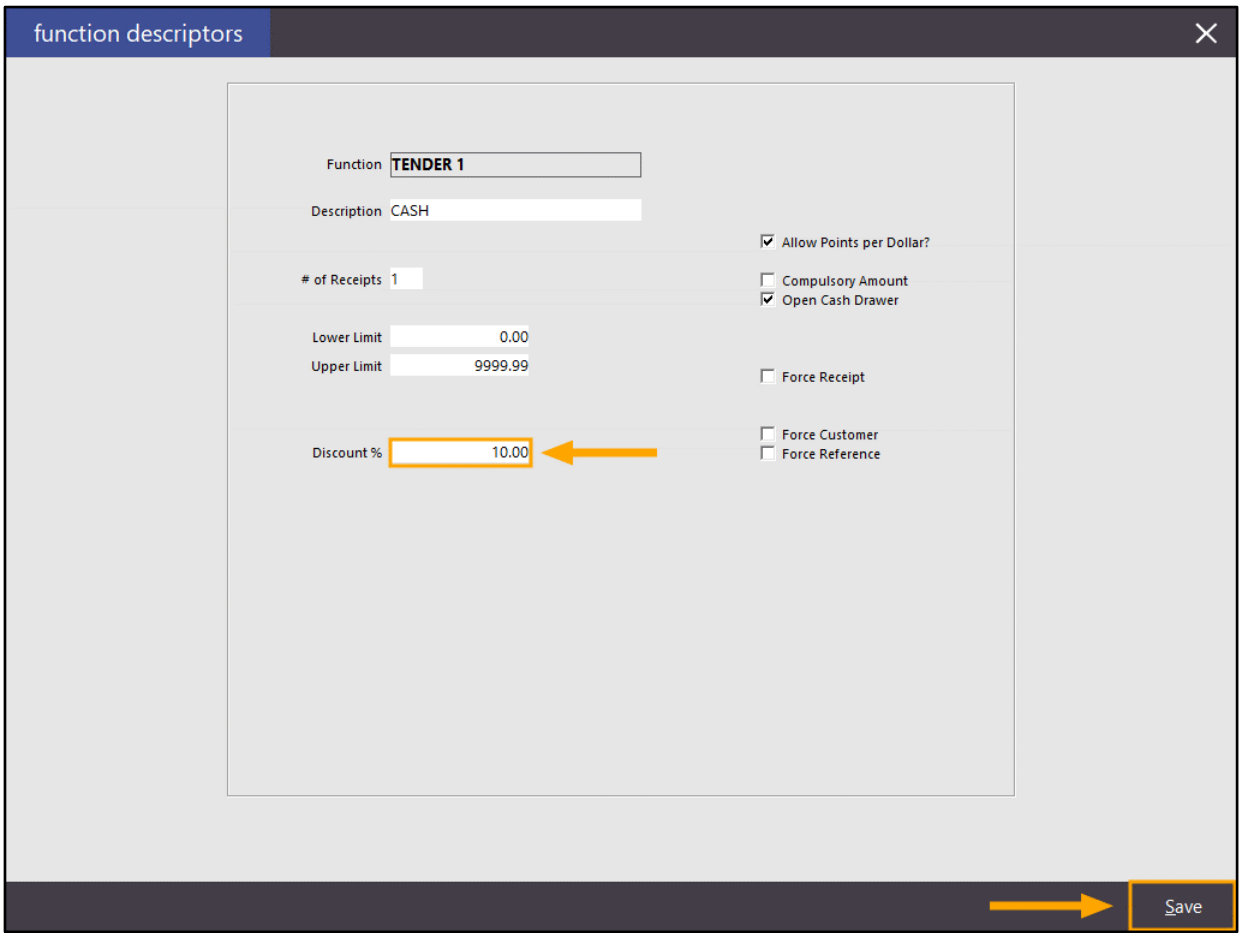
Cash Discount Function

This function adds the ability to setup a Cash Discount on the Cash Tender. When customers pay using cash, they will automatically receive the percentage discount that has been configured against the Cash Function Descriptor.
This function may be used as an incentive to encourage your customers to pay for their items using cash.
If you have a Customer Display configured and enabled on your POS terminal, text will also be displayed on the Customer Display and will show the Customer how much they can save if they pay using Cash.

To configure this function, go to: Setup > Function Descriptors > Select Cash from the list of Functions > Modify



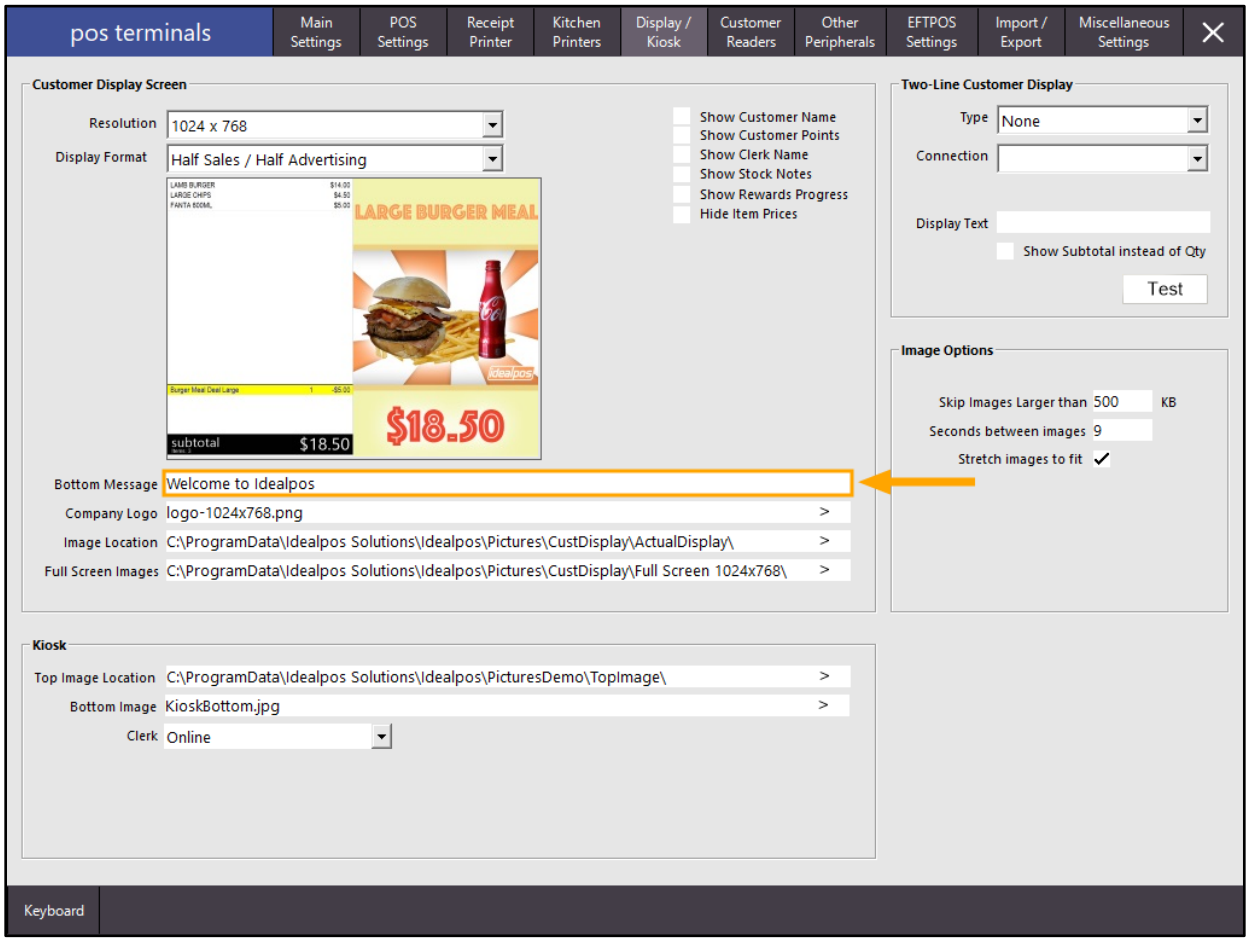
Enter a value into the Discount % field. The default value entered is 0.00 which indicates that a discount will not be applied when paying for the sale using Cash. Entering value into the Discount % field will trigger that percentage to be discounted from the total sale amount when pressing the “CASH” button on the Tender screen. Once the required Discount % has been entered, press the Save button on the bottom-right corner of the screen.



Close the Function Descriptors screen.

idealpos7 Update History

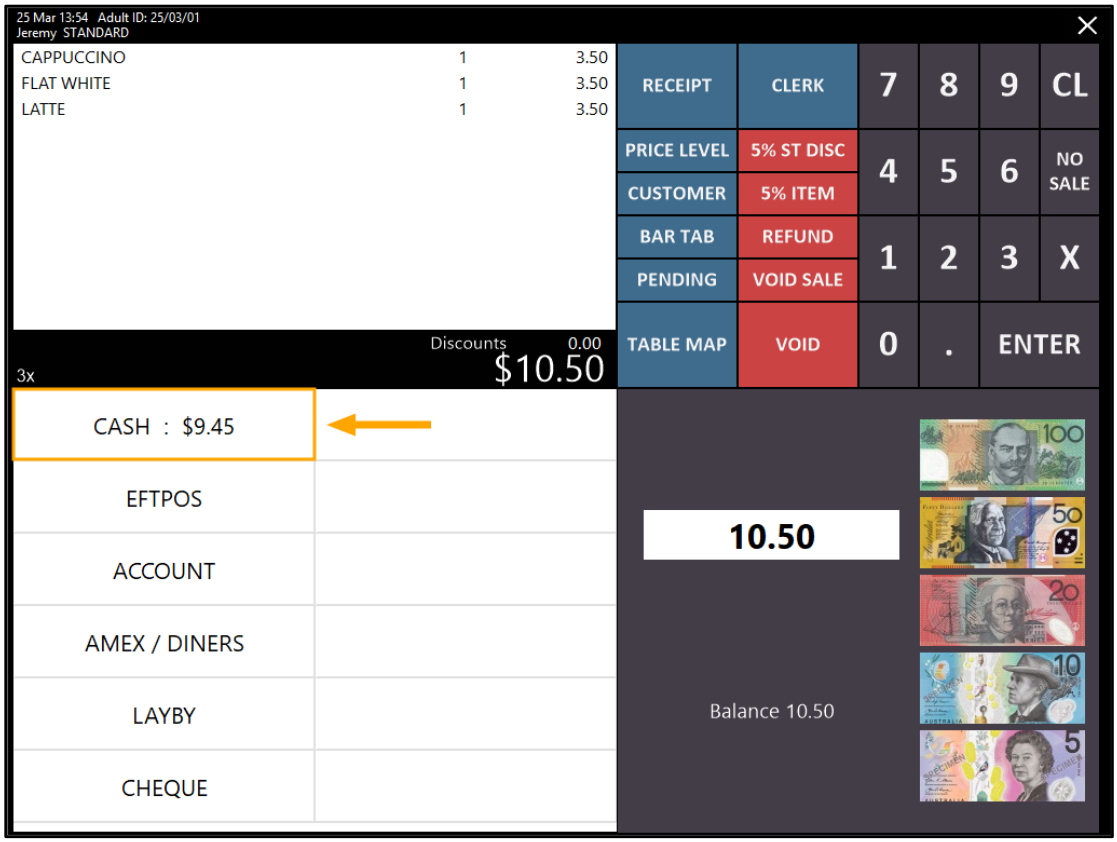
If you have a Customer Display and you want your customers to see a message at the bottom of the screen, ensure that you have a Bottom Message configured for the Customer Display. The same portion of the Customer Display will also be used to show the Customer how much they'll save when they pay with cash.
Go to: Setup > POS Terminals > Select terminal > Modify > Display/Kiosk > Bottom Message



Once you have configured the Bottom Message, close the POS Terminals configuration screen, then open the POS screen on the terminal.

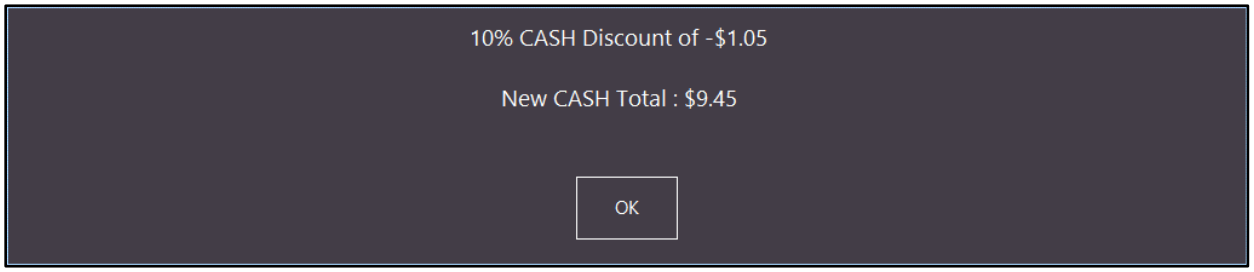
Add items to the sale, then press the “Enter” button to go to the Tender screen.

The Clerk operating the POS terminal will see the discounted Cash amount on the Cash button which the Clerk can verbally communicate to the customer if your venue does not have a Customer Display.
In addition, if you do have a Customer Display, the Discount amount will be shown at the bottom of the Customer Display when the Clerk operating the POS terminal is viewing the Tender screen at the final stage during the sale.



After pressing the “CASH” button on the Tender screen, the POS will display the discounted cash amount in a prompt.

idealpos7 Update History



If Receipts are turned on, pressing OK will trigger a receipt to be printed and the Cash Discount amount will be included on the customer receipt. Otherwise, press the Receipt button to print off a Customer Receipt.

IDEALPOS

1/212 Curtin Ave West
Eagle Farm QLD 4009
Australia

TAX INVOICE
123-456-789-11

#000702 1 Jeremy 25/03/19 14:00:42

-----BEVERAGE-----

CAPPUCCINO*	$3.50
-0.35 10% CASH Discount	
FLAT WHITE*	$3.50
-0.35 10% CASH Discount	
LATTE*	$3.50
-0.35 10% CASH Discount	
10% CASH Discount	-$1.05
TOTAL	**$9.45**
GST Subtotal	$9.45
GST Amount	$0.86
CASH	**$9.45**
FOOD TOTAL	$0.00
BEVERAGE TOTAL	$9.45
Other Categories TOTAL	$0.00

*indicates taxable supply

Powered by Idealpos

Functions

Gratuity % Functionality

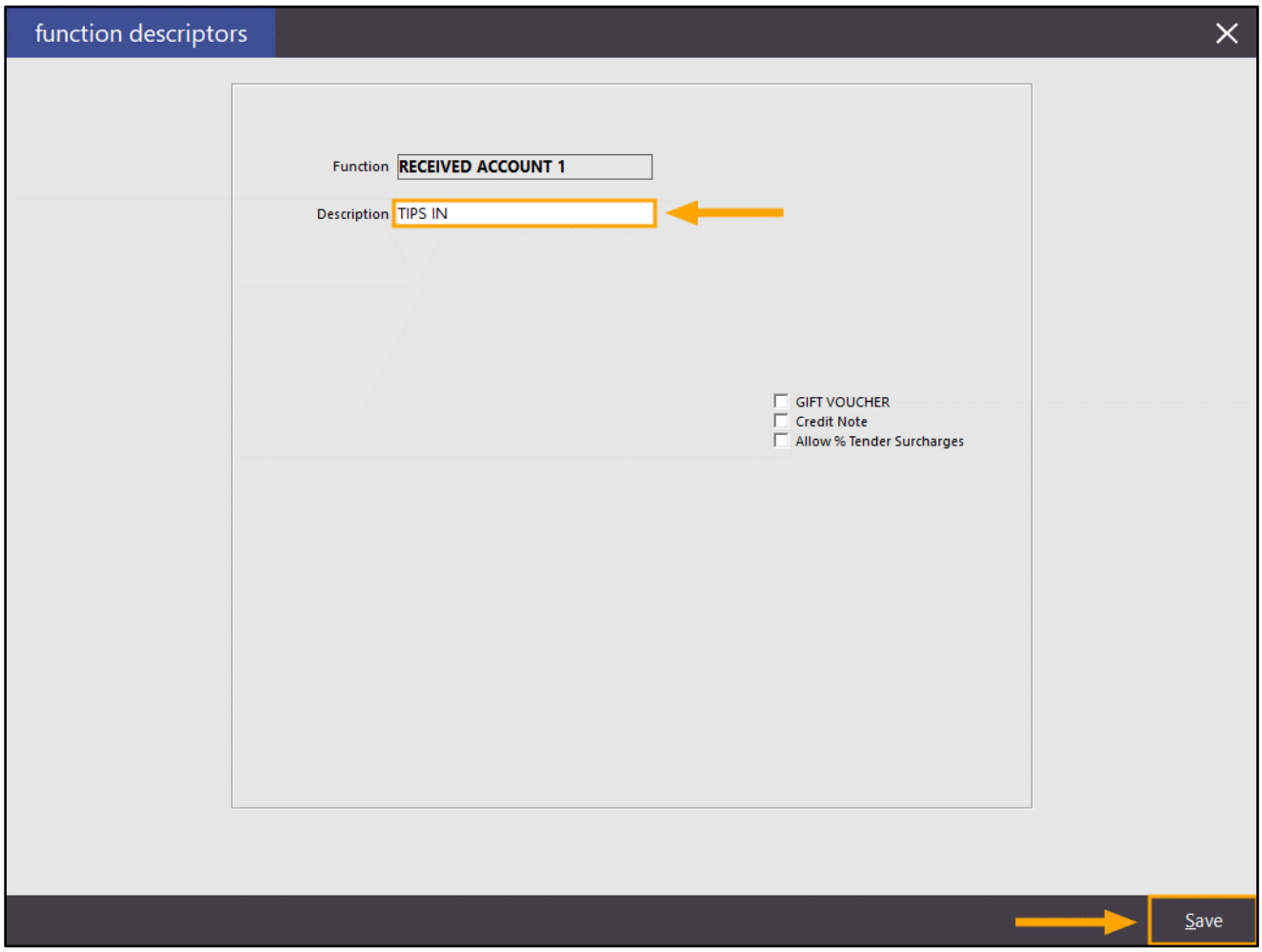
This function adds the ability to pre-configure a gratuity percent amount on a POS screen button. When the Clerk presses the button, the POS will use the pre-configured percentage to calculate the gratuity amount based on the total amount in the sale. This function is typically known as Tipping where a customer can tip an amount.
Using this function, either a single button can be created with a typical percentage tip amount, or numerous buttons can be created for the most popular tip percentage amounts at the venue.

Before setting up this function, ensure that you have a Received Account configured as a Tips function.

Go to: Setup > Function Descriptors
By default, any Received Account descriptors that have not been configured will be labelled as RA 1 to RA 4.
The descriptors configured for each Received Account function should be labelled so the function resembles the intended purpose (e.g. TIPS IN, PAID IN, Gift Voucher Purchase, etc.).
If you already have a TIPS or TIPS IN label against one of the Received Account functions, you can skip this step.

Select the next available Received Account descriptor that is labelled as RA # and press the Modify button on the bottom-right corner.

Enter a description of TIPS IN, then press the Save button on the bottom-right corner of the window.



idealpos7 Update History

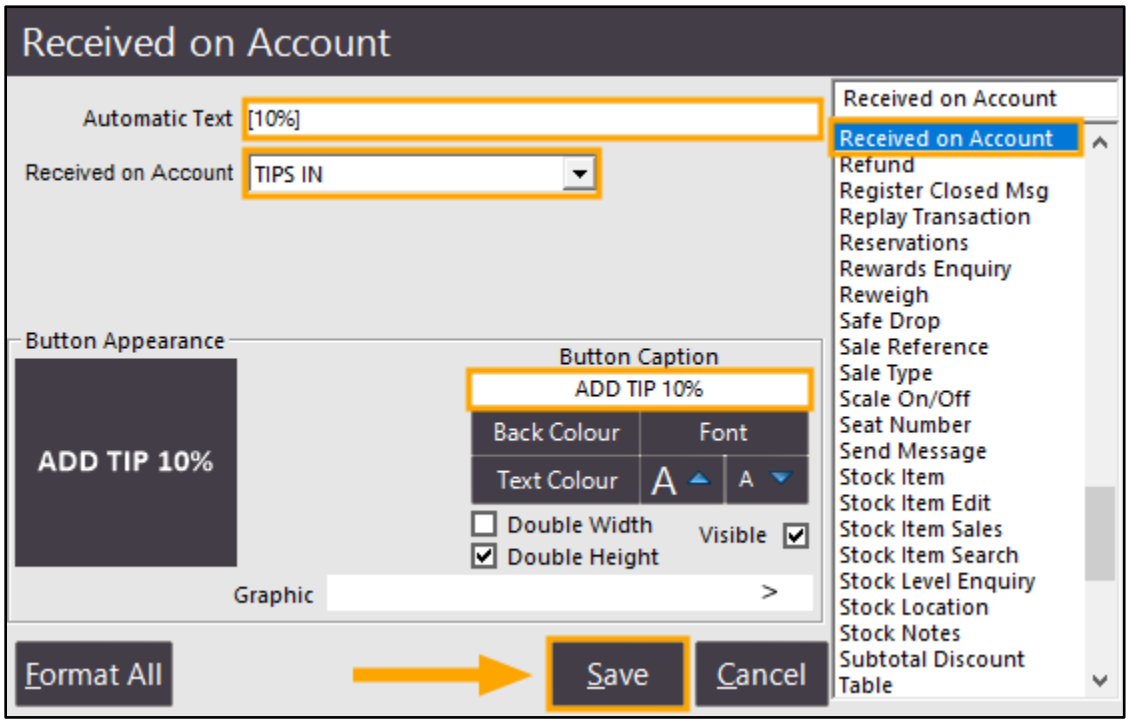
After assigning the TIPS IN function to a Received Account function, we recommend that you update any interfaces in Idealpos that support a TIPS function so that they use this Received Account function.
Examples of such interfaces are EFTPOS, Tyro Pay@Table, Clipp Interface, etc.
These are configured in Setup > Global Options > Interfaces

If using integrated EFTPOS, ensure that the correct TIPS function is selected in:
Setup > POS Terminals > Modify > EFTPOS Settings > Tips Function

Once the above has been configured/confirmed, go to: Setup > POS Screen > POS Screen Setup
Select a tab on the POS screen where you'd like to create the buttons.
Typically, Tip buttons exist on an Admin or Clerk functions tab, however, your POS screen setup may differ or you may want to add them to another tab as required.

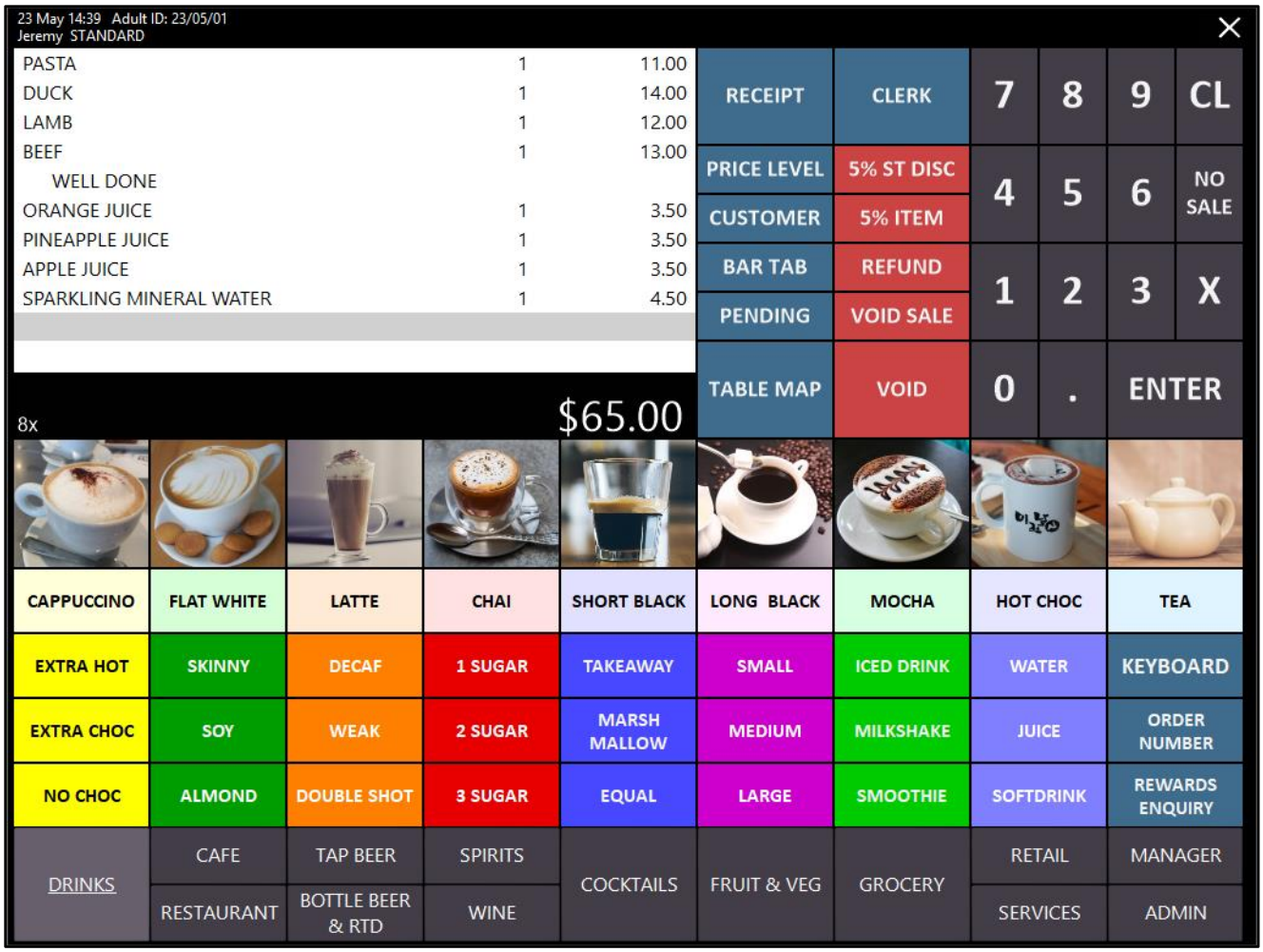
Once you have selected the desired tab, click on a blank button.
Configure the button as below, taking note that the Automatic Text field is the field that will define the percentage amount. Adjust the amount in the Automatic Text field as required. Also, enter a Button Caption that reflects the TIP function as well as the percentage amount.

Function: Received on Account
Automatic Text: [10%]
Received on Account: TIPS IN
Button Caption: ADD TIP 10%



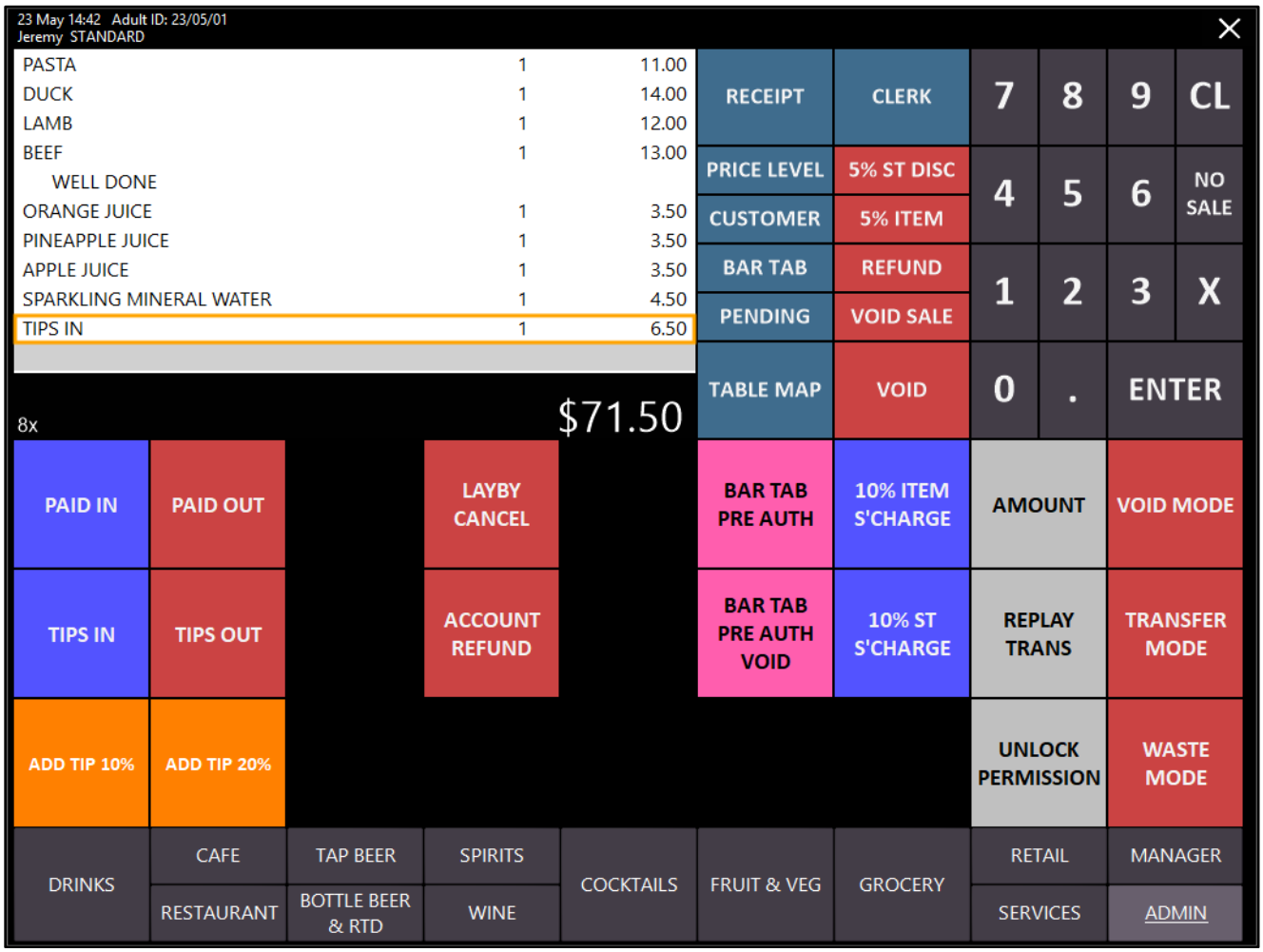
You may want to repeat the above steps for various TIP amounts as required.
Once the buttons are created, close the POS screen layout windows and return to the POS screen.

Add items to the sale as you normally would.



idealpos7 Update History

Once the items have been added, press the required “Add Tip” button.
Note that the Add Tip button can be pressed at any time during the sale, however, it will only calculate the tip amount based on the current total amount of the sale.
The below example shows the result of pressing the “ADD TIP 10%” button.
The Tip amount is automatically calculated and added to the sale, based on 10% of the sale total.
In this example, the Tip amount is $6.50 (10% of $65.00).



Kiosk

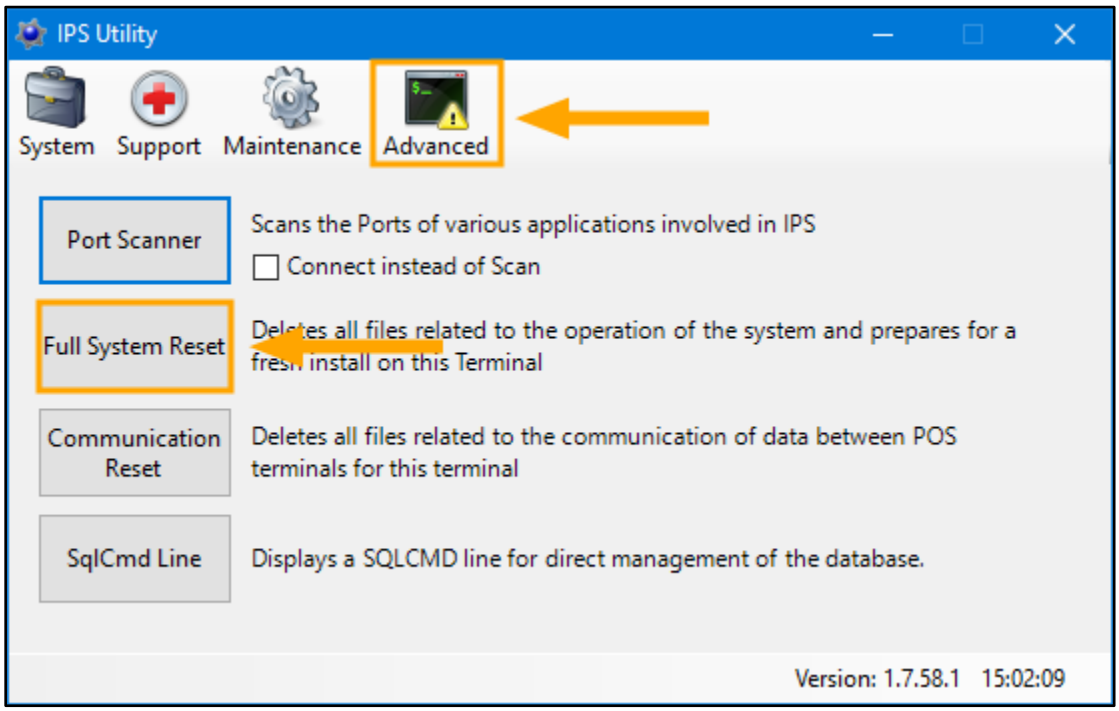
Basic Kiosk Functionality

This function adds basic Kiosk functionality to Idealpos. A POS terminal can be configured as a Kiosk so that customers can place their orders at a terminal in a similar way that is offered in many fast-food restaurants.

Please be aware and take note of the following points before demonstrating/using the Kiosk function in Idealpos:

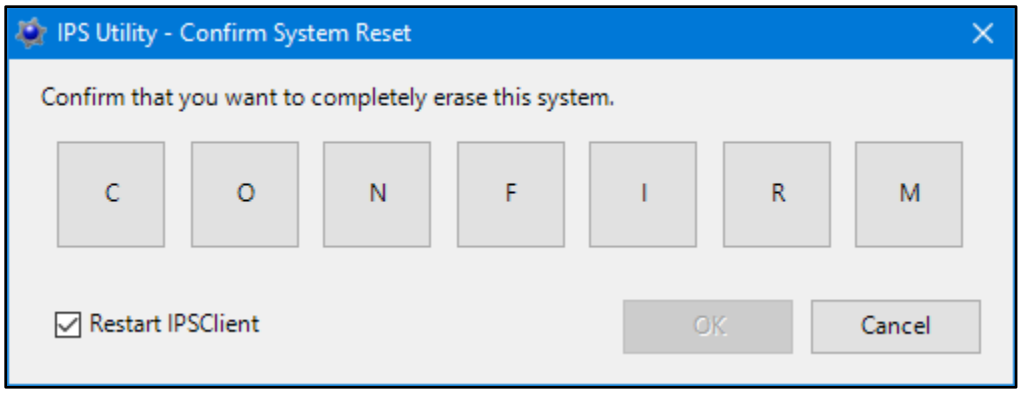
- Kiosk is enabled in the licence, therefore needs to be purchased to use this function on a permanent basis
- Kiosk module cannot be licenced together with Back Office or POS Screen on the same terminal (this restriction does not apply when demonstrating this function on a system with a Demo Licence)
- Kiosk is designed to run in portrait orientation at a resolution of 1920x1080
- The Demonstration Database included with Idealpos contains a Kiosk POS Screen Layout in portrait orientation that can be used for demonstrating the Kiosk function
- To demonstrate this function, a Full System Reset must be performed on a non-production terminal. This will result in all Idealpos settings being erased, so therefore should only be done on a demonstration terminal
- To demonstrate this function, the screen orientation in Windows will need to be changed to portrait

To configure and enable the Kiosk function, start IPSUtils.
This can be done by opening the Windows Start menu, entering IPSUtils into the search, then starting IPSUtils.
Within IPSUtils, click on the Advanced tab, then click on "Full System Reset"

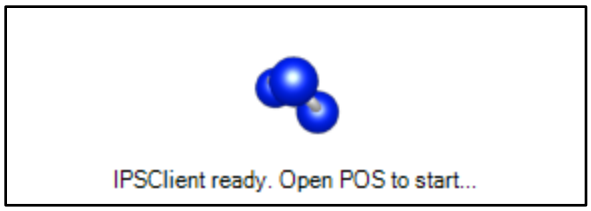


idealpos7 Update History

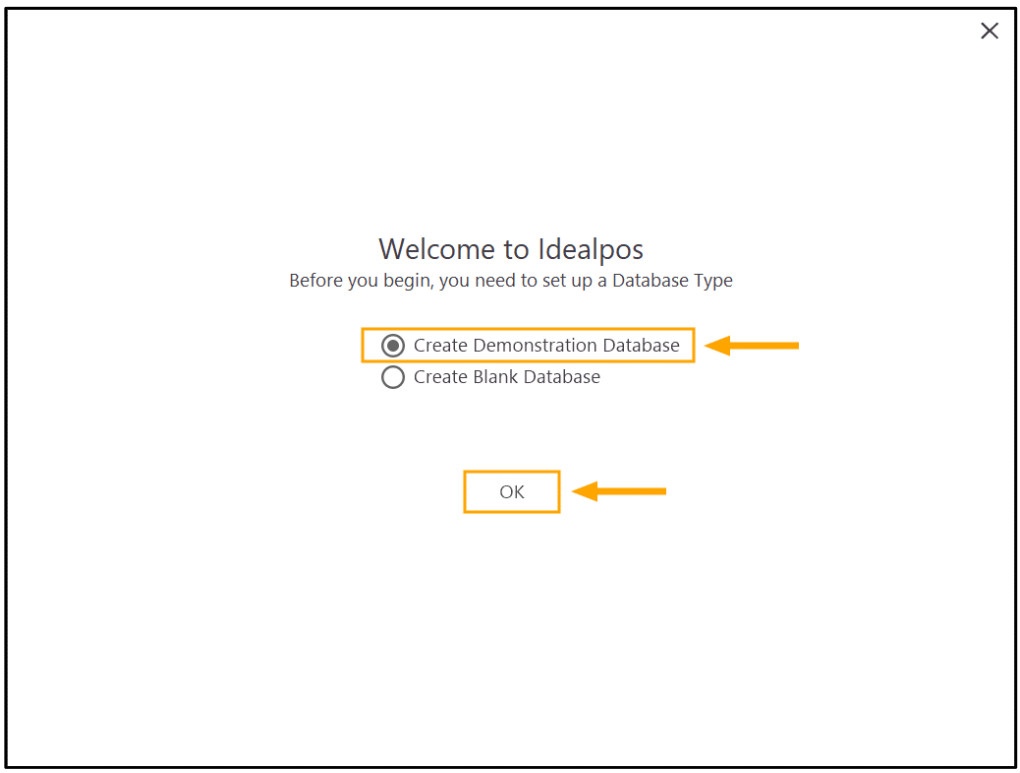
If prompted, enter the Admin password, then confirm the reset by either pressing each character on the screen, or type in “confirm” using your keyboard. After confirming, the OK button will become available.
Press OK to continue with the System Reset.



After the system reset has been completed, the following “IPSClient ready” prompt will appear on the bottom-right corner of the screen. Double click on the spinning IPSClient logo.

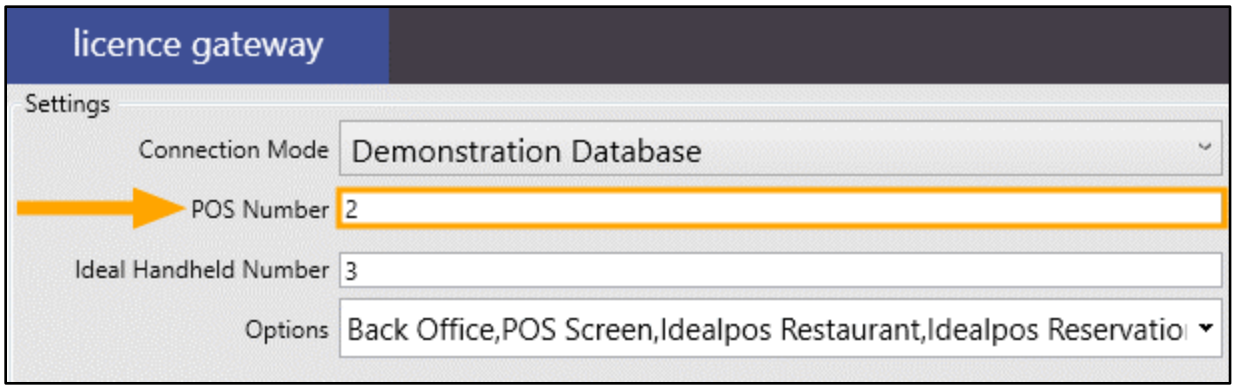


On the following prompt, select “Create Demonstration Database” then press OK.



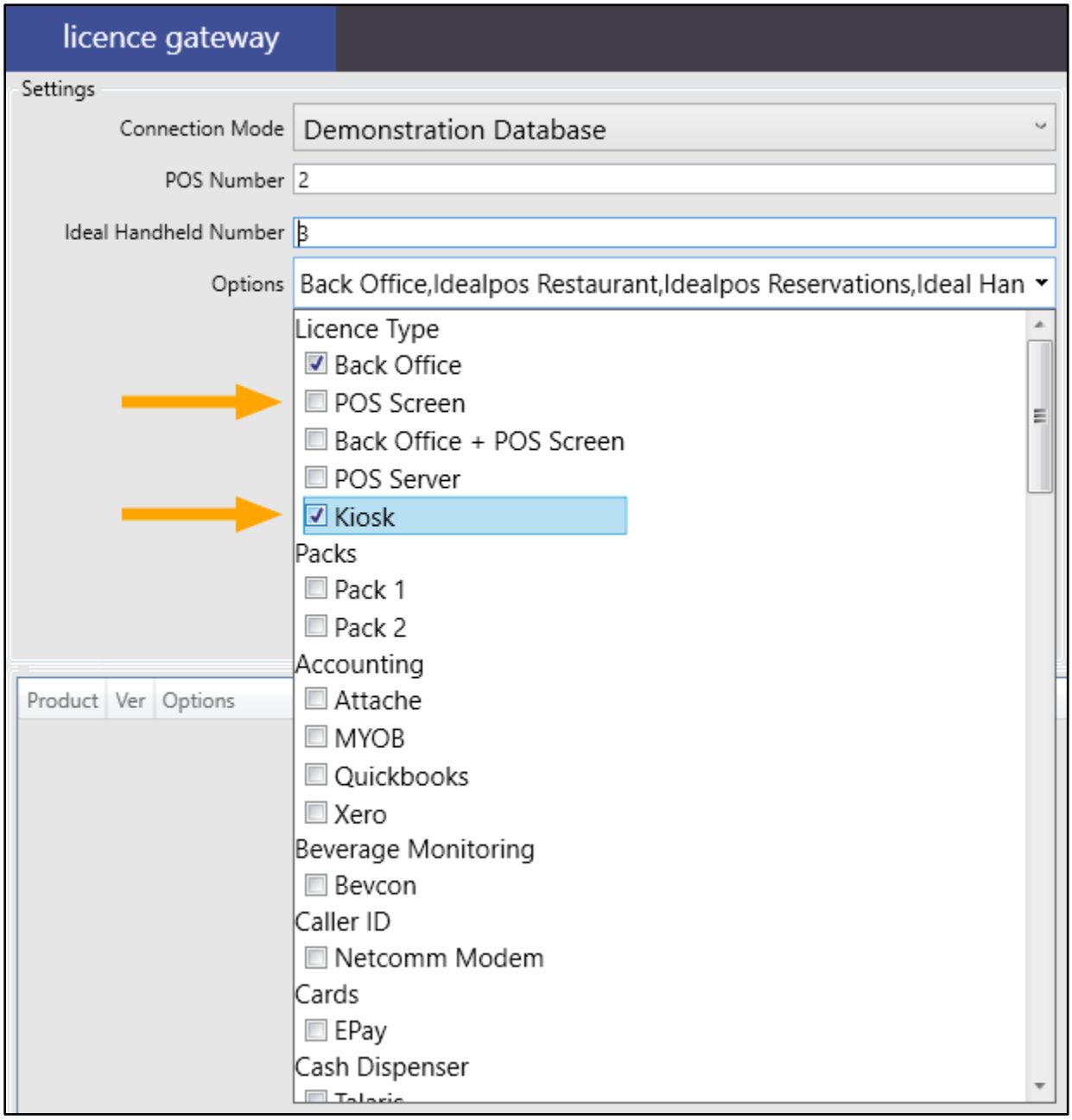
Idealpos will Create the Demo Database along with any other steps that are required for Idealpos to function.

When complete, the Idealpos POS screen will be displayed.
Close the POS screen using the "X" button on the top-right corner of the screen.
Then go to: Setup > Licence Gateway
Change the POS Number to 2

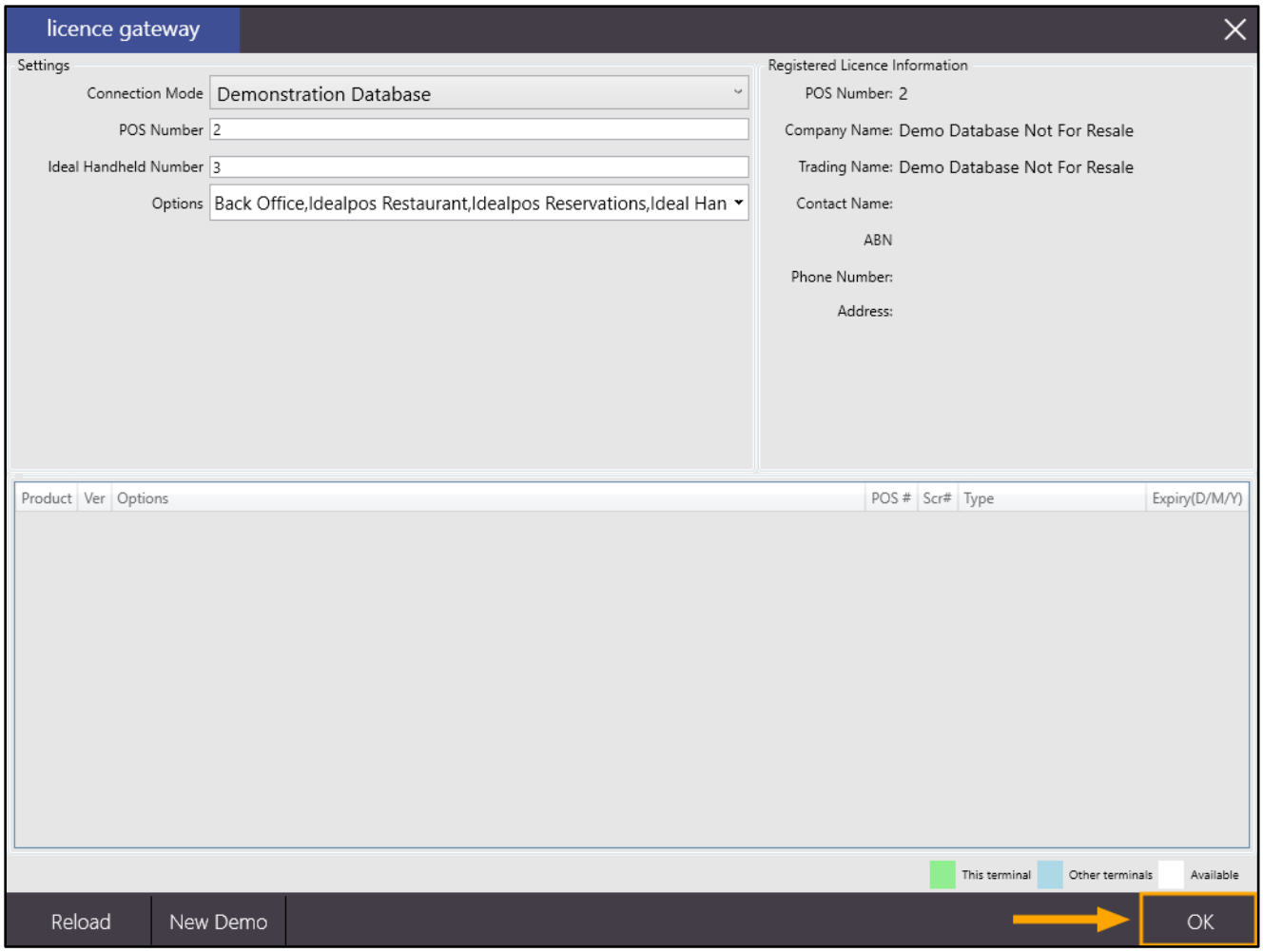


idealpos7 Update History

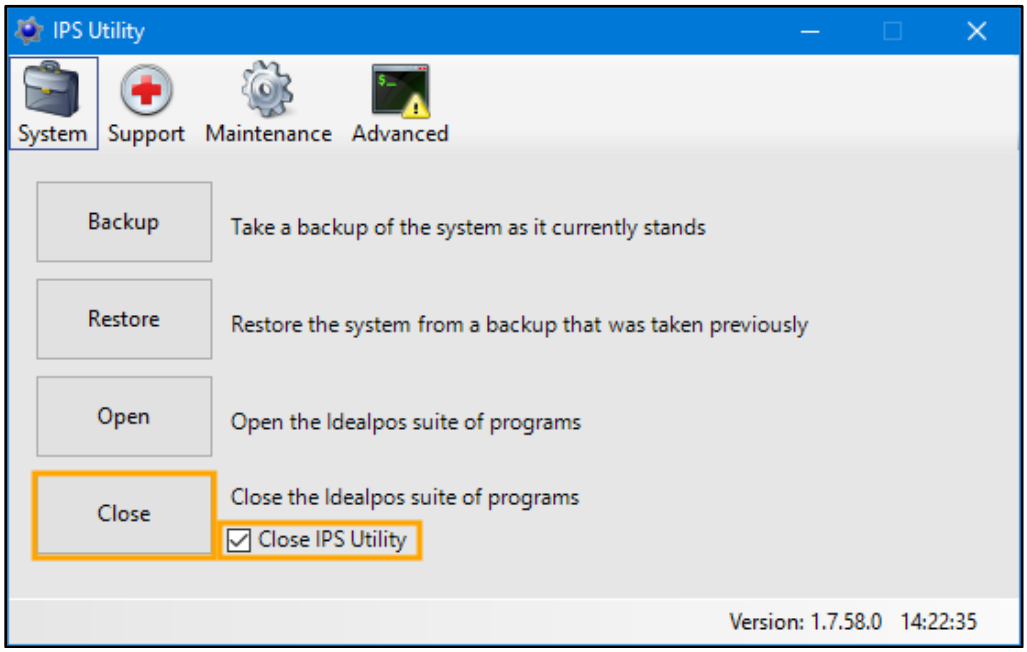
Click in the dropdown box next to Options, then disable “POS Screen” and enable “Kiosk”.



Press the “OK” button on the bottom-right corner of the screen to save the changes.

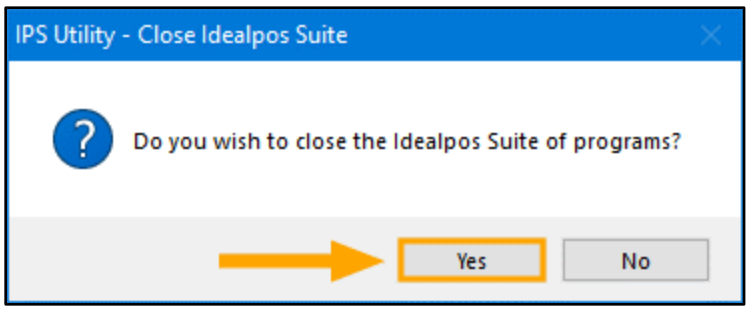


You will need to restart Idealpos for the change to take effect. IPSUtils can be used to close Idealpos.
Go to:
Start > Search for “IPSUtils” then once it is displayed, open it > Enable Checkbox: Close IPS Utility > Close

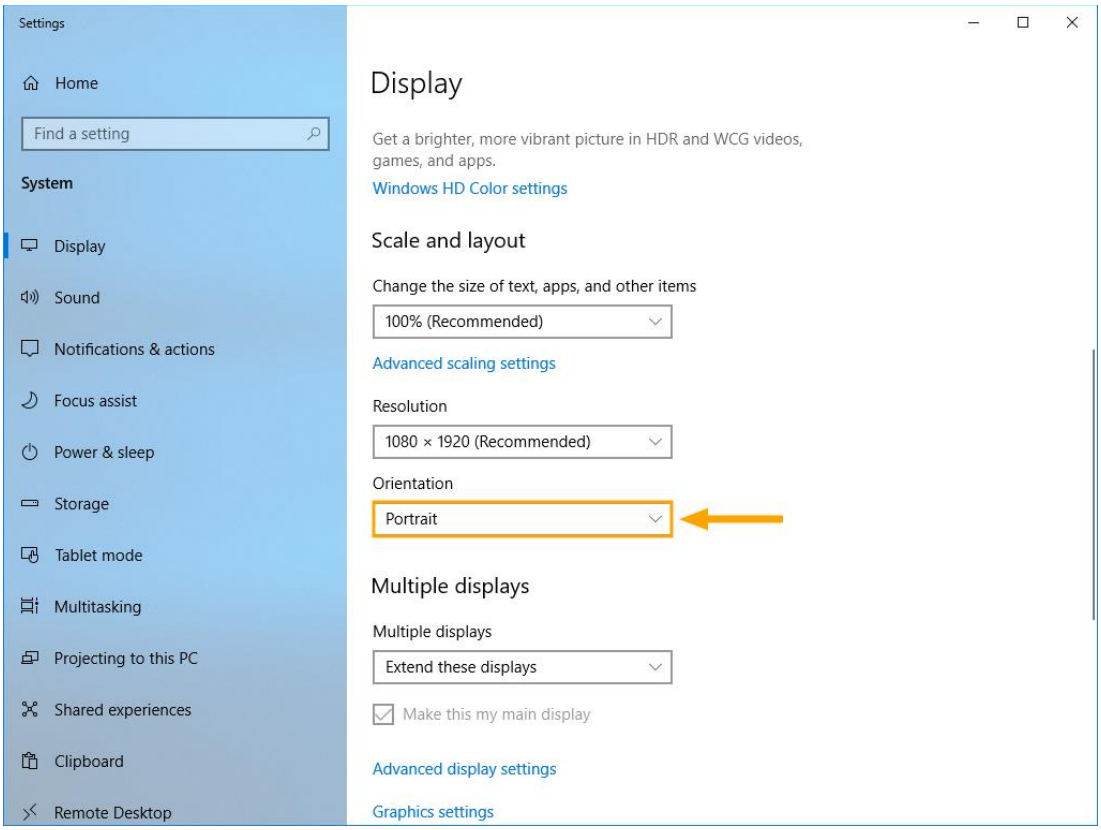


idealpos7 Update History

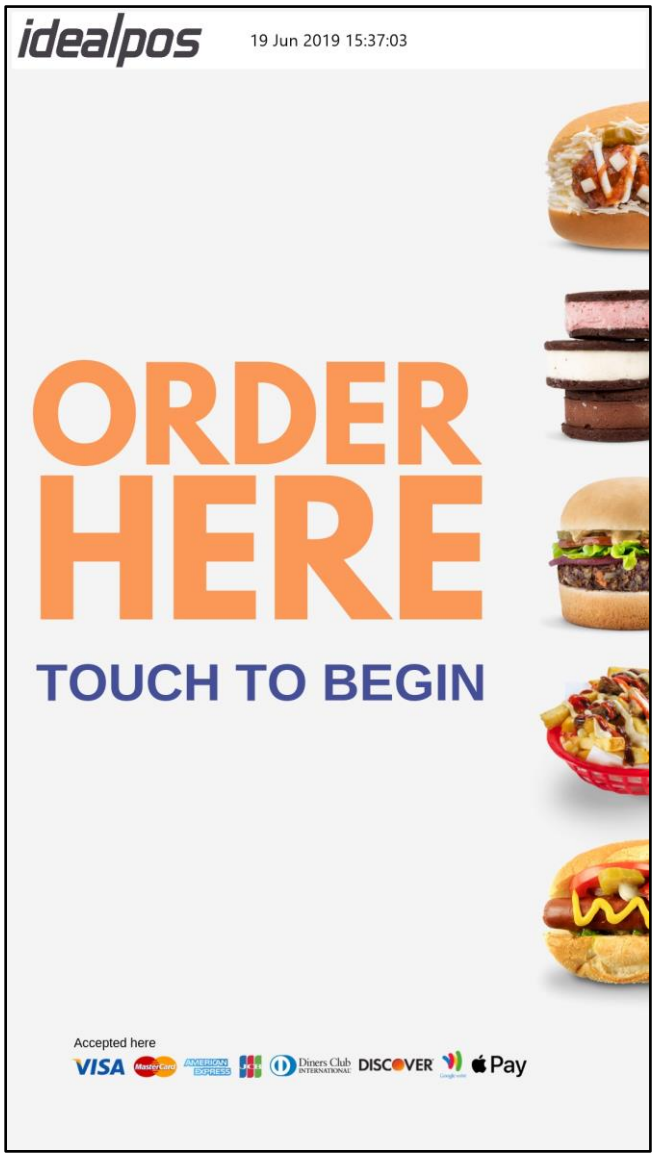
Select “Yes” when prompted to close the Idealpos Suite of programs.



As the Kiosk module is designed to run on a portrait orientation screen, you will need to adjust the Windows display settings so that the screen is rotated and displayed in portrait mode.
On a Windows 10 system, this can usually be achieved by right-clicking anywhere on the Windows desktop and choosing “Display Settings”, then changing the orientation from Landscape to Portrait.
Note however that this may differ depending on the version of Windows installed as well as the Windows Display Drivers.

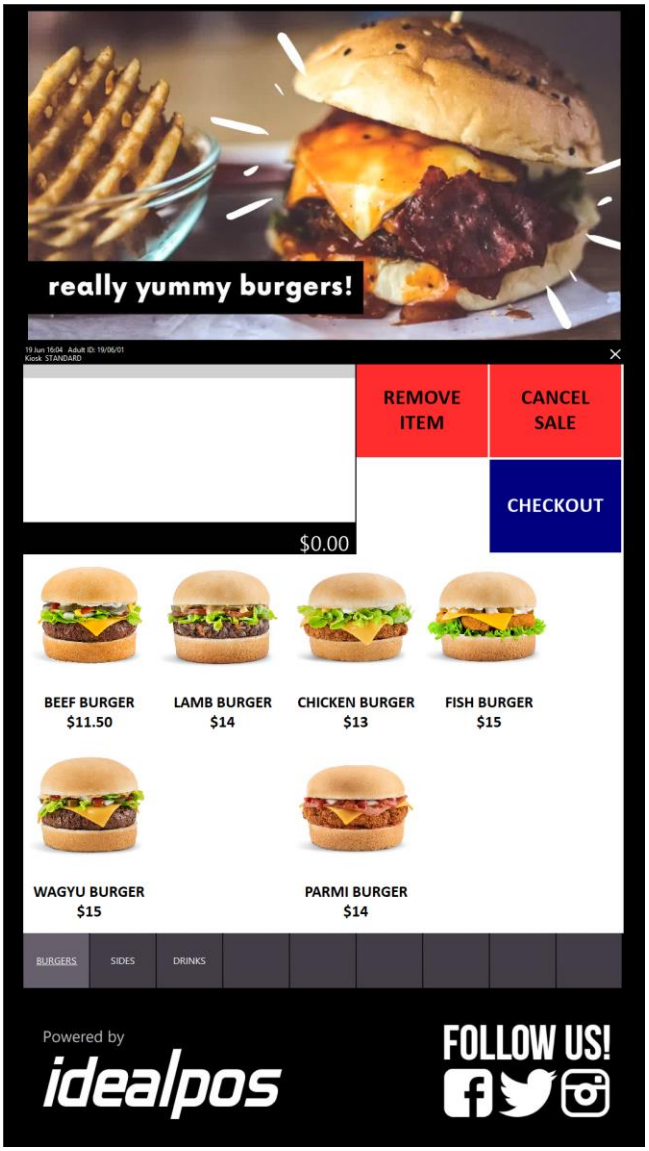


Once the Windows Display Orientation has been changed to Portrait, you may start Idealpos.
After Idealpos starts, it will display a “Kiosk” POS Screen layout that can be used to demonstrate the Kiosk module.
The first screen that appears will be an ORDER HERE screen to draw the customer’s attention towards the Kiosk.
The image used below can be modified by going to:
Setup > POS Terminals > Select POS Terminal > Modify > Display/Kiosk > Kiosk > Home Screen Image



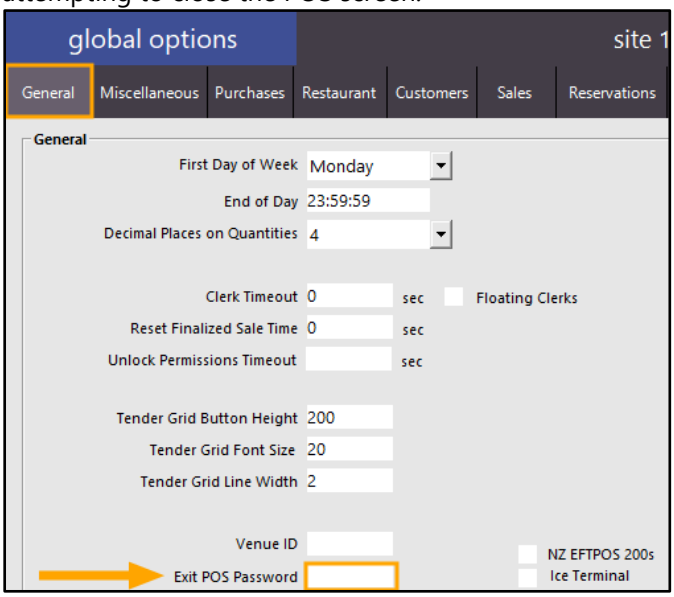
idealpos7 Update History

Clicking or pressing anywhere on the screen will reveal the built in Kiosk POS Screen Layout included in the Idealpos Demo Database. This can be used to demonstrate the various possibilities when using a Kiosk layout.
POS screen tabs included in the Kiosk Demo are BURGERS, SIDES and DRINKS.
The main buttons available on the top-right corner of the POS screen are:
REMOVE ITEM – Select any item that has been added to the sale then press REMOVE ITEM to remove the item
CANCEL SALE – Removes all items from the sale then returns to the ORDER HERE – TOUCH TO BEGIN screen
CHECKOUT – Proceeds to the CHECKOUT screen where customer makes their payment



When configuring the Kiosk function, the following functions may be useful:

- Exit POS Password – Can be used to prevent the customer from exiting the POS screen on a Kiosk.
  To configure/enable this function, go to: Setup > Global Options > General > Exit POS Password
  When the Exit POS Password is blank, the POS screen can be closed without entering a Password.
  When a password has been configured, the POS screen will prompt for a password to be entered when attempting to close the POS screen.



- Options in Setup > POS Terminals > Display/Kiosk > Kiosk
  The following settings are available:
  Top Image Location – Can be used to specify the folder containing the images or videos that will be shown at the top of the Kiosk screen. The component used to display videos is Windows Media Player, but you will need to check your videos before use, as not all formats may display correctly.
  Typically, .avi and .wmv files will play with no issue.
  Bottom image – Can be used to specify an image to display at the bottom of the Kiosk screen.
  Home Screen Image – This setting can be used to display a Home Screen Image on the Kiosk before the customer starts using the Kiosk. Typically, this can be a Welcome or Order Here image.
  This setting will override any image configured in Global Options > Other Options > Home Screen > Home Screen Graphic
  Clerk – Allows you to specify the Clerk that you want to use for the Kiosk. You may want to create a new Clerk for the specific purpose of Kiosk use. This may assist when running reports for sales performed at Kiosks.

- When creating Kiosk POS screen buttons, Carriage Returns are now supported and may be used to move POS screen button text onto the next line. The Carriage Return character is the tilde "~".
  This character can be entered into the button caption field when creating new or modifying existing POS Screen buttons via Setup > POS Screen > POS Screen Setup > Select POS Screen Layout > Buttons > Select exiting button/Create new button
  More information on this function can be found within this Update History document – see "POS Button Captions can include Carriage Returns" under the POS Screen Setup topic.

Laybys/Layaways

Layby Descriptor programmable through Function Descriptors

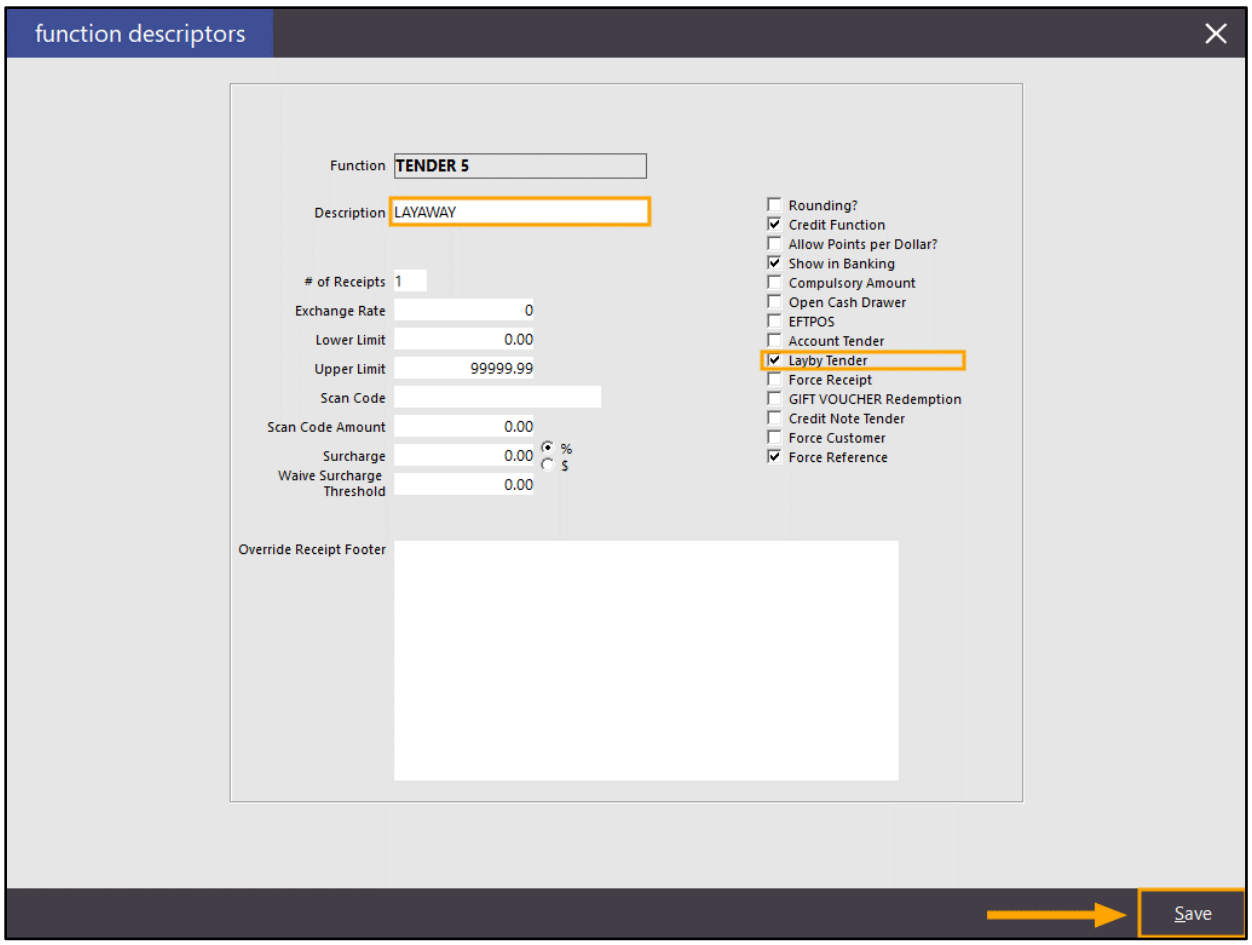
This function adds the ability to control the name used to refer to the Layby function in various screens, menus and reports in Idealpos. The name Layby is used in Australia, New Zealand and South Africa. Other regions may refer to Laybys as Layaways and Idealpos has been updated to allow for customers in those regions to customise Idealpos for their region.

To configure this function, go to: Setup > Function Descriptors.

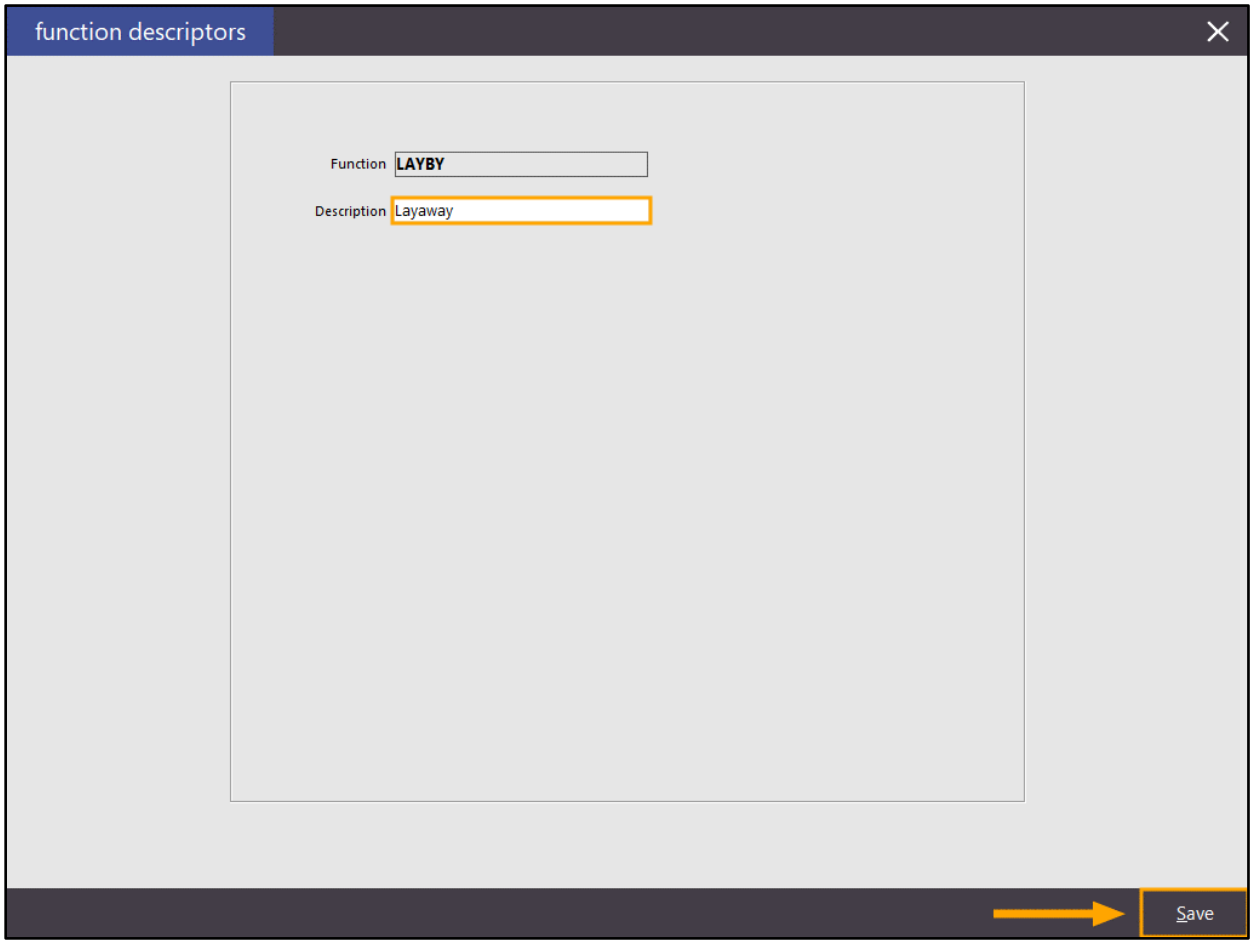
There are two Function Descriptors that need to be updated:

- Tender Descriptor – Used for the Layby/Layaway tender (shown on the Tender screen when finalising the sale)
- Layby Descriptor – Used to control whether Idealpos uses the Layby or Layaway description throughout the program

From the list of Function Descriptors, look for a Tender configured with a Description of "LAYBY", select it, then press the "Modify" button on the bottom-right corner of the Function Descriptors window. If the Layby Tender does not exist yet, you will need to select the next available/unused tender and assign it to the Layby function (unused Tenders will typically have a description that matches the Function. E.g. The TENDER 5 Function will have a Description of TENDER 5 indicating that it hasn't been configured or used).
Modify the Description to LAYAWAY and ensure that the "Layby Tender" is ticked (note that the descriptor for the Layby tickbox will be updated once all the steps have been completed below).



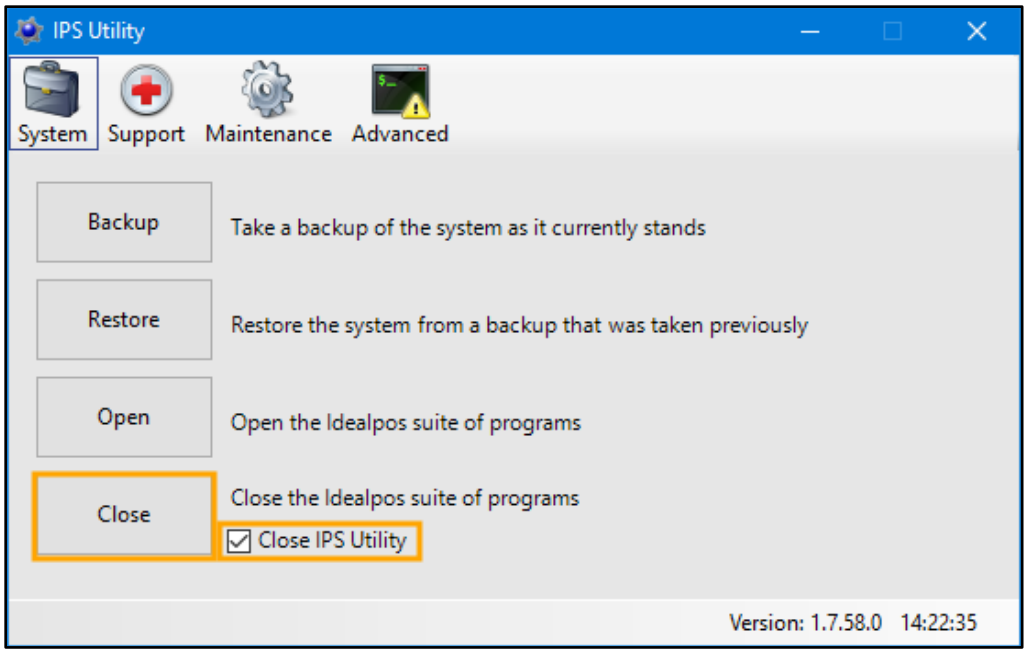
Then scroll to the bottom of the Function Descriptors window, select the “Layby” Descriptor and press the “Modify” button.
Change the description to “Layaway”, then press the “Save” button on the bottom-right corner.



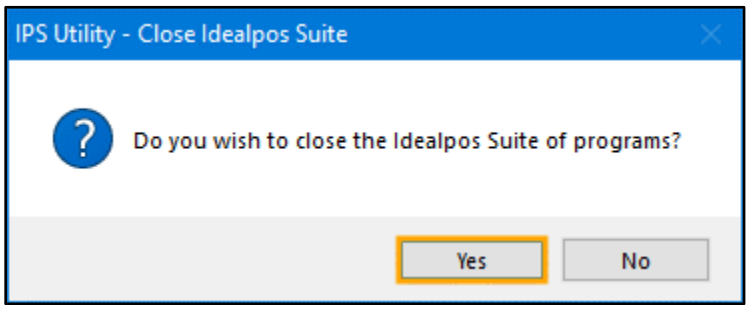
After pressing Save above, close the Function Descriptors screen.

idealpos7 Update History

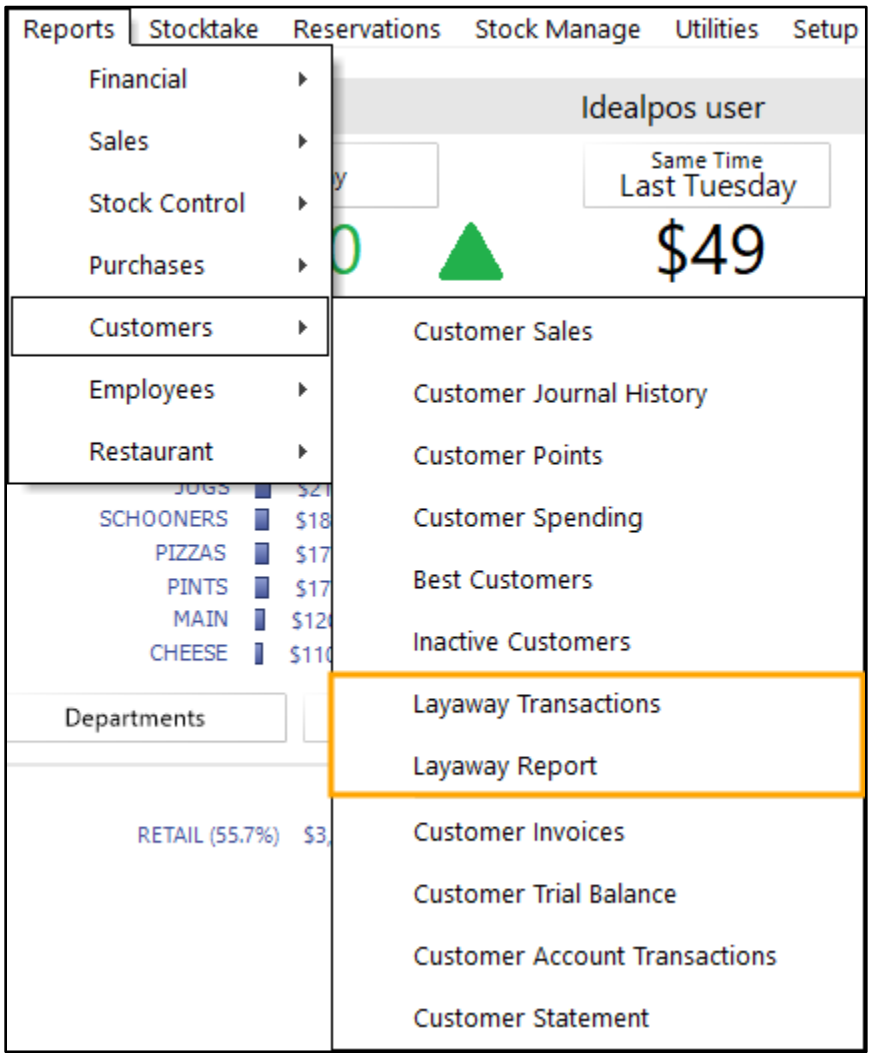
To ensure that the change has been applied across the Idealpos application, close Idealpos by going to Start > Search for “IPSUtils” then open IPS Utility.
Tick the “Close IPS Utility” tickbox then press the “Close” button.



A prompt will appear, press “Yes” to confirm.



Start Idealpos again via the Windows Start Menu and login if required.
The Layby function has now been renamed to Layaway.
To confirm, the change, you may go to Reports > Customers > Layaway Transactions/Layaway Report
The above report options were previously referred to as Layby Transactions and Layby Report



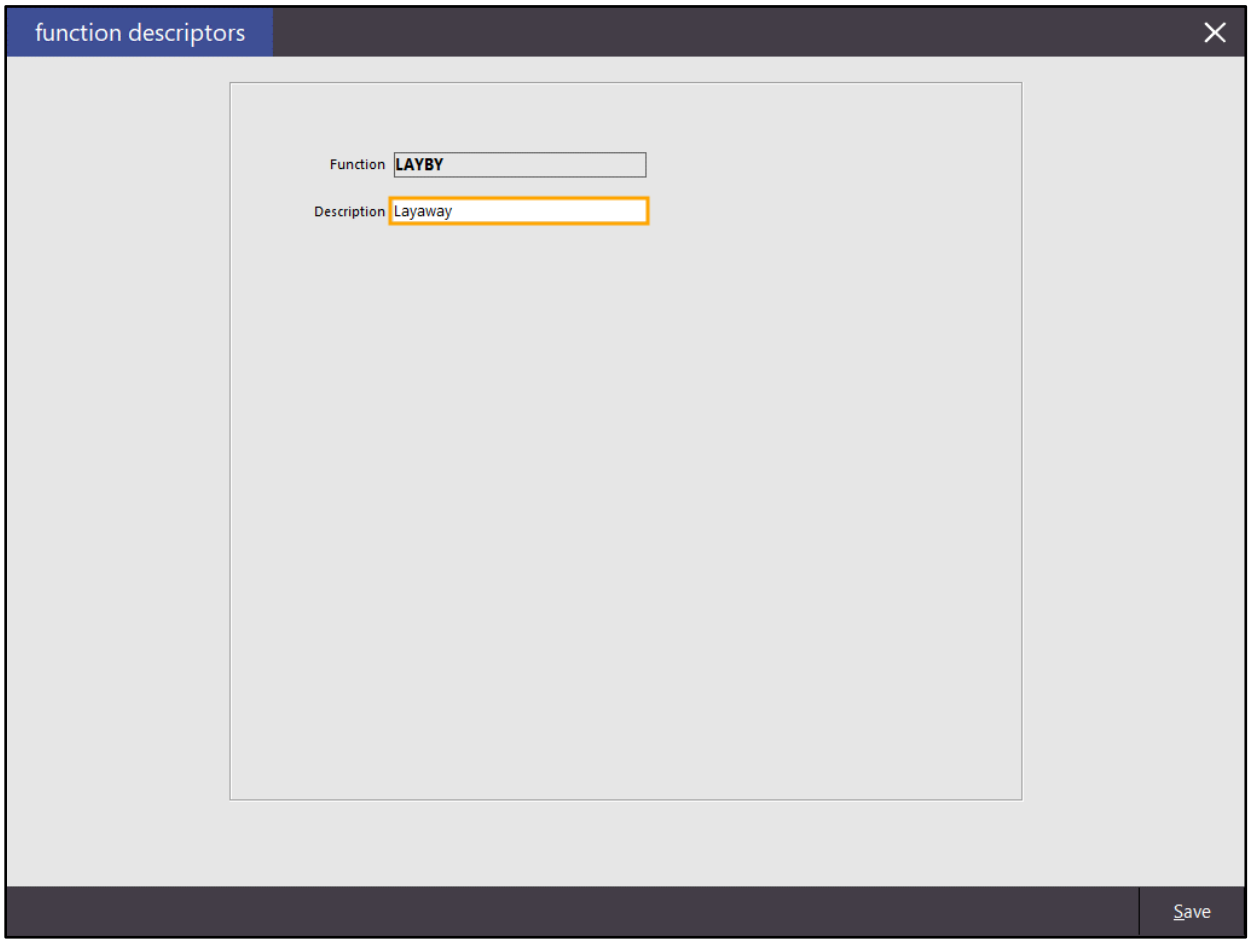
In addition to the above, there are many other locations in Idealpos that will reflect the updated Layby Descriptor, including Functions, Layby functions on the POS screen and many others.
For more information about setting up and using Laybys or Layaways, please refer to the Laybys/Layaways topic in the User Guide.

idealpos7 Update History

Layby Functions separated from Account Functions

This enhancement assists users with the configuration of Layby or Layaway Functions (Layby Adjustment, Layby Cancellation, Layby Credit and Layby Payment) in regions where Laybys are referred to by another term such as Layaways. When the Layby Descriptor has been renamed to Layaway or any other name, the Layby Functions displayed in the Functions list will be reflective of the chosen name.
Apart from separating the Layby Functions from the Account Functions for the purposes of easier identification and easier configuration in some regions, the functionality and behaviour for the separated functions remains the same and can be used interchangeably (e.g. configuring a POS screen button to use the Account Adjustment Function or Layby/Layaway Adjustment Function will do the same thing and allow an Adjustment to be performed on the Account or the Layby/Layaway).

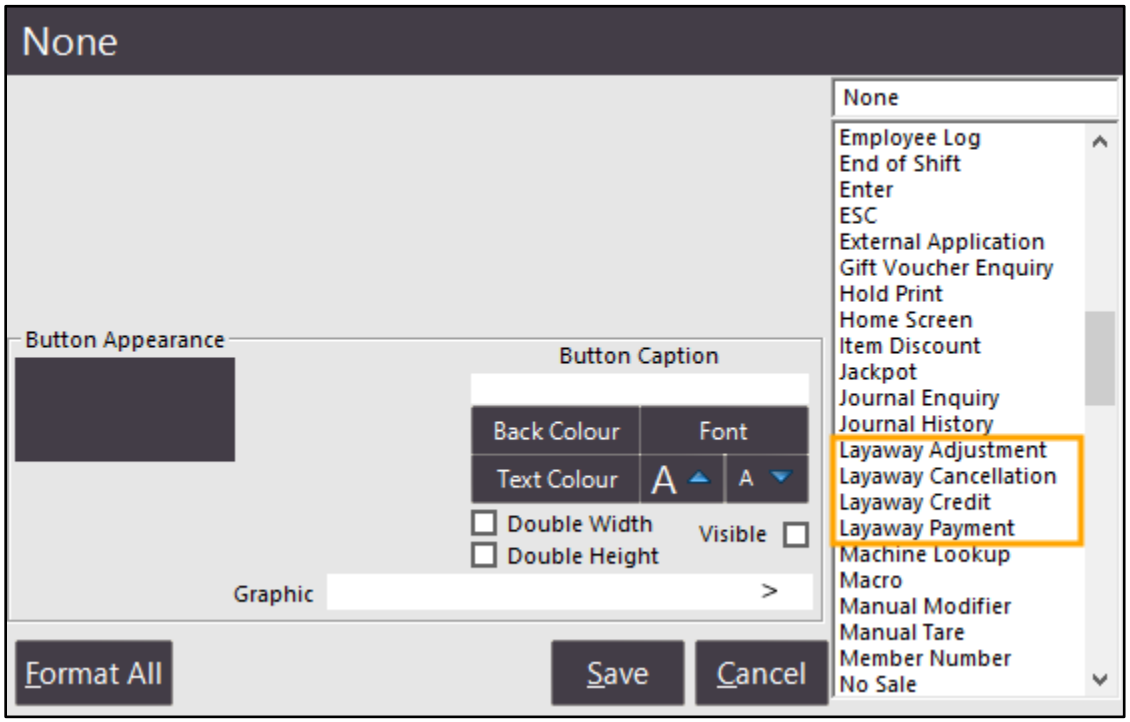
To use this function, go to: Setup > Function Descriptors > Select Function Descriptor "LAYBY" > Modify
Modify the description to reflect the name that you want Laybys to be referred to as.
In the below example, we've used "Layaway"



Press the "Save" button to save changes, then close the Function Descriptors window.

Go to Setup > POS Screen > POS Screen Setup > Select a POS Screen Layout > Press the “Buttons” button on the bottom-left corner.

On the POS Screen Layout, find a blank button and click on it.
Look for the Functions Layaway Adjustment, Layaway Cancellation, Layaway Credit and Layaway Payment in the list of available Functions. The description of these functions will be reflective of the description that was entered for the Layby Function in Setup > Function Descriptors > Layby > Modify.



Select any one of these functions as required, adjust the button appearance as desired, then press the “Save” button to save changes. This may be repeated for each Layaway function that is required.

For more information about using Laybys/Layaways and these Layby or Layaway Functions, please refer to the Laybys/Layaways topic in the User Guide.

idealpos7 Update History

Pending Sales

Pending Sales – Added Unit Price column

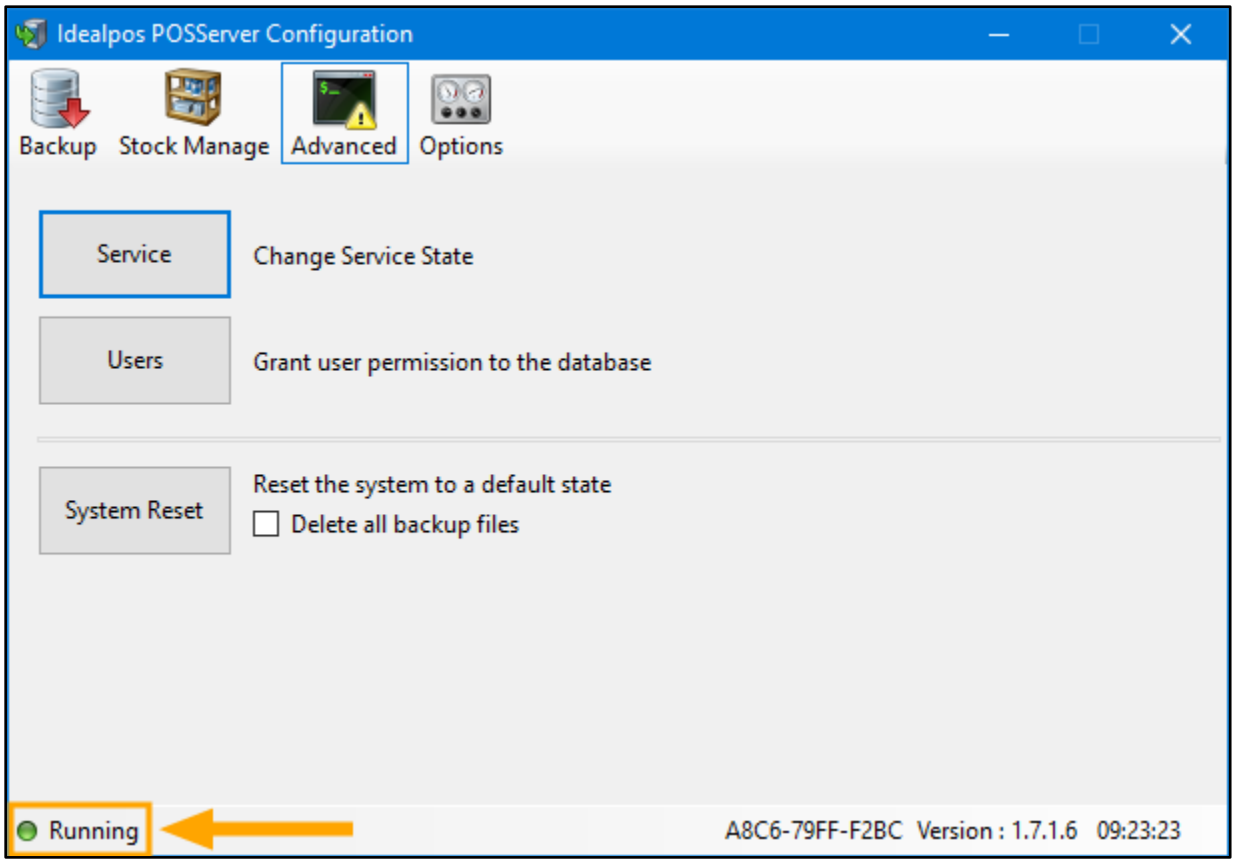
This function adds a Unit Price column when printing a Pending Sale using the Windows Print button. This is useful when needing to quickly see the individual unit price of an item where multiples of the same item have been ordered. Note that in order to use Pending Sales with the Unit Price column, the following must be configured:

- POSServer must be enabled and running
- Inhibit Amounts on A4 Windows Prints must be unticked in Global Options > Sales > Pending Sales > Inhibit Amounts on A4 Windows Prints
- A Pending Sale button needs to either exist or be created on the POS screen

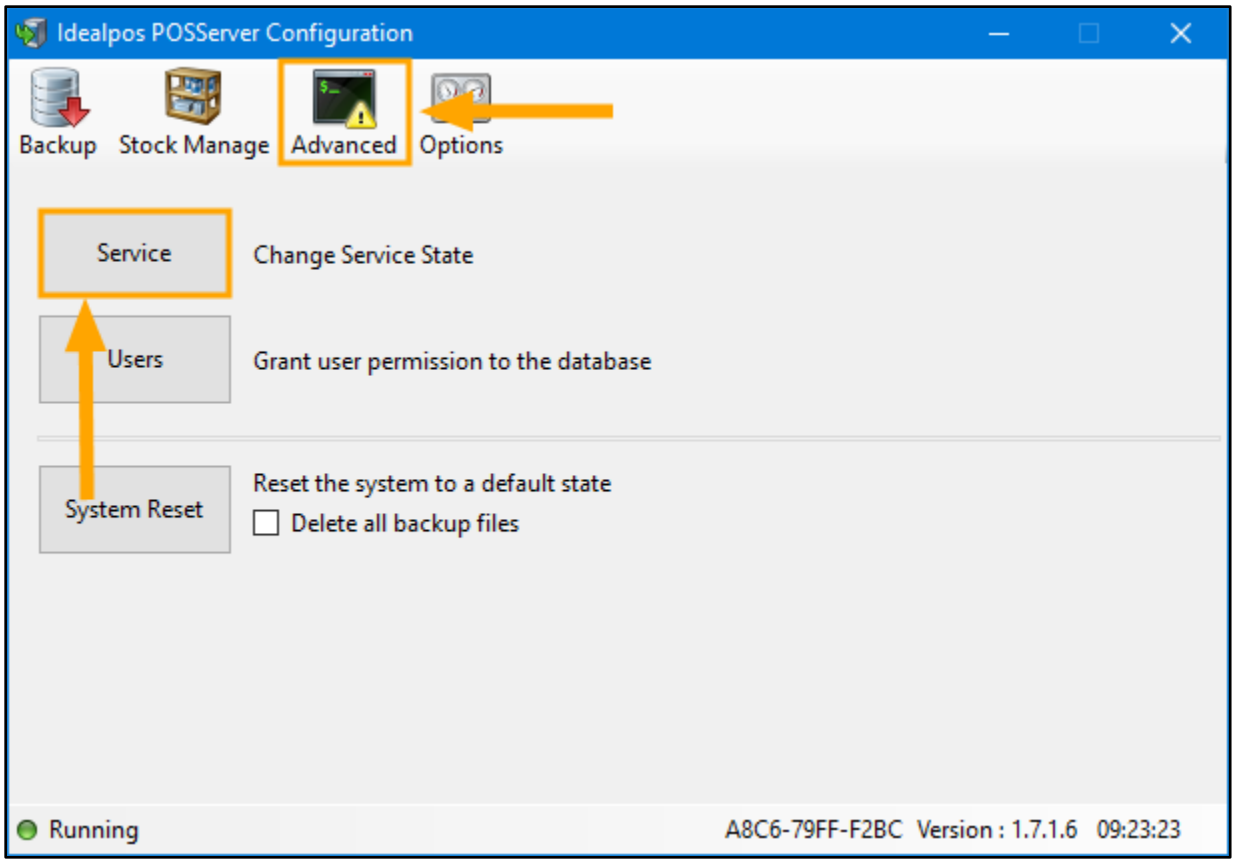
These steps are outlined in further detail below:

Ensure that POSServer is running on either the main Back-Office system or the main POS terminal.
This can be checked by going to: Start > search for POSServer and open POSServer.
If POSServer cannot be found in the Start Menu, it can also be started by going to:
C:\Program Files\Idealpos Solutions\POSServer\POSServer.exe and running as Administrator (right-click on the executable and select "Run As Administrator")

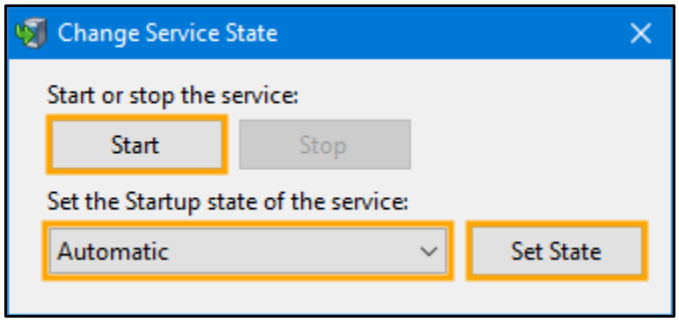
Ensure that "Running" is displayed on the bottom-left corner of the POSServer Configuration window.



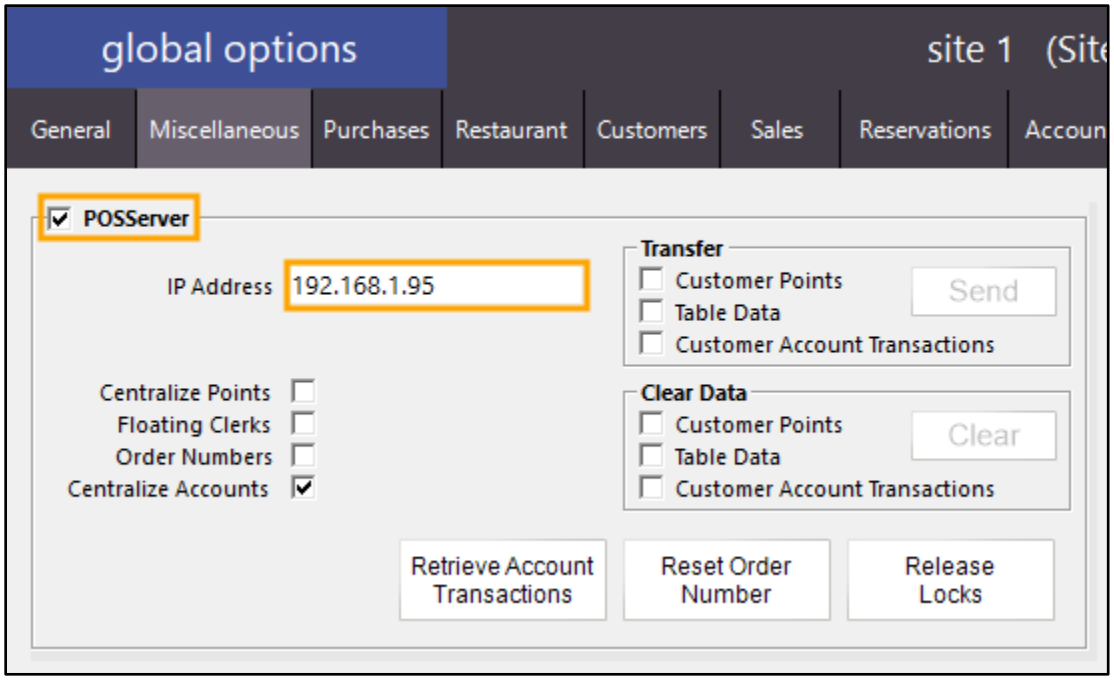
If the POSServer is not running, click on the Advanced tab, then press the “Service” button.



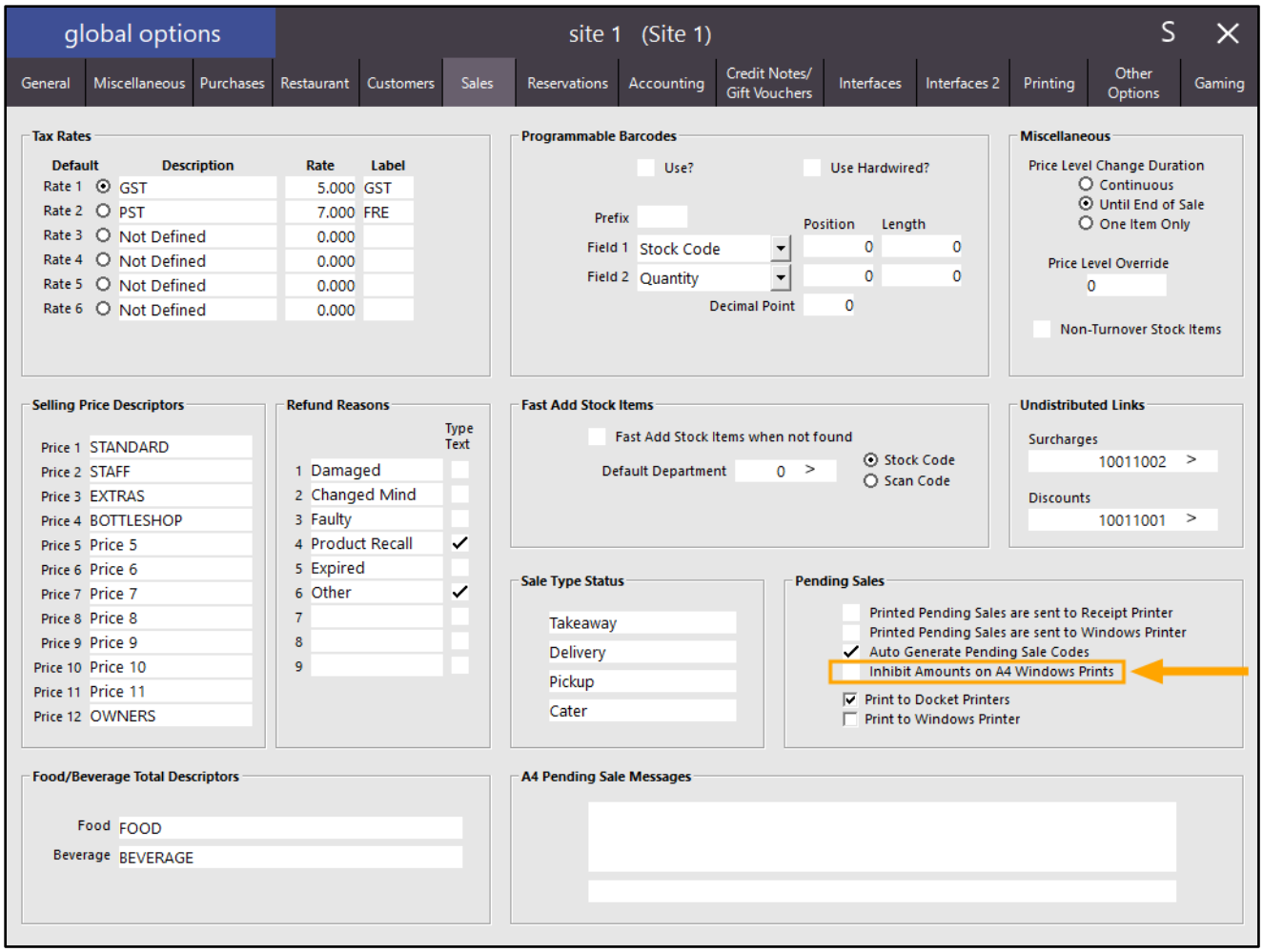
Press the “Start” button to start the Service, then Set the Startup state of the service to “Automatic”, followed by pressing the “Set State” button to apply the change.



Then ensure that POSServer is enabled in Idealpos Global Options and ensure that the IP address of the system running the POSServer has been entered.
Go to: Setup > Global Options > Miscellaneous > POSServer
The below example shows Idealpos pointing to a POSServer running on an IP address of 192.168.1.95.
Substitute the IP address below with the IP address of the system that's running the POSServer on your network

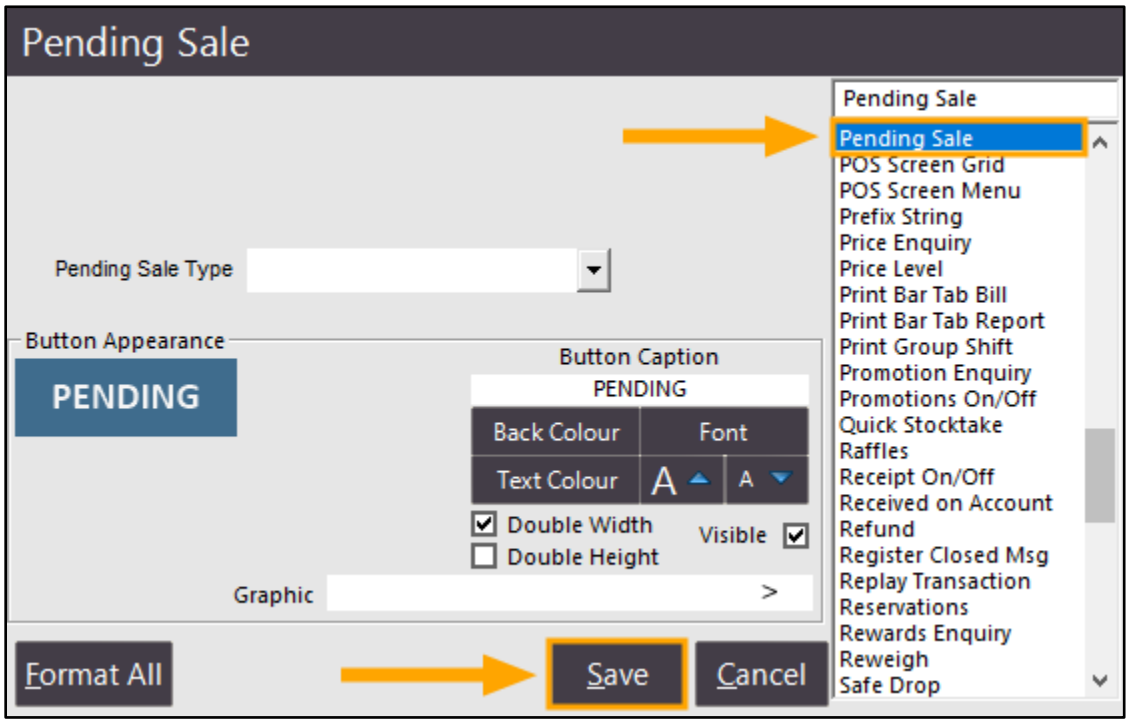


Then disable "Inhibit Amounts on A4 Windows Prints" by going to:
Setup > Global Options > Sales > Pending Sales > Inhibit Amounts on A4 Windows Prints.



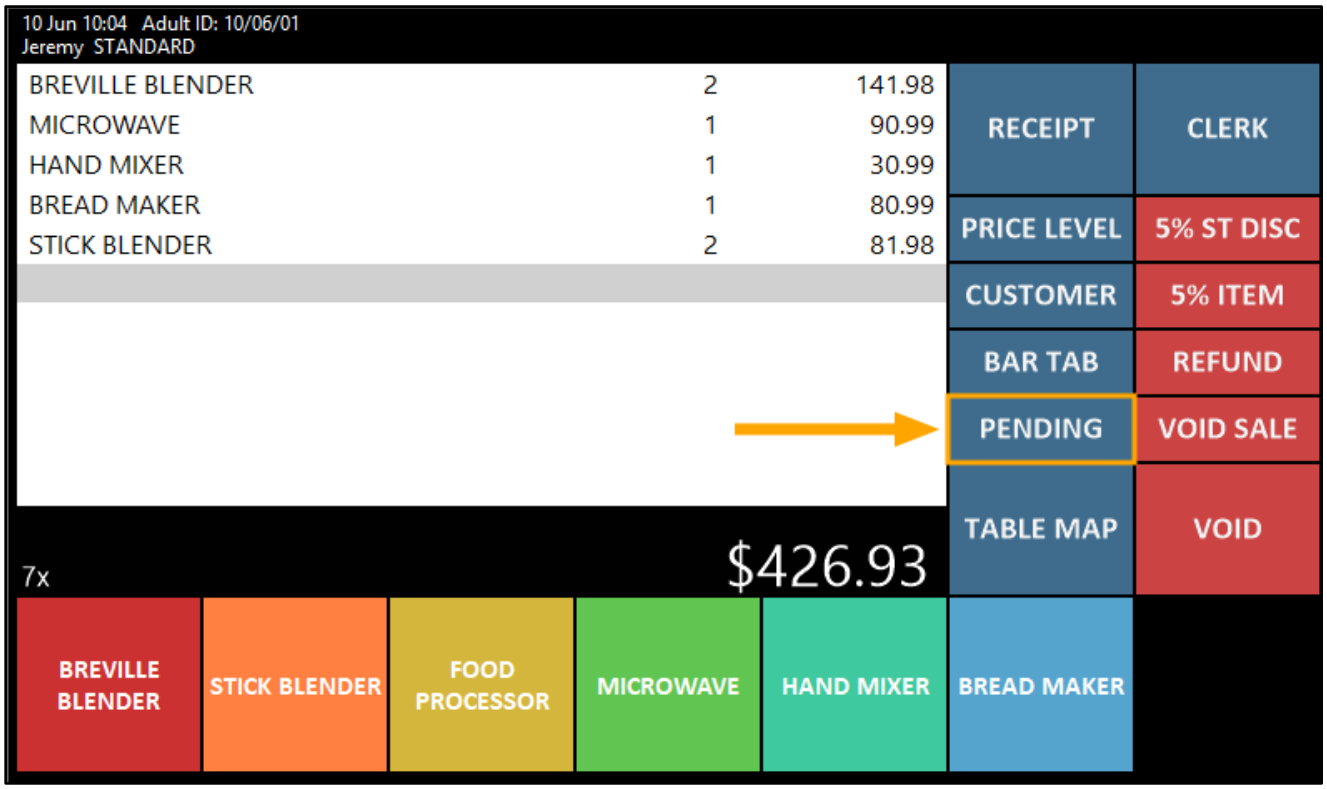
Finally, add a button to the POS Screen to enable access to the Pending Sale function.

Go to: Setup > POS Screen > POS Screen Setup > Select POS Screen Layout > Buttons
Find a blank button on the POS screen and select it.
Configure the button using the Pending Sale function as per the below example:

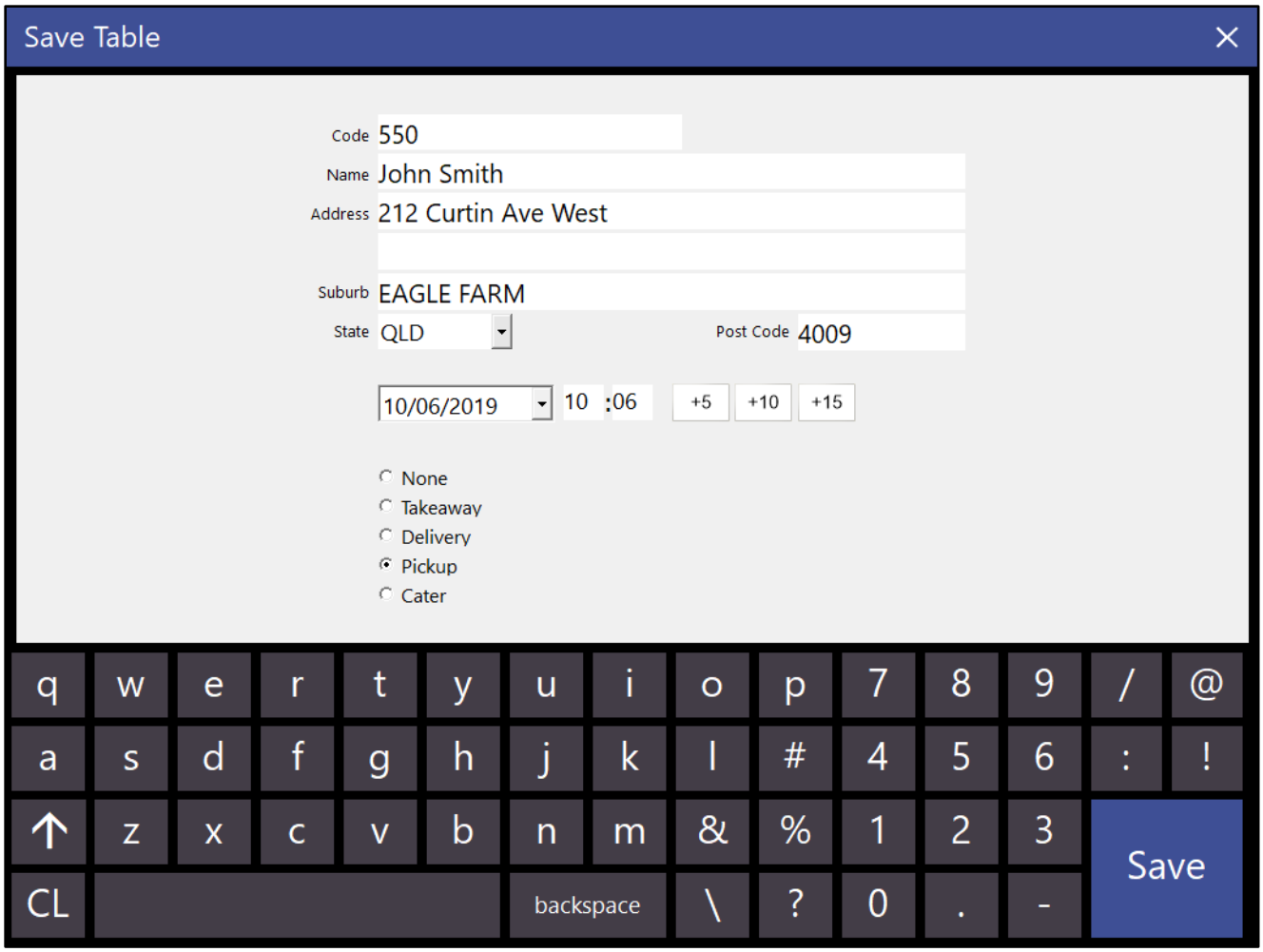


idealpos7 Update History

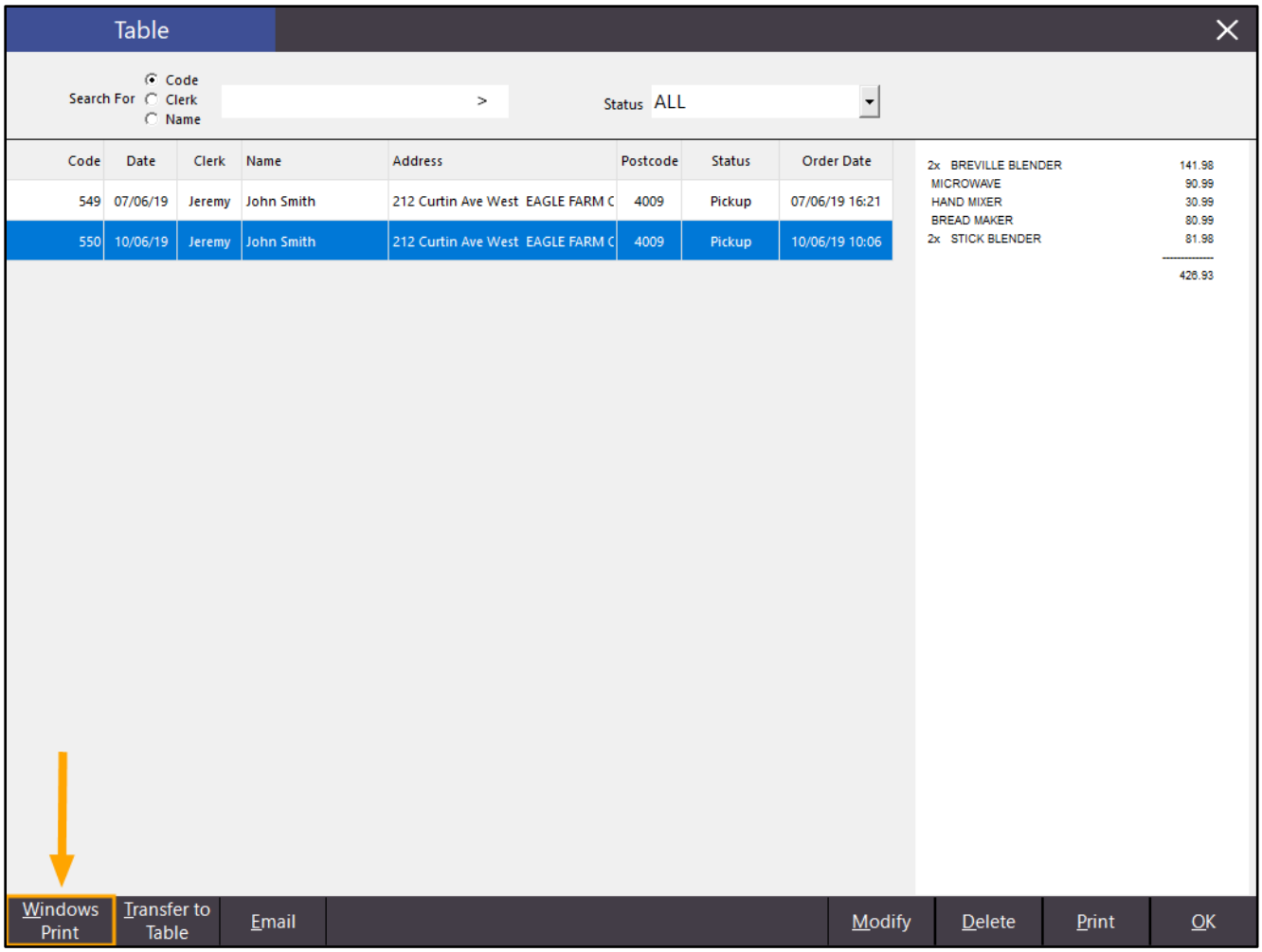
Once the above steps have been completed, the Pending Sale function can be accessed via the Pending Sale button on the POS Screen.
Add the required items to the sale.
Where a quantity greater than 1 is required for an item, enter the quantity required, press the “X” button, then press the POS Screen button for the item required.
Once the required Stock Items have been added to the sale, press the “PENDING” POS screen button that was created earlier above.



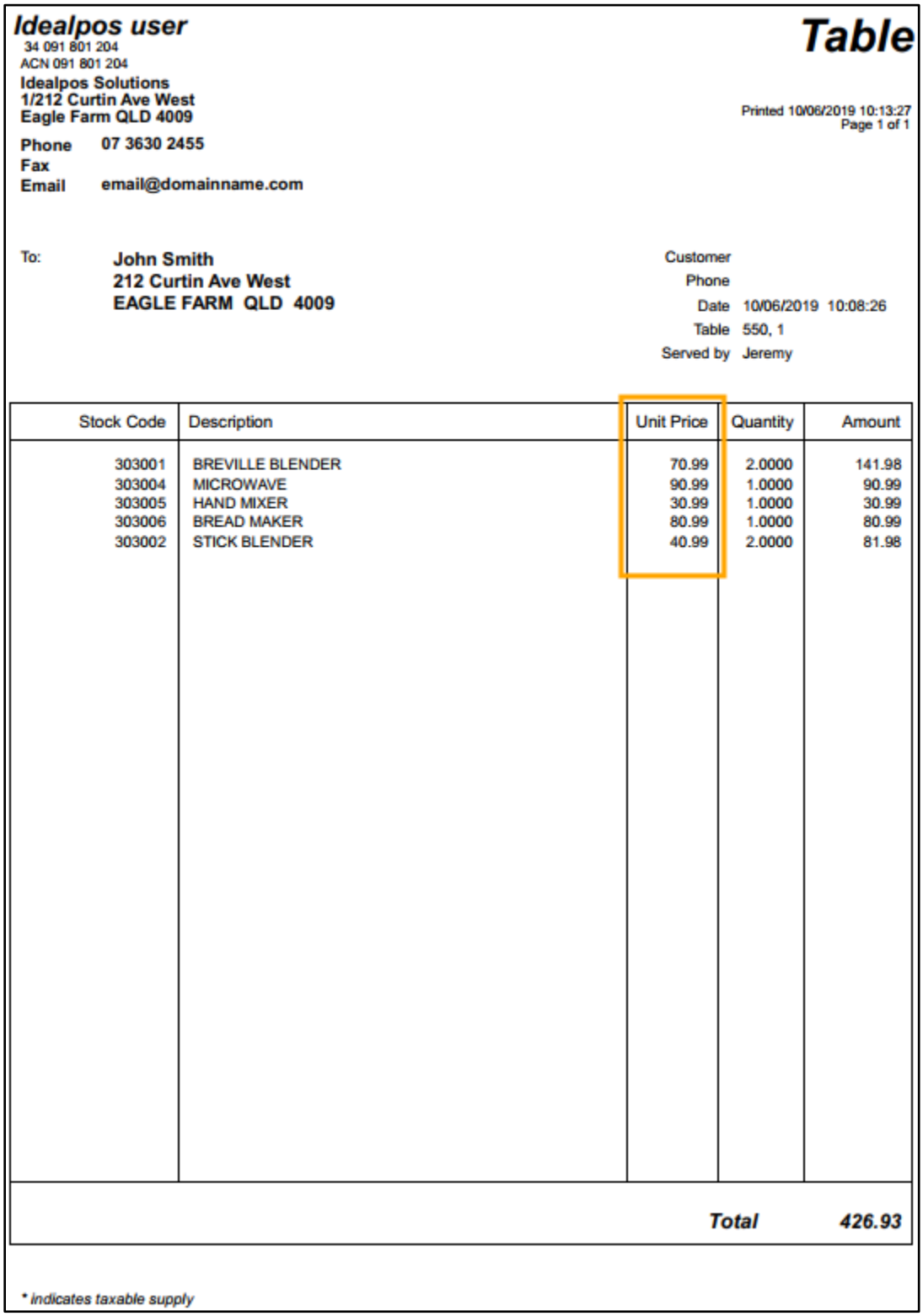
Enter the Customer Name, Address and Pending Sale Type, followed by pressing the Save button.



After the Pending Sale has been saved, retrieve the Pending Sale by pressing the “PENDING” button on the POS Screen, select the Pending Sale from the list and press the “Windows Print” button on the bottom-left corner of the screen.



The Pending Sale will be printed and will now include a Unit Price column containing the Unit Price of the items in the Pending Sale.



Idealpos user
34 091 801 204
ACN 091 801 204
Idealpos Solutions
1/212 Curtin Ave West
Eagle Farm QLD 4009

Phone **07 3630 2455**
Fax
Email **email@domainname.com**

Table

Printed 10/06/2019 10:13:27
Page 1 of 1

To: **John Smith**
212 Curtin Ave West
EAGLE FARM QLD 4009

Customer
Phone
Date 10/06/2019 10:08:26
Table 550, 1
Served by Jeremy

Stock Code	Description	Unit Price	Quantity	Amount
303001	BREVILLE BLENDER	70.99	2.0000	141.98
303004	MICROWAVE	90.99	1.0000	90.99
303005	HAND MIXER	30.99	1.0000	30.99
303006	BREAD MAKER	80.99	1.0000	80.99
303002	STICK BLENDER	40.99	2.0000	81.98

Total ***426.93***

** indicates taxable supply*

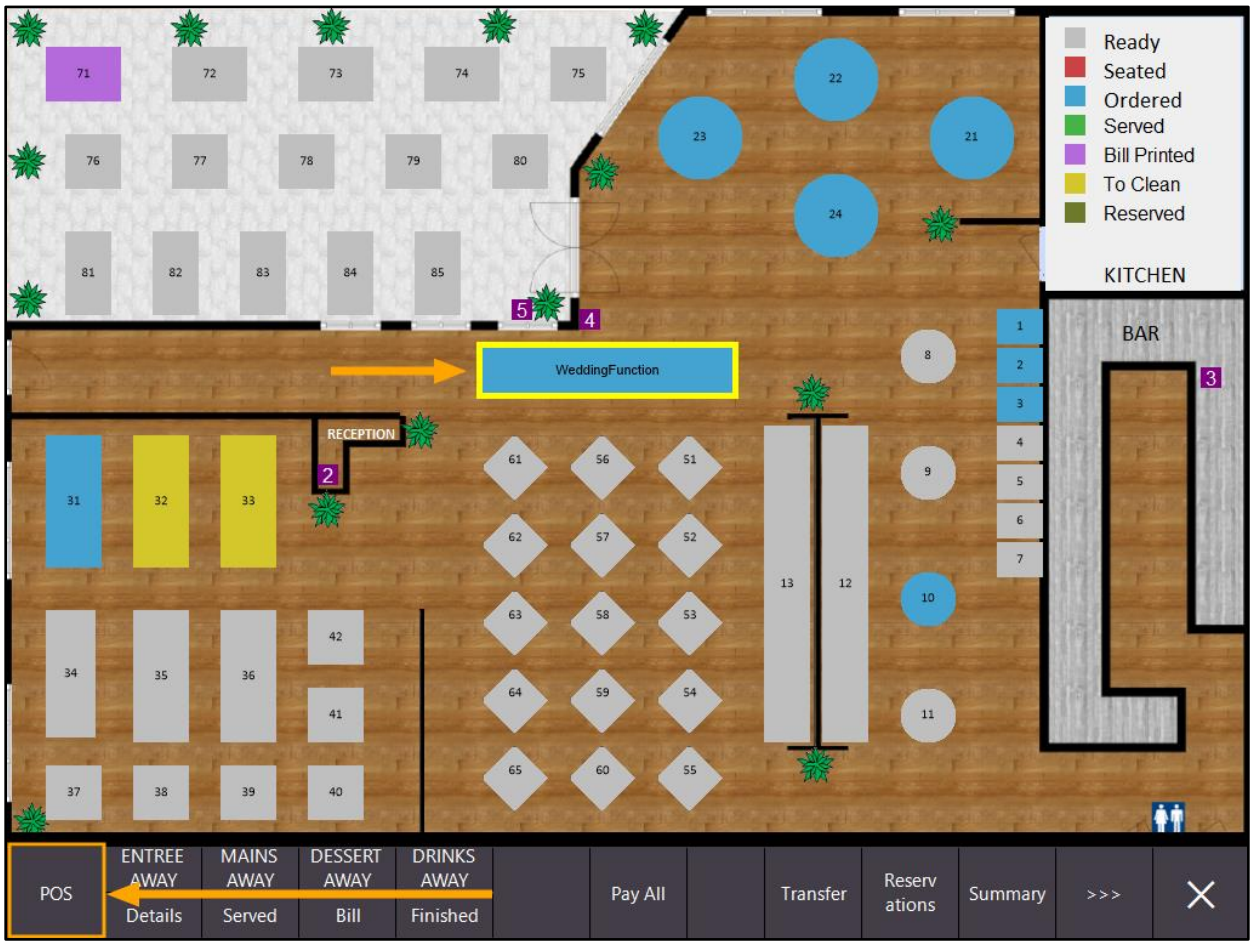
idealpos7 Update History

POS Screen

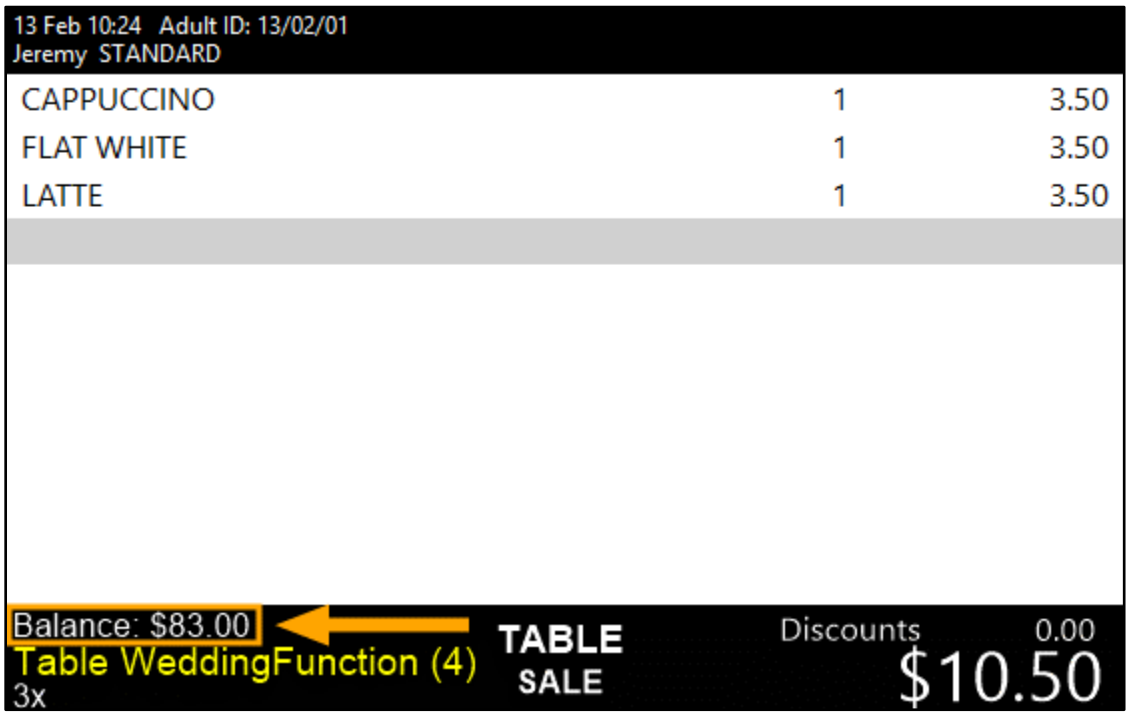
Table Balance Amount shown on POS Screen

This function adds the ability to show the Table Balance on the POS Screen when adding additional items to a table which already contains a sale or when paying off items from a table.
There is no configuration required to enable this function, however, this function requires the Restaurant Module in the Idealpos Licence.

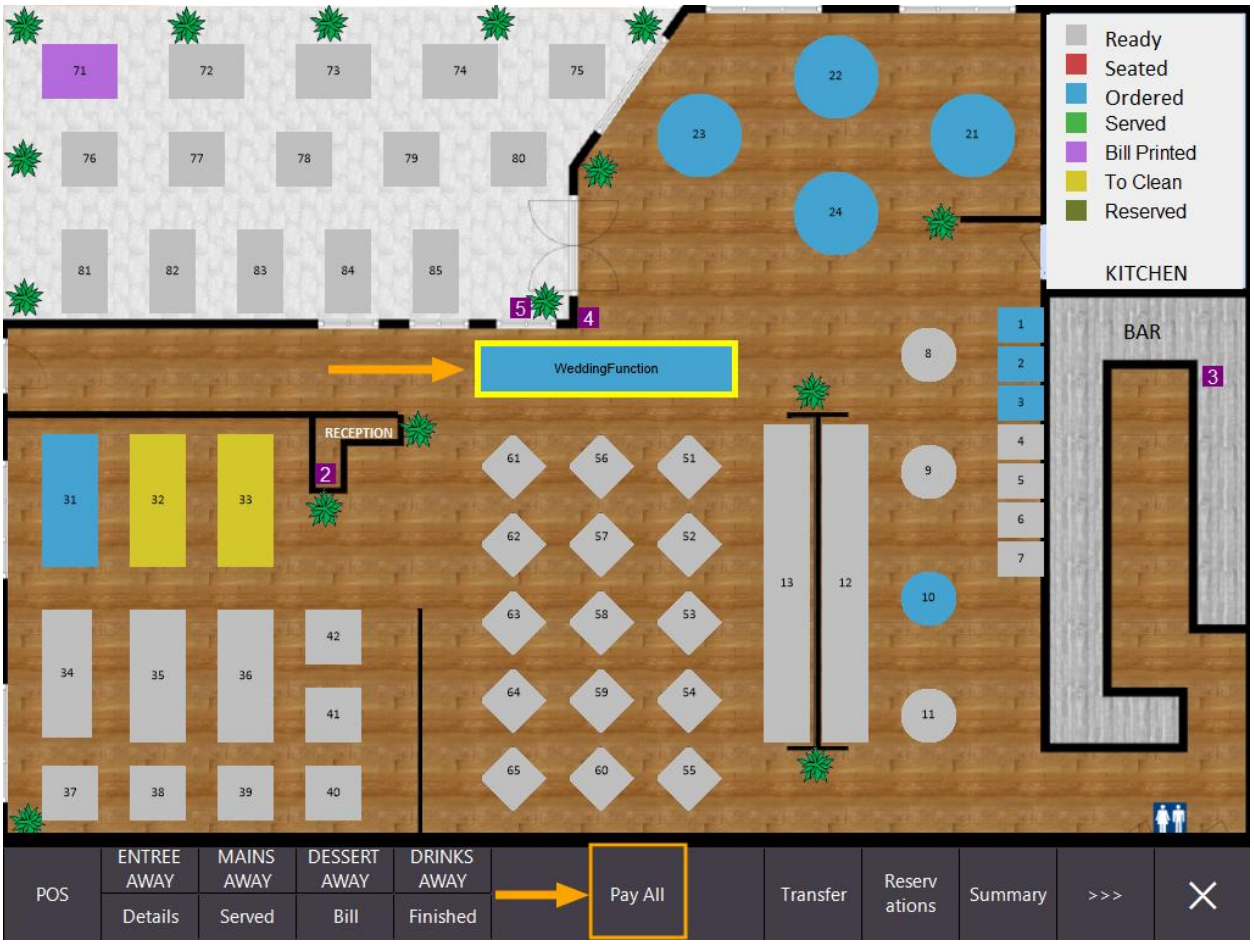
To use this function, go to the POS Screen and press the Table Map button.
Finally, select a table which contains Stock Items, then press the POS button.



The Sale screen will be displayed and will now show the Table Balance on the left-hand side just below the white transaction details area as per the below example. The Table Balance includes any items that are currently saved to the table and the amount shown below the transaction details on the right-hand side of the screen refers to the total amount of all the items which have been added to the current sale:



The Balance is also displayed when paying off either selected items from a table or paying off an entire table. From the Table Map, select a Table and press the "Pay All" button.



idealpos7 Update History

All items from the table are moved to the sale screen and can be paid off. The Balance is also displayed as per the below example. Note that the Balance amount does not include discounts.

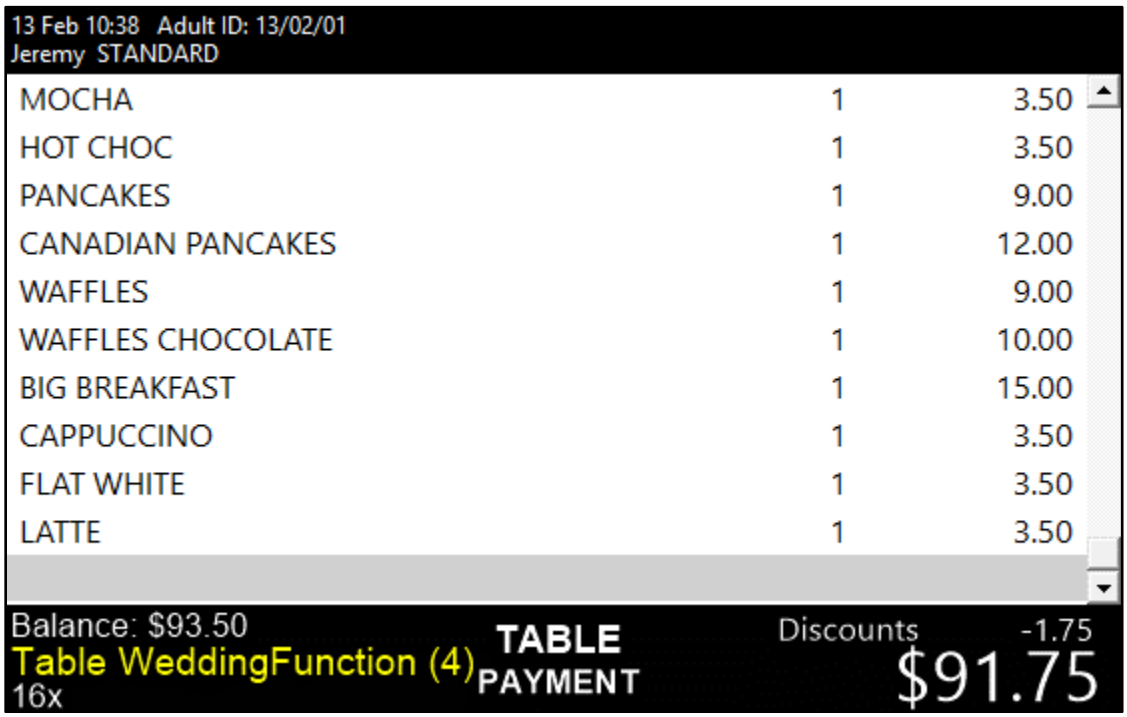
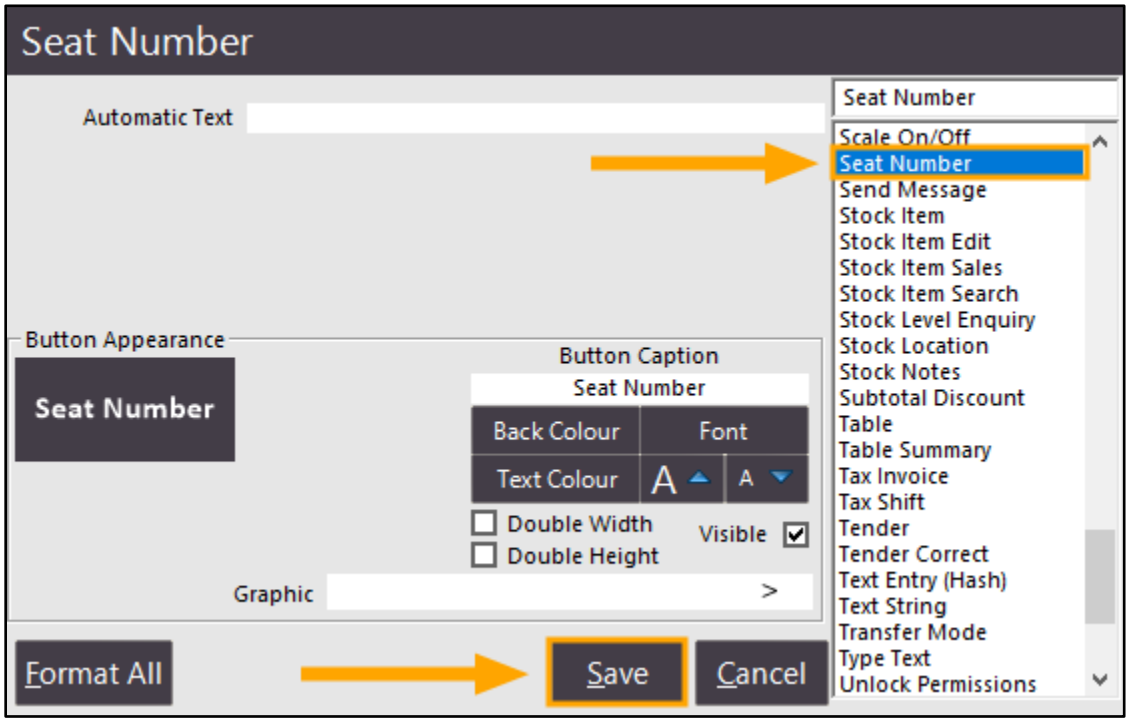


Table Preview Show Seat Numbers

This function adds the ability to see the Seat Numbers that each Stock Item has been allocated to when using Table Preview function from the POS Screen. The Table Preview function can be used while you are adding additional items to a table and need to view the current items which are already saved to the table, along with the seat numbers the items have been allocated to.

This function itself does not require any configuration, however, Idealpos may need additional configuration to enable the ability to set Seat Numbers for each Stock Item.

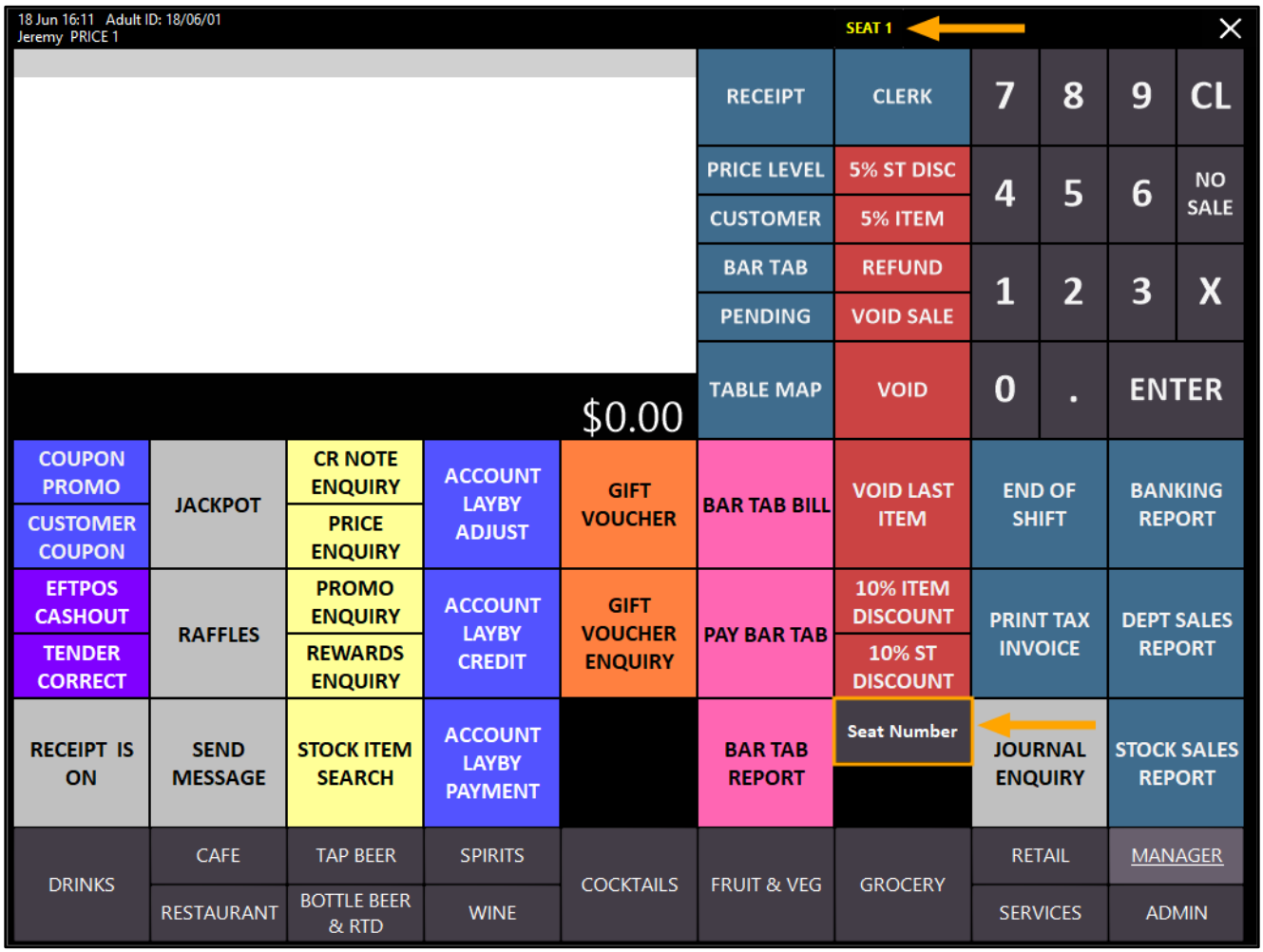
We recommend adding a Seat Number button to the POS Screen to allocate items in a sale to a Seat Number.
To add the Seat Number button to the POS Screen, go to:
Setup > POS Screen > POS Screen Setup > Select POS Screen Layout > Buttons
Find a blank button on any POS Screen tab, then select it.
You may want to have the Seat Number button on a prominent location on the POS Screen such as the top-right corner of the POS Screen. Any buttons configured on the Top-Right corner of the POS screen do not change, regardless of what POS Screen tab you are using.
Configure the button as follows, making any other Button Appearance customisation changes as desired:



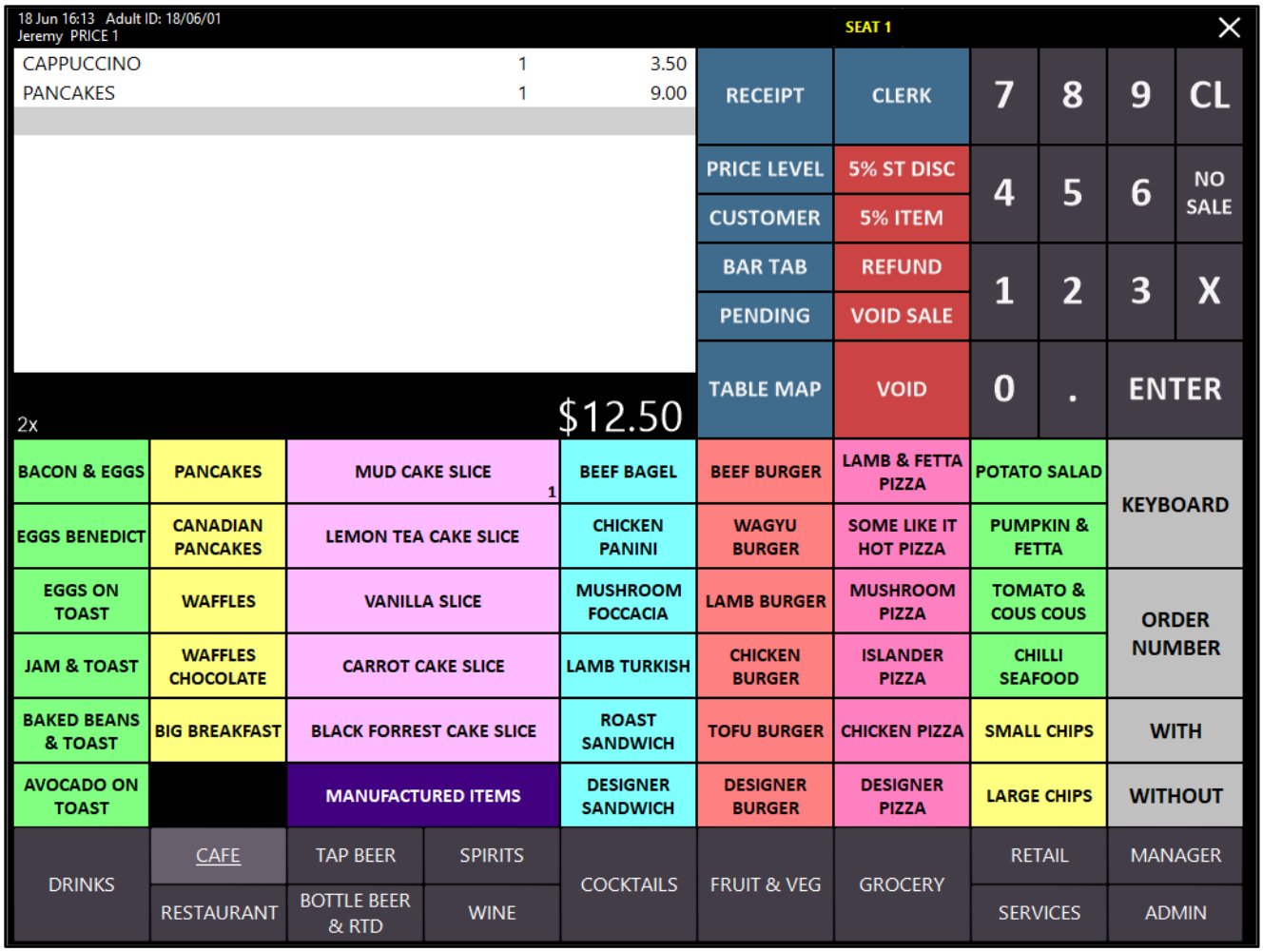
Once completed, press the “Save” button, then close the POS Screen Layout window.

idealpos7 Update History

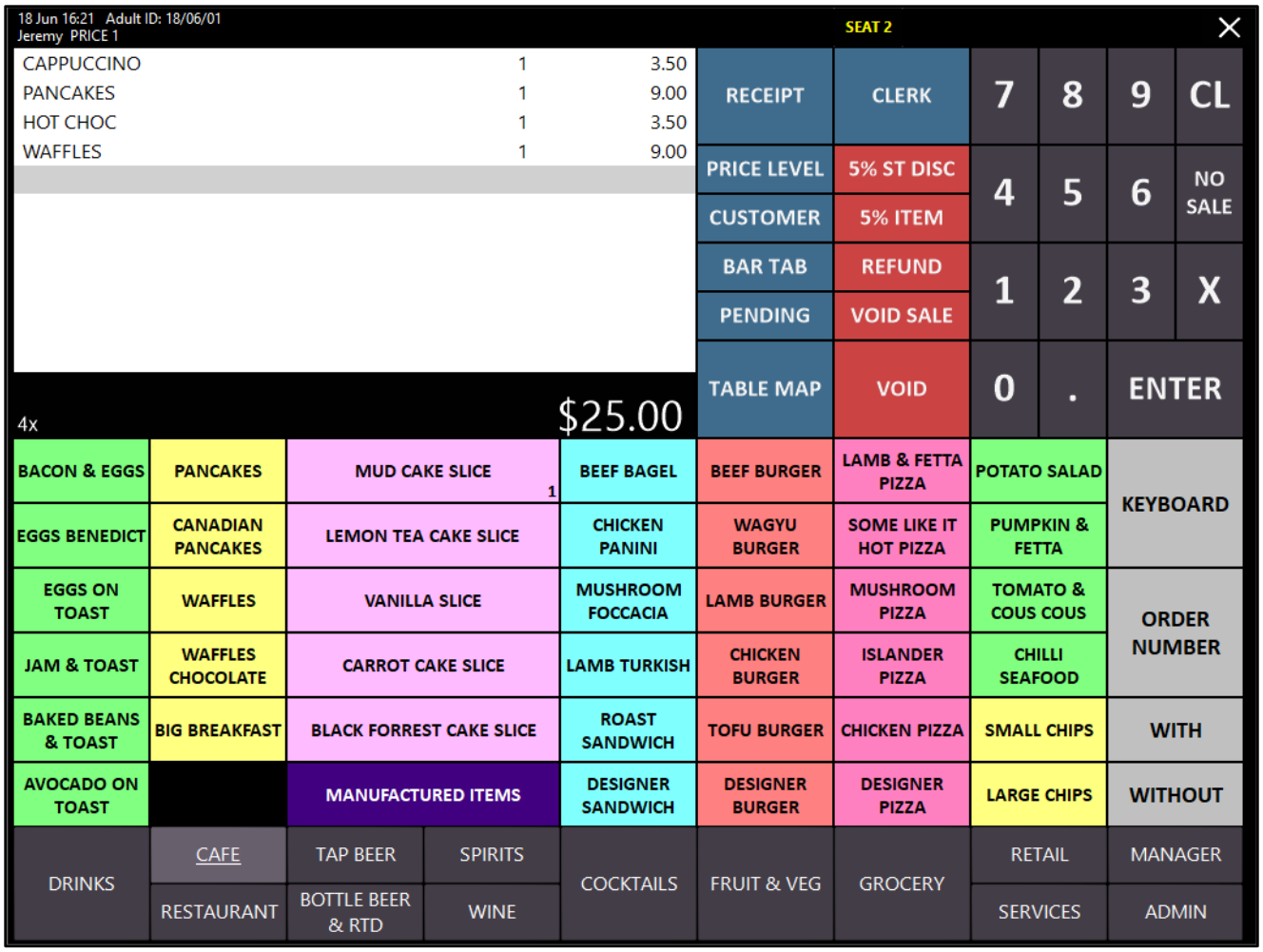
Open the POS screen, then navigate to the tab where you created the Seat Number button and press it.
"SEAT 1" will be displayed at the top of the POS Screen.



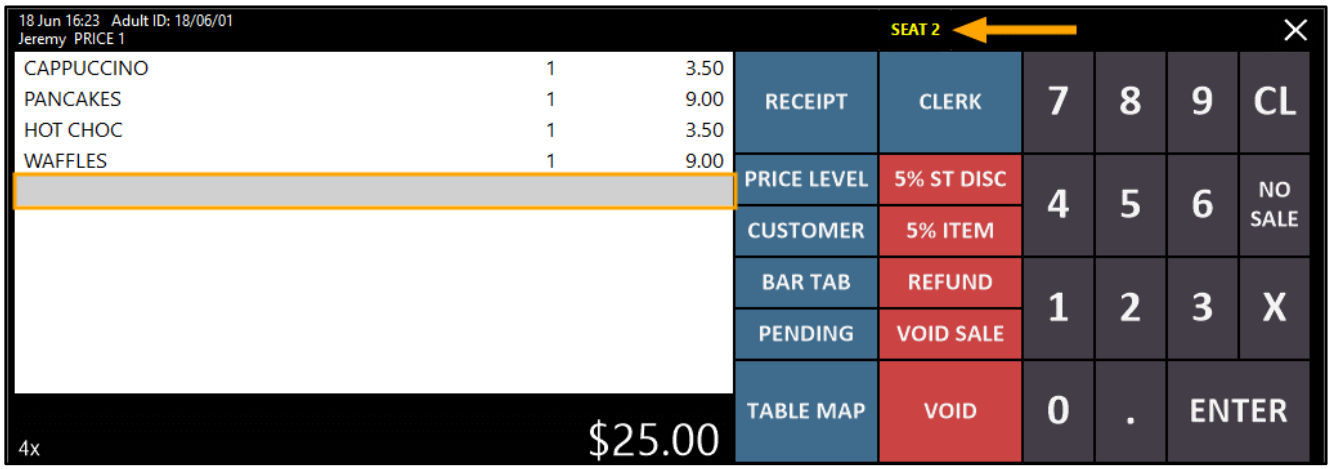
Add any items that are being ordered by the customer who will be seated at Seat 1.



To switch to the next seat number, press the Seat Number button again and the Seat Number displayed at the top of the POS Screen will increment by 1 and show SEAT 2.
You may then add items that are being ordered by the customer who will be seated at Seat 2.



The above process can be repeated until items have been ordered for each Customer seated at a table.
To clear the Seat Number function, press the "SEAT #" text at the top of the POS Screen when on a blank Sale Line.



The "SEAT #" text will then disappear from the top of the POS Screen.

When the Seat Number function is not active (SEAT # is not displayed at the top of the POS Screen), you may click on any Stock Item in the Sale and the Seat Number that the item was allocated to will be displayed at the top of the POS Screen. You might also see the Clerk name displayed in yellow at the top of the POS screen, depending on how Idealpos has been configured.

Once the sale is ready to save to a table, press the “TABLE MAP” button and select a table from the Table Map and enter the number of Covers if prompted.

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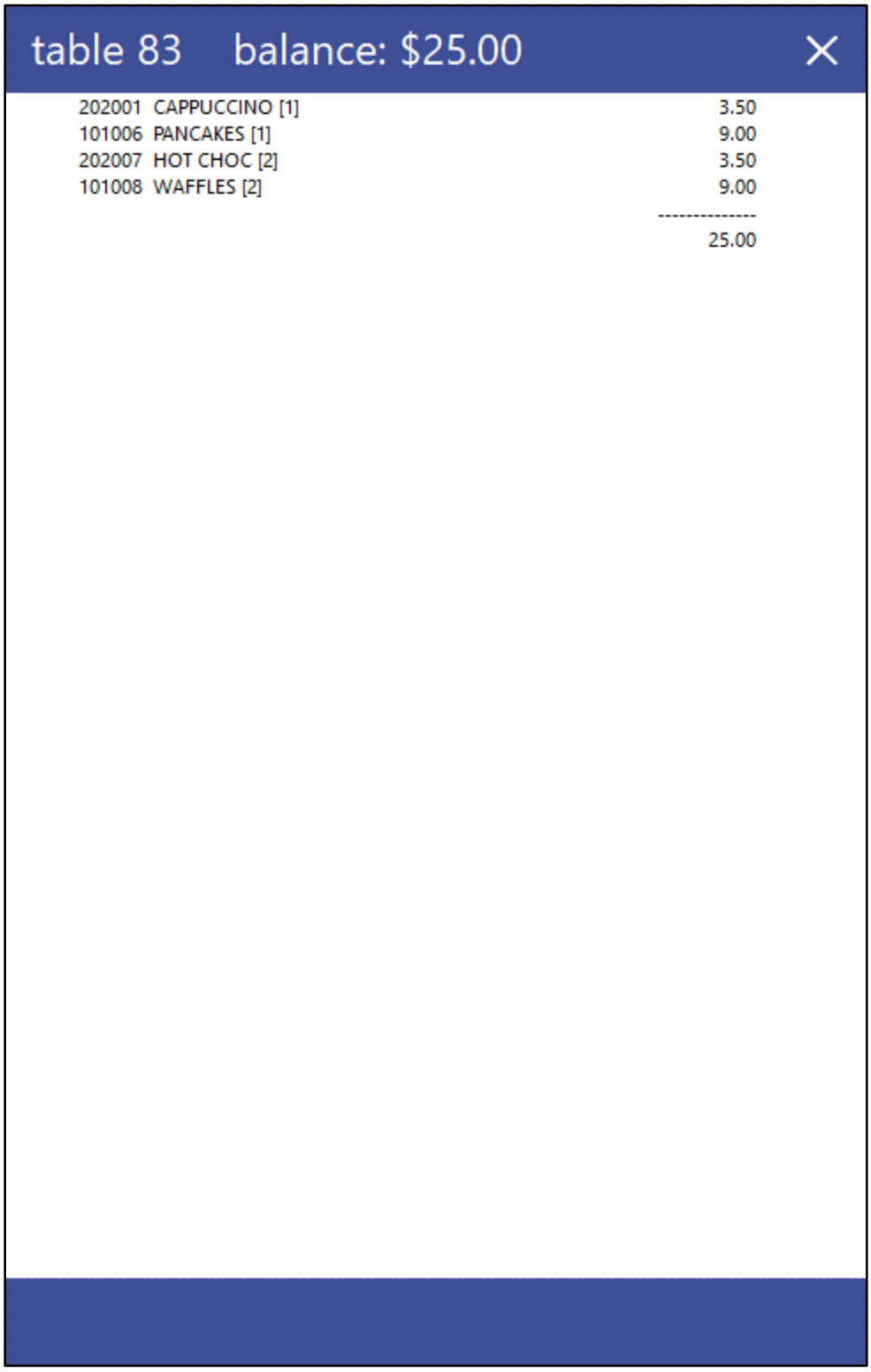
Now that items have been saved to the table, the Customer might come back at a later time and request to order additional items for their table.
Press the "TABLE MAP" button, select the Customer's table and press the "POS" button.
The below example shows table 83 selected and the location of the POS button.

The POS screen will be displayed and will show the Table number along with the number of Covers for the table. To view the Table Summary, simply press the Table number on the Sale Screen.

The Table Summary screen will be displayed and will show the Table Number, Balance, Stock Items saved to the table along with the Seat Number that each item has been allocated to.
Seat Numbers are displayed in square brackets.
The below example shows that the first Stock Item “CAPPUCCINO” is allocated to Seat Number 1.



POS Screen Setup

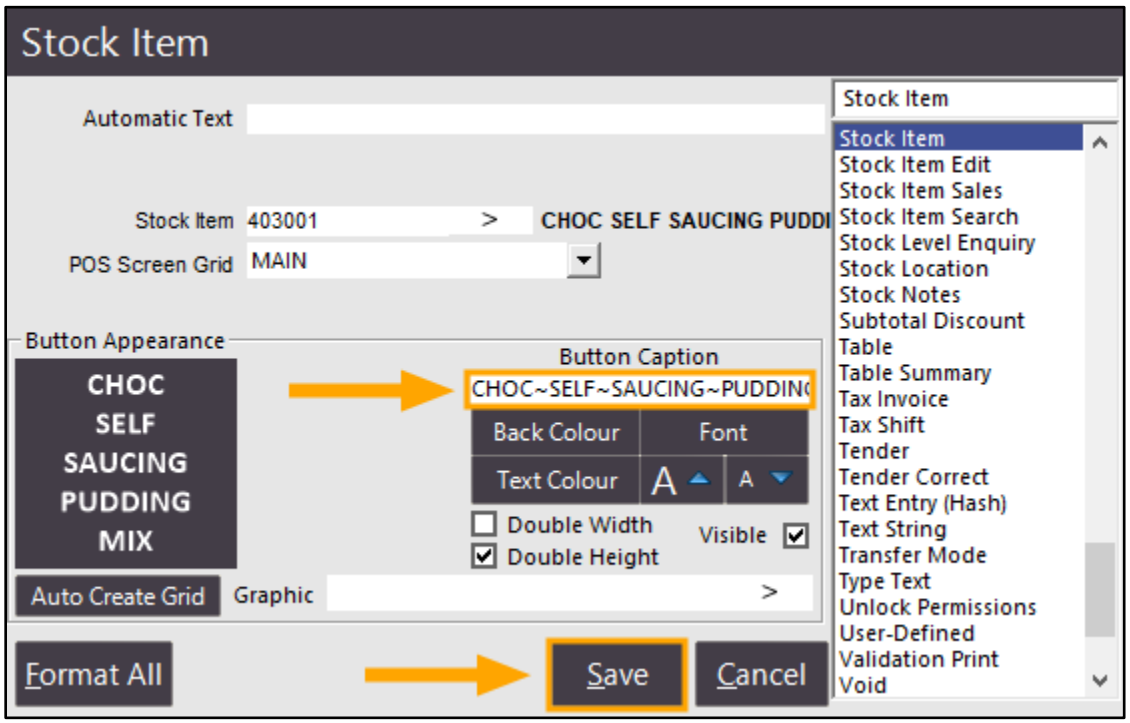
POS Button Captions can include Carriage Returns

This function allows further control of POS Button Captions by adding the option to include carriage returns anywhere in the button caption. The carriage return character is the tilde symbol "~". Any text that is entered after a tilde "~" symbol within a button caption will be displayed on the next line.

To use this function, go to: Setup > POS Screen > POS Screen Setup > Select POS Screen Layout > Buttons

Either select an existing button on the POS screen which you want to include Carriage Returns in the caption or create a new button.
The below example shows modifying an existing button.

Click on the button, then in the button caption, enter a tilde "~" symbol anywhere that you'd like to have the text move onto a new line. The button appearance displayed on the left-hand side of the screen will update on-the-fly as you make your change.
Once you have made the change, press the "Save" button and the change will be visible in the POS Screen Layout.



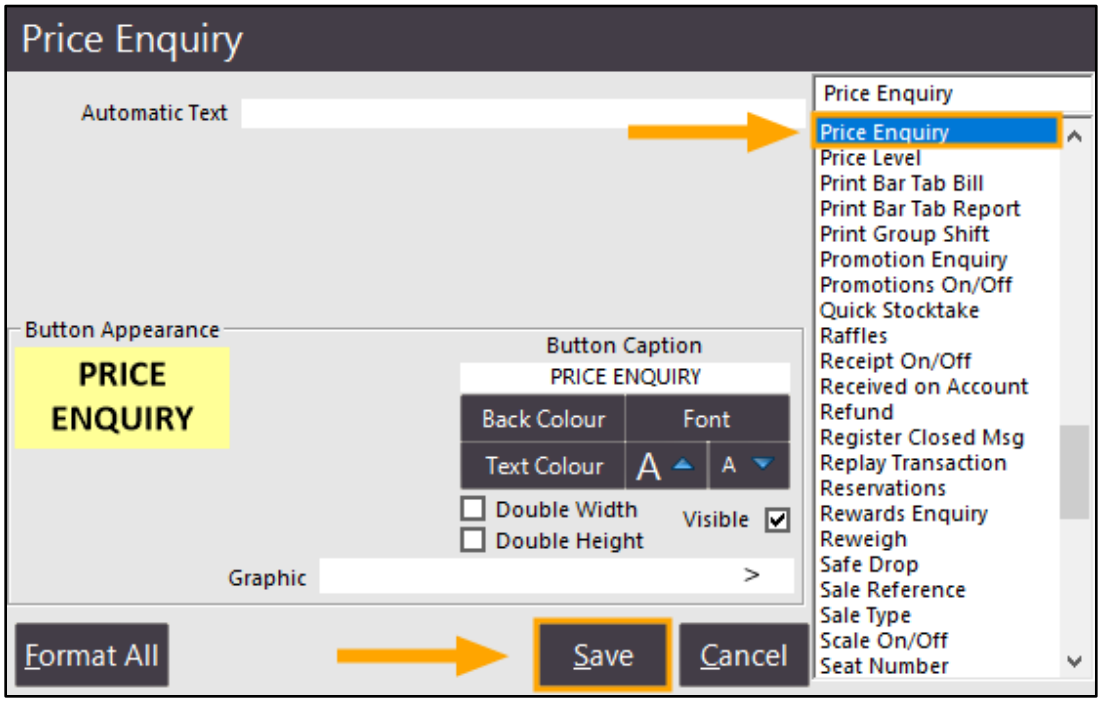
Close the POS screen layout and the change to the button will be applied.
Repeat the above process for any other buttons that require changing.

idealpos7 Update History

Price Enquiry Function allows Selling of Item

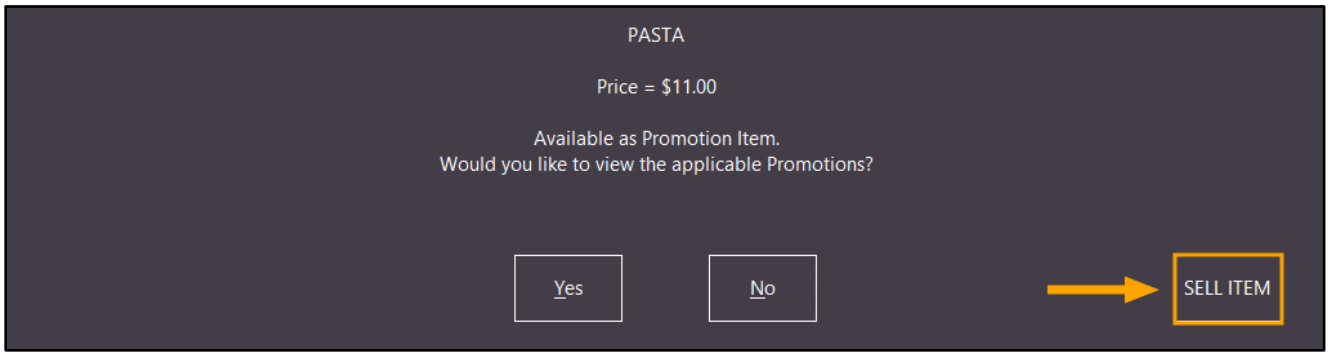
This function adds the ability to sell an Item from the Price Enquiry screen.
When performing a Price Enquiry, Idealpos will show the Stock Item, Stock Item Price as well as a SELL ITEM button. This allows the operator to add the item to the sale should the customer decide to purchase it at the price displayed on the POS screen. In addition, the SELL ITEM button is also available on the top-right corner of the applicable promotions screen when accessed via the Price Enquiry screen.
Note that this function (Selling of Item from Price Enquiry) is unavailable when checking more than one item's price at a time using the MULTI option.

To use this function, go to:
Setup > POS Screen > POS Screen Setup > Select POS Screen Layout > Buttons > Create a new button as follows:

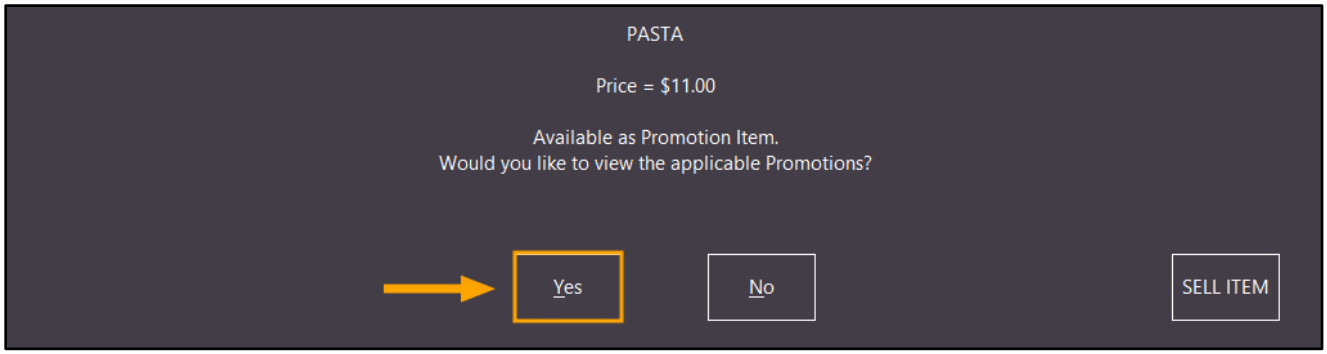


Press Save, then close the POS layout screens.
Go to the POS screen > Press the Price Enquiry button > Press a Stock Item button
Idealpos will display the Stock Item Description, Price, a SELL ITEM button and depending if the Stock Item has any applicable promotions, an option to view applicable promotions is also available.

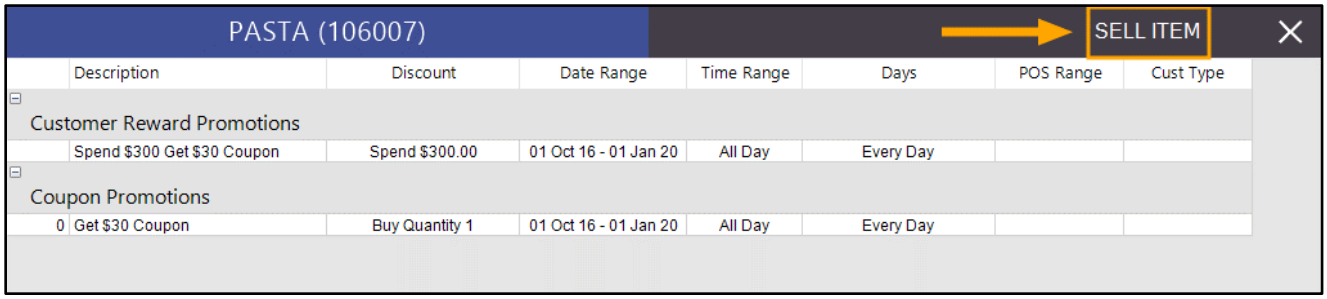
The below is an example of a Price Enquiry on an item which has available promotions.
Pressing the "SELL ITEM" button will add the item to the sale and dismiss the Price Enquiry prompt.



In addition to being able to sell the item from the above screen, it is also possible to sell the item when viewing the applicable promotions.
Press the "Yes" button on the prompt to view applicable promotions:



A SELL ITEM button is displayed on the top-right corner of the promotions screen which can also be used to add the item to the sale. Pressing the "SELL ITEM" button will add the item to the sale and dismiss the promotions screen.



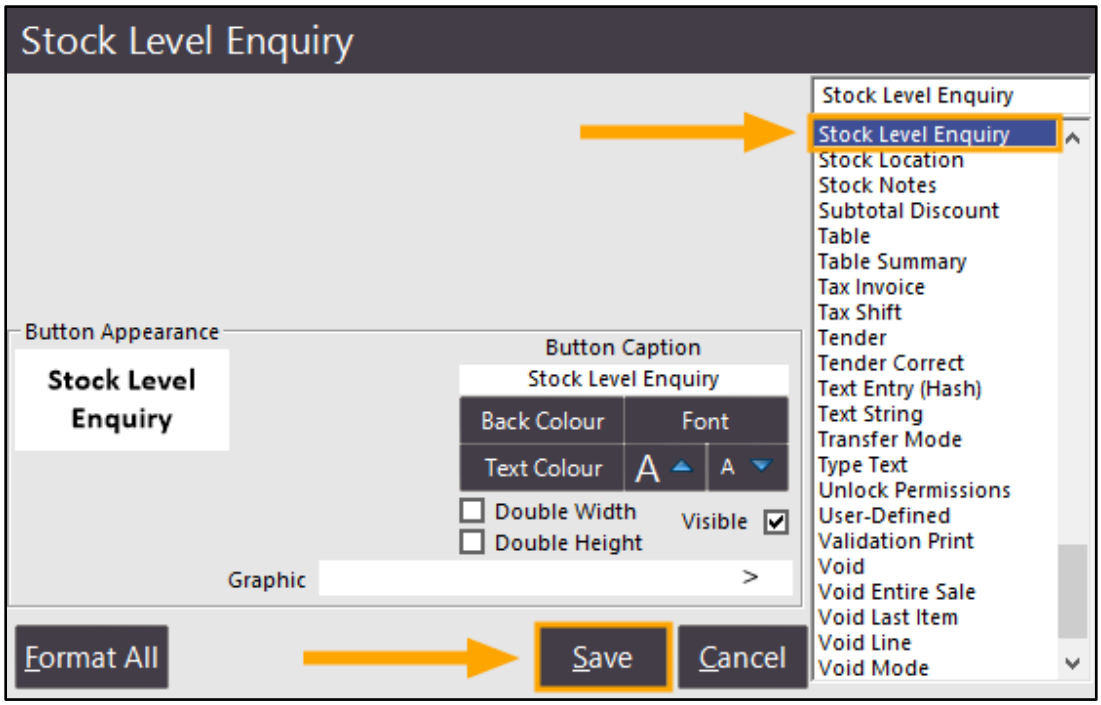
When performing a Price Enquiry on an item which doesn't have any promotions available, the Price Enquiry screen will be displayed as follows. The available options are "OK" or "SELL ITEM".
Press "SELL ITEM" to add the item to the sale or press the "OK" button to dismiss the prompt and return to the sale screen without adding the item to the sale:

idealpos7 Update History

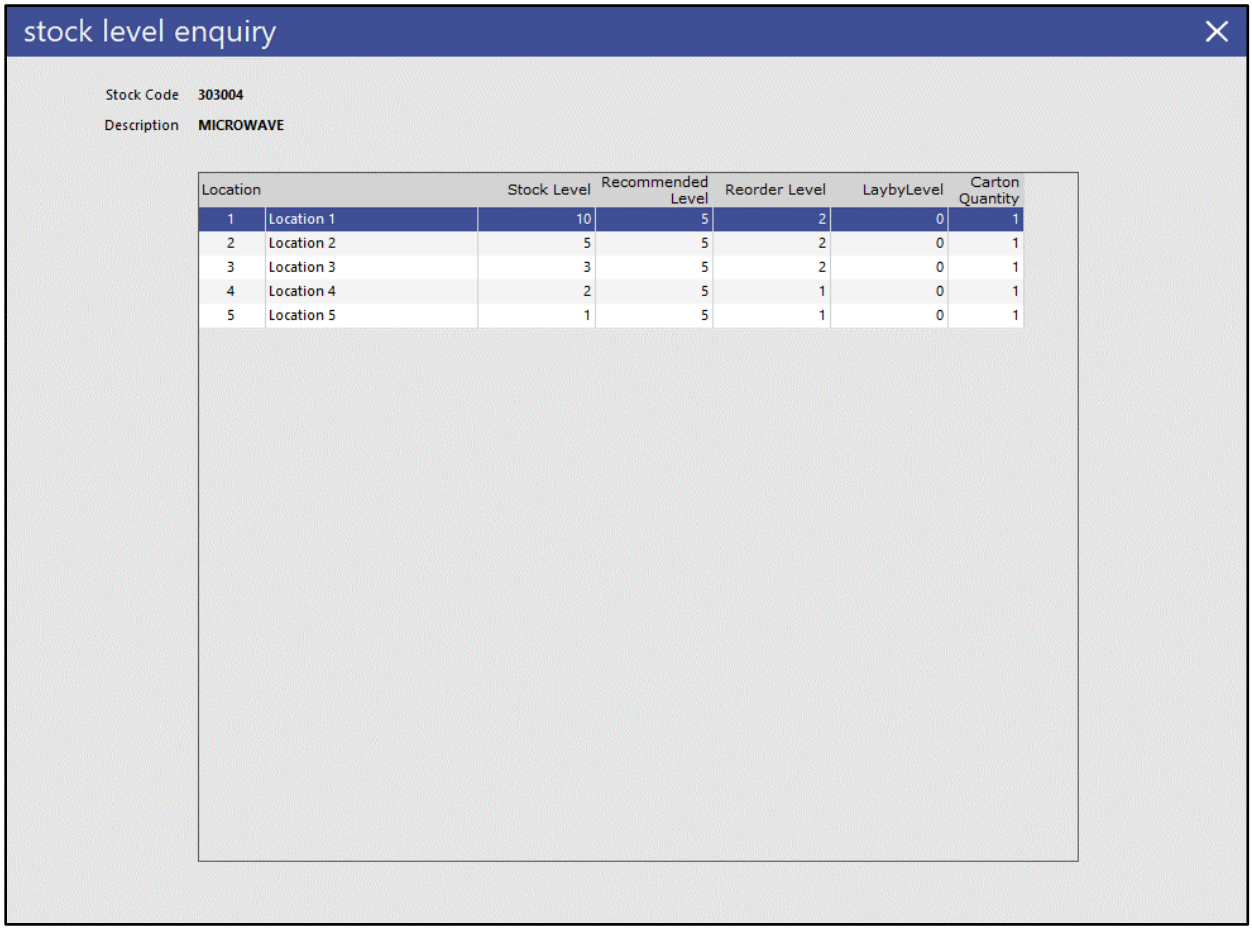
Stock Level Enquiry Function for POS Screen

This function allows the ability to perform a Stock Level Enquiry from the POS Screen. This may be useful in cases where you need to find out the Stock Level of a particular Stock Item in either the current location or any other locations which the Stock Item is available.

To configure this function, go to:
Setup > POS Screen > POS Screen Setup > Select a POS Screen Layout > Buttons > Select blank button > Configure as below, then press "Save" to save the button:



Close the POS Screen Layout windows, then go to:
POS Screen > Press the Stock Level Enquiry button > Press a Stock Item button on the POS Screen > Stock Level Enquiry is displayed:



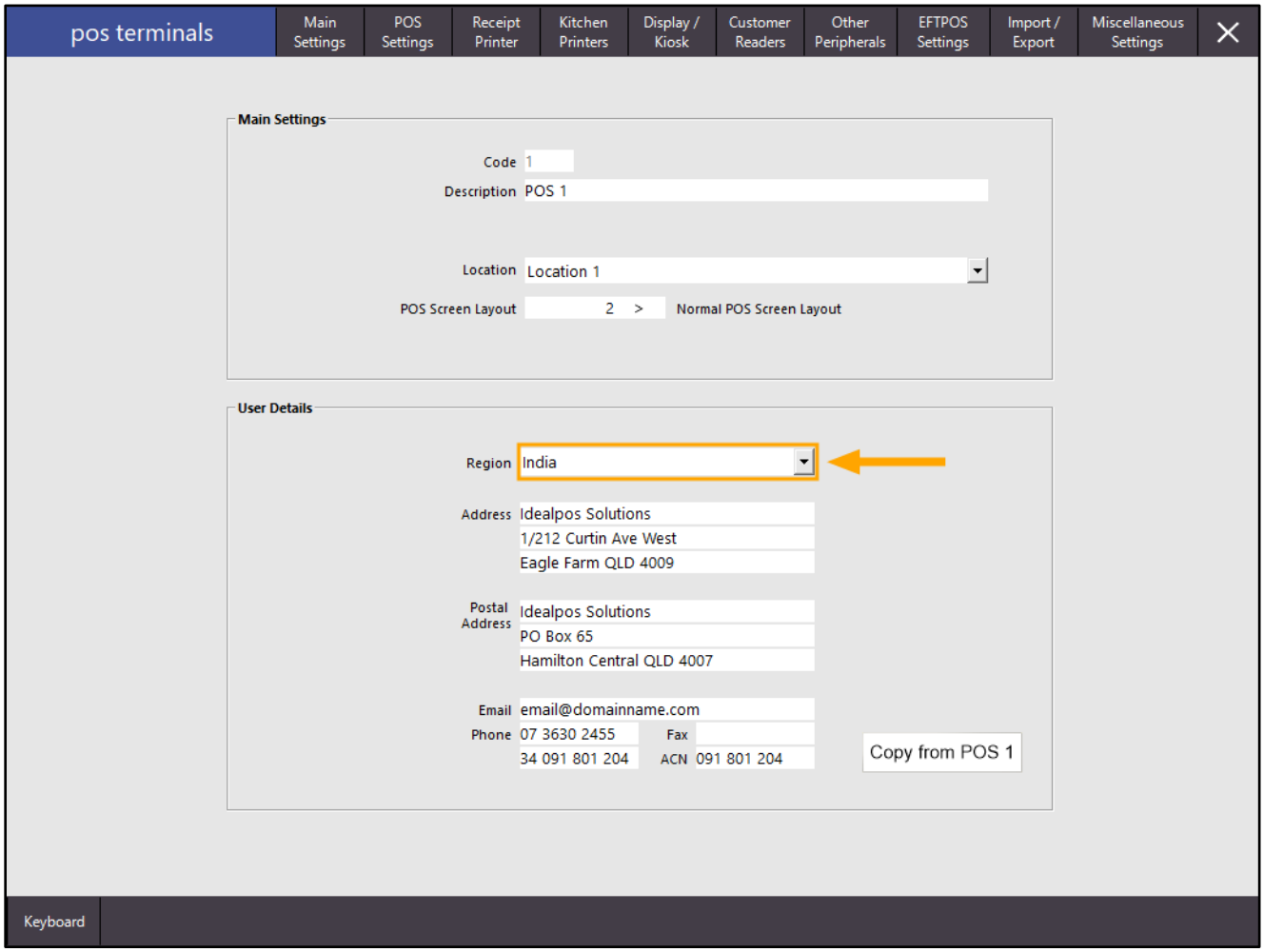
POS Terminal Settings

Added new Region setting for India

A new Region setting has been added for India. This setting can now be used by Customers who are located in India. When setting Idealpos to the India region, the following changes are included:

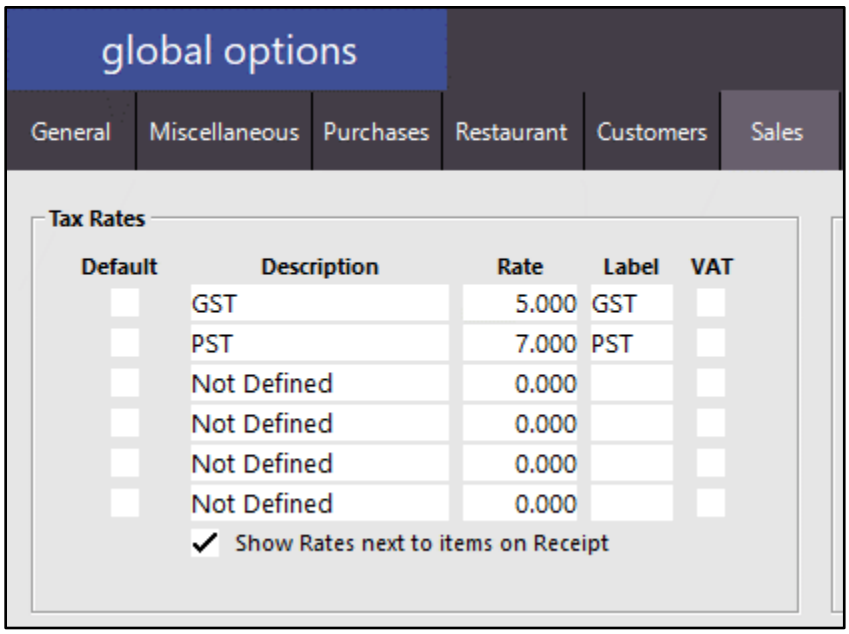
- Indian Currency Denominations for Fast Cash Keys will be displayed on the Tender screen
- Indian Currency Denominations for Cash Declaration will be displayed on the Cash Declaration screen
- Tax settings configuration will be changed to allow Indian Taxes to be configured

We recommend that the Windows Region is first configured accordingly and once this has been done, the Idealpos region can be configured by going to:
Setup > POS Terminals > Modify > Main Settings > User Details > Region > India

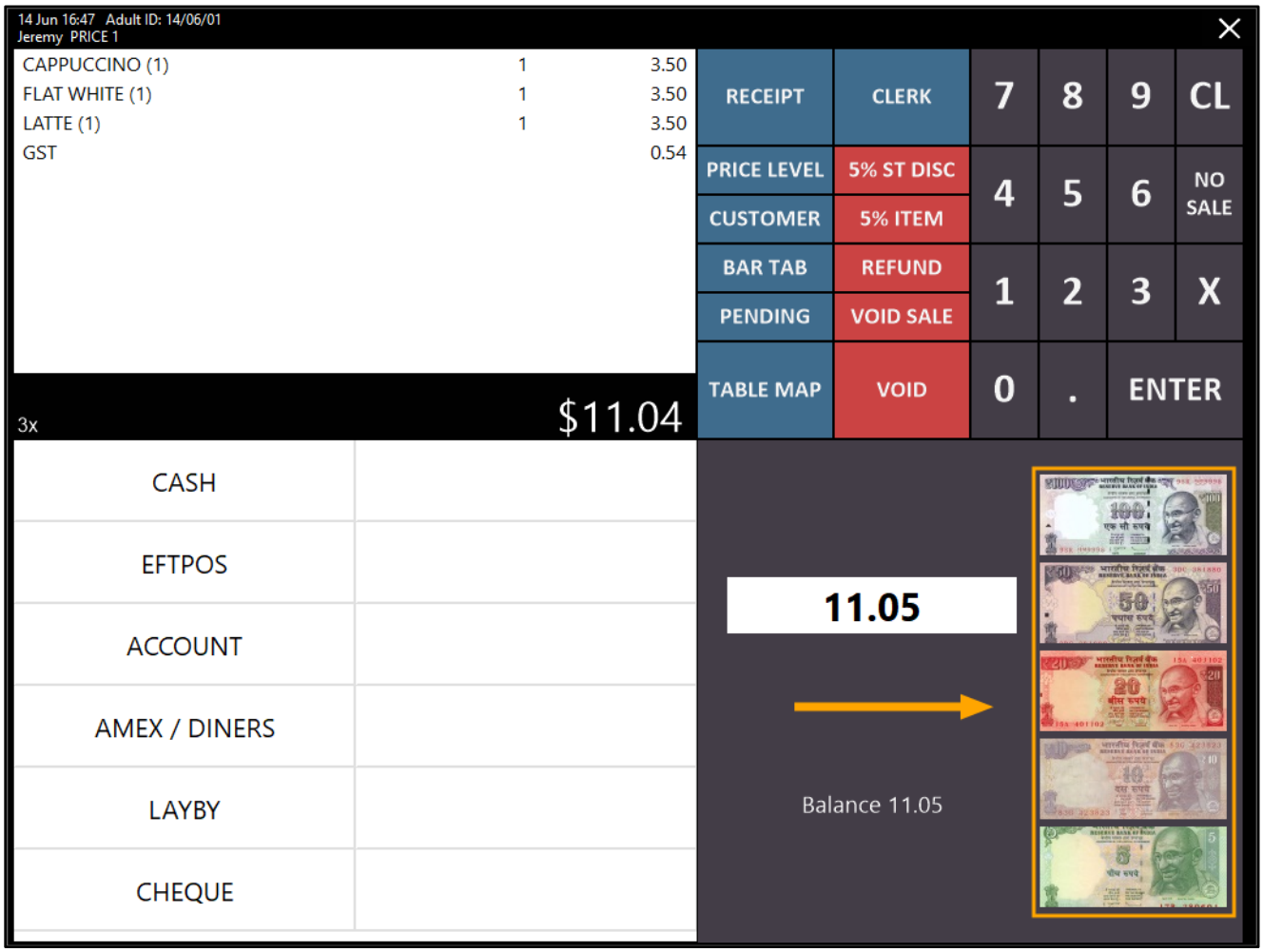


After making the above change, restart Idealpos for the change to take effect.

Tax rates can be configured by going to: Setup > Global Options > Sales > Tax Rates



When tendering sales in Idealpos, Indian Currency Denominations and Currency Images will be displayed:



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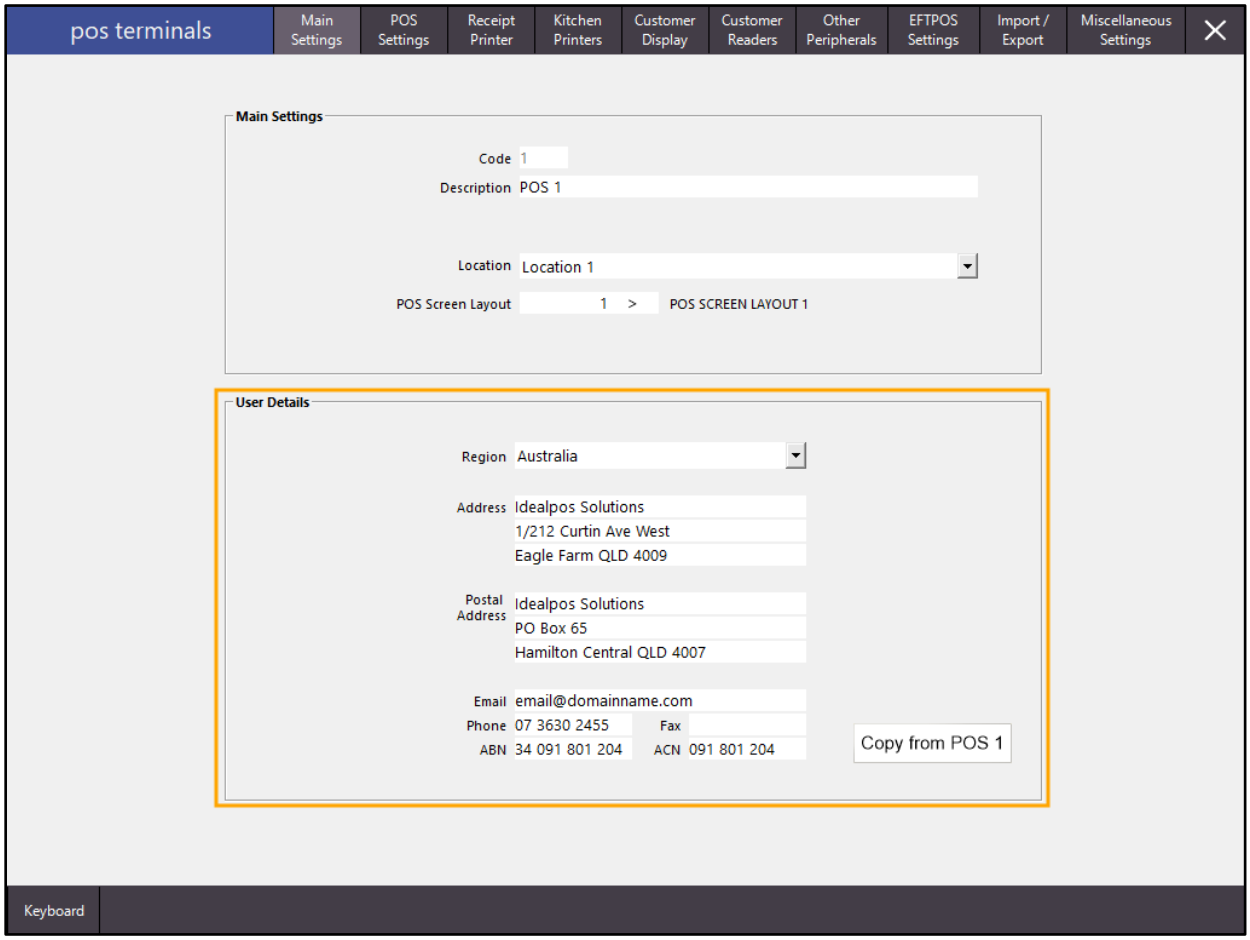
User Details Copy function

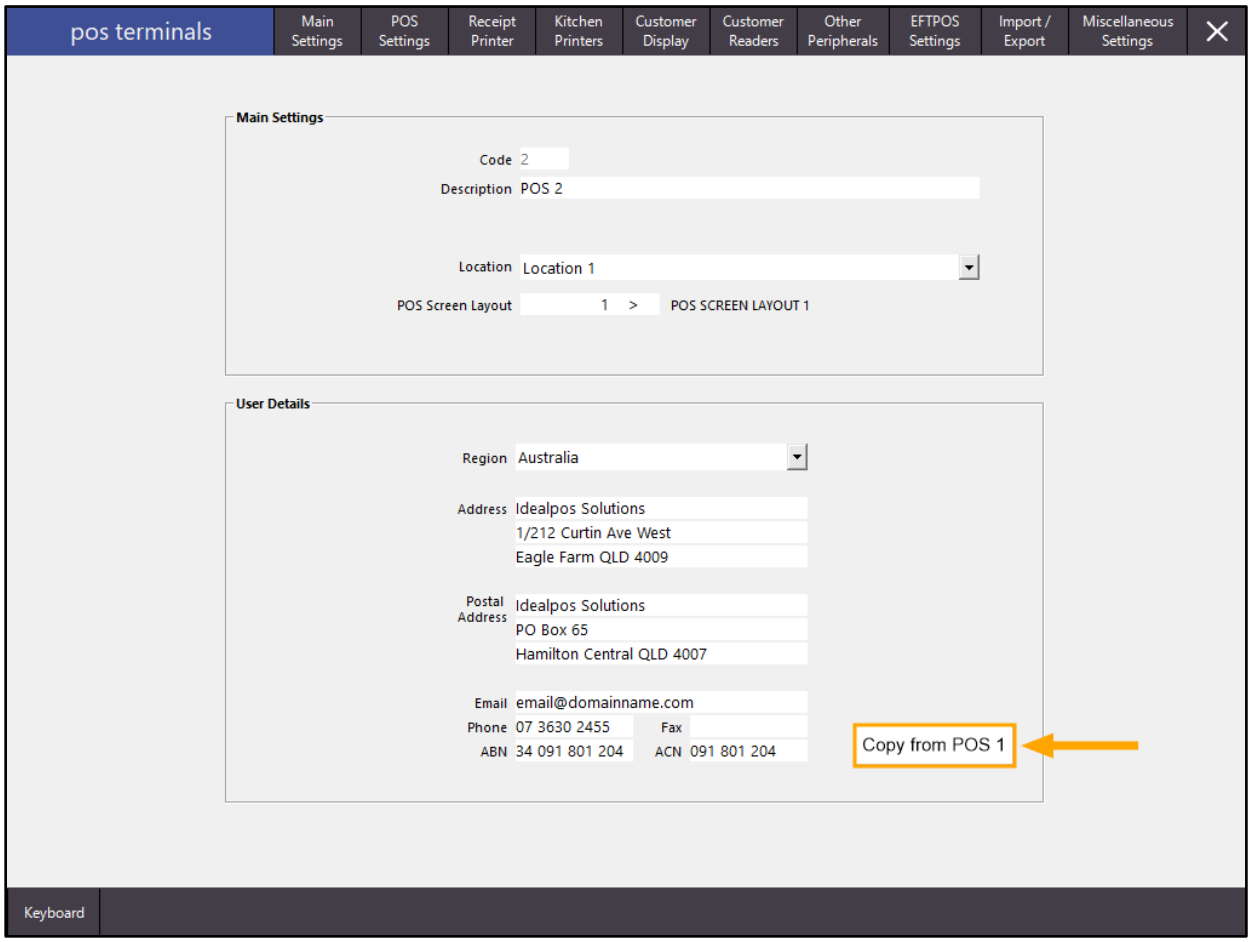
This function adds the ability to copy the POS Terminal User Details (Region, Address, Postal Address, Email, Phone, Fax, ABN, ACN) from POS 1 to any terminal. This function can be used in cases when the User Details need to be updated for all terminals but using the existing "Copy from POS #" function would result in each POS terminal's unique configuration being lost.
Therefore, the Copy from POS 1 button can now be used instead which will allow each POS Terminal's unique configuration to be preserved while allowing the ability to quickly copy the User Details settings from POS 1.

To use this function, go to:
Setup > POS Terminals > Select POS 1 > Modify > Configure/Update the User Details as required



To save the change, close the POS Terminal configuration screen for POS 1.

Then select the next POS Terminal from the list and select "Modify"
Press the "Copy from POS 1" button which will copy All User Details (Region, Address, Postal Address, Email, Phone, Fax, ABN and ACN) from POS 1 to the current POS Terminal being modified.
Close the POS Terminal configuration screen for the POS Terminal and repeat the process for all required remaining terminals.



idealpos7 Update History

POSServer

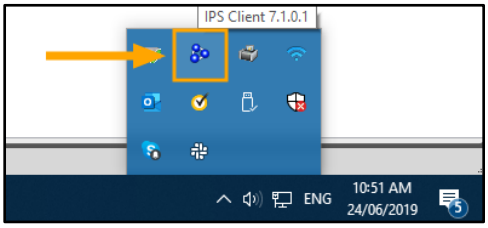
Centralised Customer Account/Layby Transactions retrieved from POSServer

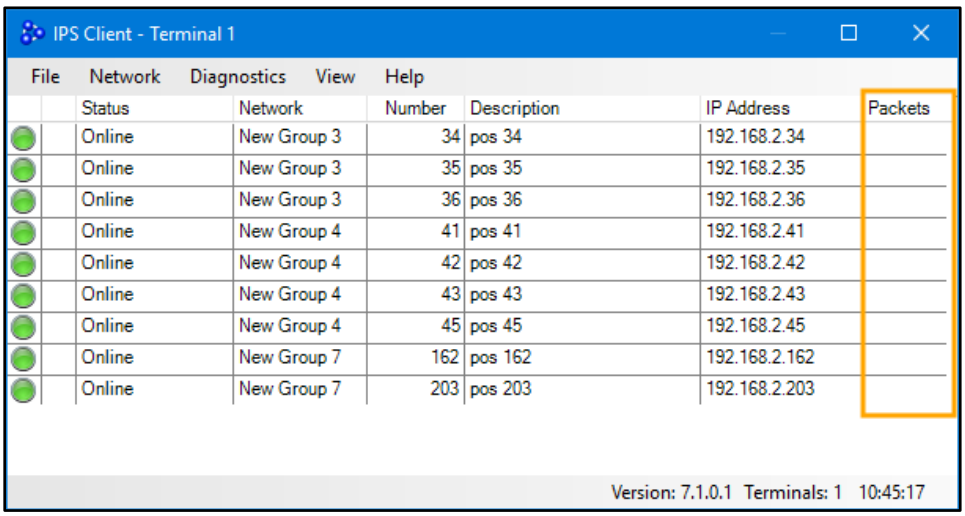
This function enables the ability to centralise Customer Account and Layby Transaction data in the POSServer. By centralising Customer Transactions on the POSServer, all terminals will have access to the same consistent Customer balances. In addition, a customer can only be added to a transaction at one POS terminal at a time (i.e. a customer cannot be added to a sale on two or more POS terminals at the same time, as POS will display a message that the customer is currently in use at POS #).

The Centralised Accounts function is disabled by default.
If you are using multiple POSServers at a site, Centralised Accounts are not supported and should not be enabled.

Before enabling Centralised Accounts, we recommend that the following steps are completed:

- Check and ensure that there are no unprocessed packets for any POS terminals in IPS Client. Confirm this by going to the main Back Office terminal and clicking on the IPS Client icon within the Windows System Tray. Note that Idealpos must be running in order for IPS Client to appear in the System Tray.



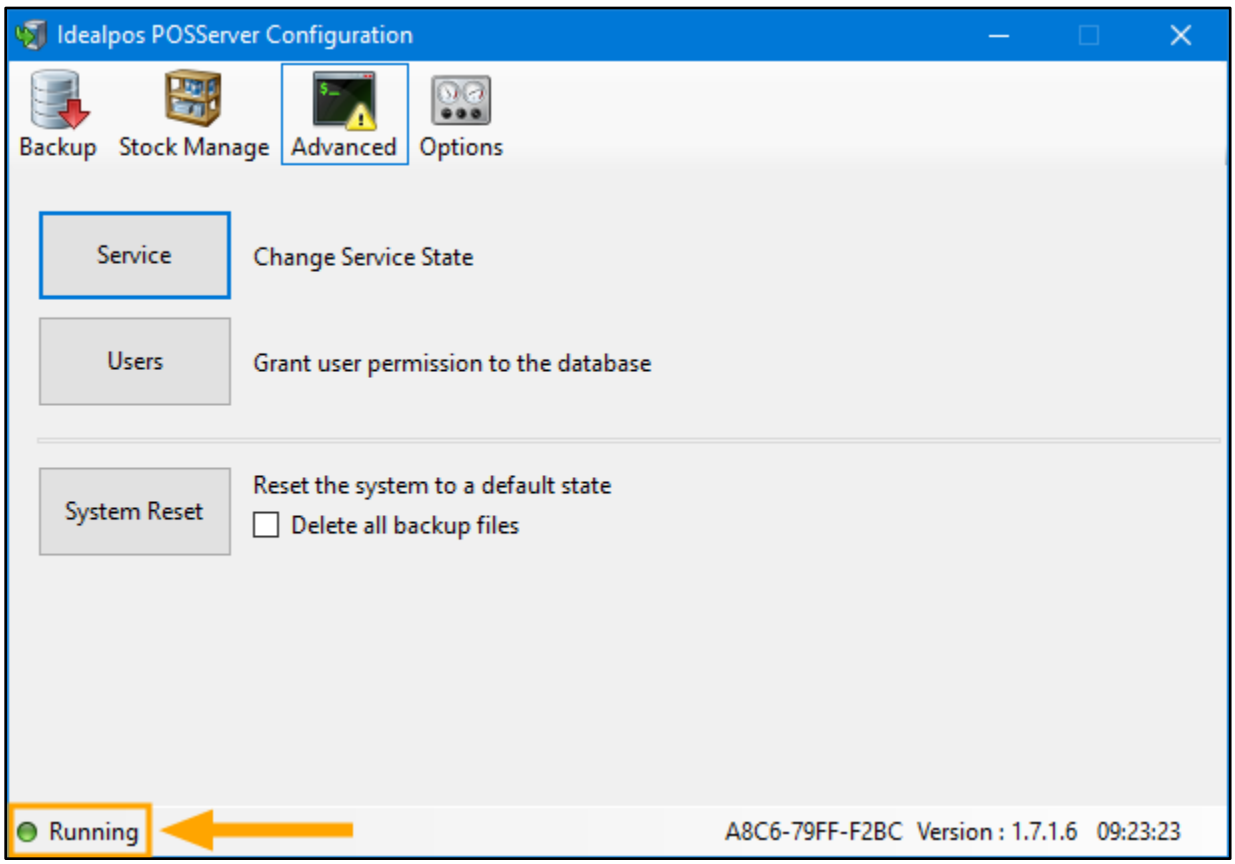


- We recommend creating a backup of the Idealpos database for each terminal.
  This can be done either by opening IPS Utils on each terminal and pressing the “Backup” button, or from the main dashboard screen at each terminal by going to File > Backup Database, then following any remaining prompts to create the backup.

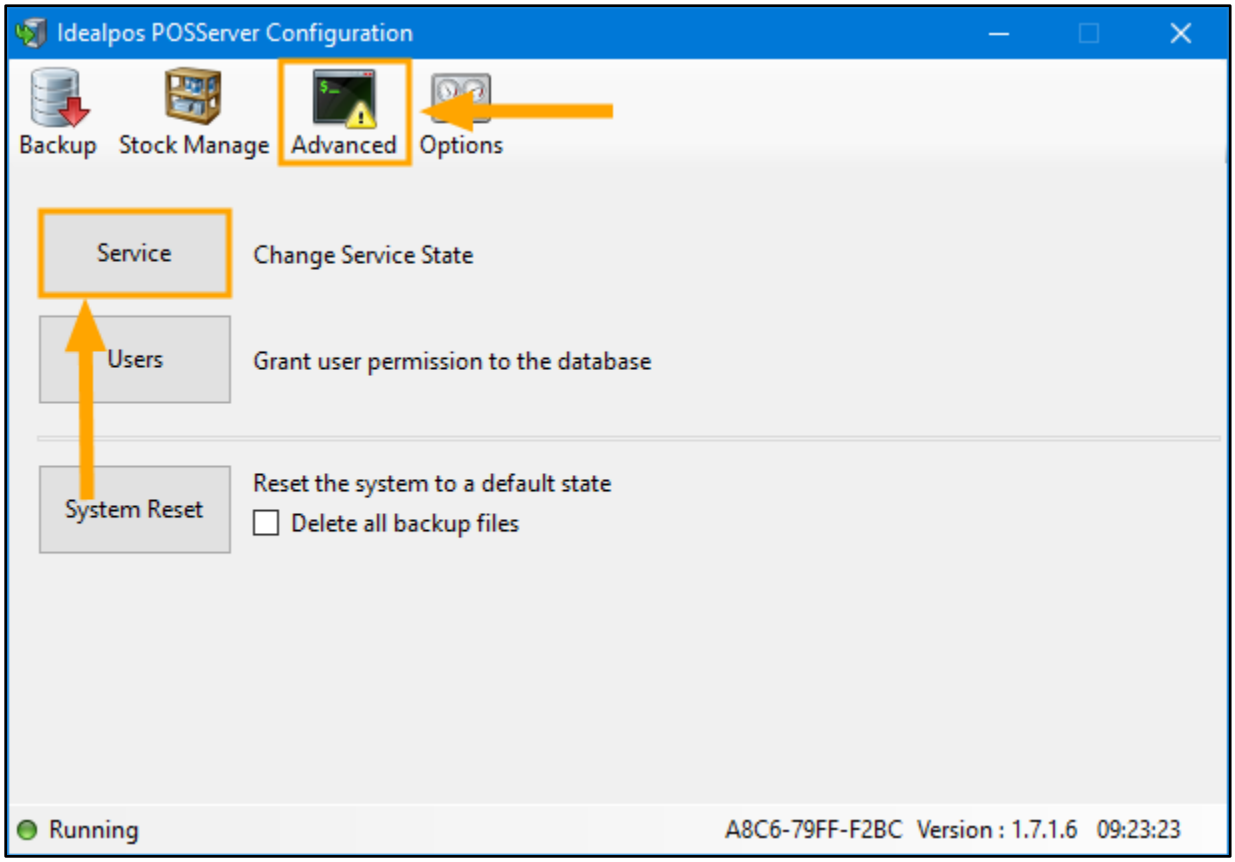
- If POSServer is already configured and in use, we also recommend creating a backup of the POSServer from the main terminal which is running the POSServer. Run the POSServer configuration (POSServer.exe) as Administrator (right click on the POSServer and choose “Run as Administrator”). A shortcut to POSServer should exist in the Windows Start Menu, however, it can also be found in "C:\Program Files\Idealpos Solutions\POSServer\POSServer.exe". Press the “Backup” button, then choose a location to save the backup and press “Backup”

Enabling Centralised Accounts involves multiple steps as outlined below:
Ensure that POSServer is running on either the main Back-Office system or the main POS terminal.
This can be checked by going to: Start > search for POSServer and open POSServer.
If POSServer cannot be found in the Start Menu, it can also be started by going to:
C:\Program Files\Idealpos Solutions\POSServer\POSServer.exe and running as Administrator (right-click on the executable and select "Run As Administrator")

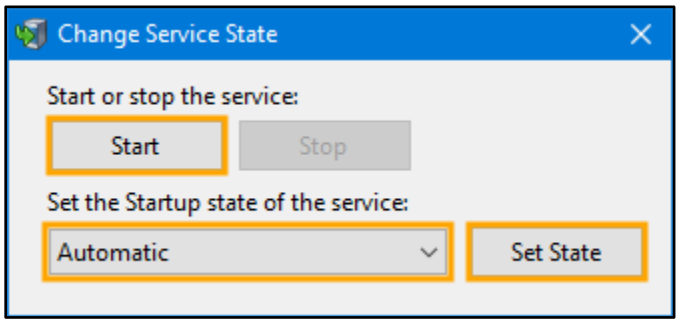
Ensure that "Running" is displayed on the bottom-left corner of the POSServer Configuration window.



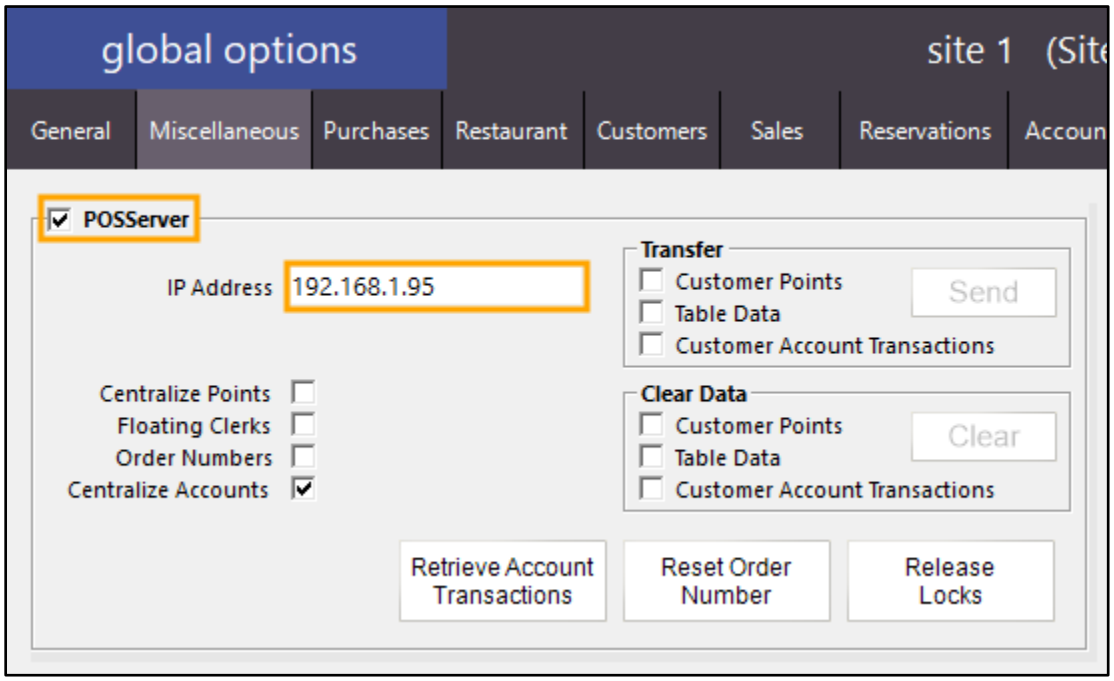
If the POSServer is not running, click on the Advanced tab, then press the “Service” button.



Press the “Start” button to start the Service, then Set the Startup state of the service to “Automatic”, followed by pressing the “Set State” button to apply the change.

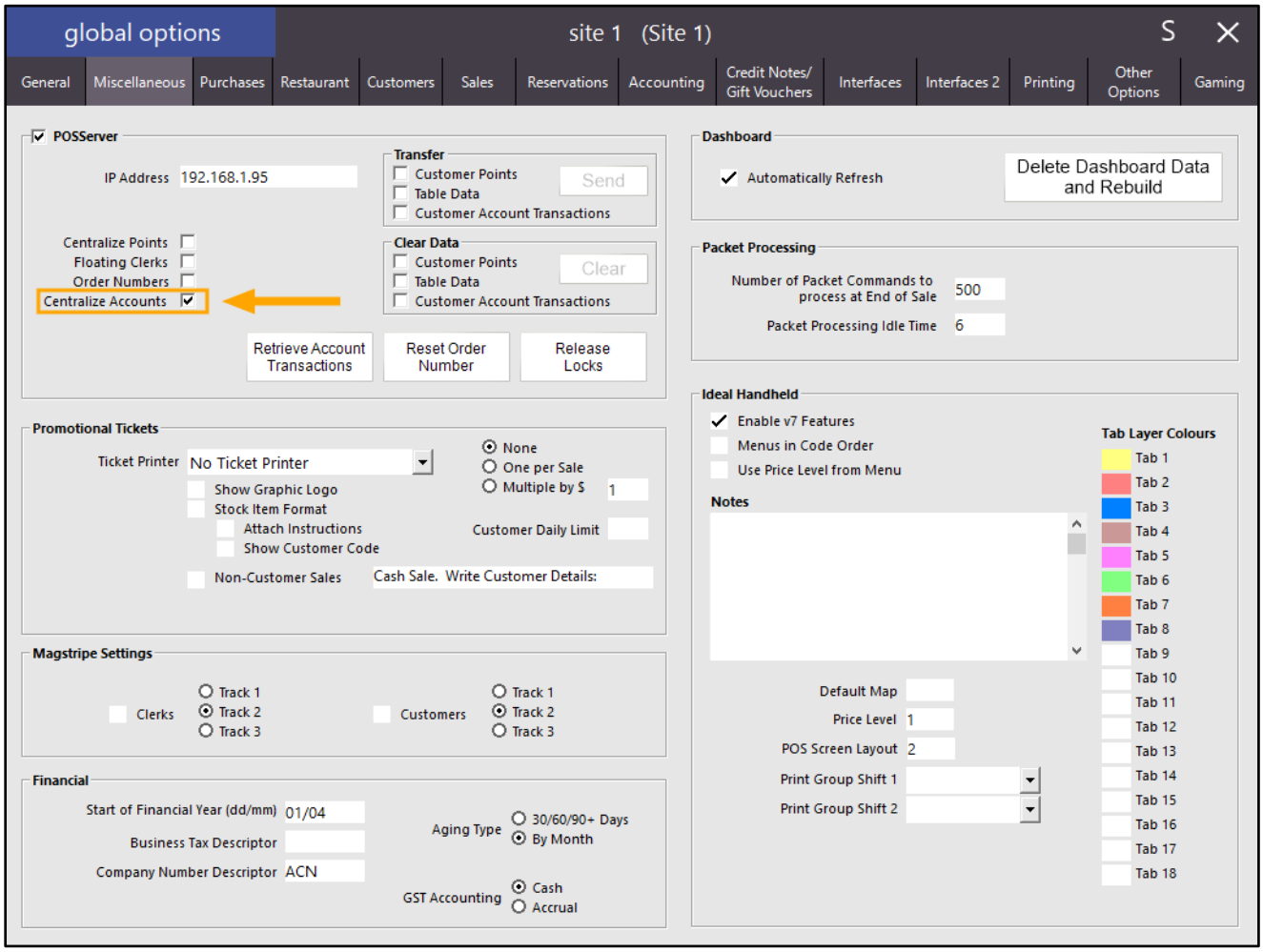


Then ensure that POSServer is enabled in Idealpos Global Options and ensure that the IP address of the system running the POSServer has been entered.
Go to: Setup > Global Options > Miscellaneous > POSServer
The below example shows Idealpos pointing to a POSServer running on an IP address of 192.168.1.95.
Substitute the IP address below with the IP address of the system that's running the POSServer on your network

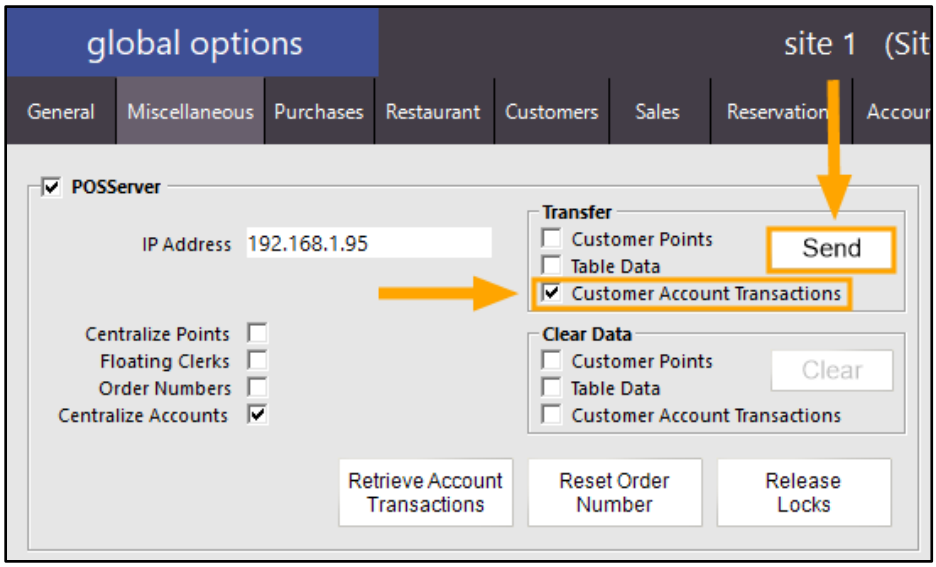


Then Enable tickbox “Centralise Accounts”

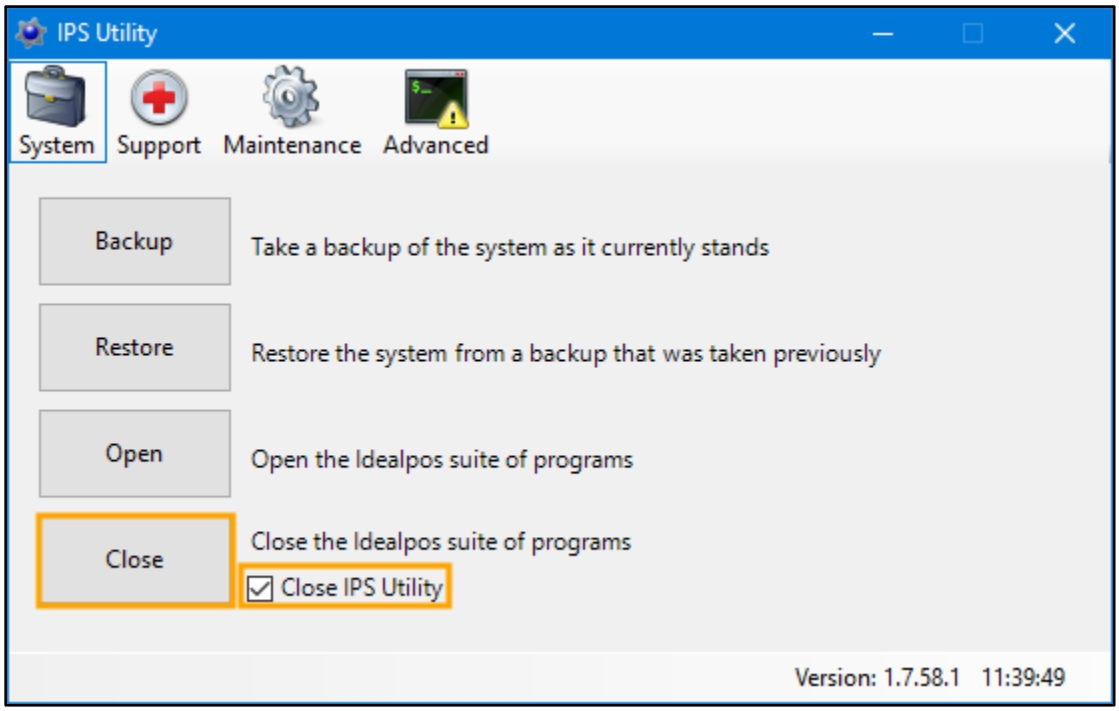
Once Centralised Accounts have been enabled, we recommend that they remain enabled. This setting shouldn’t be toggled on and off.



Customer Account Transactions must also be manually Transferred/Sent from a POS terminal to the POSServer.
From the main or primary terminal (typically POS 1 at the venue/site), go to: Setup > Global Options > Miscellaneous.
Within the Transfer section, enable the “Customer Account Transactions” tickbox, then press “Send”.
You may be prompted to enter the Administrator password.
All Customer Account Transactions from the current terminal will be sent to the POSServer.



Once the above steps have been completed, restart Idealpos on each POS terminal.
This can be done by opening IPS Utils and pressing the “Close” button.
Go to Start > search for “IPSUtils” and open IPSUtils.
Tick the “Close IPS Utility” option, then press the “Close” button.



Confirm any prompts by pressing “Yes” to close the Idealpos suite of programs.
Then start Idealpos again by either double clicking the Idealpos shortcut on the desktop or by going to the Start Menu and going to Idealpos > Idealpos.

Customer Accounts can be used as normal and any User Interface screens will remain the same when using Customer Accounts.

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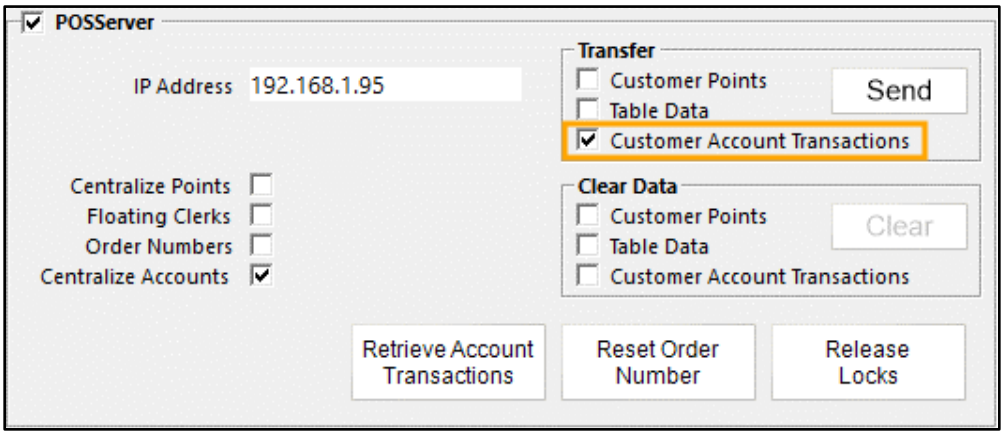
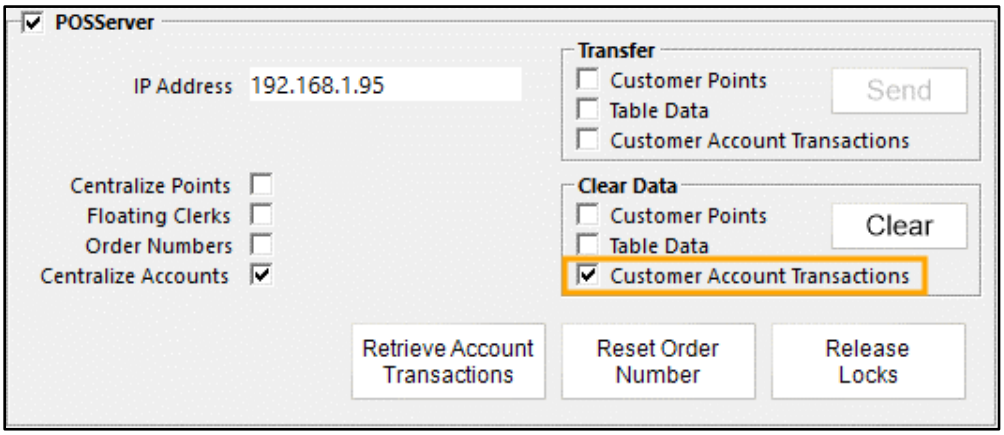
Additional options for Customer Accounts related functions have also been added to the Global Options > Miscellaneous > POSServer section.
Note that these options are for advanced users and should only be used when you are familiar with their purpose and the outcome you are trying to achieve.

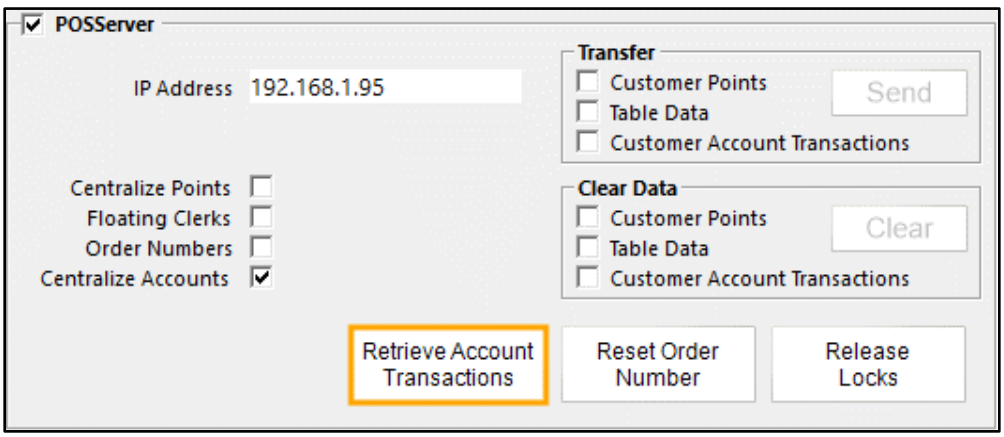
- Transfer Customer Account Transactions – This option will Clear Customer Account Transactions from the POSServer and replace with data from the current terminal



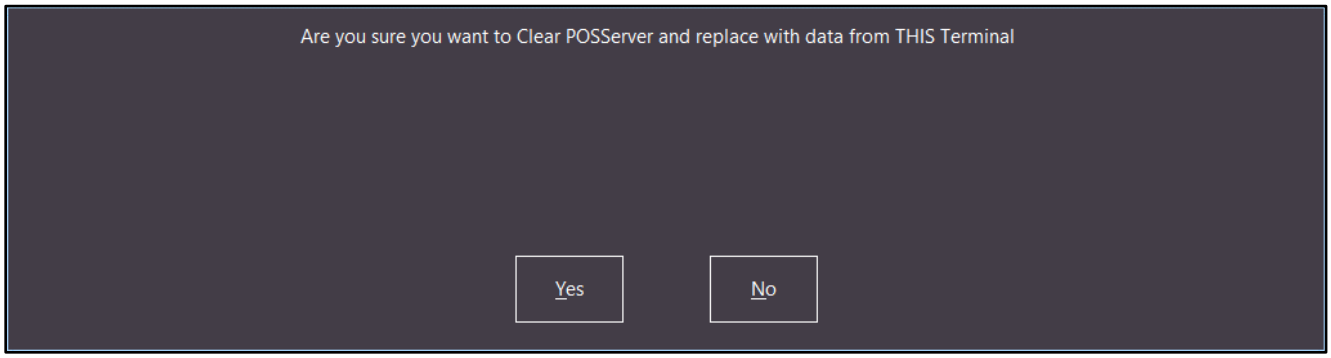
- Clear Customer Account Transactions – This option will clear Customer Account Transactions from the POSServer



- Retrieve Account Transactions – This option will clear all Customer Account Transactions on the current terminal and will replace with Account Transaction Data from the POSServer.



When using these functions, Idealpos will prompt for the Admin Password, followed by a confirmation prompt explaining exactly what the selected option will perform with the opportunity to proceed or cancel via the Yes/No buttons.



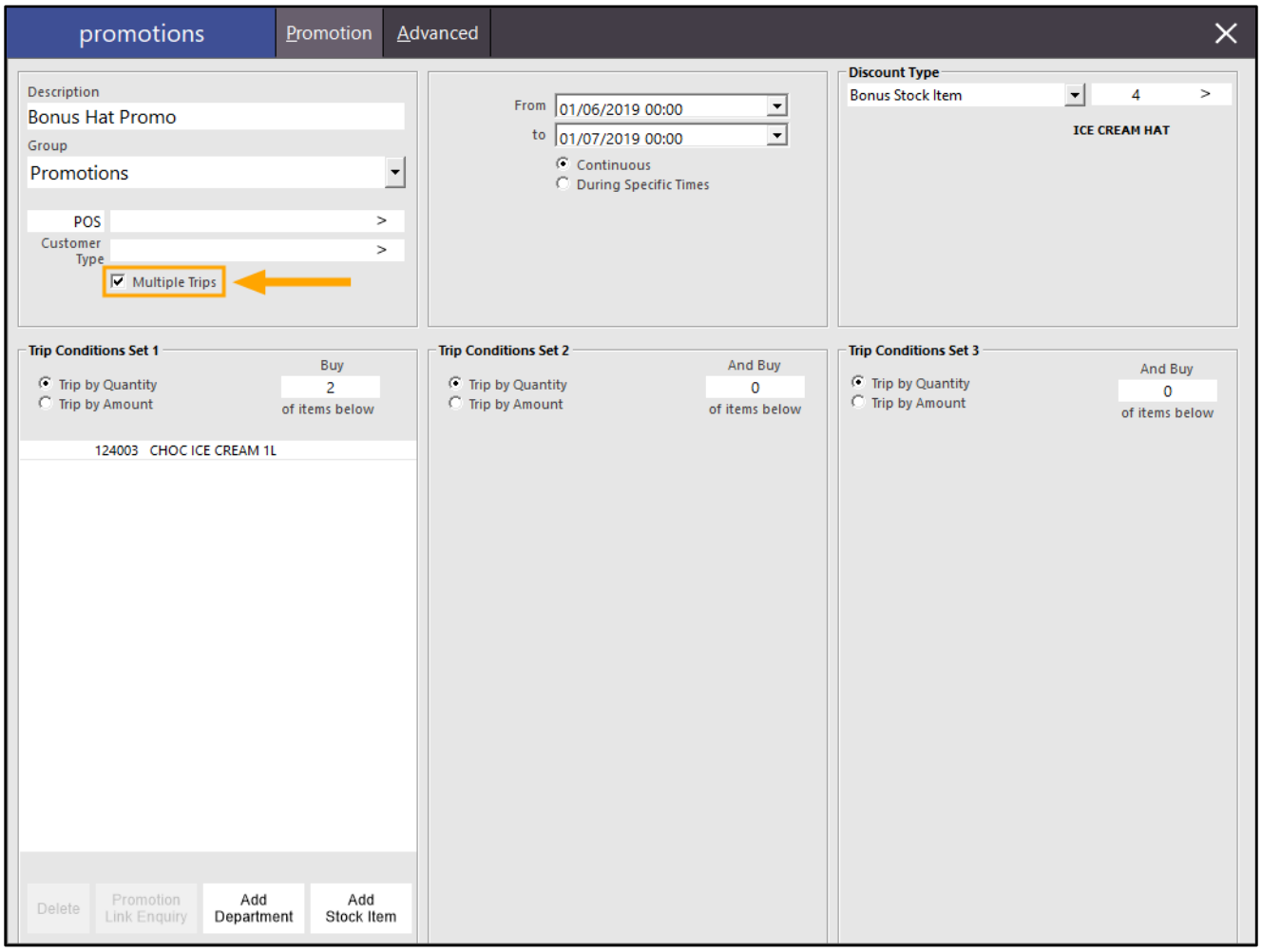
Promotions

MAXTRIPS tag for Multi-Trip Promotions

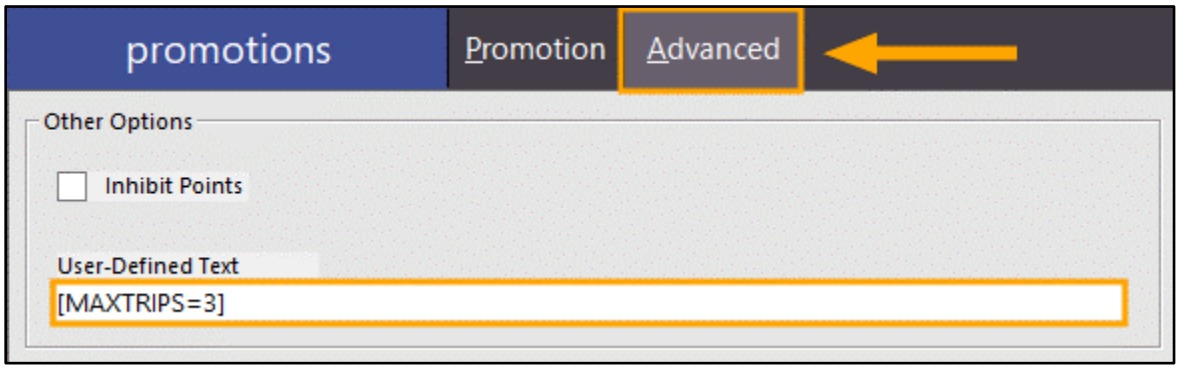
This function adds the ability to specify the maximum number of times that a Multiple Trip Promotion can be tripped in a single sale. This can be used where you need to restrict the promotion. An example promotion that may need to have the number of trips restricted could include a promotion that gives a Customer a bonus promotional item when they purchase either a single Stock Item or a combination of Items.

To use this function, go to: File > Sales > Promotions > Promotions > Select a Promotion > Modify

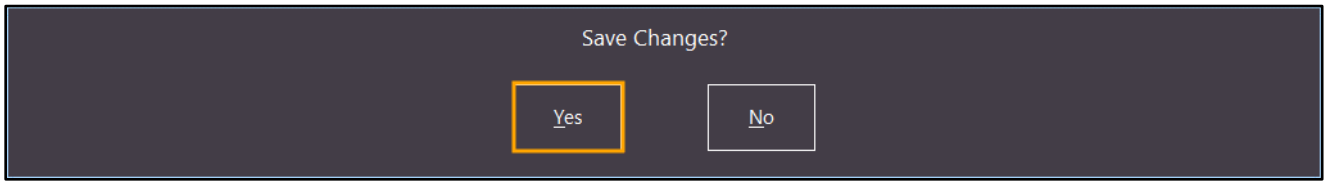
The below example shows a Promotion which triggers a bonus ICE CREAM HAT Stock Item when purchasing 2x CHOC ICE CREAM 1L.
The MAXTRIPS tag is only applicable to Promotions that have the "Multiple Trips" option enabled, so ensure that the Multiple Trips option is enabled on the promotion that you want to limit the number of trips on:



Once you have either created a new promotion with “Multiple Trips” enabled or ensured the “Multiple Trips” option has been enabled on an existing promotion, click on the “Advanced” tab, then enter [MAXTRIPS=#] into the User-Defined field.
Replace # with the number of maximum trips that you want the promotion to be limited to.
The below example shows the maximum number of trips set to 3.



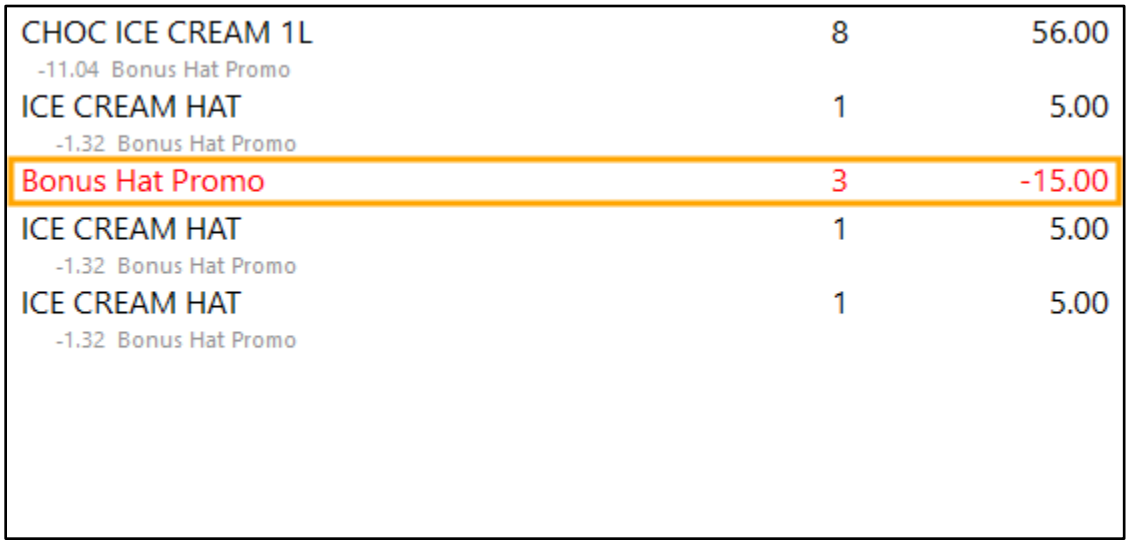
Close the Promotions screen and when prompted, select “Yes” to save the changes.



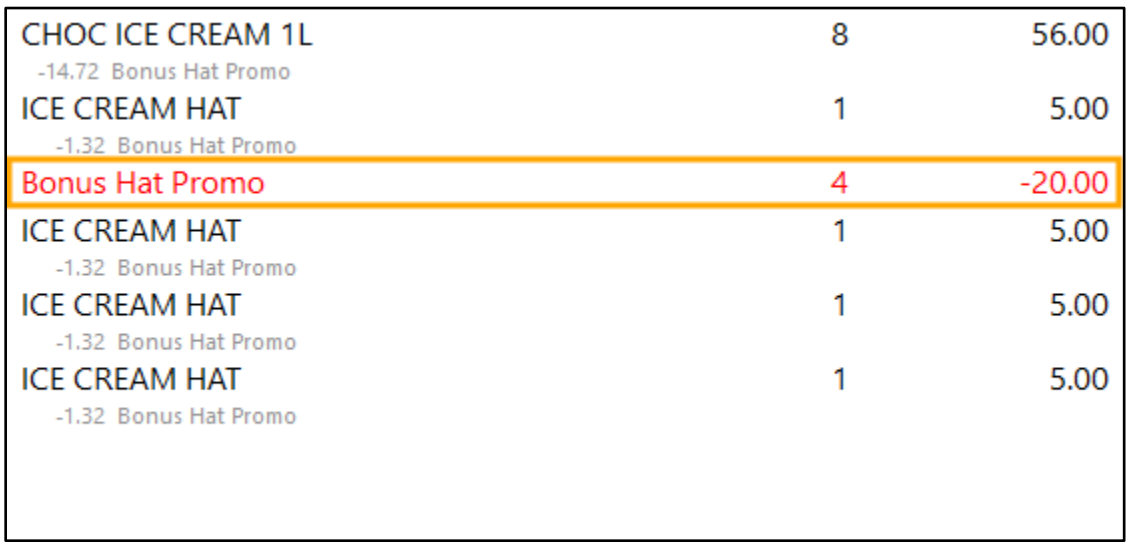
idealpos7 Update History

Open the Idealpos POS screen then trigger the Promotion by purchasing the required number of items.
In this example, the promotion triggers a bonus ICE CREAM HAT Stock Item worth $5.00 when 2x CHOC ICE CREAM 1L items are purchased.
The promotion will be limited to triggering 3 times (MAXTRIPS set to 3).
Purchasing 6x CHOC ICE CREAM 1L Stock Items will trigger the Bonus Hat Promo 3 times.
After the max trips have been reached for the promotion, the promotion will not trip again for the current sale.
After the sale has been tendered and finalised, the promotion can be tripped three times in the next sale.

The below shows the CHOC ICE CREAM 1L item purchased 8 times with [MAXTRIPS=3] enabled.
Note the Bonus Hat Promo only tripped 3 times which is in accordance with the MAXTRIPS setting.



When the MAXTRIPS setting has not been set in the Advanced tab, there is no limit to the number of times the Promotion can be tripped and the below example shows that the Bonus Hat Promo was tripped 4 times.



Raffles

Raffles inhibit redrawing of an already drawn number on multi-draw raffles

The logic used to draw Raffles in Idealpos has been updated so that it behaves more like a traditional raffle draw. After a ticket has been drawn in a raffle, Idealpos will mark that ticket as drawn and if the raffle is drawn again, previously drawn tickets will be excluded from the raffle draw. A raffle can be re-drawn again and again until either all the tickets included in the raffle are drawn or until the raffle is reset.
There is no configuration required to enable this function.

See the Raffles topic in the Idealpos User Guide for more information about configuring and using Raffles in Idealpos: https://userguide.idealpos.com.au/#Raffles/Raffles.htm

idealpos7 Update History

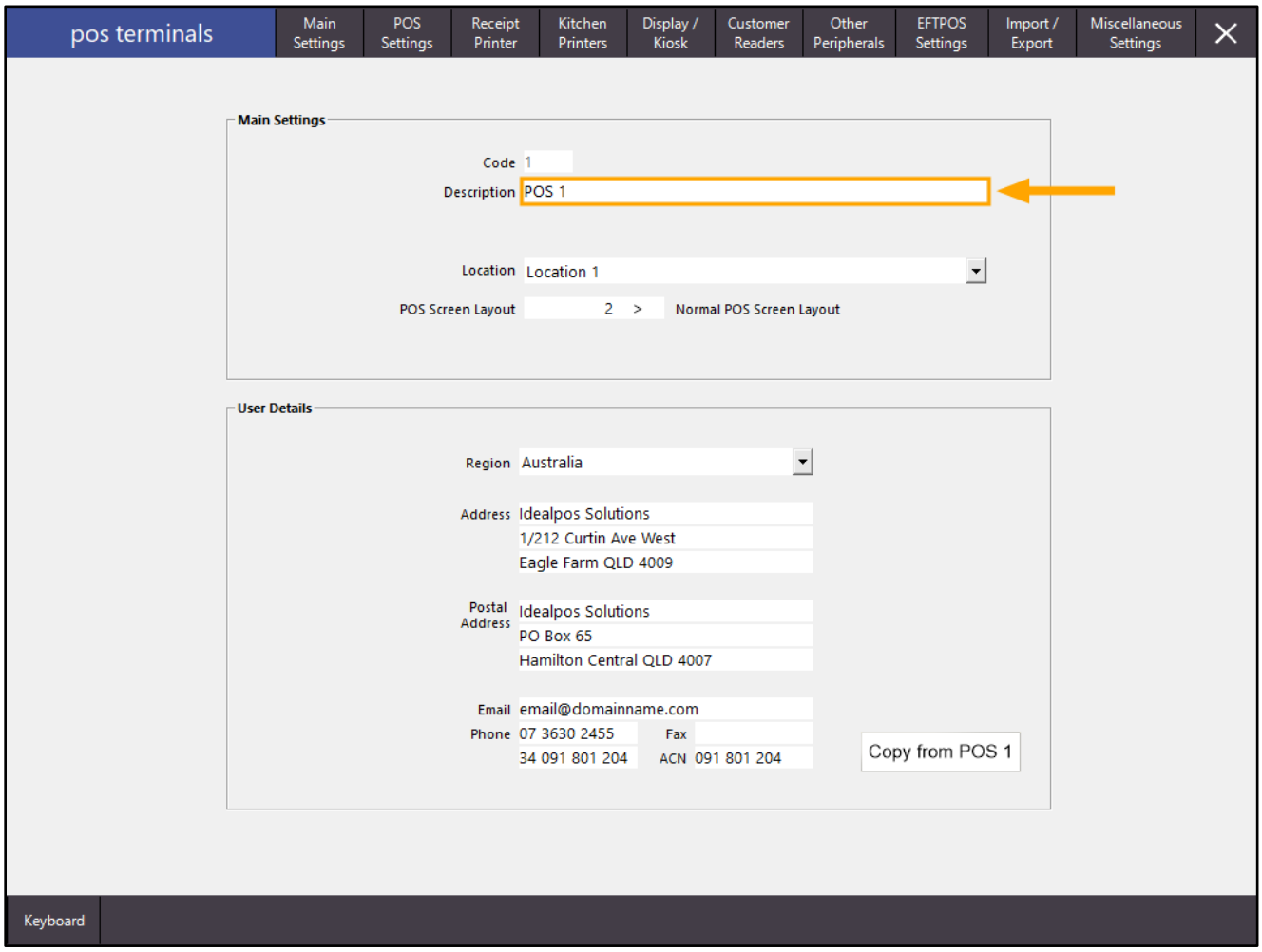
Reports

POS Description shows on the Reports header

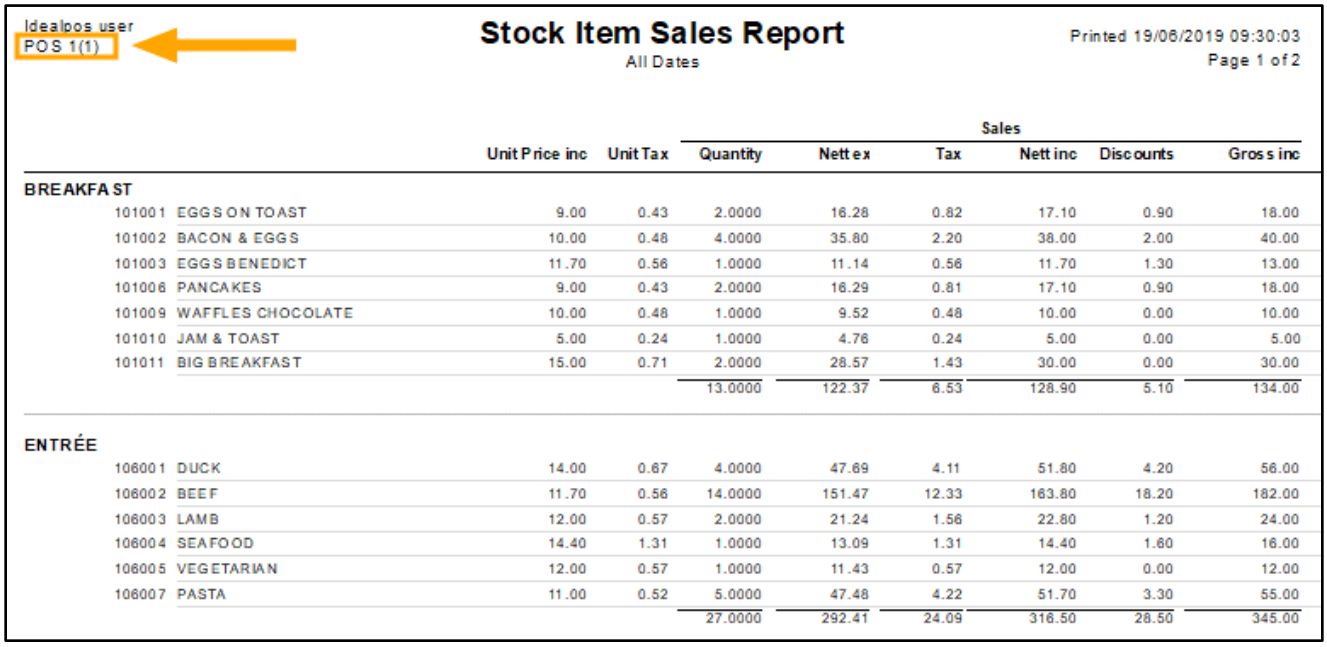
This function adds the POS Description to the Reports header for any report that is available via the Idealpos Reports menu. The Description of the POS which runs a report will be displayed in the header of the report.

There is no configuration required to enable the POS Description to display in the report header, however, you may want to update the POS Descriptions of your terminals so that the correct POS Description is displayed on your reports.

To update POS Descriptions, go to:
Setup > POS Terminals > Select a POS Terminal from the list > Modify
Modify the Description in the Description field, then close the POS terminals screen.
Repeat the process for each POS terminal that needs the description updated.



Once the POS Descriptions have been updated, any report can be run from the Reports menu and the POS Description will appear on the top-left corner of the report in the Report Header.
The below example shows the Stock Item Sales Report which is available via Reports > Sales > Stock Item Sales



Idealpos user
POS 1(1)

Stock Item Sales Report
All Dates

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		Unit Price inc	Unit Tax	Sales Quantity	Sales Nett ex	Sales Tax	Sales Nett inc	Sales Discounts	Sales Gross inc
BREAKFAST									
101001	EGGS ON TOAST	9.00	0.43	2.0000	16.28	0.82	17.10	0.90	18.00
101002	BACON & EGGS	10.00	0.48	4.0000	35.80	2.20	38.00	2.00	40.00
101003	EGGS BENEDICT	11.70	0.56	1.0000	11.14	0.56	11.70	1.30	13.00
101006	PANCAKES	9.00	0.43	2.0000	16.29	0.81	17.10	0.90	18.00
101009	WAFFLES CHOCOLATE	10.00	0.48	1.0000	9.52	0.48	10.00	0.00	10.00
101010	JAM & TOAST	5.00	0.24	1.0000	4.76	0.24	5.00	0.00	5.00
101011	BIG BREAKFAST	15.00	0.71	2.0000	28.57	1.43	30.00	0.00	30.00
				13.0000	122.37	6.53	128.90	5.10	134.00
ENTRÉE									
106001	DUCK	14.00	0.67	4.0000	47.69	4.11	51.80	4.20	56.00
106002	BEEF	11.70	0.56	14.0000	151.47	12.33	163.80	18.20	182.00
106003	LAMB	12.00	0.57	2.0000	21.24	1.56	22.80	1.20	24.00
106004	SEAFOOD	14.40	1.31	1.0000	13.09	1.31	14.40	1.60	16.00
106005	VEGETARIAN	12.00	0.57	1.0000	11.43	0.57	12.00	0.00	12.00
106007	PASTA	11.00	0.52	5.0000	47.48	4.22	51.70	3.30	55.00
				27.0000	292.41	24.09	316.50	28.50	345.00

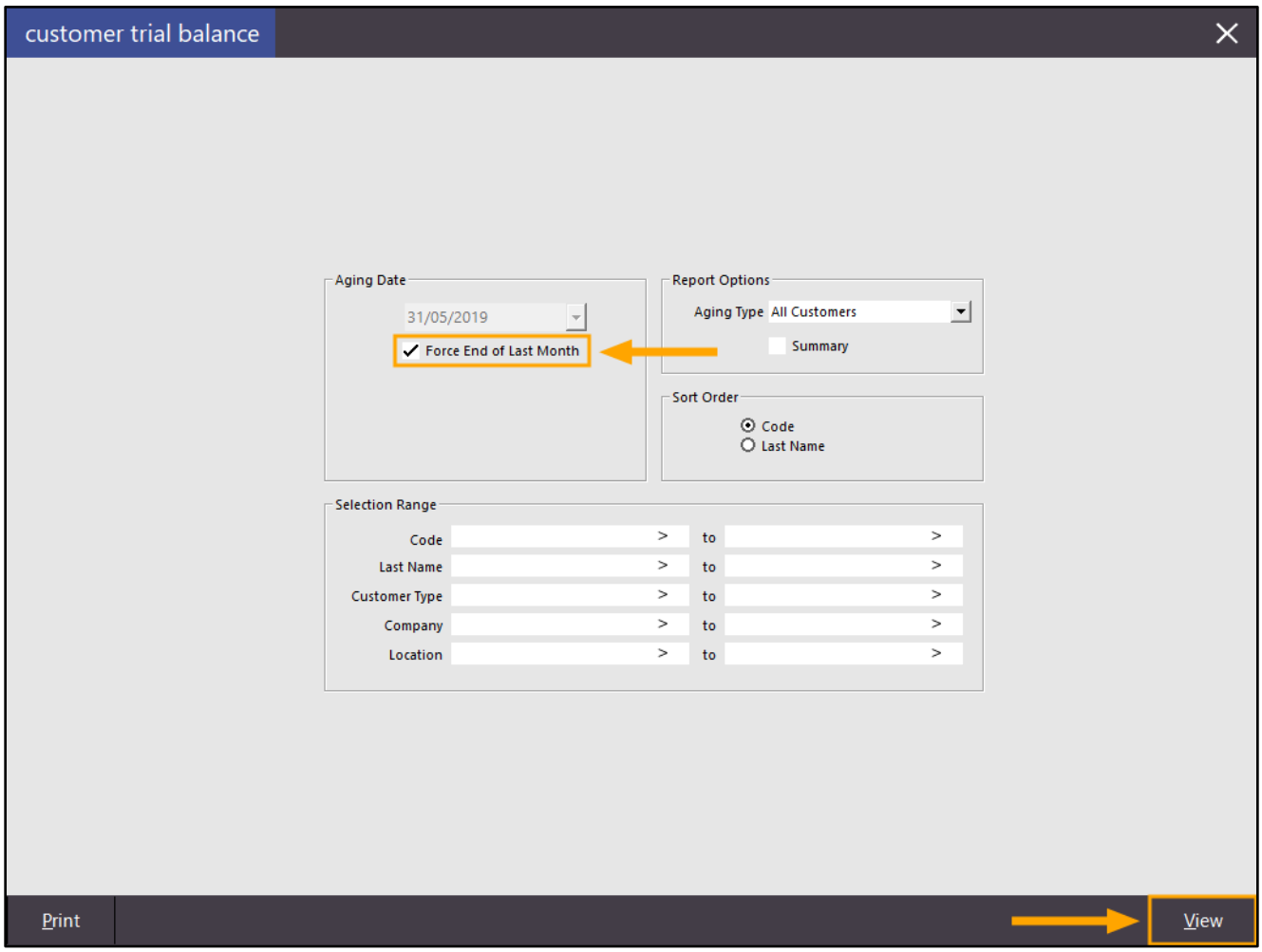
Reports – Customers

Customer Trial Balance – Option to Force End of Last Month for Scheduling

This function adds the ability to run the Customer Trial Balance Report with the option to "Force End of Last Month". This is useful in cases where you want to create a Shortcut for the report and when using the shortcut, you want the report to use an Aging Date for the last day of the previous month (relative to the current date which you're running the report).
In addition, the same function can be utilised when including the Shortcut Report in a schedule.

To use this function, go to: Reports > Customers > Customer Trial Balance

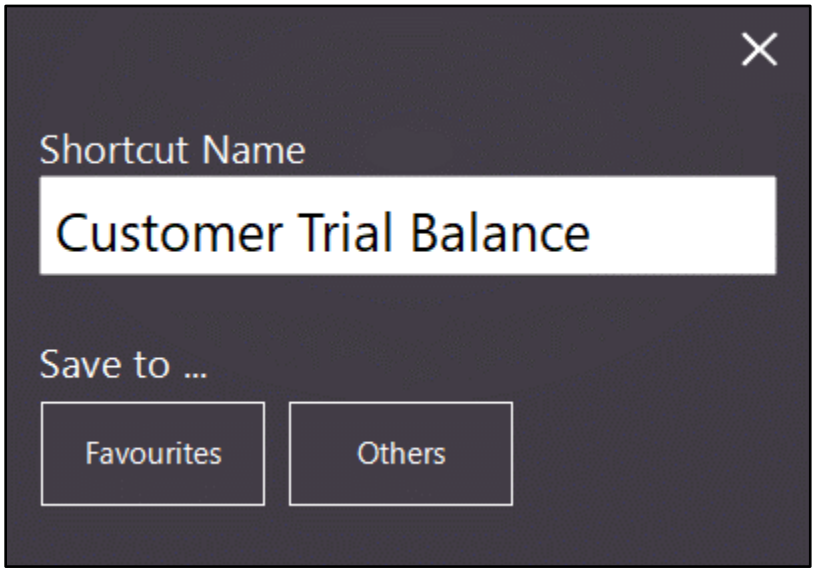
Enable the "Force End of Last Month" checkbox, set any other report selections as required, then press "View" to run the report:



The report will be displayed using the last day of the previous month as the Aging Date.
The below example shows the Customer Trial Balance Report Header with an Aging Date of 31/05/2019 and a printed date of 19 June 2019.

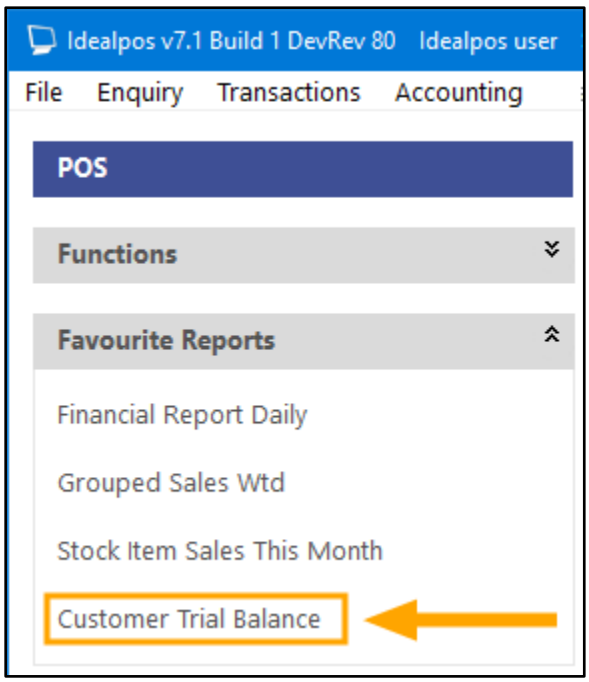
From the top-right corner of the screen, press the "S" button to create a shortcut for the Customer Trial Balance Report. The Shortcut will include the options that were selected when running the report, including the "Force End of Last Month" option.

Enter a Shortcut Name, then choose a location to save the Shortcut to.
For this example, we'll use the "Favourites" location.



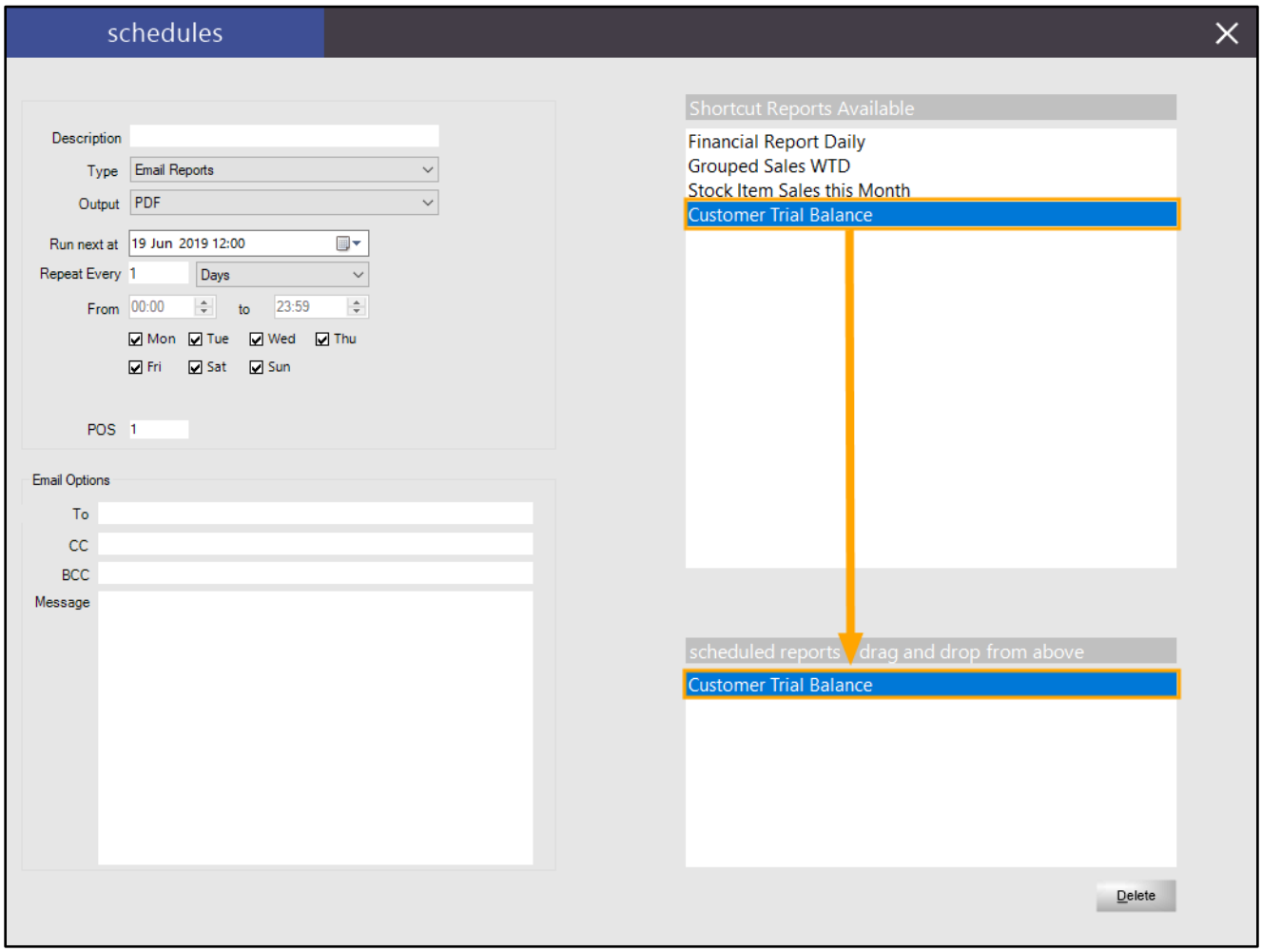
Close the Customer Trial Balance Report.

A Shortcut for the Report will now appear on the Back-Office screen under “Favourite Reports”.

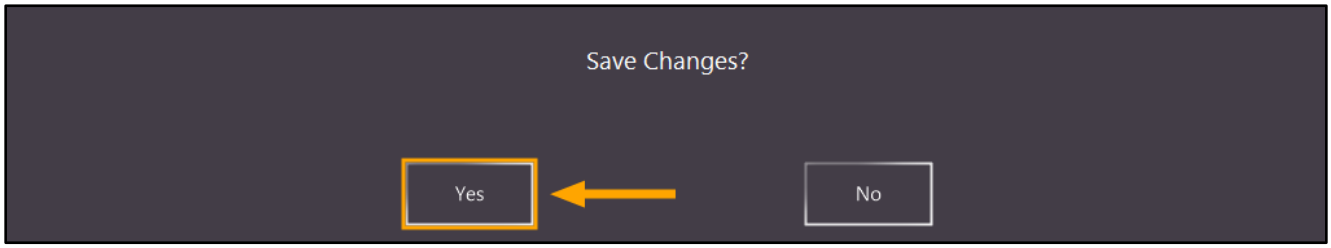


Clicking on the Shortcut will run the Customer Trial Balance using the options that were selected when the report was created, including the “Force End of Last Month” Aging Date option.

A Schedule can also be created for the Report Shortcut.
Go to Setup > Schedules > Either select an existing Schedule and press Modify or press the "Add" button.
Select the required options for the Schedule and drag the "Customer Trial Balance" report from "Shortcut Reports Available" to "Scheduled Reports".



Once the schedule has been created, close the Schedules screen and select "Yes" when prompted to Save Changes.



The Schedule will appear in the list of Schedules and will run as per the settings that were configured.
When run via the Schedule, the report will use the settings chosen in the report, including "Force End of Last Month".

Reports – Sales

Pending Sales Report – Includes Total by Sale Type Status

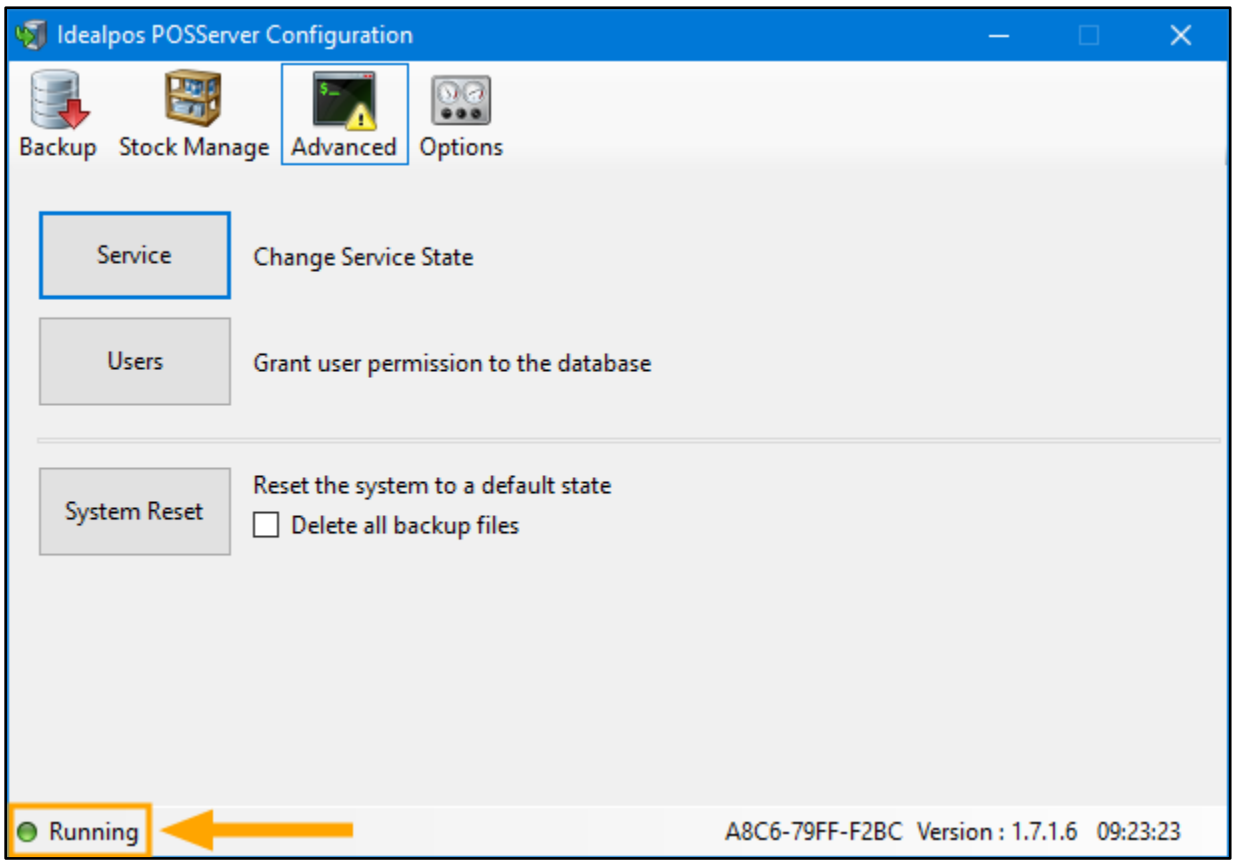
This function adds a Total for each Sale Type that is reported within the Pending Sales Report.
No additional configuration is required to enable this function; it is enabled by default.

In order to use Pending Sales, ensure that you have POSServer enabled and a Pending Sale button on your POS Screen.

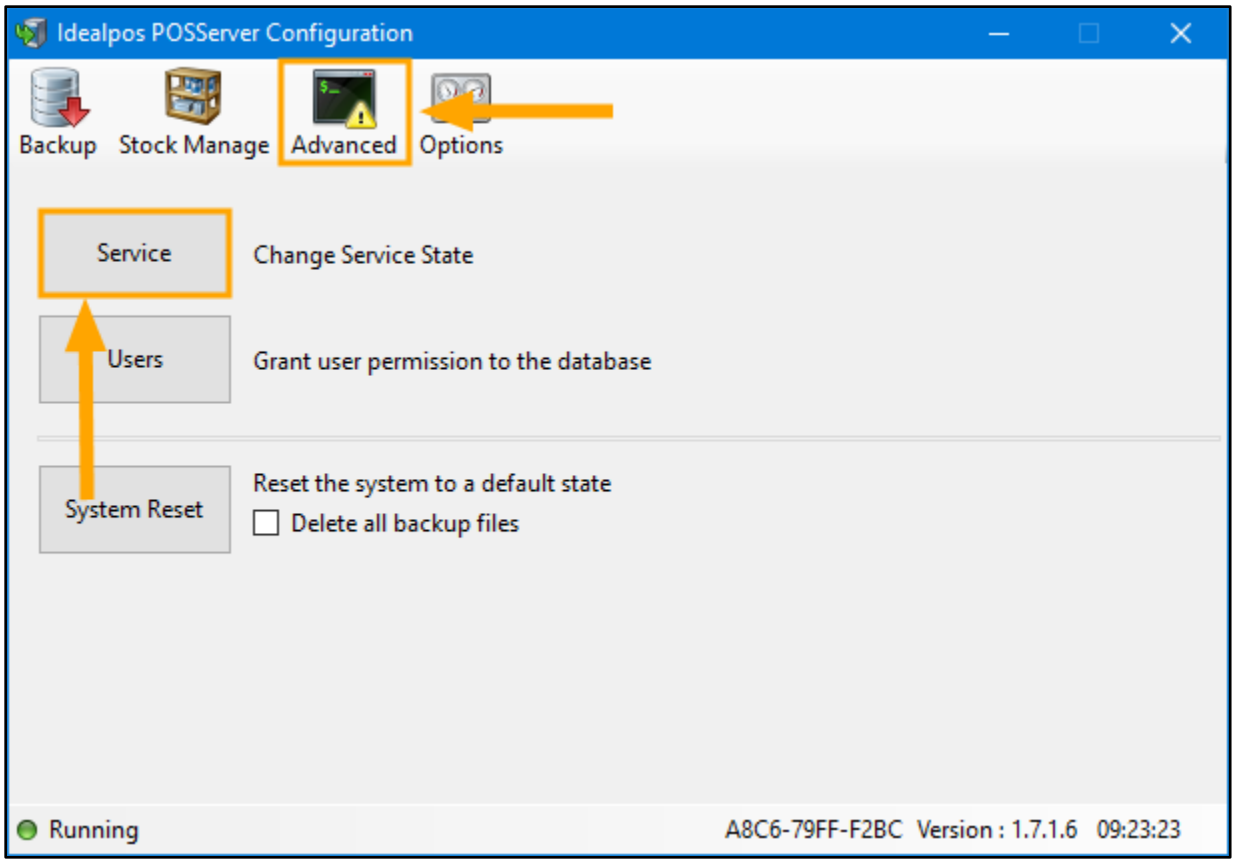
The steps to configure Pending Sales and use the Pending Sales Report are outlined as follows:

Ensure that POSServer is running on either the main Back-Office system or the main POS terminal.
This can be checked by going to: Start > search for POSServer and open POSServer.
If POSServer cannot be found in the Start Menu, it can also be started by going to:
C:\Program Files\Idealpos Solutions\POSServer\POSServer.exe and running as Administrator (right-click on the executable and select "Run As Administrator")

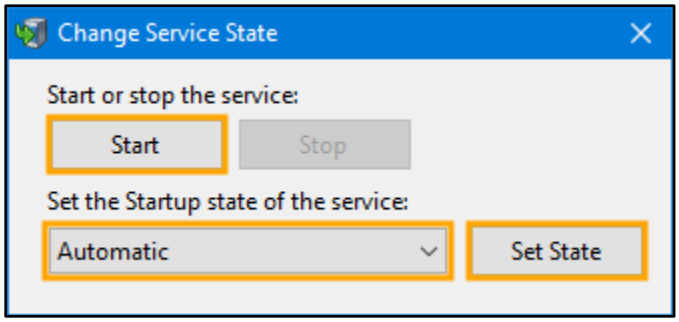
Ensure that "Running" is displayed on the bottom-left corner of the POSServer Configuration window.



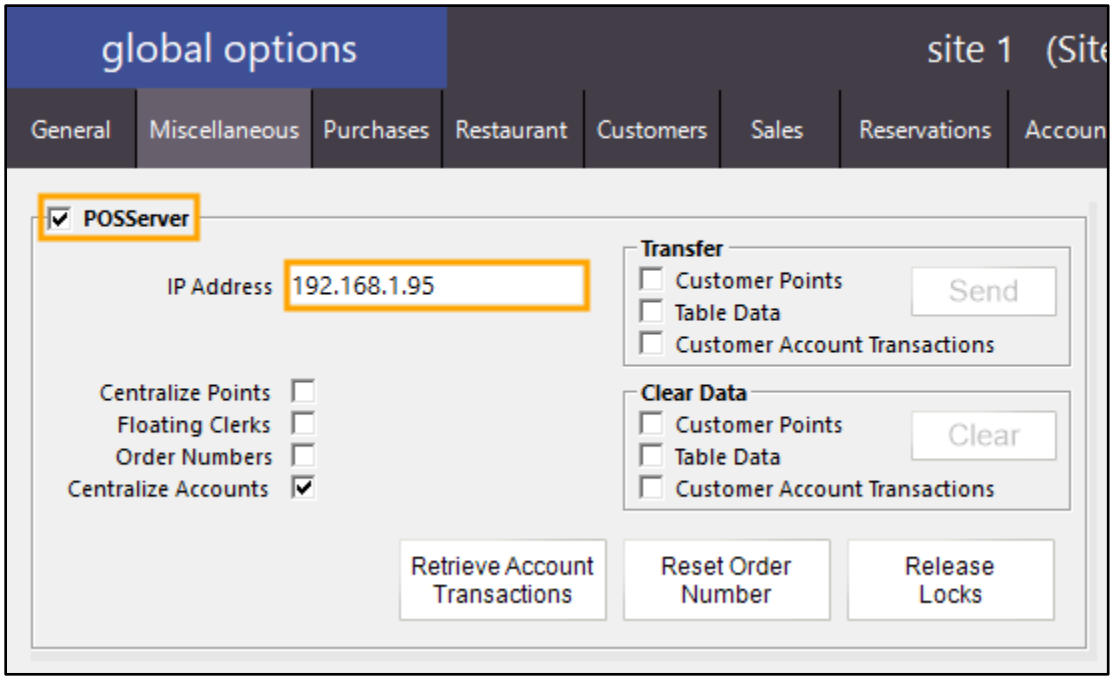
If the POSServer is not running, click on the Advanced tab, then press the “Service” button.



Press the “Start” button to start the Service, then Set the Startup state of the service to “Automatic”, followed by pressing the “Set State” button to apply the change.

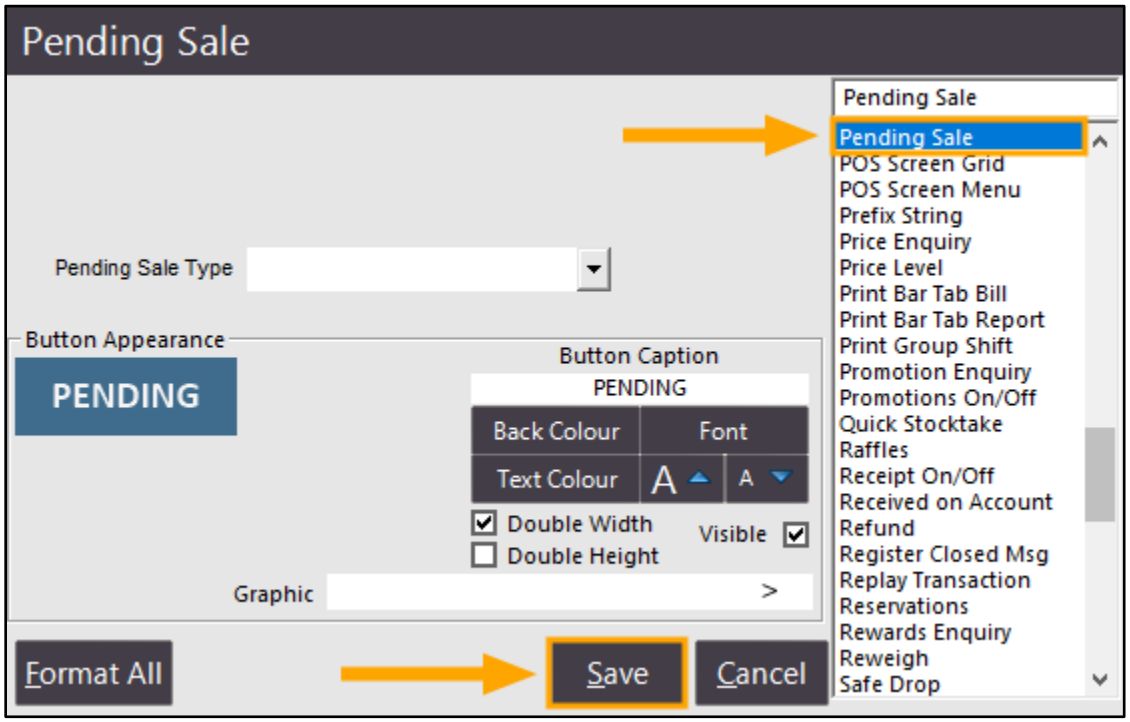


Then ensure that POSServer is enabled in Idealpos Global Options and ensure that the IP address of the system running the POSServer has been entered.
Go to: Setup > Global Options > Miscellaneous > POSServer
The below example shows Idealpos pointing to a POSServer running on an IP address of 192.168.1.95.
Substitute the IP address below with the IP address of the system that's running the POSServer on your network

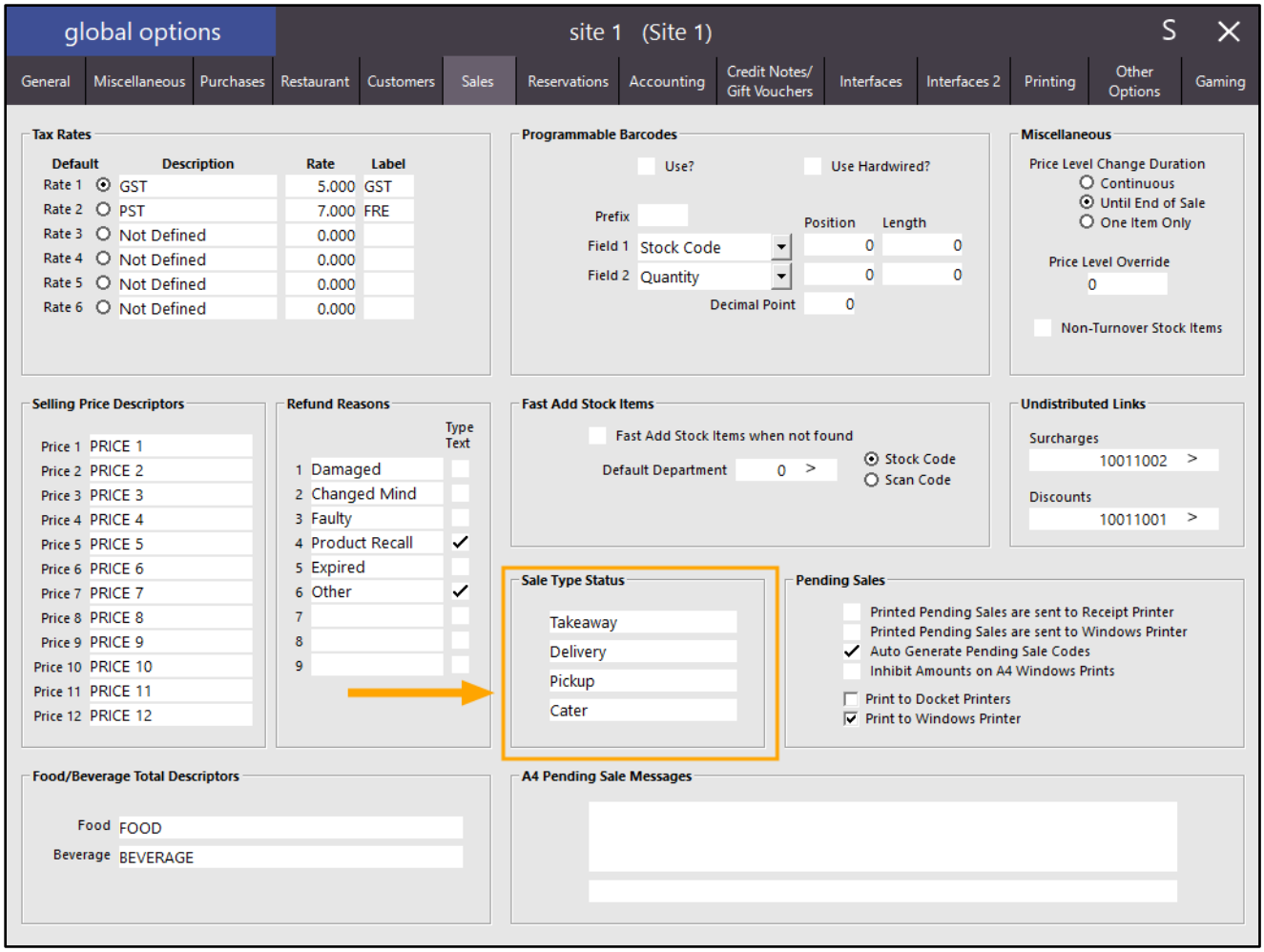


You will also need a Pending Sale button on your POS Screen to access the Pending Sale function.

Go to: Setup > POS Screen > POS Screen Setup > Select POS Screen Layout > Buttons
Find a blank button on the POS screen and select it.
Configure the button using the Pending Sale function as per the below example:

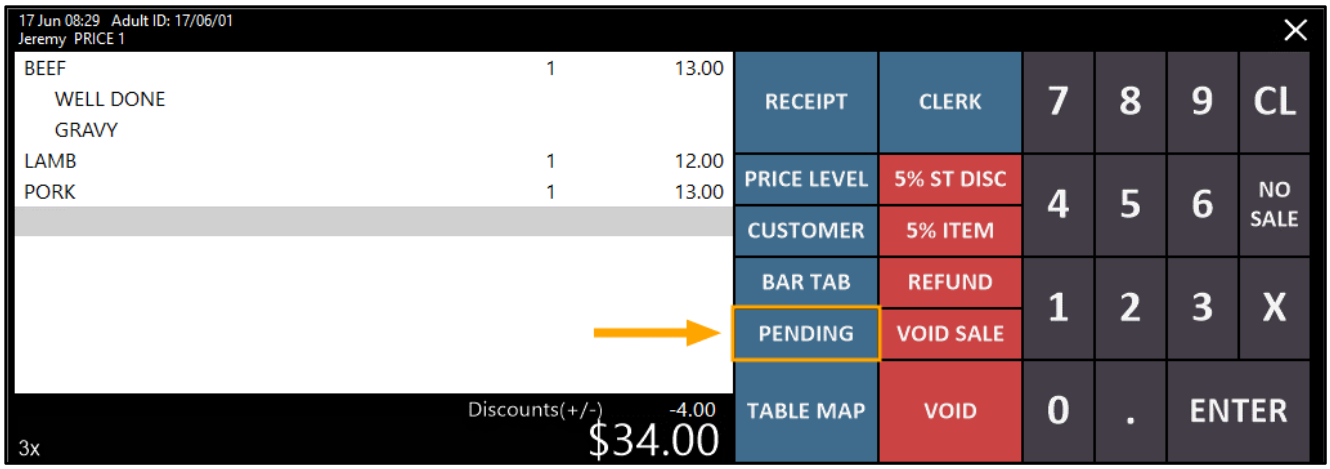


You may also want to adjust the different types of Pending Sales (such as Pickup, Takeaway, etc.).
This can be done by going to: Setup > Global Options > Sales > Sale Type Status
You can modify the Sale Type Status as required:

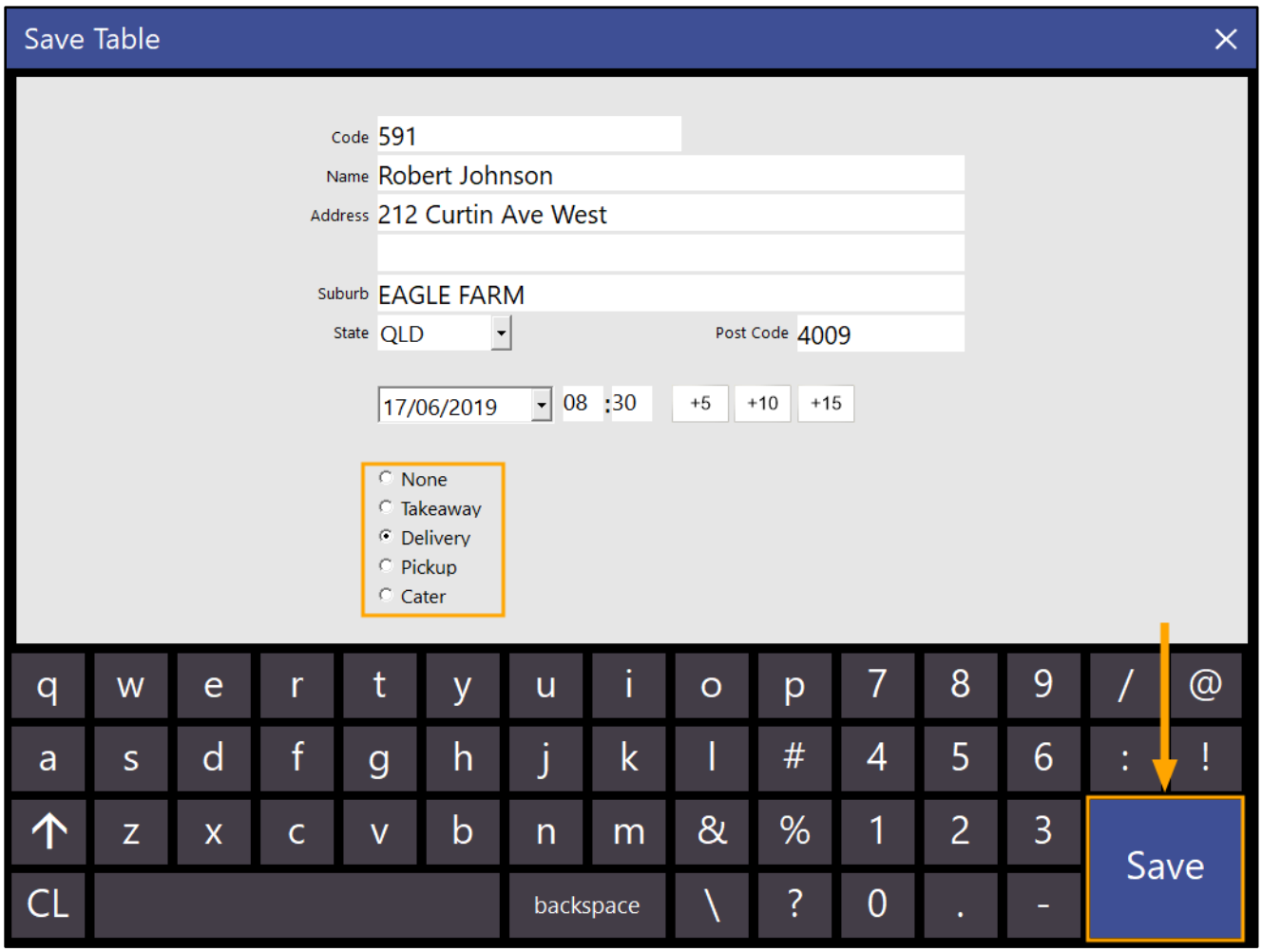


Once the Sale Type Statuses have been modified as required, close the Global Options screen and go to the POS screen.

Add items as required, then press the Pending Sale button.



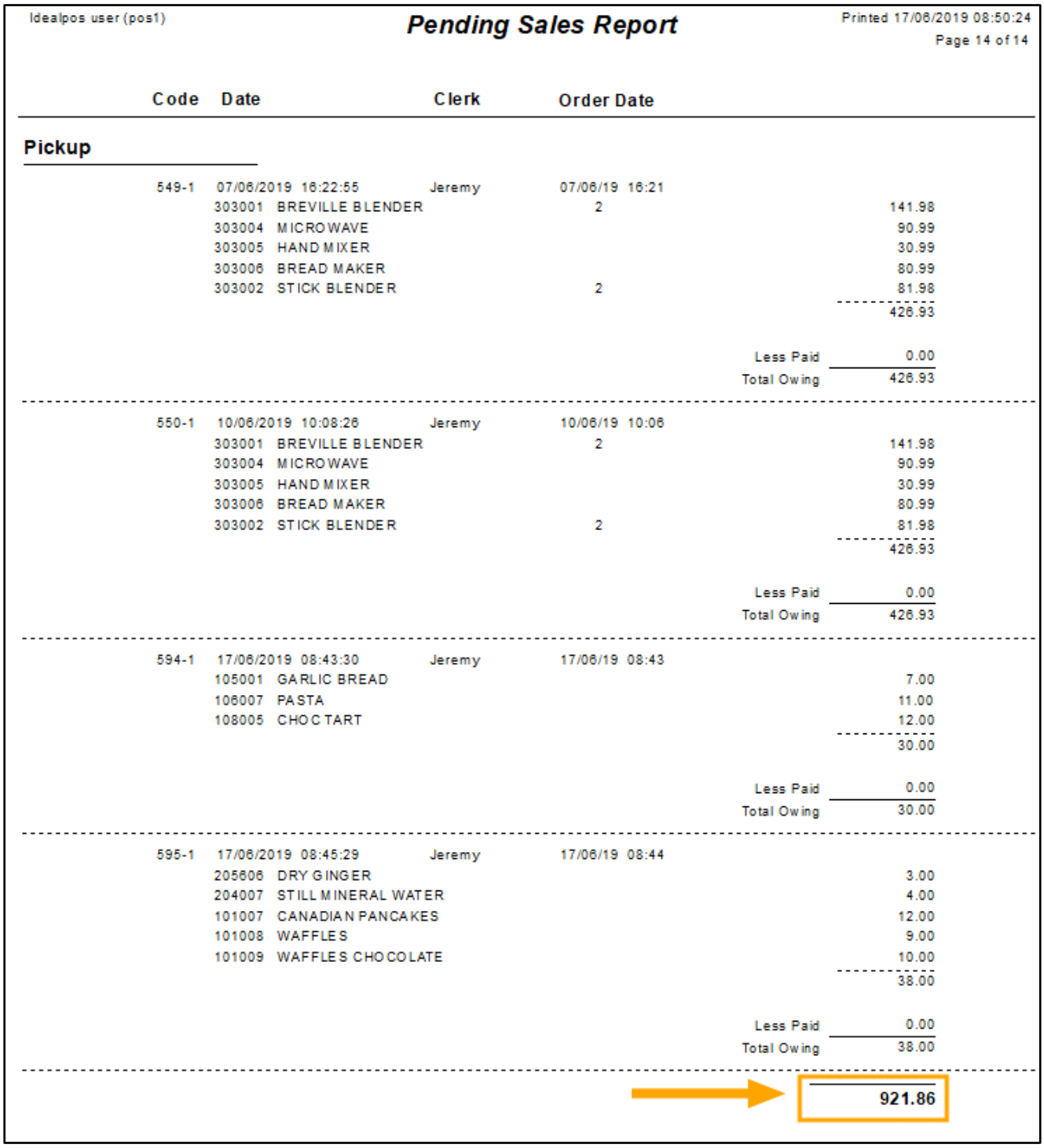
Enter the Customer Details, select the Pending Sale Status and finally press "Save" to save the Pending Sale.



Repeat the above process for any other required Pending Sales.

Once Pending Sales have been saved, the Pending Sales Report can be run by going to:
Reports > Sales > Pending Sales > View

The report will list each Pending Sale Type. At the end of each Sale Type, a total amount for all sales of that Sale Type will be displayed.



Idealpos user (pos1)

Pending Sales Report

Printed 17/06/2019 08:50:24
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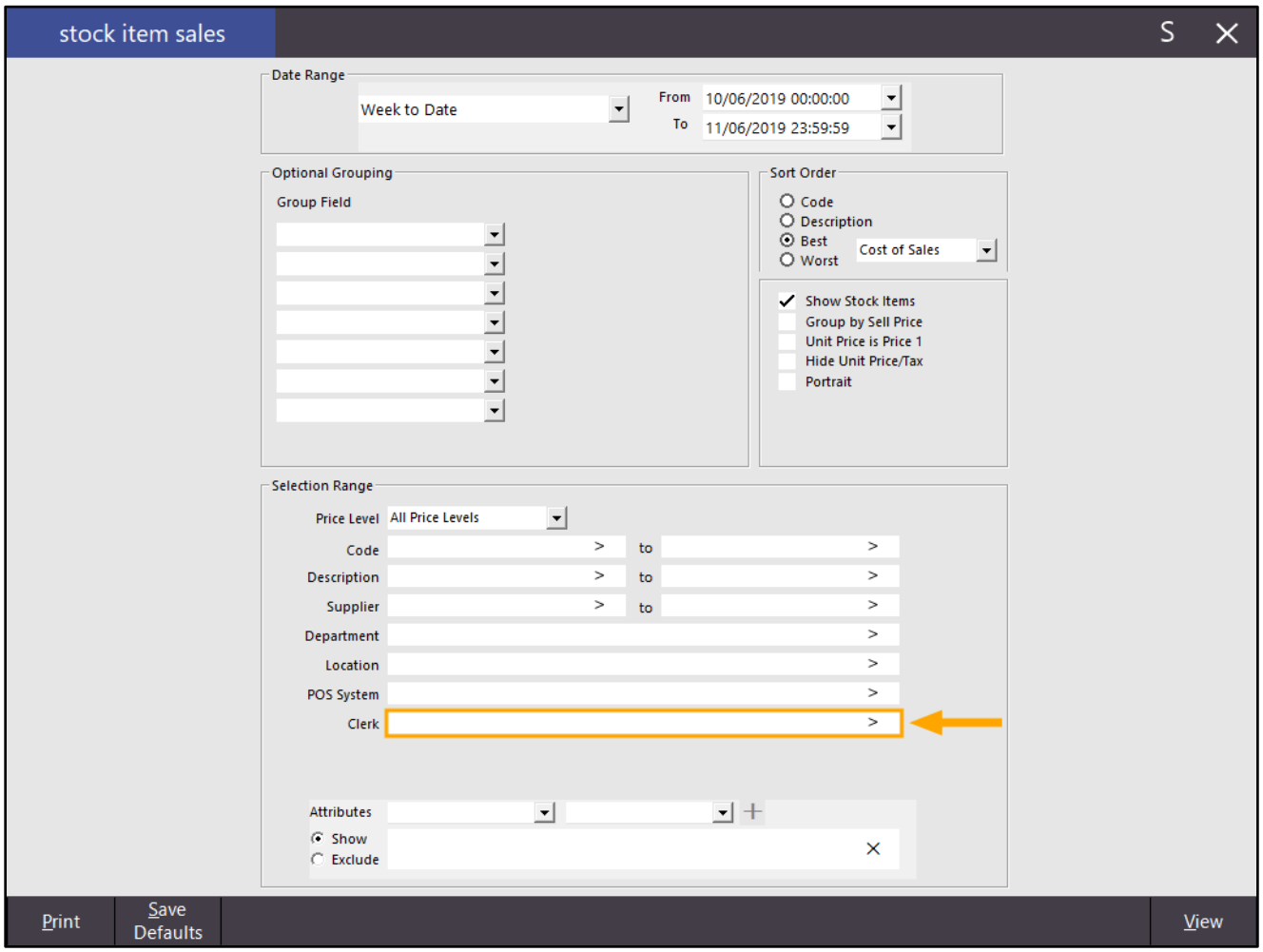
Code	Date	Clerk	Order Date		
Pickup					
549-1	07/06/2019 16:22:55	Jeremy	07/06/19 16:21		
303001	BREVILLE BLENDER		2		141.98
303004	MICROWAVE				90.99
303005	HAND MIXER				30.99
303006	BREAD MAKER				80.99
303002	STICK BLENDER		2		81.98
					426.93
				Less Paid	0.00
				Total Owing	426.93
550-1	10/06/2019 10:08:26	Jeremy	10/06/19 10:06		
303001	BREVILLE BLENDER		2		141.98
303004	MICROWAVE				90.99
303005	HAND MIXER				30.99
303006	BREAD MAKER				80.99
303002	STICK BLENDER		2		81.98
					426.93
				Less Paid	0.00
				Total Owing	426.93
594-1	17/06/2019 08:43:30	Jeremy	17/06/19 08:43		
105001	GARLIC BREAD				7.00
106007	PASTA				11.00
108005	CHOC TART				12.00
					30.00
				Less Paid	0.00
				Total Owing	30.00
595-1	17/06/2019 08:45:29	Jeremy	17/06/19 08:44		
205606	DRY GINGER				3.00
204007	STILL MINERAL WATER				4.00
101007	CANADIAN PANCAKES				12.00
101008	WAFFLES				9.00
101009	WAFFLES CHOCOLATE				10.00
					38.00
				Less Paid	0.00
				Total Owing	38.00
					921.86

idealpos7 Update History

Stock Item Sales Report – Clerk Selection Range

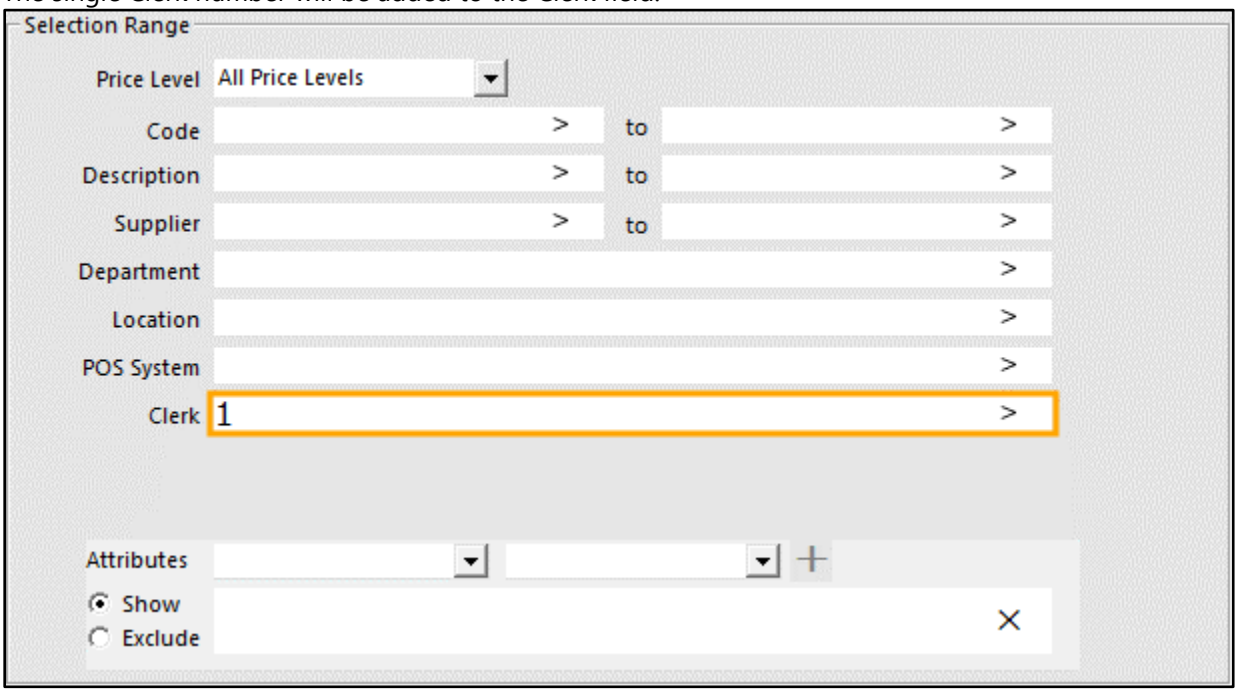
This function adds a Clerk field to the Selection Range in the Stock Item Sales Report.
This function allows the user to run the Stock Item Sales Report based on either a single Clerk, specific Clerks or a range of Clerks.
This function is useful where you need to report on Stock Item Sales based on the Clerk that completed the sale.

To use this function, go to: Reports > Sales > Stock Item Sales

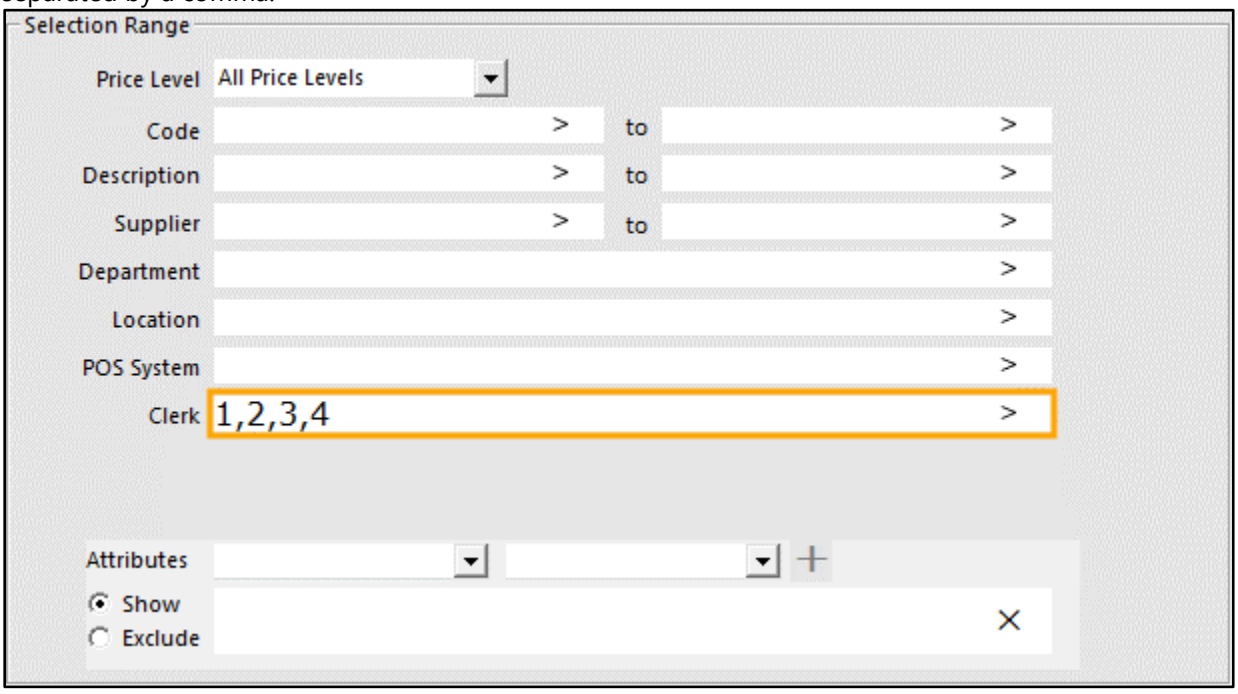


The Clerk can be reported in the following ways:

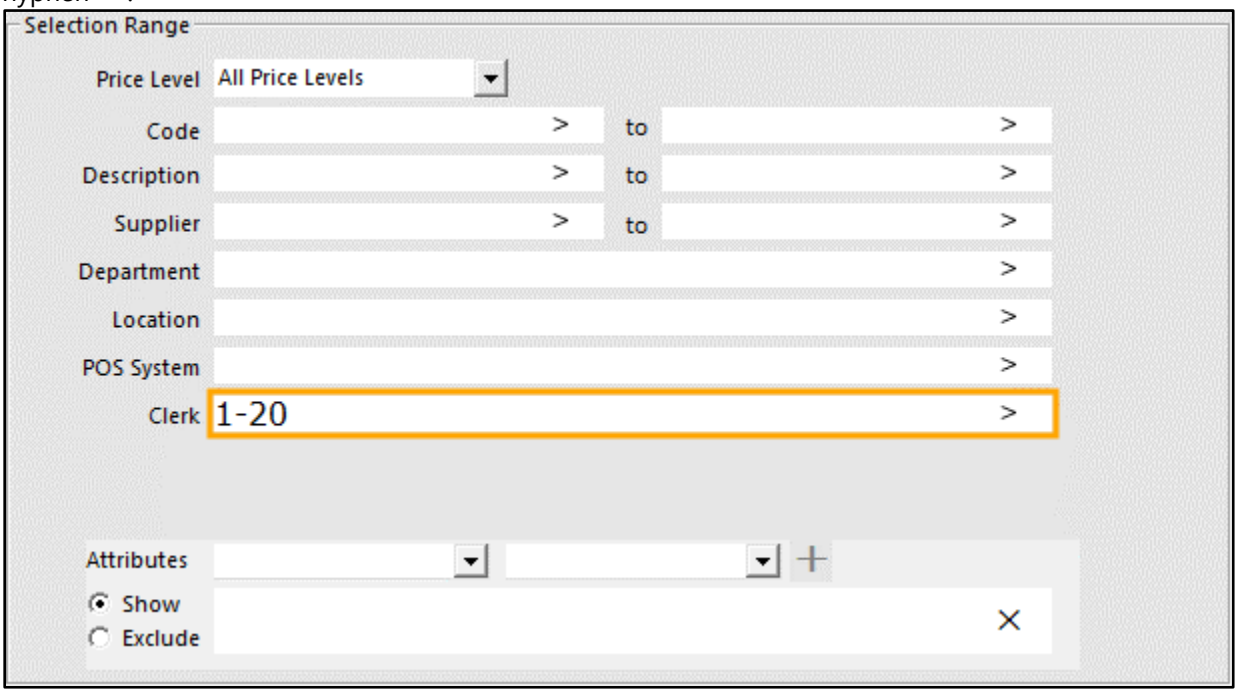
- Single Clerk – Click on the ">" button in the Clerk field, select a Clerk from the list then press OK. The single Clerk number will be added to the Clerk field.



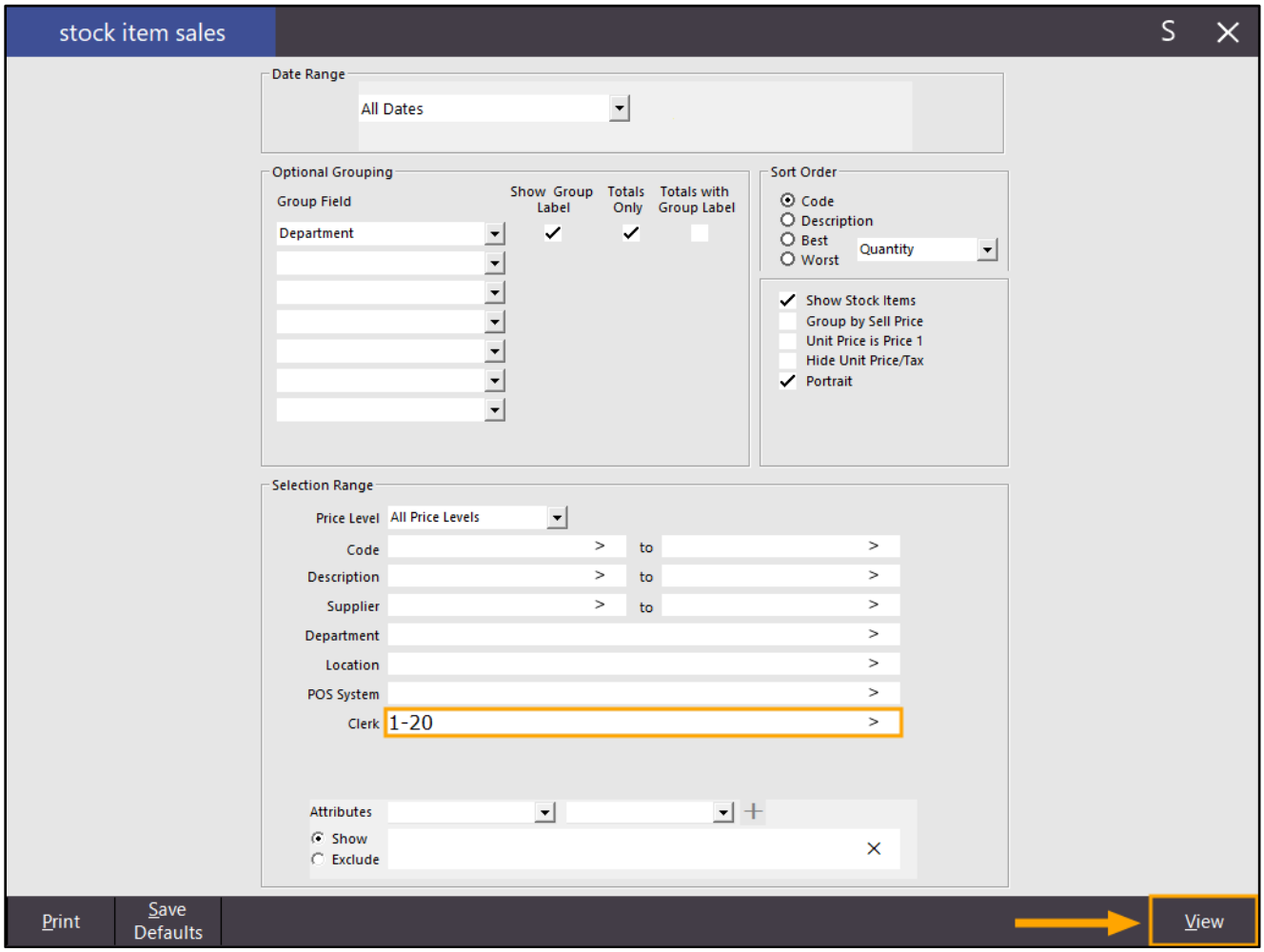
- Multiple Clerks – Click on the ">" button in the Clerk field, select a Clerk from the list then press OK. Repeat this process until you add the required Clerks. Each Clerk number will be listed in the Clerk field, separated by a comma.



- Clerk Range – Click on the ">" button in the Clerk field, select the first Clerk in the range then press OK. Click the mouse cursor into the Clerk field after the Clerk number and enter a hyphen "-" (when entering the hyphen, ensure that the Clerk number is not selected, otherwise it will be overwritten when entering the hyphen). Then press the ">" button, select the final Clerk in the range and press OK. The Clerk field will contain the two Clerk numbers separated by a hyphen.
  If you already know the Clerk numbers of the Clerk range that you want to report on, you can manually enter the range of Clerk numbers into the Clerk field by entering the first and last Clerk numbers, separated by a hyphen "-".



Once you have selected the required Clerk(s) in the Selection Range along with any other desired report options, press the "View" button on the bottom-right corner of the Stock Item Sales window to run the Report.



idealpos7 Update History

The report will be displayed and will display report data based on the selections that were chosen.

Idealpos user (pos1)

Stock Item Sales Report

All Dates

Clerk 1-20

Printed 11/06/2019 13:35:03

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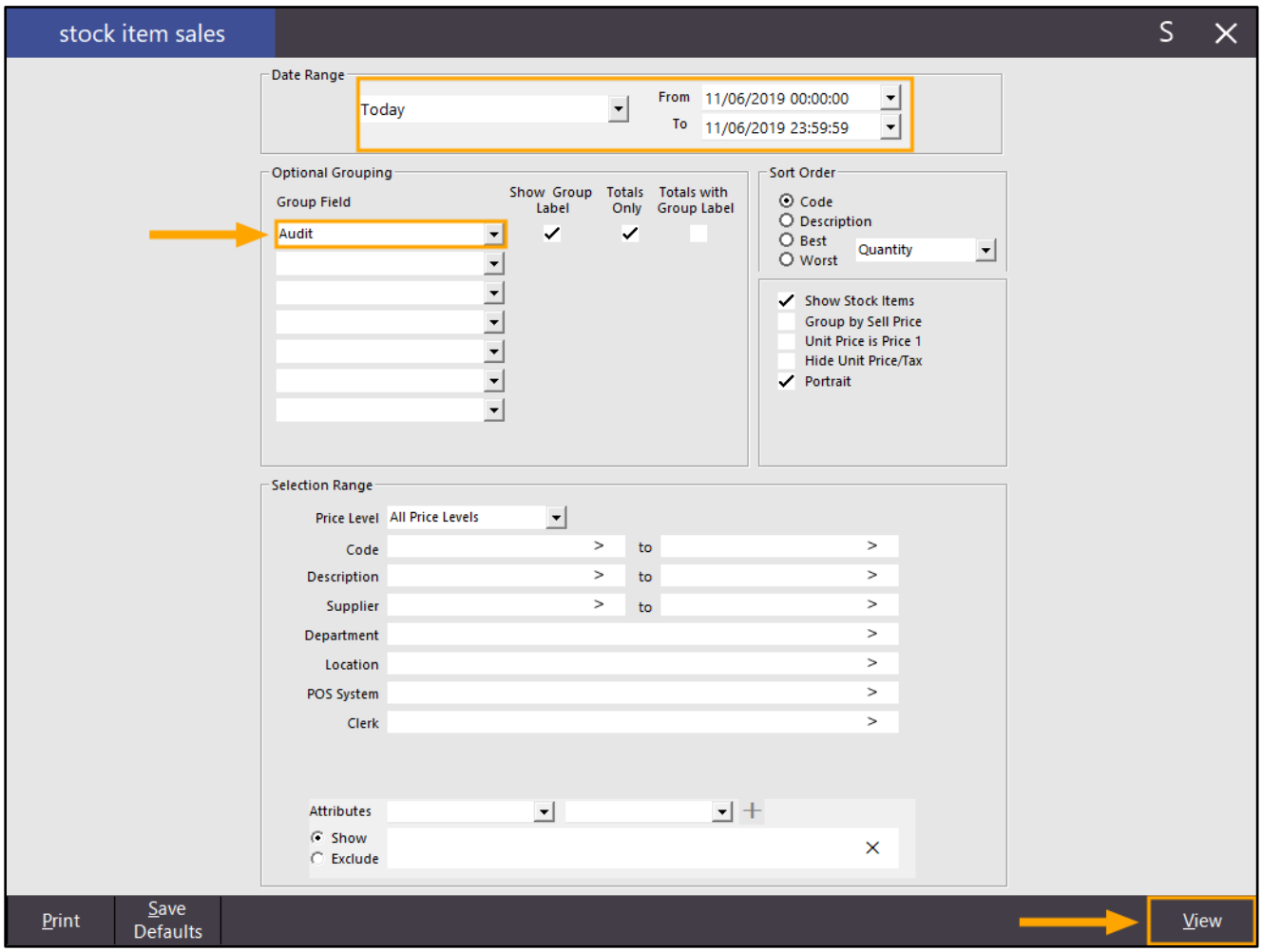
				Sales					
		Unit Price inc	Unit Tax	Quantity	Nett ex	Tax	Nett inc	Discounts	Gross inc
BREAKFAST									
101001	EGGS ON TOAST	8.10	0.39	1.0000	7.71	0.39	8.10	0.90	9.00
101002	BACON & EGGS	9.00	0.43	2.0000	16.76	1.25	18.00	2.00	20.00
101003	EGGS BENEDICT	11.70	0.56	1.0000	11.14	0.56	11.70	1.30	13.00
101006	PANCAKES	8.10	0.39	1.0000	7.71	0.39	8.10	0.90	9.00
				5.0000	43.33	2.57	45.90	5.10	51.00
ENTRÉE									
106001	DUCK	12.60	1.15	3.0000	34.36	3.44	37.80	4.20	42.00
106002	BEEF	11.70	1.06	14.0000	151.47	12.33	163.80	18.20	182.00
106003	LAMB	10.80	0.98	1.0000	9.82	0.98	10.80	1.20	12.00
106004	SEAFOOD	14.40	1.31	1.0000	13.09	1.31	14.40	1.60	16.00
106007	PASTA	9.90	0.90	4.0000	37.00	3.70	40.70	3.30	44.00
				23.0000	245.74	21.76	267.50	28.50	296.00
MAIN									
107009	KANGAROO	24.00	2.18	3.0000	43.64	4.36	48.00	24.00	72.00
				3.0000	43.64	4.36	48.00	24.00	72.00
TEA									
201006	CHAI	3.60	0.17	15.0000	52.32	2.92	55.24	4.76	60.00
				15.0000	52.32	2.92	55.24	4.76	60.00
COFFEE									
202001	CAPPUCCINO	3.15	0.29	23.0000	67.99	5.30	73.29	7.21	80.50
202002	FLAT WHITE	2.31	0.21	31.0000	89.43	5.91	95.34	13.16	108.50
202003	LATTE	3.15	0.29	30.0000	90.36	5.54	95.90	9.10	105.00
202004	SHORT BLACK	3.00	0.14	4.0000	10.36	0.77	11.13	0.87	12.00
202005	LONG BLACK	3.15	0.15	2.0000	5.87	0.44	6.30	0.70	7.00
202007	HOT CHOC	3.15	0.29	1.0000	2.86	0.29	3.15	0.35	3.50
202010	MOCHA	3.15	0.29	1.0000	2.86	0.29	3.15	0.35	3.50
				92.0000	269.73	18.53	288.26	31.74	320.00
ELECTRICAL APPLIANCES									
303001	BREVILLE BLENDER	70.99	6.45	0.0000	0.00	0.00	0.00	0.00	0.00
				0.0000	0.00	0.00	0.00	0.00	0.00
GROCERIES									
1	OPEN STOCK ITEM	182.50	16.59	56.0000	1,941.32	177.21	2,118.53	126.55	2,245.08
3	LYNX YOU	5.40	0.26	1.0000	5.14	0.26	5.40	0.60	6.00
				57.0000	1,946.46	177.47	2,123.93	127.15	2,251.08
PACKET MIXES									
403001	CHOC SELF SAUCING PUDDING MIX	4.94	0.24	3.0000	14.10	0.72	14.82	1.65	16.47
				3.0000	14.10	0.72	14.82	1.65	16.47
CHARGES									
601002	MEMBERSHIP	9.90	0.47	3.0000	28.29	1.41	29.70	3.30	33.00
				3.0000	28.29	1.41	29.70	3.30	33.00
				201.0000	**2,643.61**	**229.74**	**2,873.35**	**226.20**	**3,099.55**

Stock Item Sales Report – Group by Audit

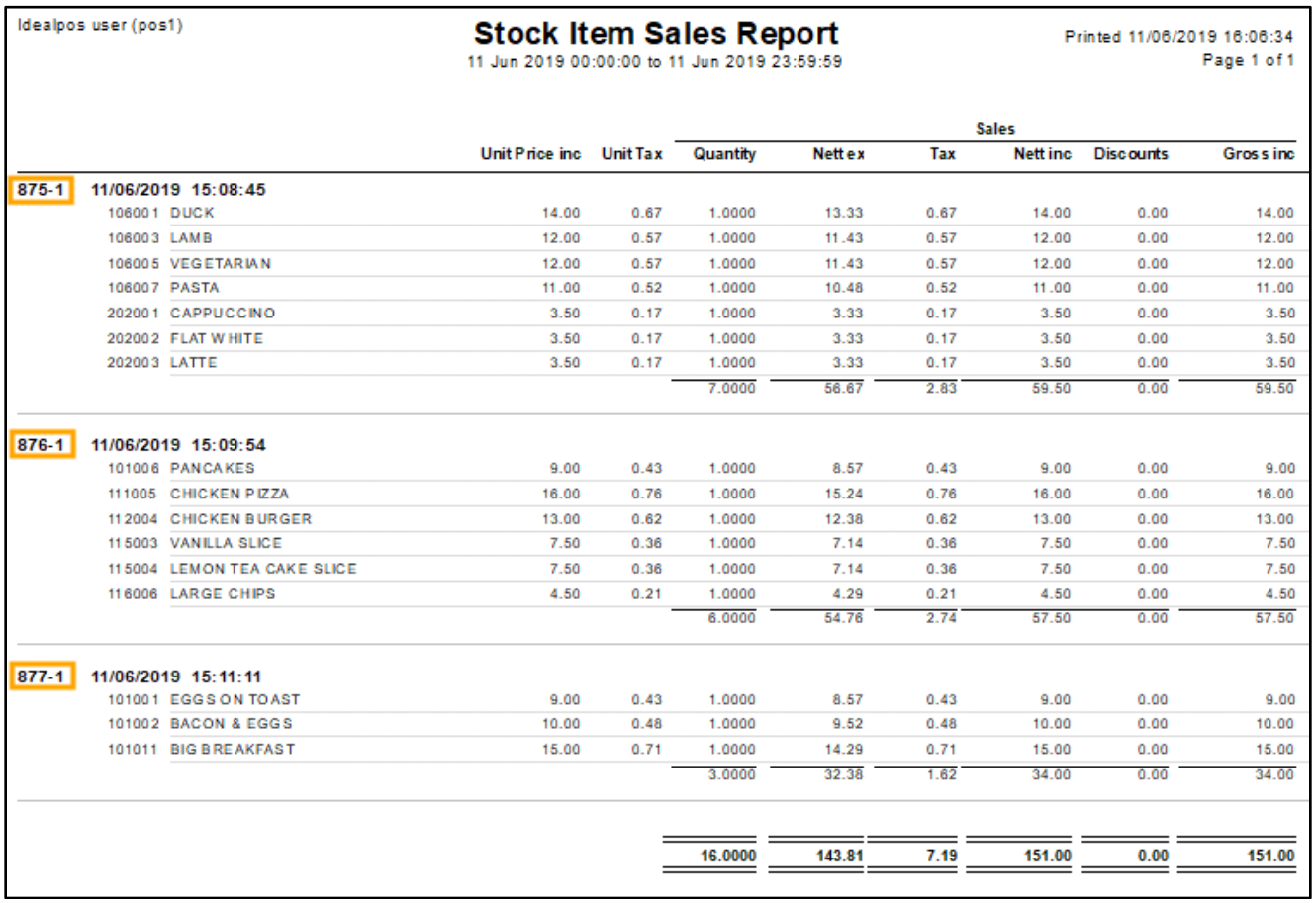
This function adds the ability to group the Stock Item Sales Report by the Audit number.
Each sale that is completed in Idealpos has an Audit Number associated with it.
When running the Stock Item Sales Report with the Group by Audit option selected, the report will list each Audit Number that occurred in the selected period along with the items that were purchased in each Audit Number.

To use this function, go to: Reports > Sales > Stock Item Sales
Select the desired Date Range.
Within the Optional Grouping section, select the Group Field "Audit" from the dropdown box.
Press the "View" button on the bottom-right corner to view the report



idealpos7 Update History

The Stock Item Sales Report will be displayed and will be grouped by the Audit Numbers that occurred in the selected period. The Stock Items purchased within each Audit Number will be displayed below the Audit Number.



Idealpos user (pos1)

Stock Item Sales Report

11 Jun 2019 00:00:00 to 11 Jun 2019 23:59:59

Printed 11/06/2019 16:06:34

Page 1 of 1

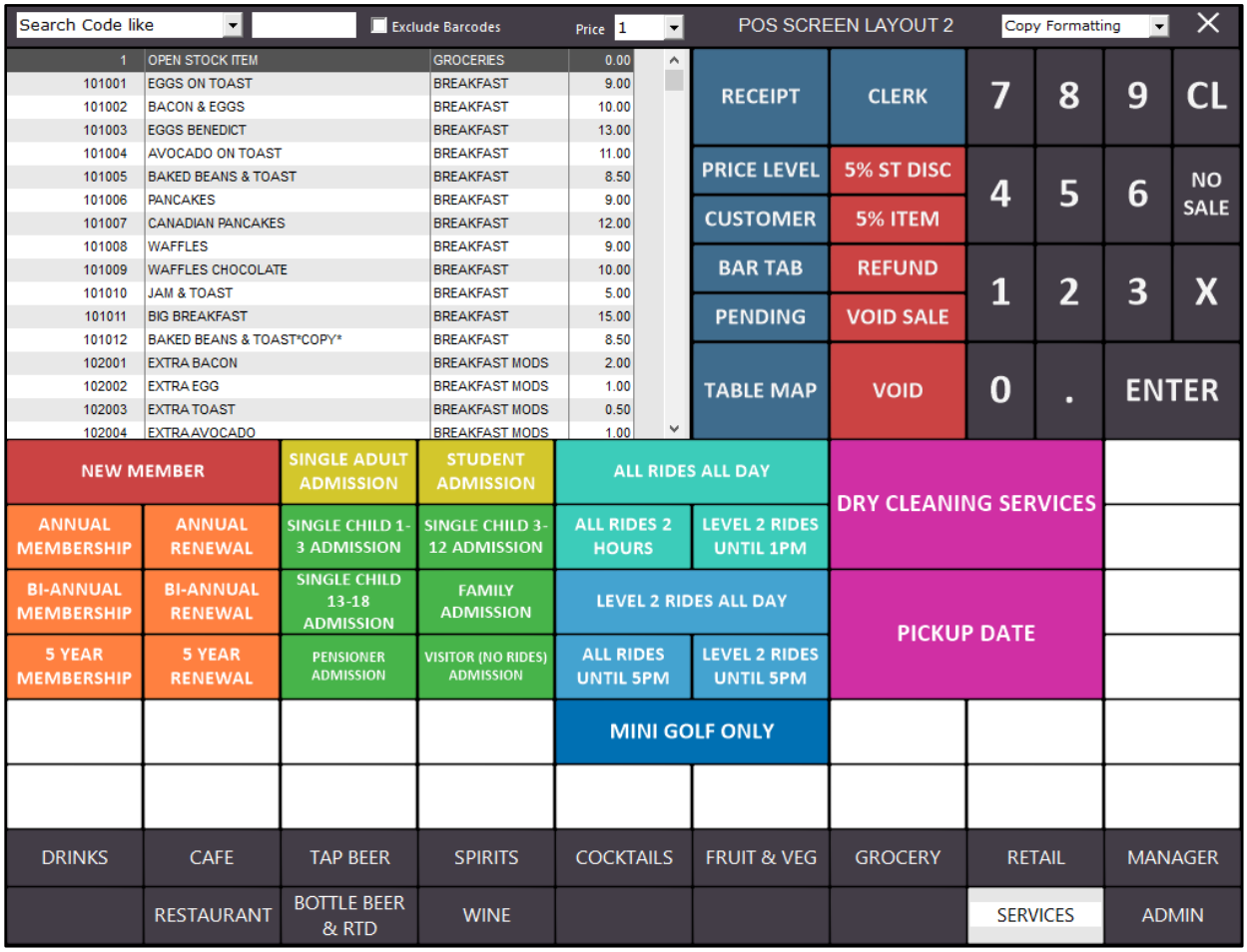
			Unit Price inc	Unit Tax	Sales Quantity	Sales Nett ex	Sales Tax	Sales Nett inc	Sales Discounts	Sales Gross inc
875-1	11/06/2019 15:08:45									
	106001	DUCK	14.00	0.67	1.0000	13.33	0.67	14.00	0.00	14.00
	106003	LAMB	12.00	0.57	1.0000	11.43	0.57	12.00	0.00	12.00
	106005	VEGETARIAN	12.00	0.57	1.0000	11.43	0.57	12.00	0.00	12.00
	106007	PASTA	11.00	0.52	1.0000	10.48	0.52	11.00	0.00	11.00
	202001	CAPPUCCINO	3.50	0.17	1.0000	3.33	0.17	3.50	0.00	3.50
	202002	FLAT WHITE	3.50	0.17	1.0000	3.33	0.17	3.50	0.00	3.50
	202003	LATTE	3.50	0.17	1.0000	3.33	0.17	3.50	0.00	3.50
					7.0000	56.67	2.83	59.50	0.00	59.50
876-1	11/06/2019 15:09:54									
	101006	PANCAKES	9.00	0.43	1.0000	8.57	0.43	9.00	0.00	9.00
	111005	CHICKEN PIZZA	16.00	0.76	1.0000	15.24	0.76	16.00	0.00	16.00
	112004	CHICKEN BURGER	13.00	0.62	1.0000	12.38	0.62	13.00	0.00	13.00
	115003	VANILLA SLICE	7.50	0.36	1.0000	7.14	0.36	7.50	0.00	7.50
	115004	LEMON TEA CAKE SLICE	7.50	0.36	1.0000	7.14	0.36	7.50	0.00	7.50
	116006	LARGE CHIPS	4.50	0.21	1.0000	4.29	0.21	4.50	0.00	4.50
					6.0000	54.76	2.74	57.50	0.00	57.50
877-1	11/06/2019 15:11:11									
	101001	EGGS ON TOAST	9.00	0.43	1.0000	8.57	0.43	9.00	0.00	9.00
	101002	BACON & EGGS	10.00	0.48	1.0000	9.52	0.48	10.00	0.00	10.00
	101011	BIG BREAKFAST	15.00	0.71	1.0000	14.29	0.71	15.00	0.00	15.00
					3.0000	32.38	1.62	34.00	0.00	34.00
					16.0000	**143.81**	**7.19**	**151.00**	**0.00**	**151.00**

Stock Item Sales Report – Group by Sale Type

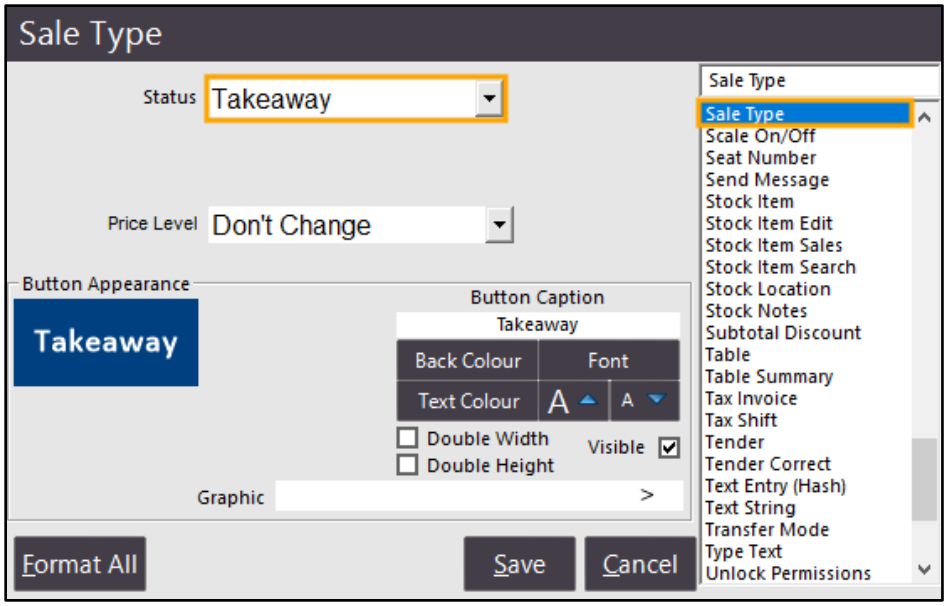
This function adds the ability to group the Stock Item Sales Report by Sale Type (e.g. Takeaway, Delivery, Pickup, Cater, etc.). to the Optional Grouping – Group Field section of the Stock Item Sales Report.
When the "Sale Type" option has been selected from any of the dropdown boxes in the Option Grouping – Group Field section, a Sale Type dropdown box will appear in the Selection Range section. Through the use of this function, it is now possible to group the Stock Item Sales Report by Sale Type. As this this function will report on existing sales that have already been performed, you will need to have pre-existing sales with Sale Types recorded against them.

If this reporting function is something you want to make use of but you haven't been recording Sales Types against your POS transactions, you will need to ensure that buttons have been configured on the Idealpos POS screen to allow you to choose the Sale Type for future POS transactions.

To do this, go to: Setup > POS Screen > POS Screen Setup > Select a POS Screen Layout > Buttons
Find a POS Screen tab which has blank/available buttons and select a blank button.



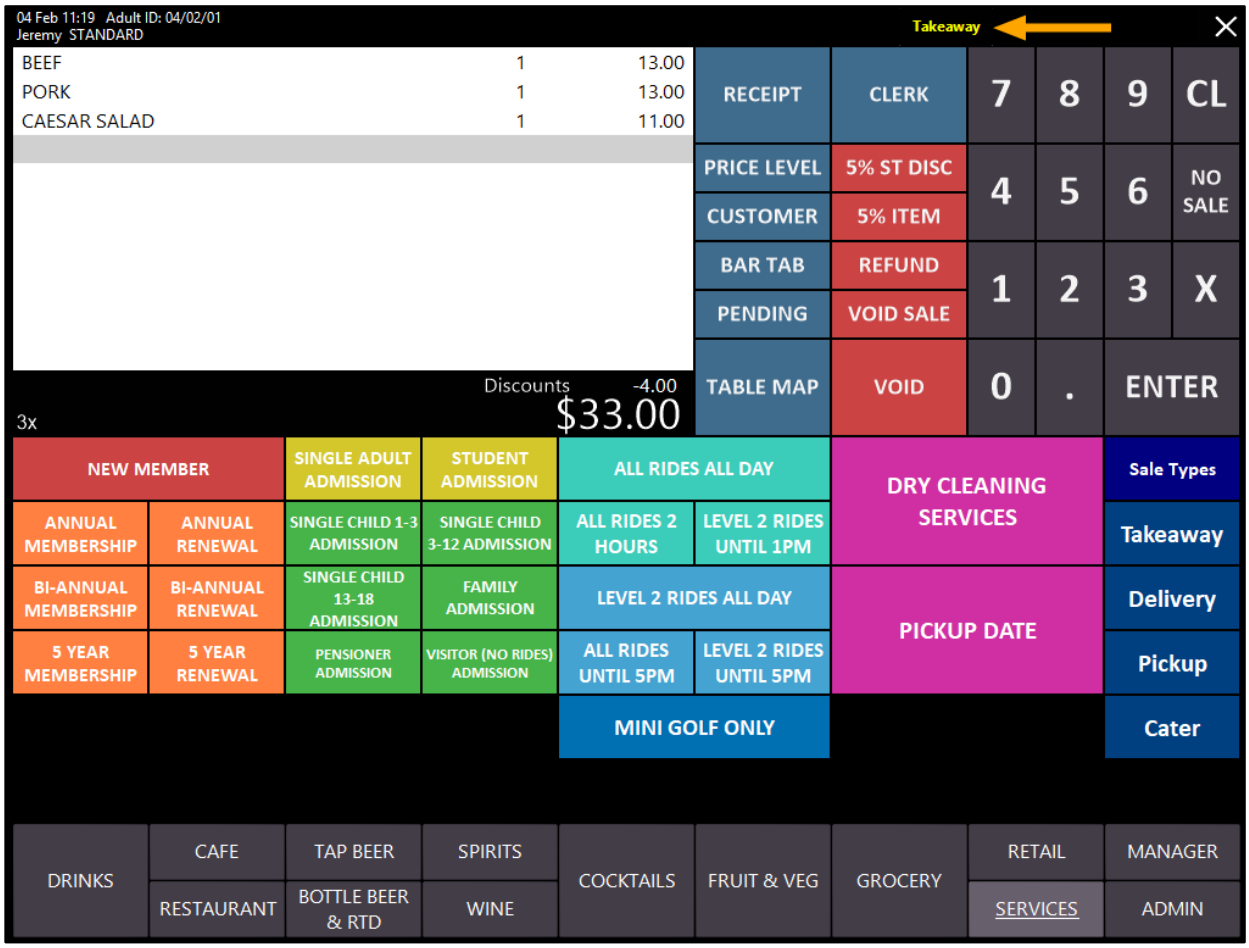
Select the "Sale Type" option from the list of Functions, then select the desired Sale Type from the Status dropdown box. If required, you may also select another Price Level (e.g. you might sell a meal at a different price for a Delivery Sale Type compared to a meal that is sold for a Pickup Sale Type).
Once you have finished configuring the Sale Type button, press the "Save" button.



Repeat the above steps to create additional buttons for each Sale Type as required.
Once finished creating the Sale Type buttons, close the POS Screen Layout windows.

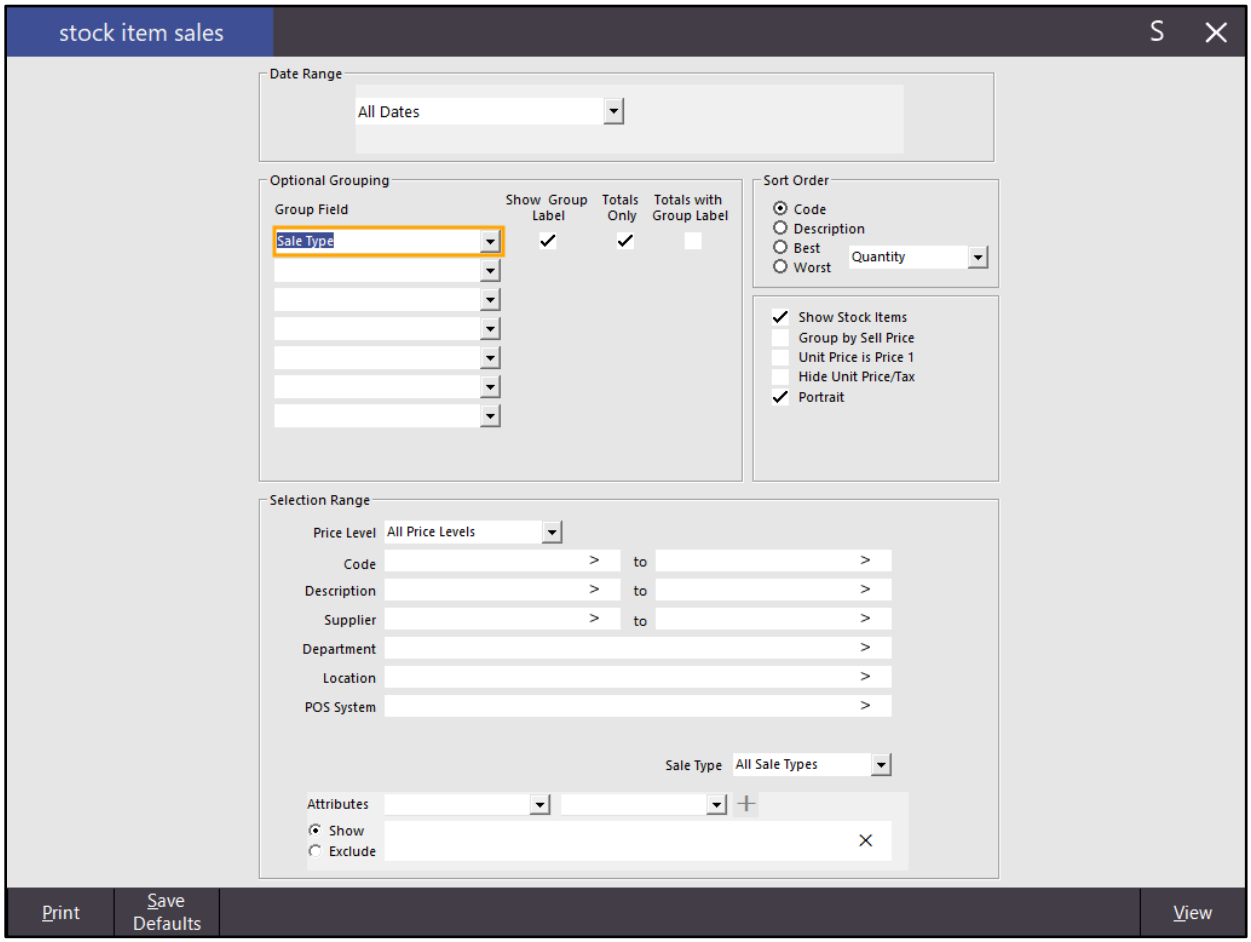
When performing a sale in Idealpos, press the desired Sale Type button anytime during the sale to set the Sale Type. After pressing a Sale Type button, you will notice the Sale Type will be displayed on the top-right corner of the screen. Note that if you accidentally press a Sale Type, you can remove the Sale Type from the sale by pressing the Sale Type text at the top of the POS screen

The below example shows the Sale Type displayed on the top-right corner of the screen:

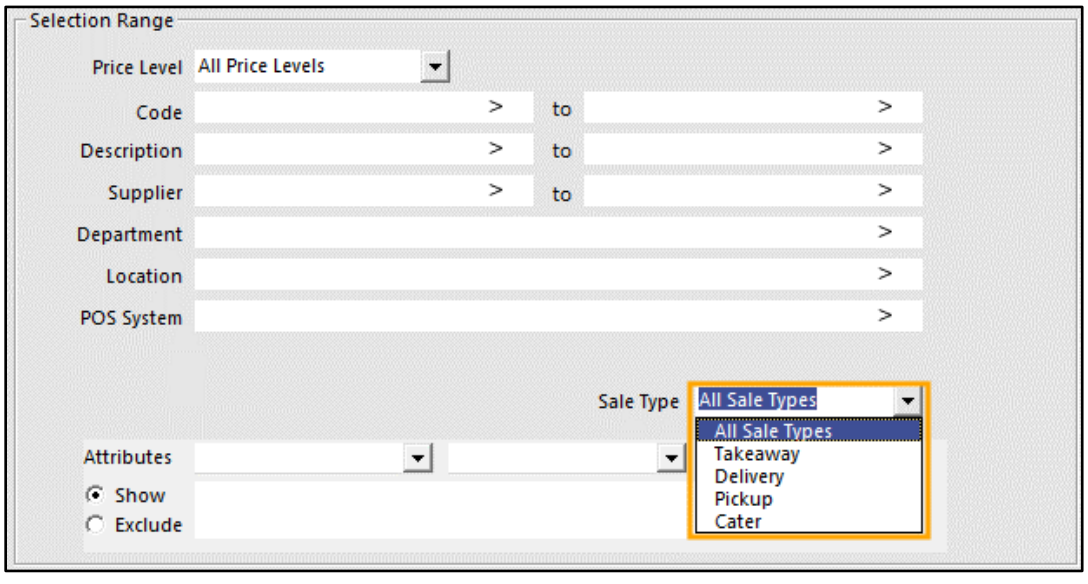


idealpos7 Update History

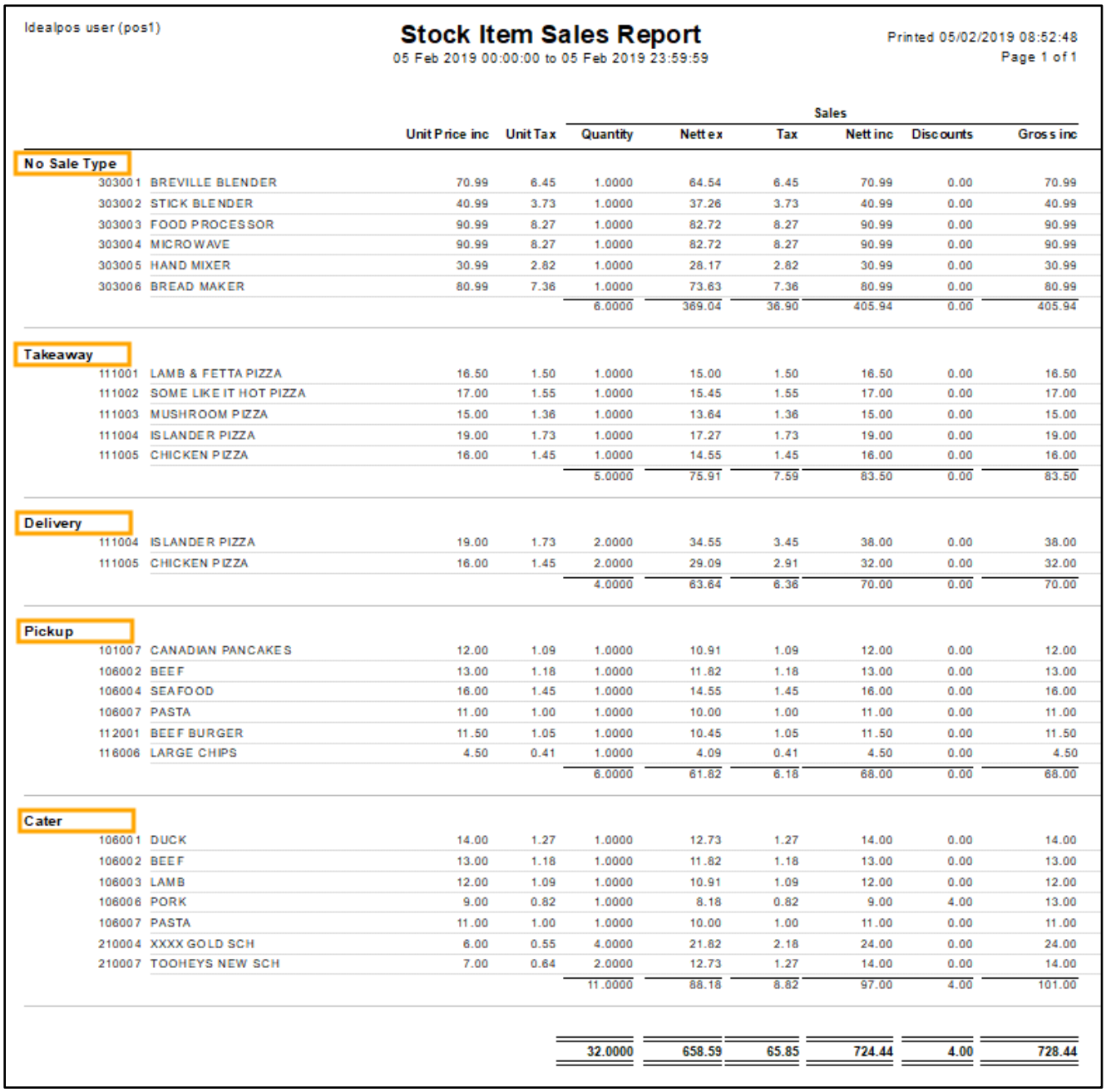
To use the Sale Type function in the Stock Item Sales report, go to: Reports > Sales > Stock Item Sales.
From the Optional Grouping – Group Field section, select the “Sale Type” option from any of the available dropdown boxes:



Under the “Selection Range” section, you will find a “Sale Type” dropdown box – select the desired Sale Type that you want to report on. Selecting the “All Sale Types” option will report on all Sale Types (including sales which haven’t had a Sale Type specified), with each Sale Type listed and grouped under its own heading (the heading will be displayed provided that the “Show Group Label” option has been enabled for the Group Field). Selecting any of the other Sale Type options will only display the selected Sale Type on the report.



Once you have selected the desired options for the Stock Item Sales Report, press the “View” button located on the bottom right corner of the screen. The report will be displayed and will be grouped by the Sale Type. As mentioned previously, any items sold in transactions where a Sales Type was not specified will be listed under “No Sale Type”, with all other Sale Types listed under their respective headings.



Idealpos user (pos1)

Stock Item Sales Report

05 Feb 2019 00:00:00 to 05 Feb 2019 23:59:59

Printed 05/02/2019 08:52:48
Page 1 of 1

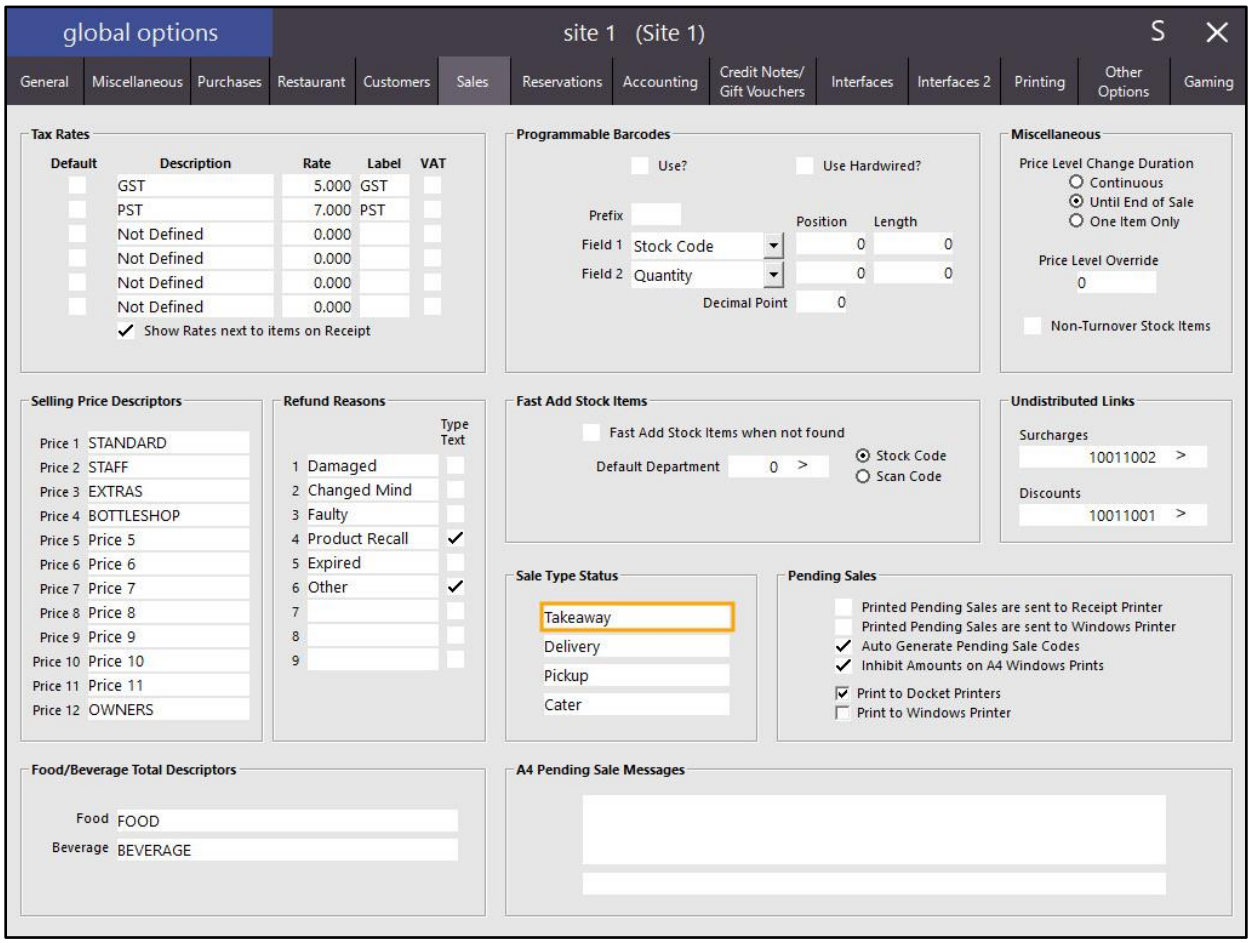
				Sales					
		Unit Price inc	Unit Tax	Quantity	Nett ex	Tax	Nett inc	Discounts	Gross inc
No Sale Type									
303001	BREVILLE BLENDER	70.99	6.45	1.0000	64.54	6.45	70.99	0.00	70.99
303002	STICK BLENDER	40.99	3.73	1.0000	37.26	3.73	40.99	0.00	40.99
303003	FOOD PROCESSOR	90.99	8.27	1.0000	82.72	8.27	90.99	0.00	90.99
303004	MICROWAVE	90.99	8.27	1.0000	82.72	8.27	90.99	0.00	90.99
303005	HAND MIXER	30.99	2.82	1.0000	28.17	2.82	30.99	0.00	30.99
303006	BREAD MAKER	80.99	7.36	1.0000	73.63	7.36	80.99	0.00	80.99
				6.0000	369.04	36.90	405.94	0.00	405.94
Takeaway									
111001	LAMB & FETTA PIZZA	16.50	1.50	1.0000	15.00	1.50	16.50	0.00	16.50
111002	SOME LIKE IT HOT PIZZA	17.00	1.55	1.0000	15.45	1.55	17.00	0.00	17.00
111003	MUSHROOM PIZZA	15.00	1.36	1.0000	13.64	1.36	15.00	0.00	15.00
111004	ISLANDER PIZZA	19.00	1.73	1.0000	17.27	1.73	19.00	0.00	19.00
111005	CHICKEN PIZZA	16.00	1.45	1.0000	14.55	1.45	16.00	0.00	16.00
				5.0000	75.91	7.59	83.50	0.00	83.50
Delivery									
111004	ISLANDER PIZZA	19.00	1.73	2.0000	34.55	3.45	38.00	0.00	38.00
111005	CHICKEN PIZZA	16.00	1.45	2.0000	29.09	2.91	32.00	0.00	32.00
				4.0000	63.64	6.36	70.00	0.00	70.00
Pickup									
101007	CANADIAN PANCAKES	12.00	1.09	1.0000	10.91	1.09	12.00	0.00	12.00
106002	BEEF	13.00	1.18	1.0000	11.82	1.18	13.00	0.00	13.00
106004	SEAFOOD	16.00	1.45	1.0000	14.55	1.45	16.00	0.00	16.00
106007	PASTA	11.00	1.00	1.0000	10.00	1.00	11.00	0.00	11.00
112001	BEEF BURGER	11.50	1.05	1.0000	10.45	1.05	11.50	0.00	11.50
116006	LARGE CHIPS	4.50	0.41	1.0000	4.09	0.41	4.50	0.00	4.50
				6.0000	61.82	6.18	68.00	0.00	68.00
Cater									
106001	DUCK	14.00	1.27	1.0000	12.73	1.27	14.00	0.00	14.00
106002	BEEF	13.00	1.18	1.0000	11.82	1.18	13.00	0.00	13.00
106003	LAMB	12.00	1.09	1.0000	10.91	1.09	12.00	0.00	12.00
106006	PORK	9.00	0.82	1.0000	8.18	0.82	9.00	4.00	13.00
106007	PASTA	11.00	1.00	1.0000	10.00	1.00	11.00	0.00	11.00
210004	XXXX GOLD SCH	6.00	0.55	4.0000	21.82	2.18	24.00	0.00	24.00
210007	TOOHEYS NEW SCH	7.00	0.64	2.0000	12.73	1.27	14.00	0.00	14.00
				11.0000	88.18	8.82	97.00	4.00	101.00
				32.0000	**658.59**	**65.85**	**724.44**	**4.00**	**728.44**

Stock Item Attributes

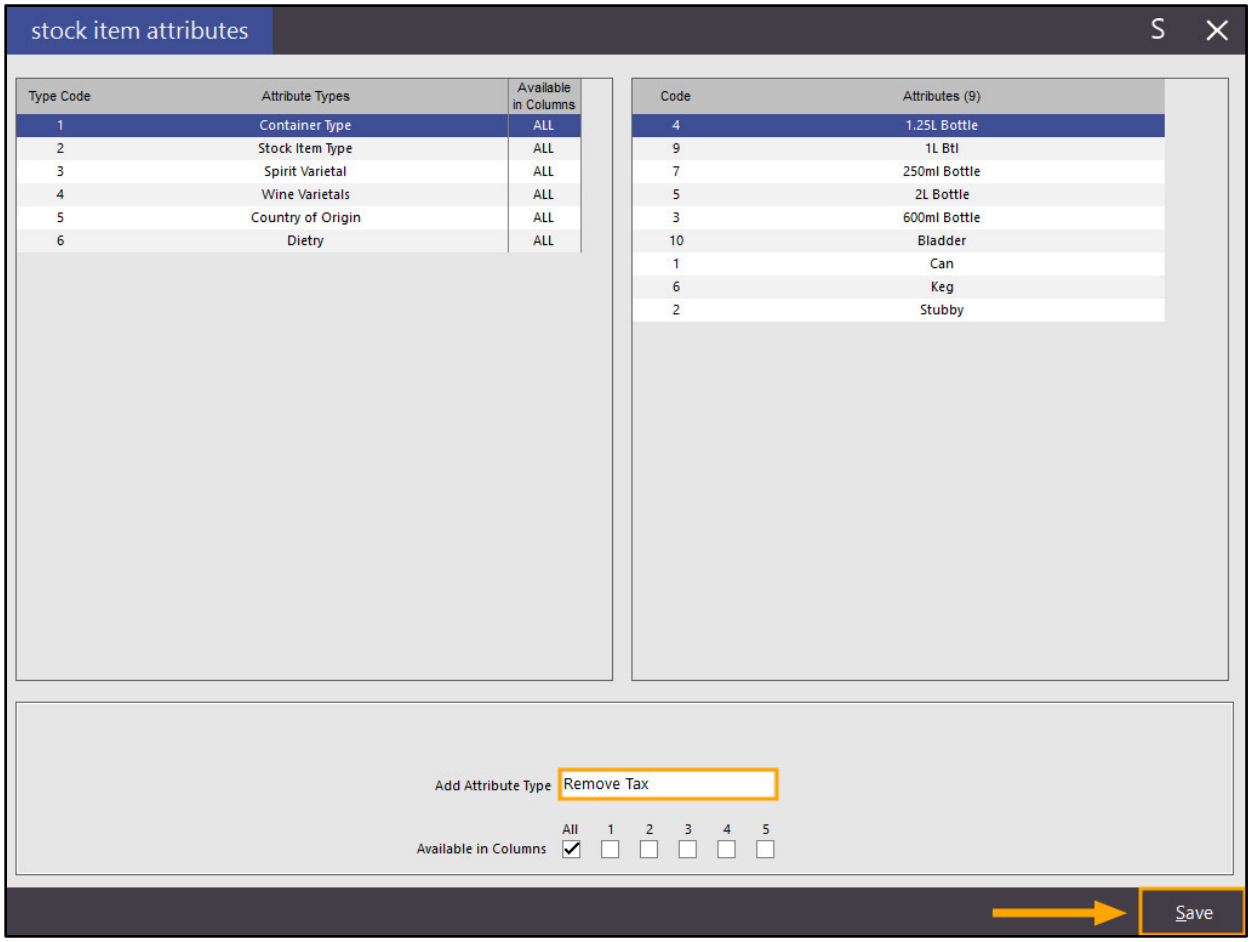
Stock Item Attribute to Remove Tax on Take-Away Items (Canada/USA)

This function adds the ability to stop tax from being applied to specific items that are sold as a Takeaway (e.g. when a customer orders a meal, then takes it away and consumes it elsewhere). This option only applies to and affects systems which are configured to use the Canada/USA region
(Setup > POS Terminals > Select Terminal > Modify > Region: Canada / USA).

To configure and use this function, go to Setup > Global Options > Sales
Under "Sale Type Status", ensure that you take note of the exact way the Takeaway text has been entered

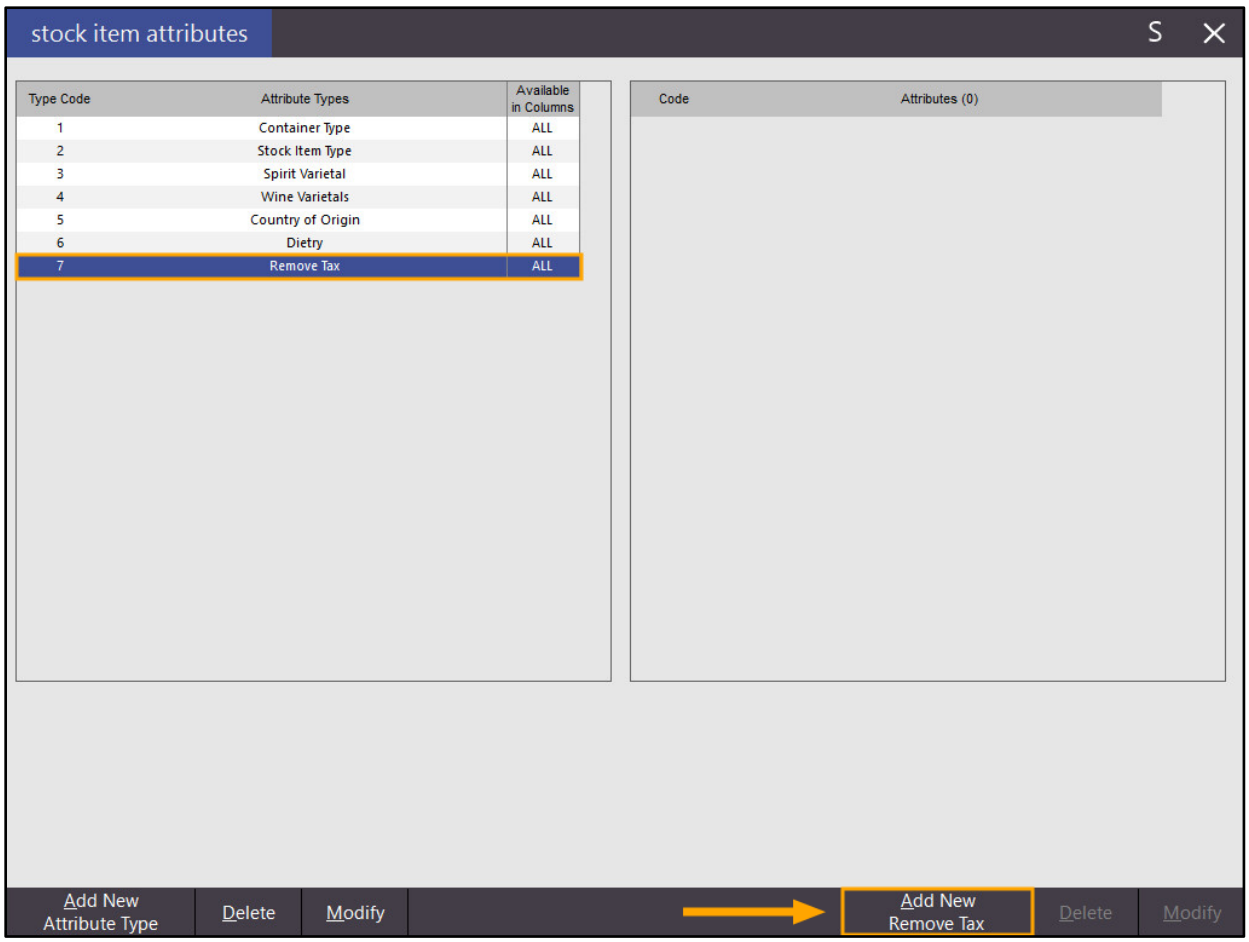


Close the Global Options screen.
Go to File > Sales > Stock Item Attributes > Add New Attribute Type > Enter “Remove Tax” into the Add Attribute Type field, then press “Save”.

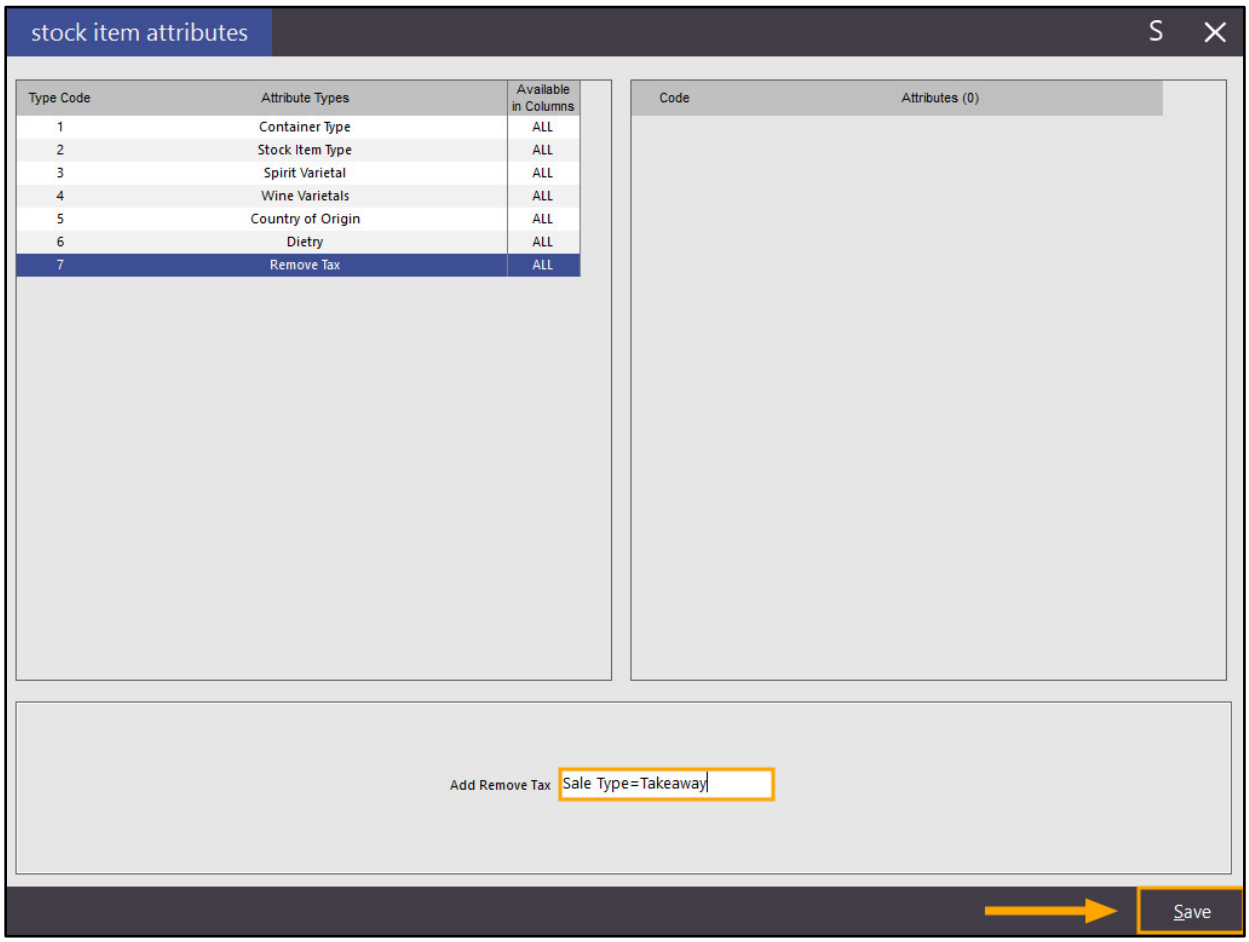


Close the “Add Attribute Type” screen by pressing the “X” on the top right corner of the screen.

Then select the “Remove Tax” Attribute Type followed by pressing the “Add New Remove Tax” button



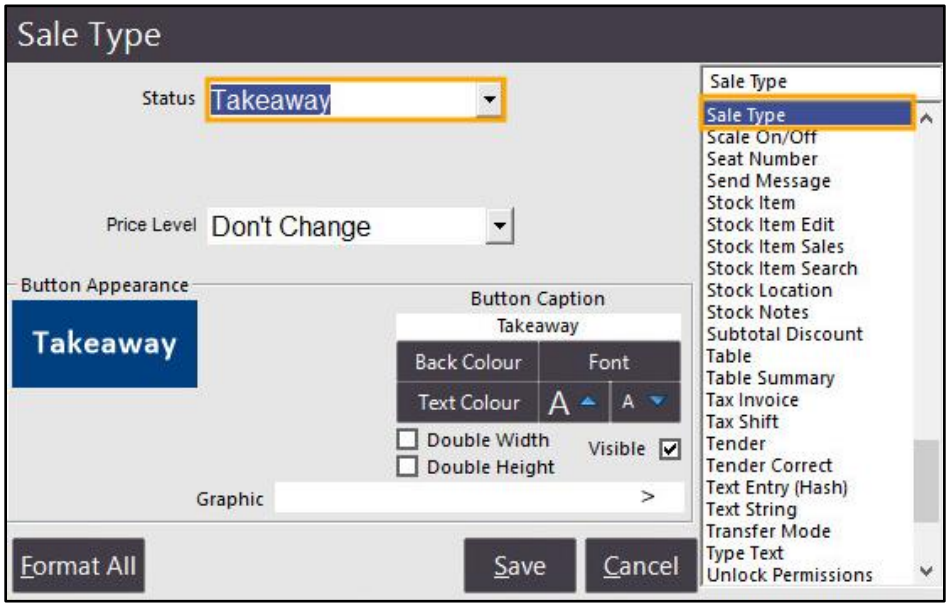
Next to the “Add Remove Tax” field at the bottom of the screen, enter Sale Type=Takeaway
Note that when adding this Attribute, the Takeaway text must be entered exactly the same as it appears in Global Options > Sales > Sale Type.
Press “Save” to save the Attribute.



Close the Add Attribute and Stock Item Attribute screens.

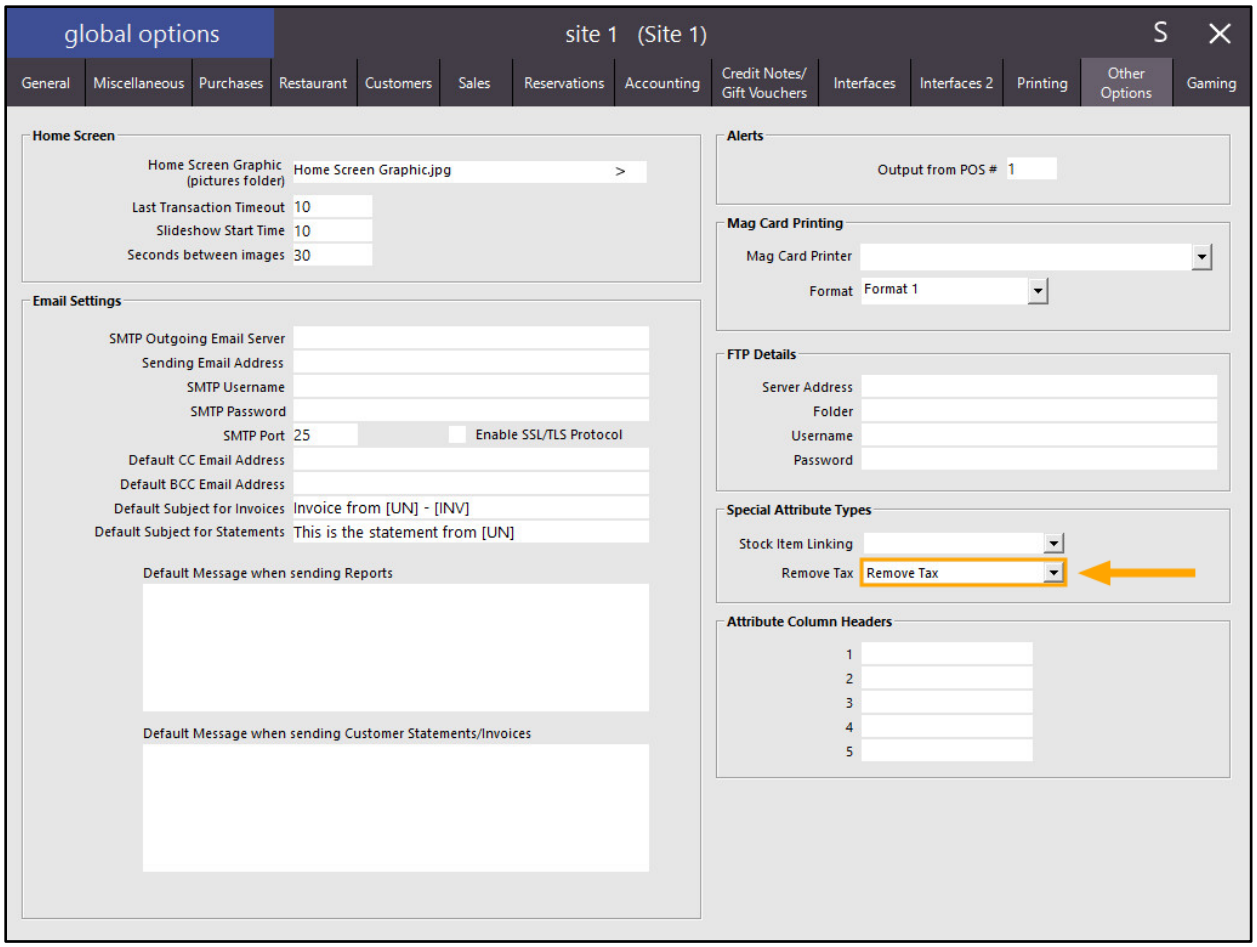
idealpos7 Update History

In order to specify a Takeaway Sale Type during a sale, you will need to ensure that you have a Takeaway Sale Type button on the POS Screen.
Go to Setup > POS Screen > POS Screen Setup > Select a POS Screen Layout > Buttons
Find a blank unused button on the POS screen, click on it and configure it as follows then press “Save”:



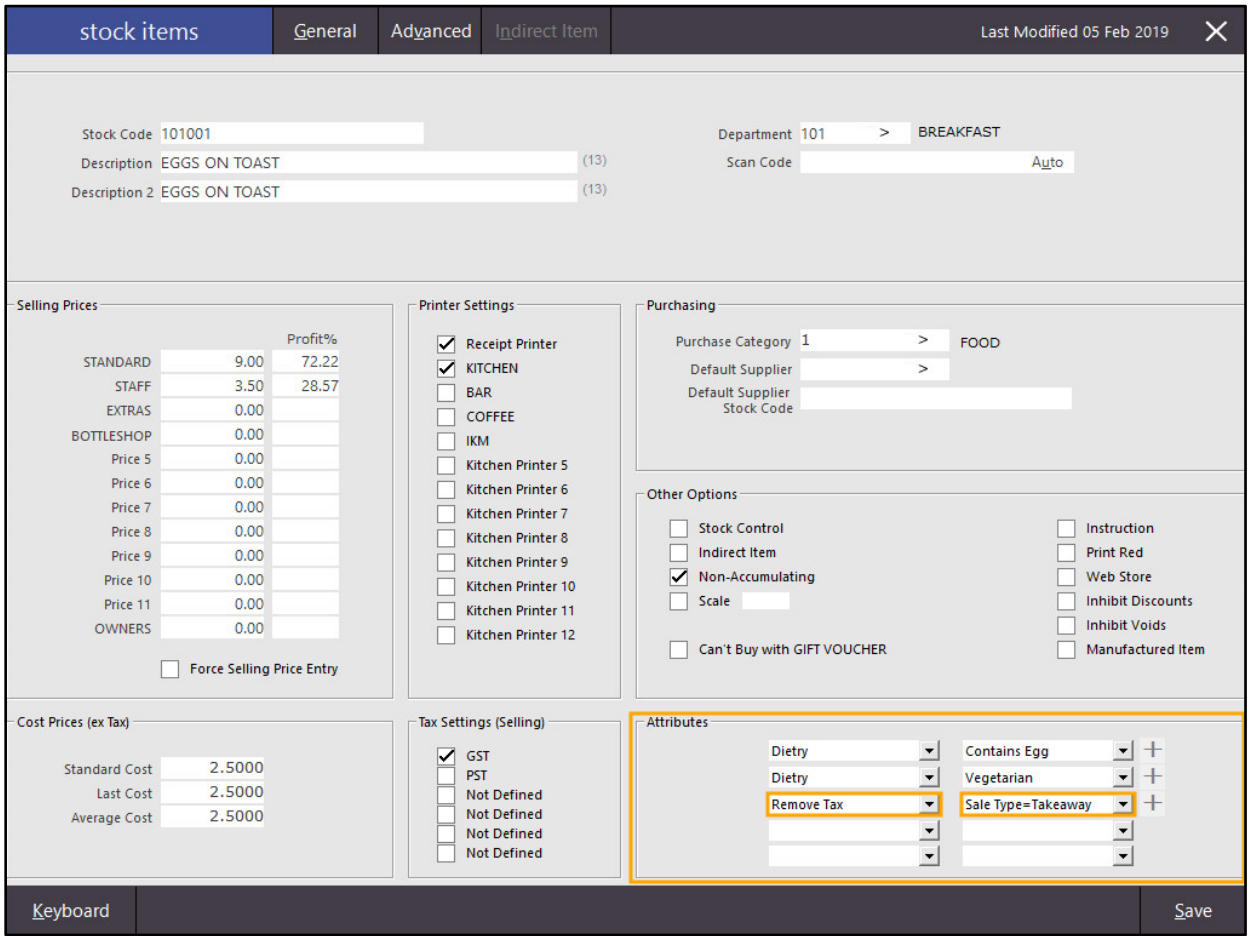
Close the POS Screen Layout screens.

The Special Attribute Types – Remove Tax option needs to point to the Remove Tax Attribute Type.
Go to: Setup > Global Options > Other Options > Special Attribute Types
Select the Remove Tax option from the Remove Tax dropdown list.


global options
site 1 (Site 1)
General
Miscellaneous
Purchases
Restaurant
Customers
Sales
Reservations
Accounting
Credit Notes/ Gift Vouchers
Interfaces
Interfaces 2
Printing
Other Options
Gaming
Home Screen
Home Screen Graphic (pictures folder)
Home Screen Graphic.jpg
Last Transaction Timeout
10
Slideshow Start Time
10
Seconds between images
30
Email Settings
SMTP Outgoing Email Server
Sending Email Address
SMTP Username
SMTP Password
SMTP Port
25
Enable SSL/TLS Protocol
Default CC Email Address
Default BCC Email Address
Default Subject for Invoices
Invoice from [UN] - [INV]
Default Subject for Statements
This is the statement from [UN]
Default Message when sending Reports
Default Message when sending Customer Statements/Invoices
Alerts
Output from POS #
1
Mag Card Printing
Mag Card Printer
Format
Format 1
FTP Details
Server Address
Folder
Username
Password
Special Attribute Types
Stock Item Linking
Remove Tax
Remove Tax
Attribute Column Headers
1
2
3
4
5

Close the Global Options window to save the change.

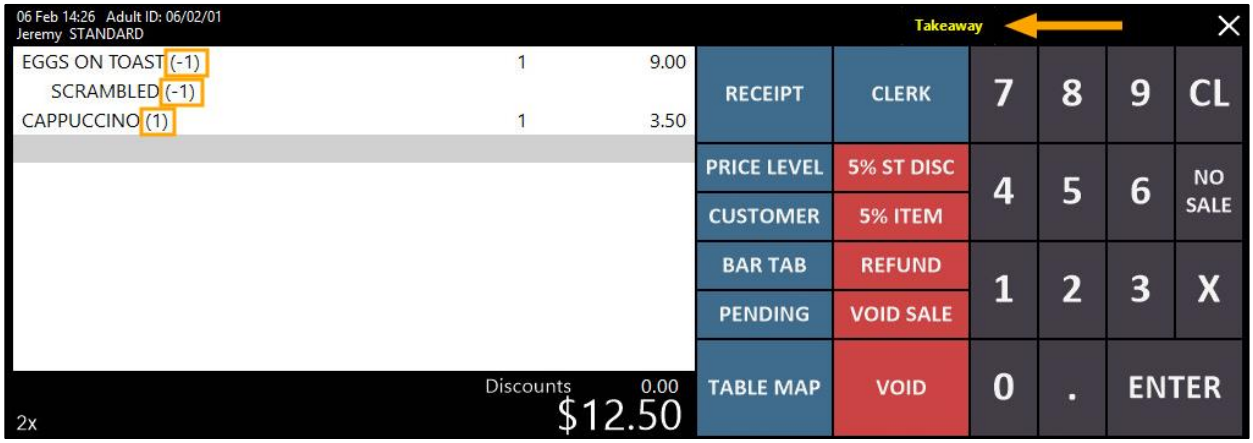
The final step is setting Attribute Types on any Stock Items which should not be taxed when sold as a Takeaway.
Go to File > Stock Control > Stock Items > Select an Item > Modify
On the bottom-right corner of the Stock Items screen under the Attributes Section, select the “Remove Tax” option from any of the left-hand side dropdown boxes.
The corresponding dropdown box on the right-hand side should automatically pre-select the “Sale Type=Takeaway” option as per the below example:



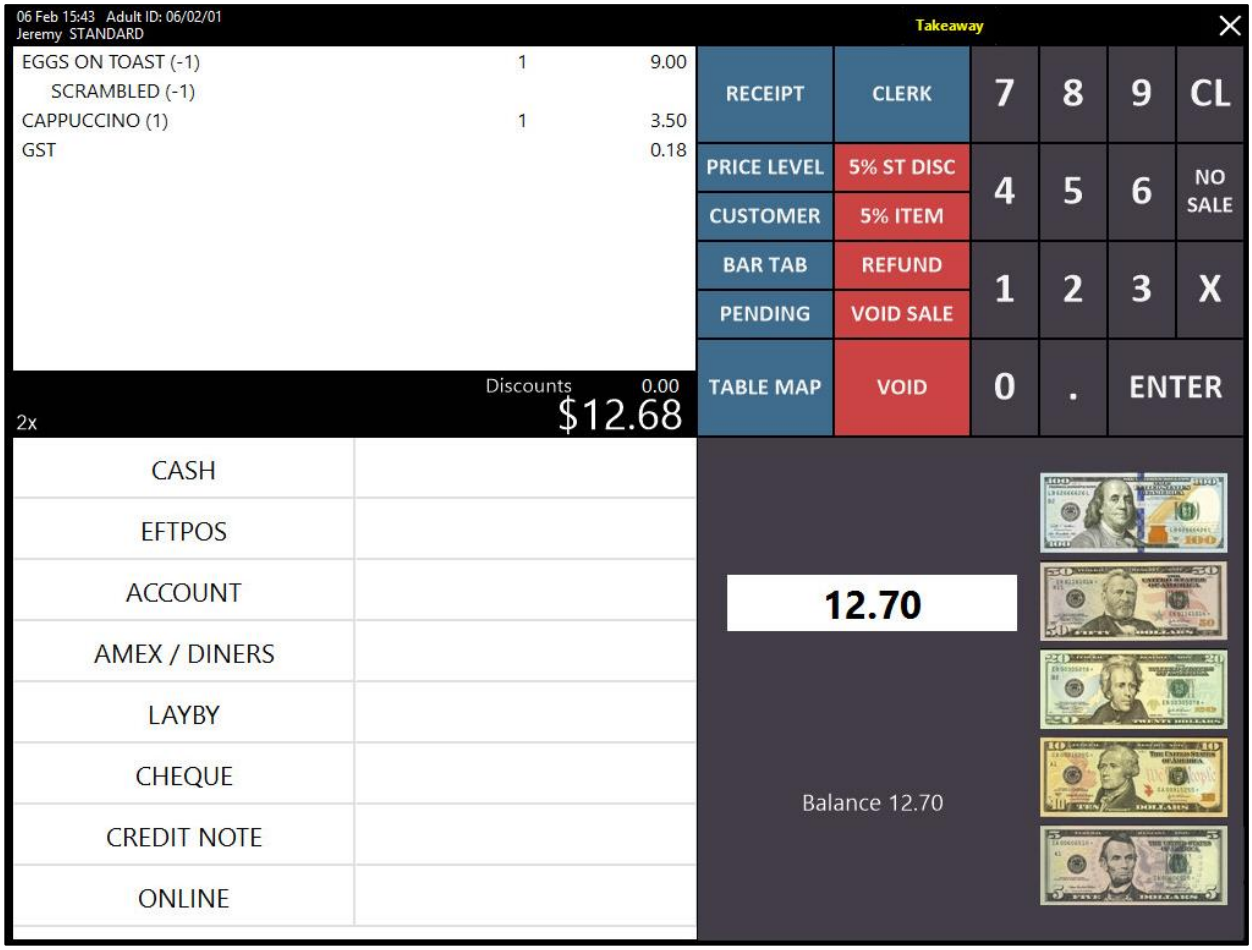
Press the “Save” button to save the change and repeat the above process for any other Stock Items which should have tax excluded when they are sold as a Takeaway.

Once you have set the Attributes for all Stock Items that need to be excluded from tax when sold as a Takeaway, close the Stock Items screens then go to the POS screen.
Press the Takeaway button, then add the item to the sale which had the Remove Tax Attribute configured.
When the Takeaway Sale Type button has been pressed, Takeaway will appear on the top-right corner of the screen (this can also be pressed to clear/cancel the Takeaway Sale Type from the current sale).
Any items that are added to the sale and have had the Remove Tax Attribute configured will appear with a hyphen (-) in front of the Tax Rate IDs. This indicates that the item will be exempt from tax. Any items that have not had the Remove Tax Attribute set will show a Tax ID without a hyphen. The Tax ID values displayed on the Sale screen correspond to the Tax that has been enabled for the Stock Item (File > Stock Control > Stock Items > Select Item > Modify) and what position the enabled Tax Rate appears in Setup > Global Options > Sales > Tax Rates.

The below example shows EGGS ON TOAST have been exempt from tax and CAPPUCCINO will have tax applied:

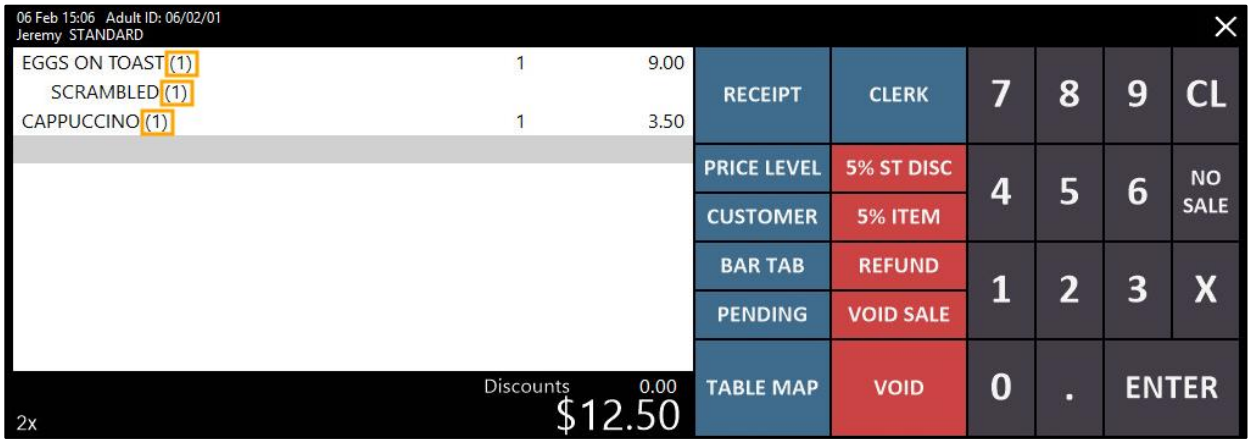


Press the “Enter” button to go to the Tender screen.
Tax is only applied to items which are not exempt from Tax.
The sale can be finalised by selecting a tender type or cash amount.

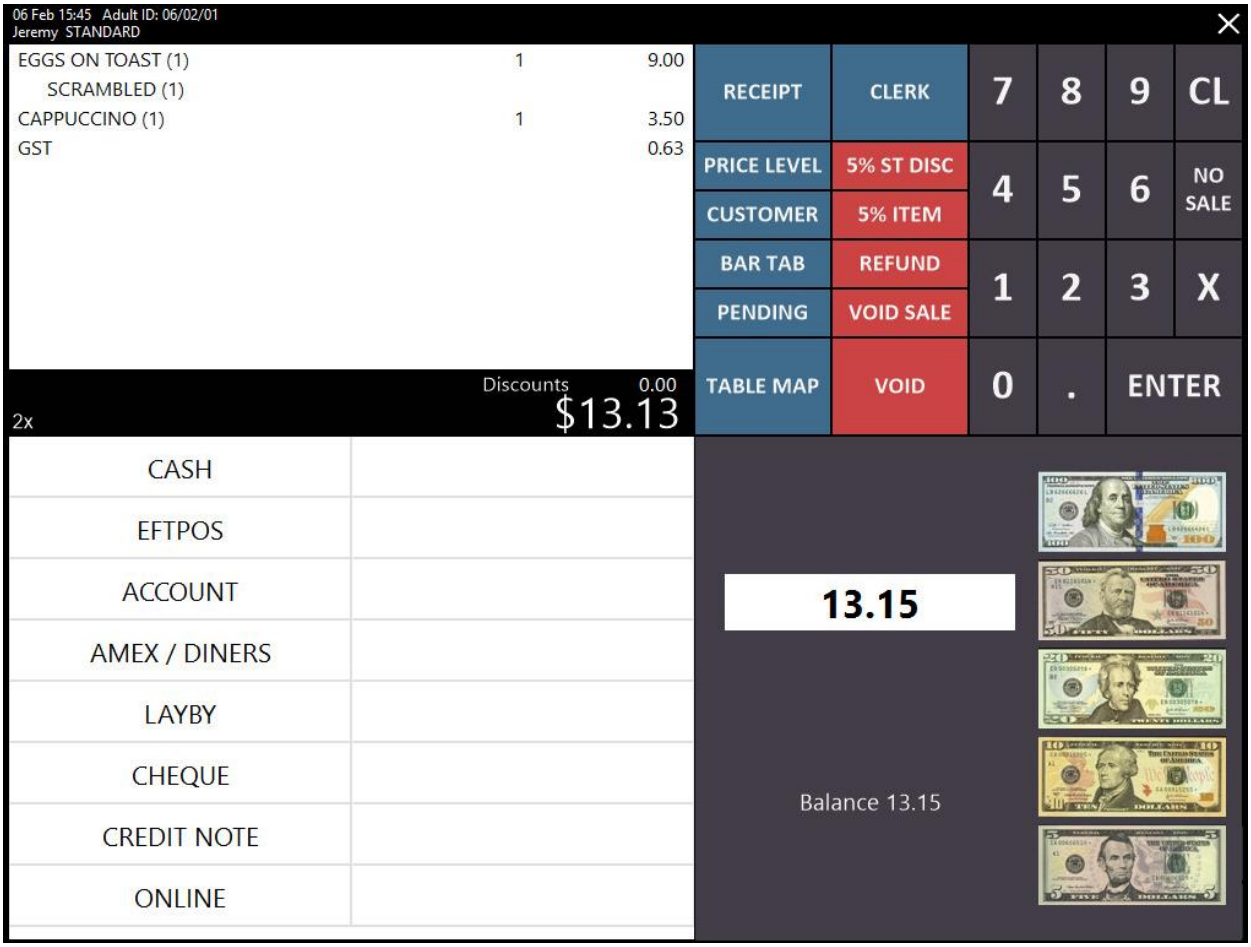


idealpos7 Update History

When the Takeaway button has not been pressed, any items that have had the Remove Tax Attribute configured will show the tax identifier without a hyphen indicating that tax is applicable to those items.



Pressing the “Enter” button to go to the Tender screen shows that Tax has been applied to all items.
The sale can be finalised by selecting a tender type or cash amount.



Stock Items

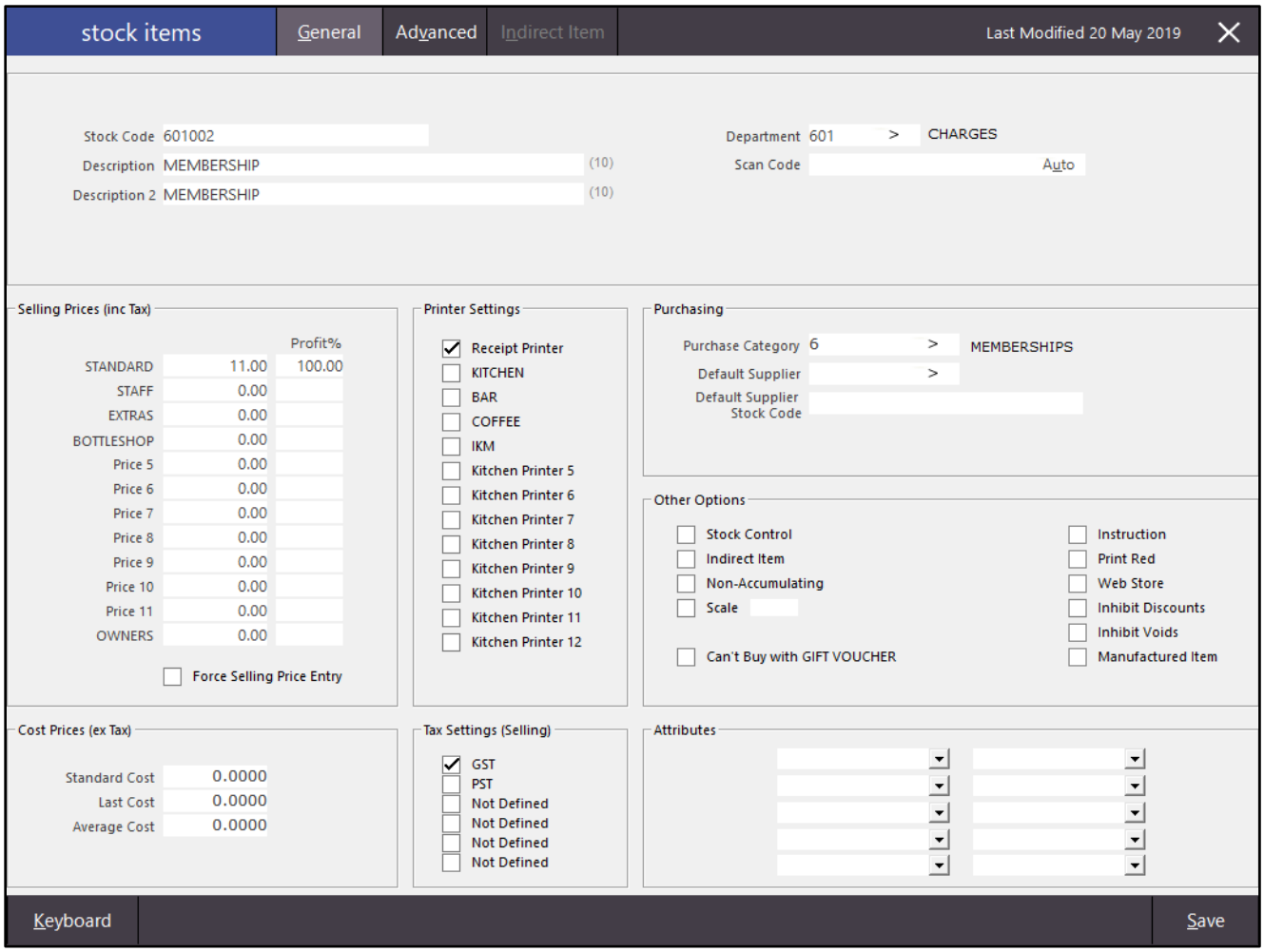
DOB2 Tag for Stock Item Sales prompt can handle Specific Date

The DOB2 field in a Customer record is typically used by Clubs to store the Membership expiry date of the Customer. The DOB2 of a Customer can be updated automatically when a Stock Item is added to a sale (such as when the Customer purchases a Membership Stock Item). This is achieved by entering a #DOB2 tag into the Sales Prompt field of the Stock Item.

This function adds the ability to set a Specific Date when using the DOB2 tag (in addition to still having the ability to increment the Customer's DOB2 by a specific number of months).

Some clubs may want all their members to have the same expiry date, regardless of when the membership was purchased and this function can be used in these cases.

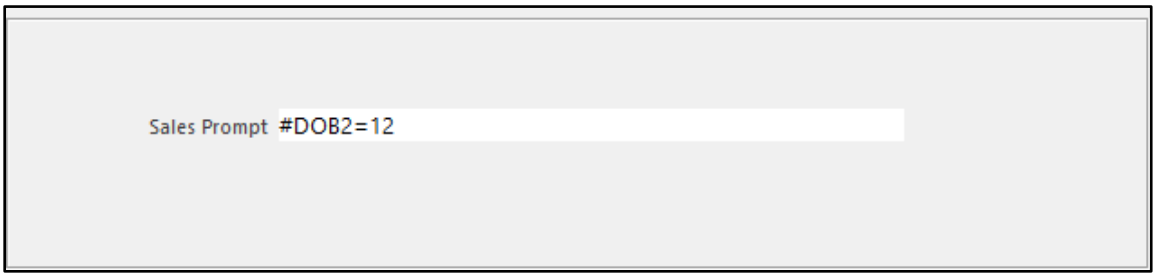
To configure and use this function, go to: File > Stock Control > Stock Items > Open/Create a Membership Stock Item. If creating a new item, ensure that you fill out the required details.
The below example shows a Membership Stock Item (based on the Annual Membership Stock Item that is included in the Idealpos Demonstration Database)



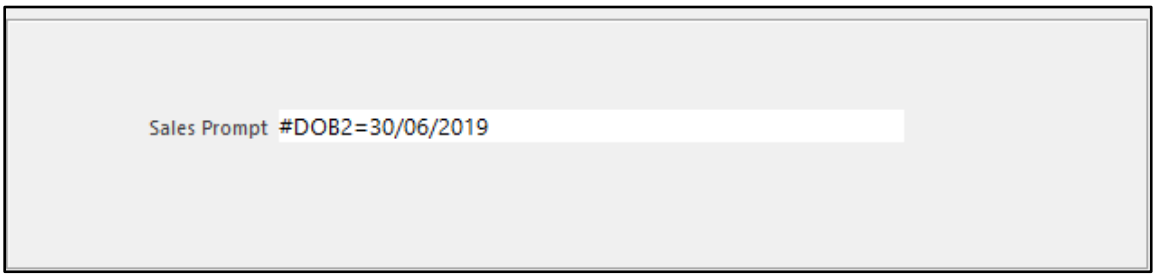
idealpos7 Update History

Once the Membership Item has been created, open the Stock Item and click on the Advanced tab.
In the Sales Prompt field of the Advanced tab, enter the DOB2 tag.
You have the following options:

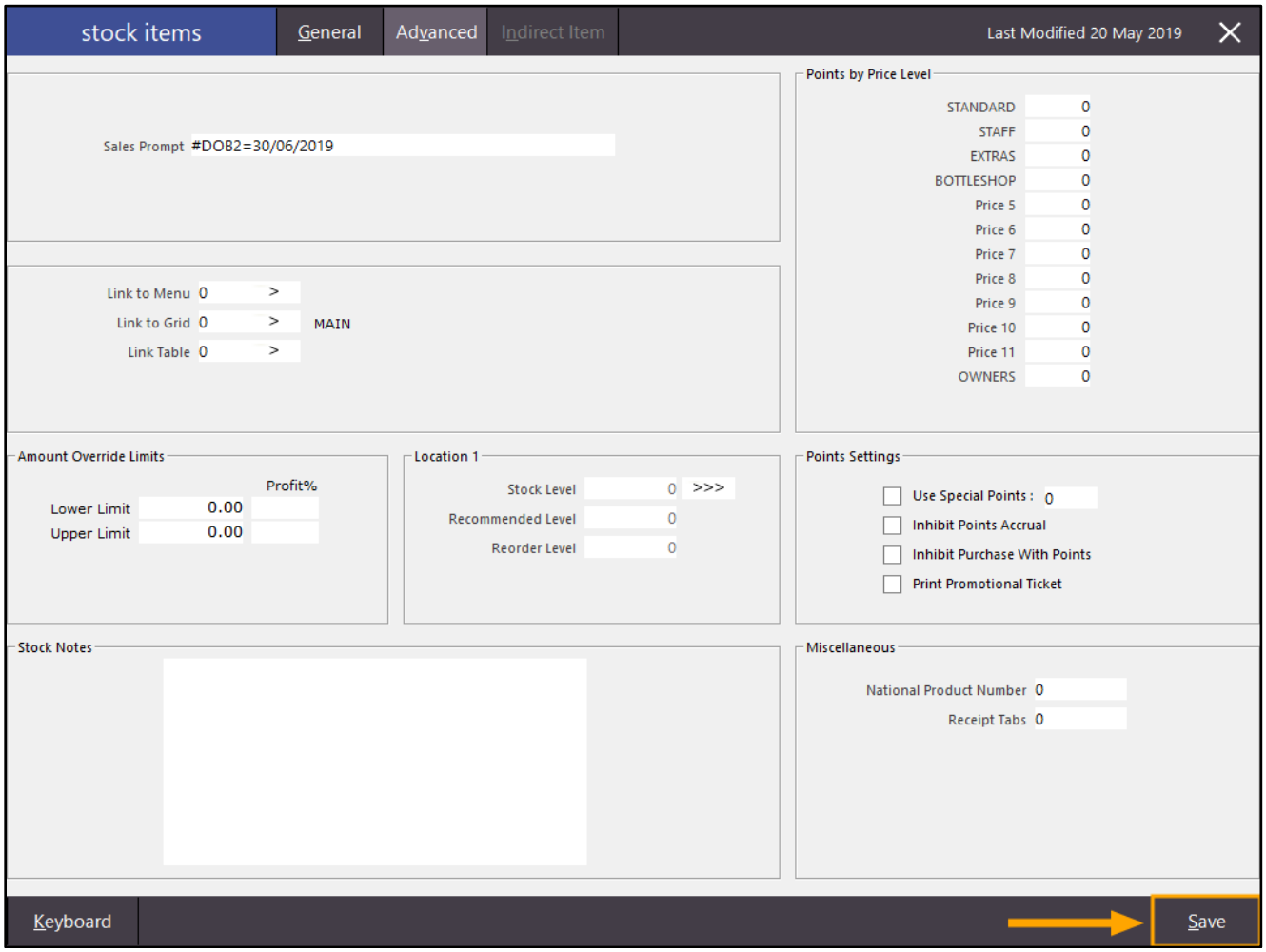
- Increment the DOB2 by a specific number of months
  To achieve this, enter #DOB2=NumberOfMonths
  E.g. #DOB2=12



- Set the DOB2 to a specific date
  To achieve this, enter #DOB2=DD/MM/YYYY
  E.g. #DOB2=30/06/2019

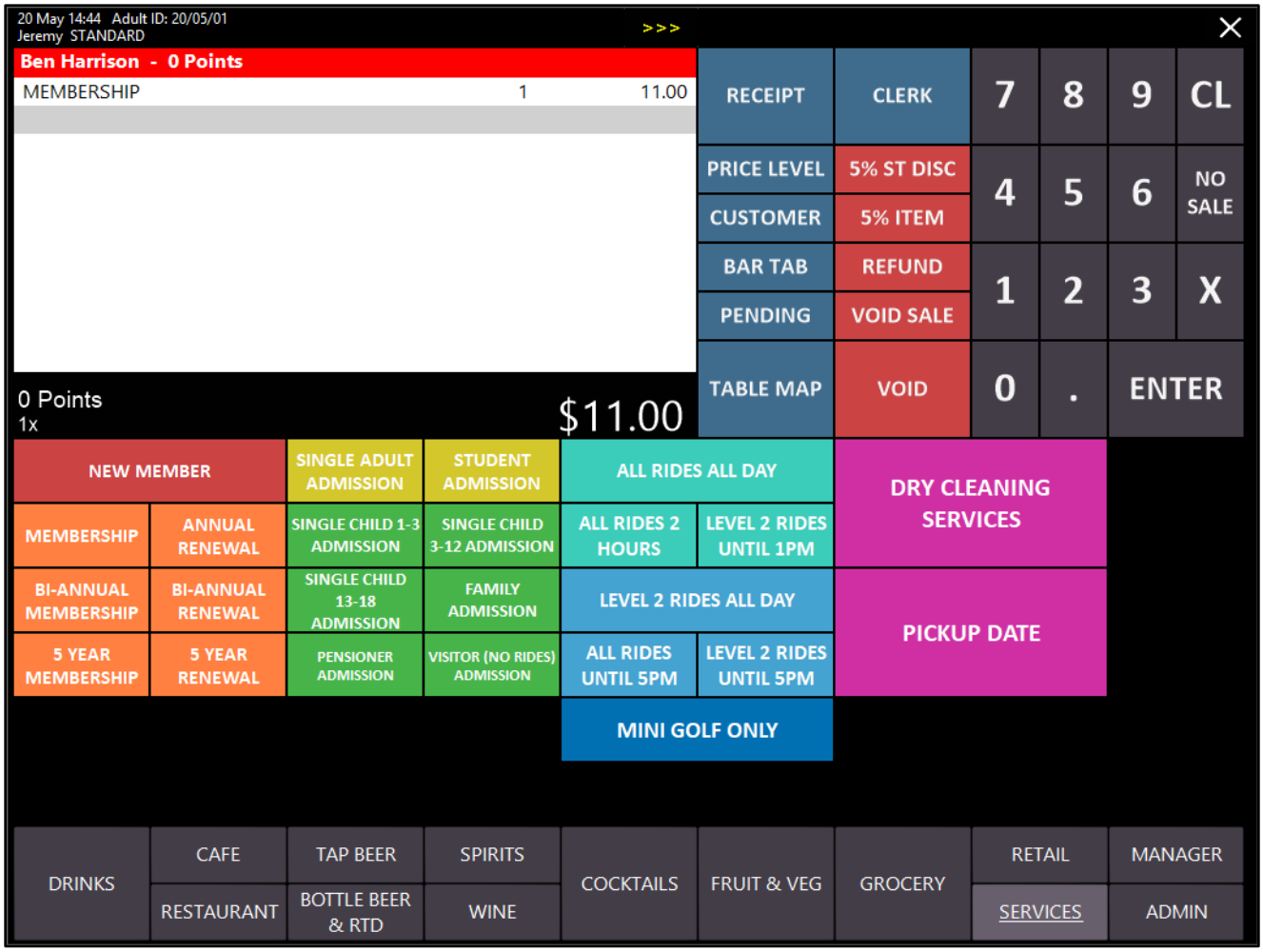


For the purposes of demonstrating the new Specific Date function, we entered #DOB2=30/06/2019
Once the change has been made, press the “Save” button on the bottom-right corner of the window.



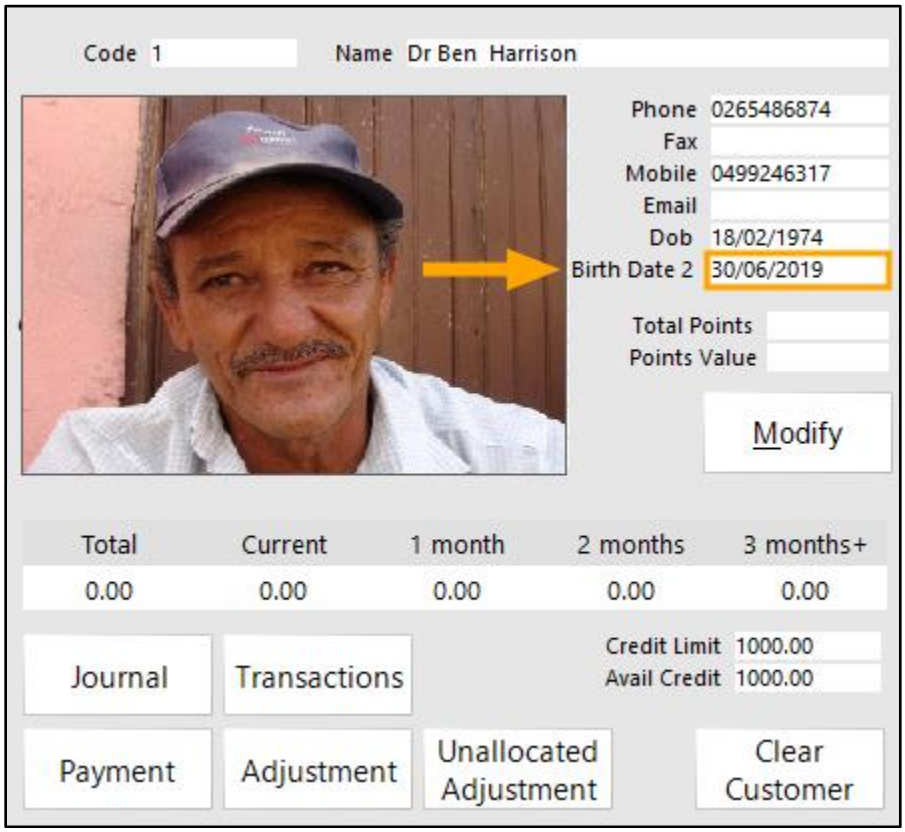
idealpos7 Update History

Go to the POS screen and add a Customer to the sale, then add the Membership Stock Item to the Sale.



Press the ENTER button, then tender the sale.
The DOB2 field will be updated with the new DOB2 as configured in the Sales Prompt field of the Membership Stock Item.

To confirm that the DOB2 has been updated, add the Customer to the sale, then press the ">>>" button at the top of the screen. The Customer details will be displayed and will include the updated Birth Date 2:



If required, additional functions can be configured for the DOB2 field.
Refer to: Setup > Global Options > Customers > Customer Date Function.
These are outlined in further detail in the Global Options > Customers topic in the User Guide.

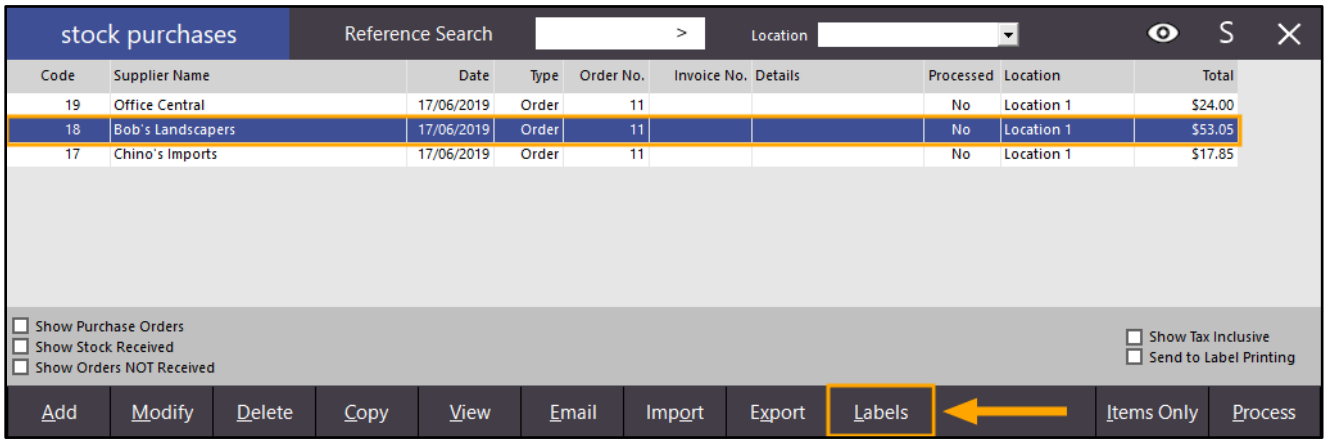
idealpos7 Update History

Stock Purchases

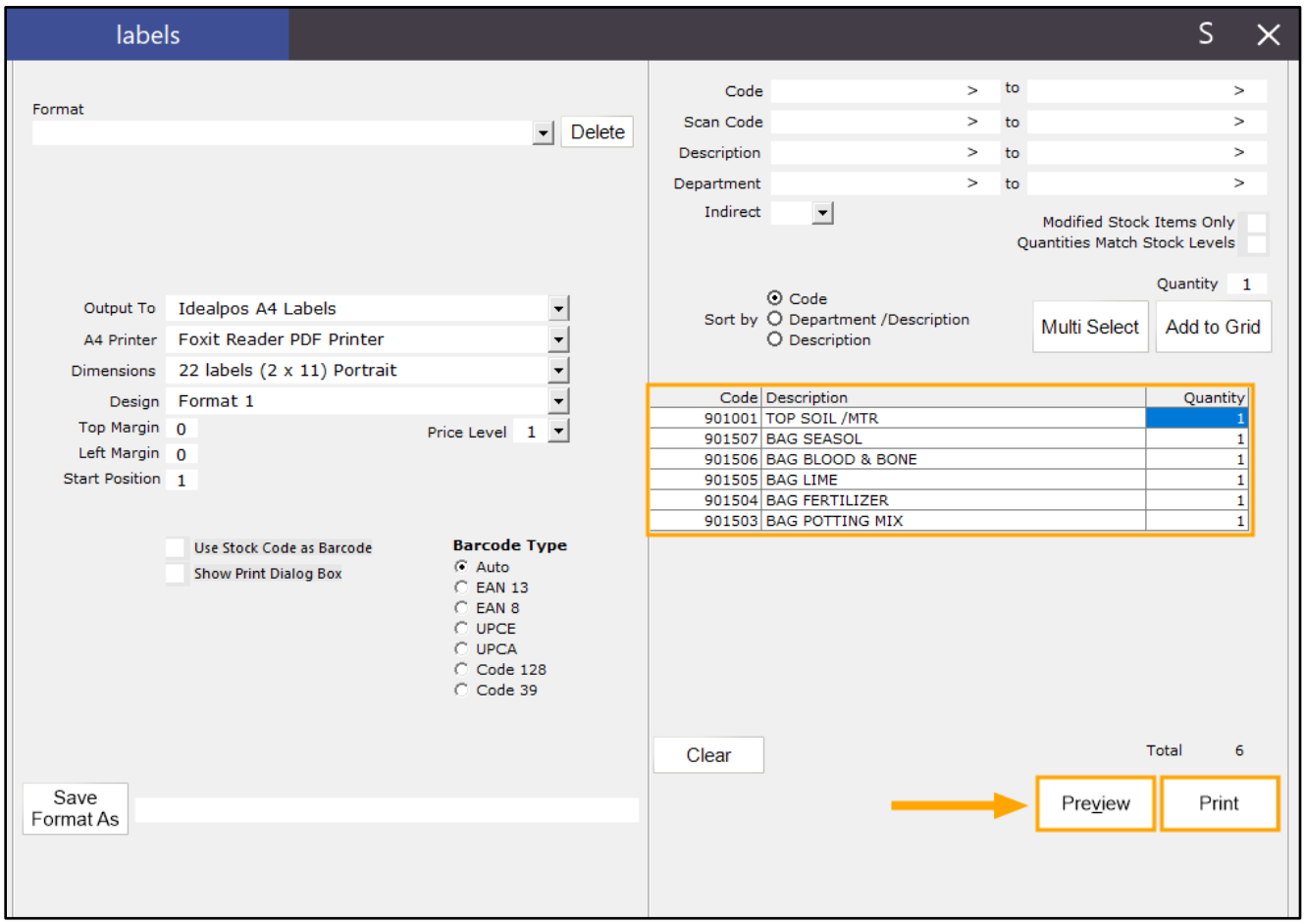
Send Unprocessed Purchase Orders to Stock Item Labels

This function adds the ability to send any Unprocessed Purchase Orders to Stock Item Labels.
This can be useful when labels for Stock Items need to be printed before an order is processed or finalised.

To access this function, go to: Transactions > Stock Control > Stock Purchases
Select the Stock Purchase which contains the Stock Items that require Stock Item Labels to be printed then press the "Labels" button.



The Labels screen will be displayed and any Stock Items that were in the selected Purchase Order will be ready for printing.
Select the required options for printing the Labels, then either press "Preview" to Preview the Labels, or press "Print" to Print the Labels.



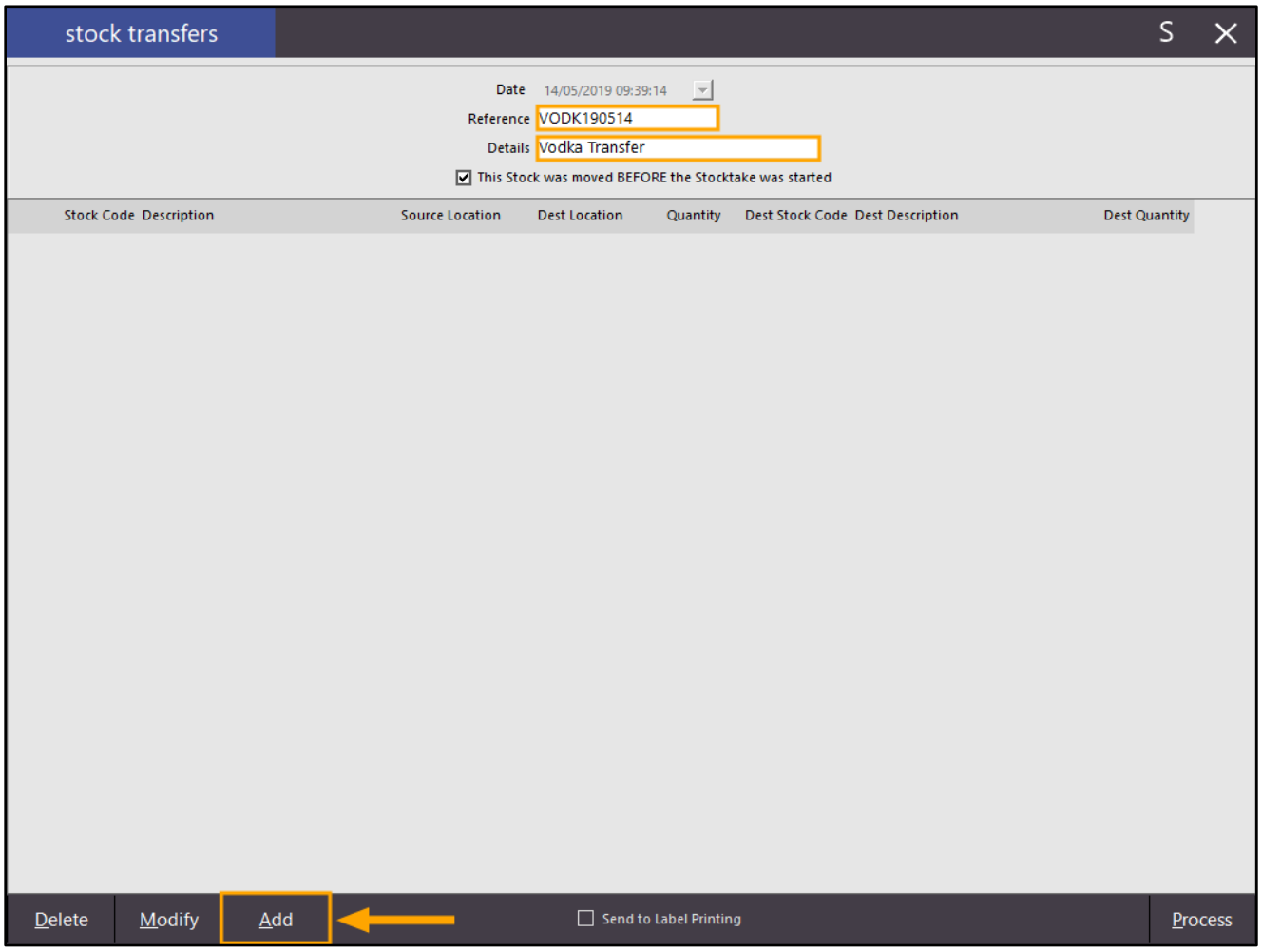
Stock Transfers

Stock Transfers to Different Items – Option to Update Cost based on Source Item

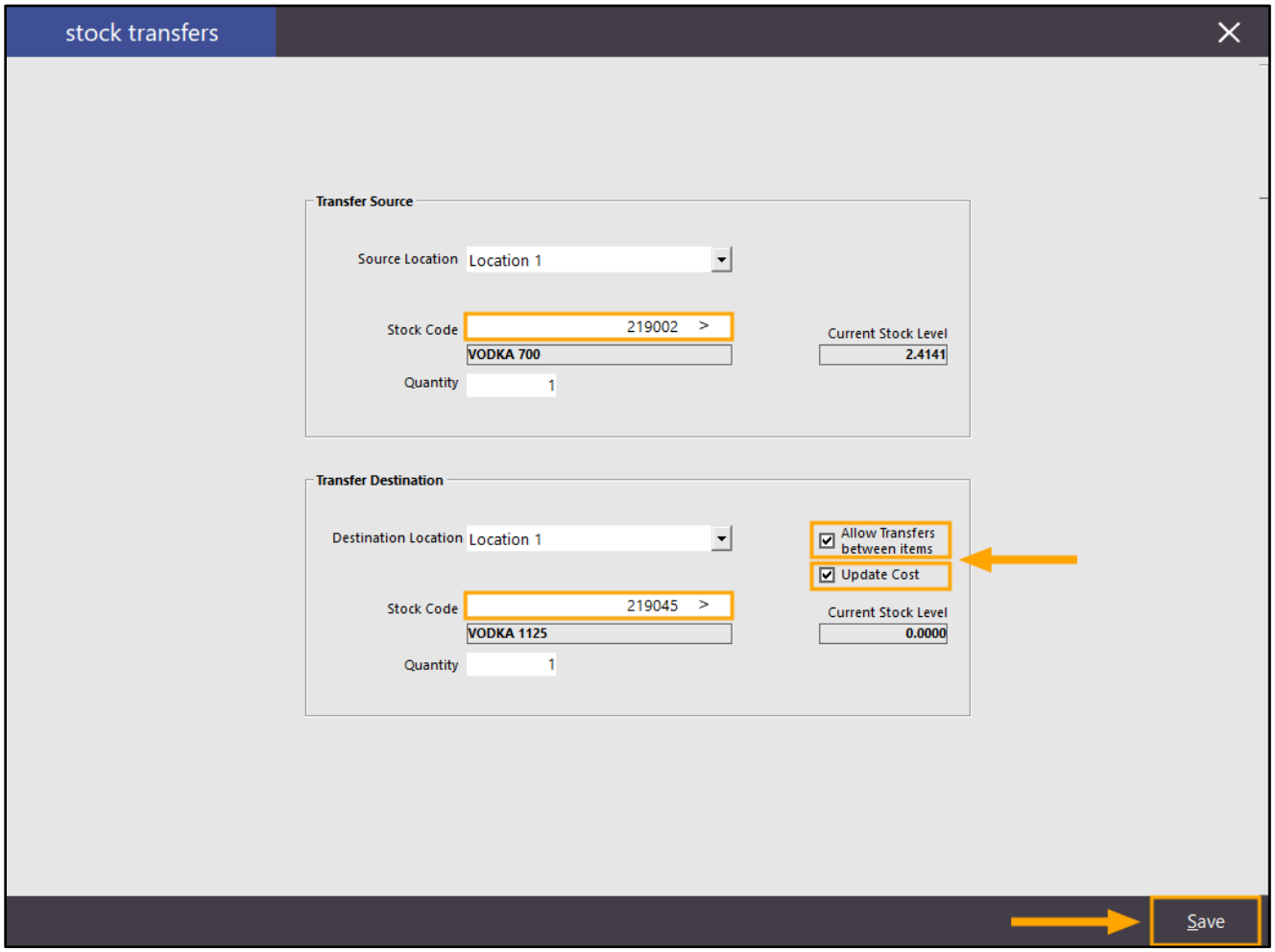
This function enables the ability to update the Cost of the destination Stock Item using the Cost of the source item when transferring stock between items. This function is useful in cases where you need to transfer stock from one item to another (where the source item has a different cost price to the destination item), then need be able to accurately report on the actual cost of the destination item, factoring in the cost of other items that were transferred to the destination item

To use this function, go to: Back Office screen > Transactions > Stock Control > Stock Transfers

Enter a Reference and the Details of the Stock Transfer, then press the "Add" button:

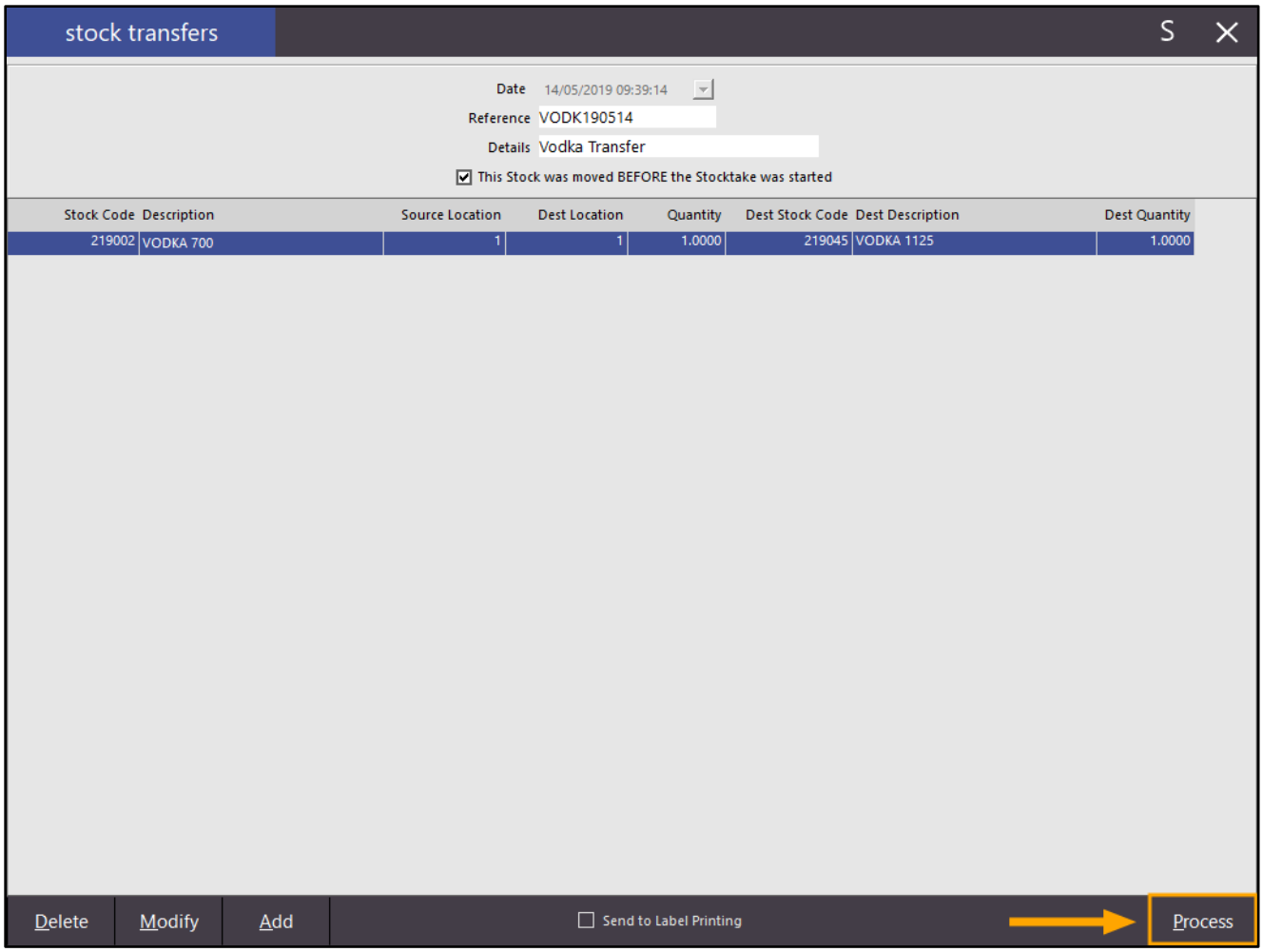


On the following screen, select the Source Location, Stock Code and Quantity from the Transfer Source section.
After selecting the Transfer Source, the Transfer Destination will be pre-filled with the same Stock Code and Quantity as the Transfer Source.
In the Transfer Destination section, select the Destination Location and enable the "Allow Transfers between items" checkbox. By enabling the Allow Transfers between items checkbox, the Stock Code in the Transfer Destination can be modified so that you can transfer stock from one item to another (e.g. Transfer Stock from Stock Item Vodka 700mL to Stock Item Vodka 1125mL). After you select a different Stock Item in the Transfer Destination compared to the Stock Item in the Transfer Source, an "Update Cost" checkbox will become visible. To update the Cost of the Destination Item using the Cost of the Source Item, ensure that you tick the "Update Cost" checkbox.
Finally, press the "Save" button on the bottom-right corner to save the Stock Transfer to the transfer batch.



You may repeat the above process if you want to transfer multiple Stock Items, otherwise, close the screen to return to the screen showing all the Stock Items in the Stock Transfer batch.

To process the items in the Stock Transfer batch, press the “Process” button on the bottom-right corner of the window.



After the Stock Transfer batch is processed, the Stock Transfers window will remain on the screen and any items in the batch will be cleared from the list.

idealpos7 Update History

When running any reports relating to the destination Stock Item that just had stock transferred to it, or when viewing the destination Stock Item, the Average Cost will now be updated using the cost from the source item.
This can be confirmed by running a Stock Valuation Report on the item (Reports > Stock Control > Stock Valuation) and/or opening the Stock Item (File > Stock Control > Stock Items) and viewing the Average Cost.

The Stock Valuation Report will show the updated Average Cost and Stock Value:

Idealpos user (pos1)

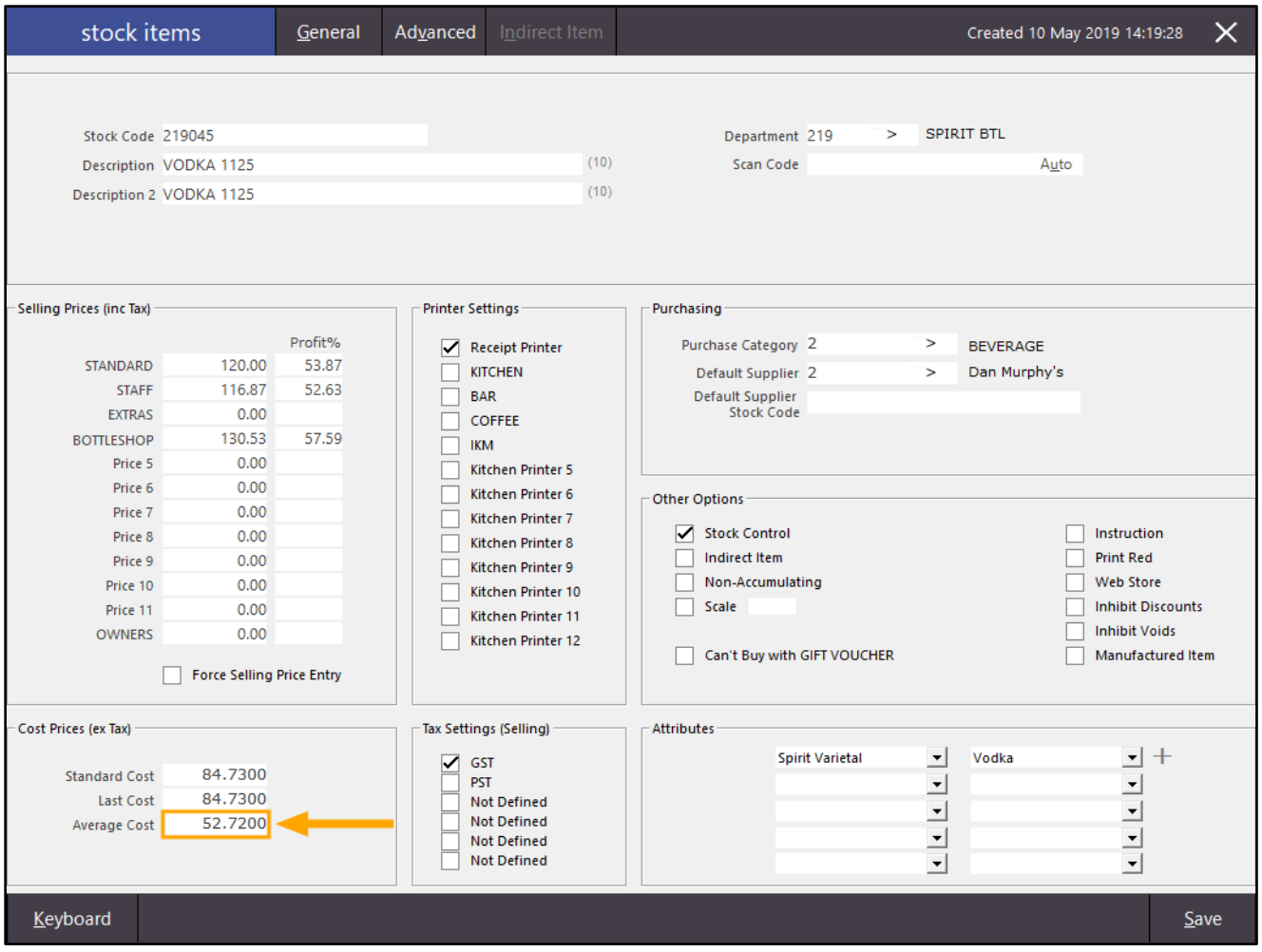
Stock Valuation Report

Printed 14/05/2019 10:47:18
Page 1 of 1

Code 219045 to 219045

Code	Description	Stock Level	L/B Level	Avg Cost	Stock Value
219045	VODKA 1125	1.0000	0.0000	52.72	52.72
		1.0000	**0.0000**		**52.72**

The Stock Item will also show the updated Average Cost as shown below:



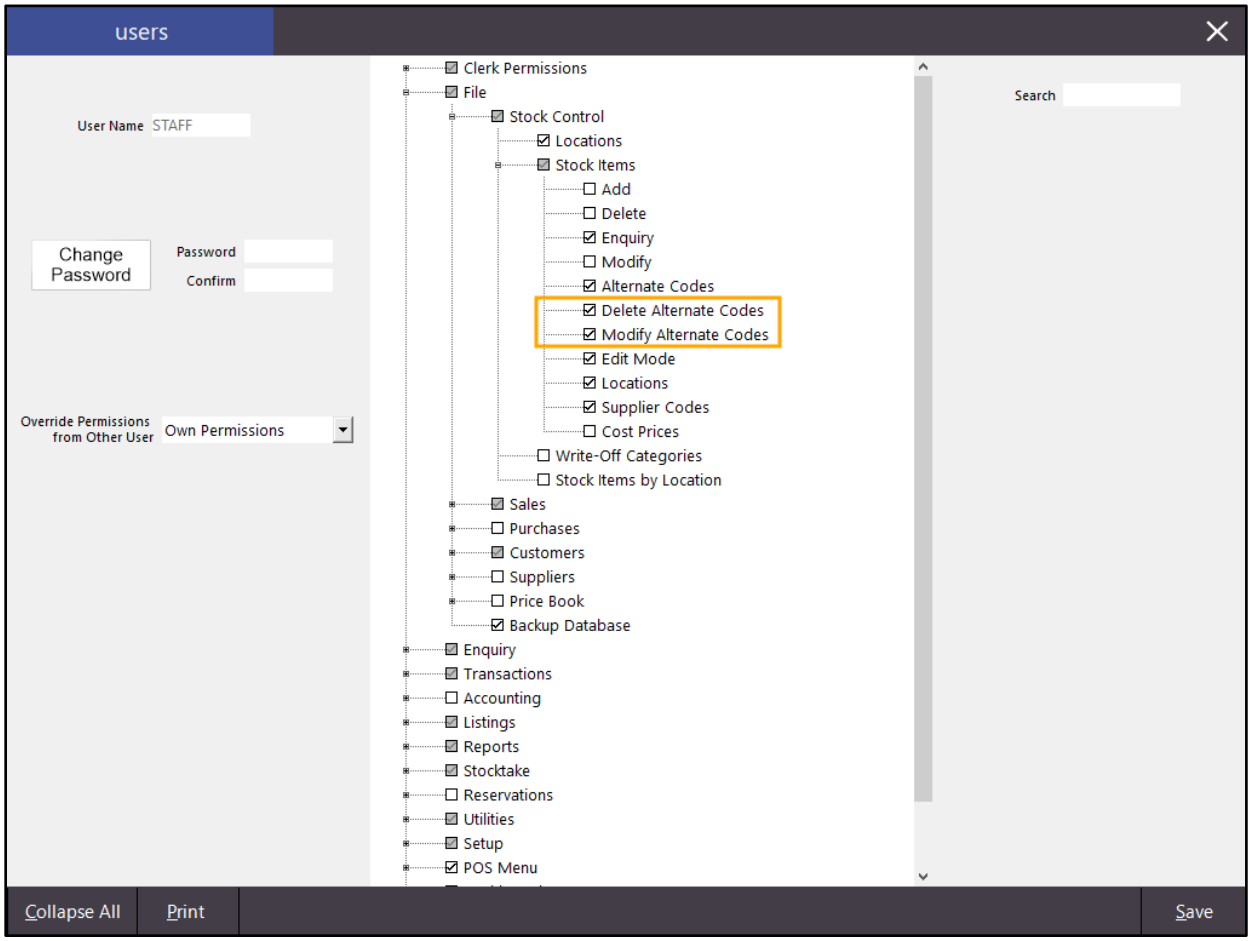
Please note that when the Average Cost is calculated and updated, it is calculated based on previous purchase costs of the item. This means if the destination item that the stock was transferred to has no purchase history, the Average Cost will drop to the same cost as the source item. If there is purchase history recorded against the destination item, the previous cost of the destination item will be used when Idealpos calculates and updates the Average Cost.

Users

Alternate Codes Modify/Delete User Permissions

This function adds the ability to allow or deny a User's access to the Modify Alternate Codes and Delete Alternate Codes features in the Stock Items screen. Denying or allowing access to these functions may be useful in environments where specific staff are only permitted to update or Delete Alternate Codes.

To configure access to Alternate Codes, go to:
Setup > Users > Select User > Modify > File > Stock Control > Stock Items > Check/Uncheck Delete Alternate Codes/Modify Alternate Codes > Save.

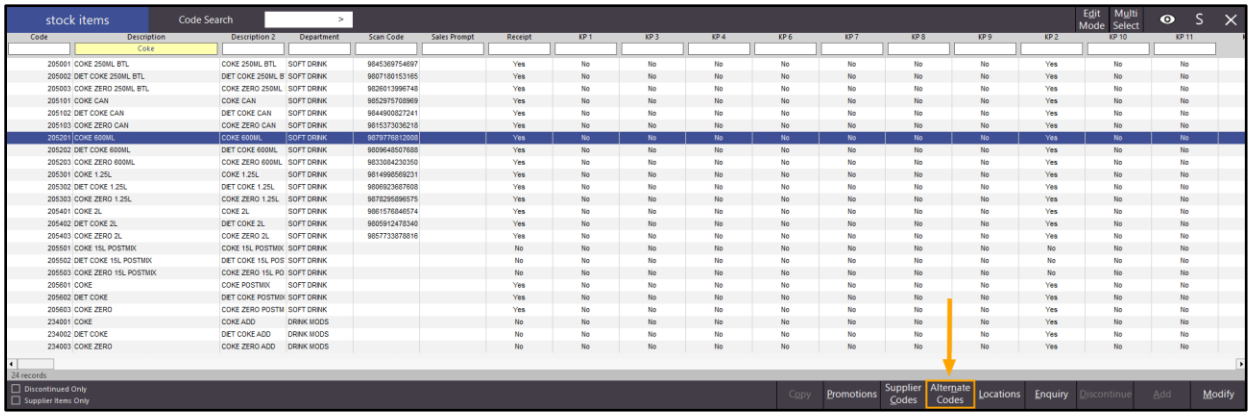


Once the desired changes have been made for the selected user, press the "Save" button.
Repeat the above process for any remaining users which need access to these functions modified.

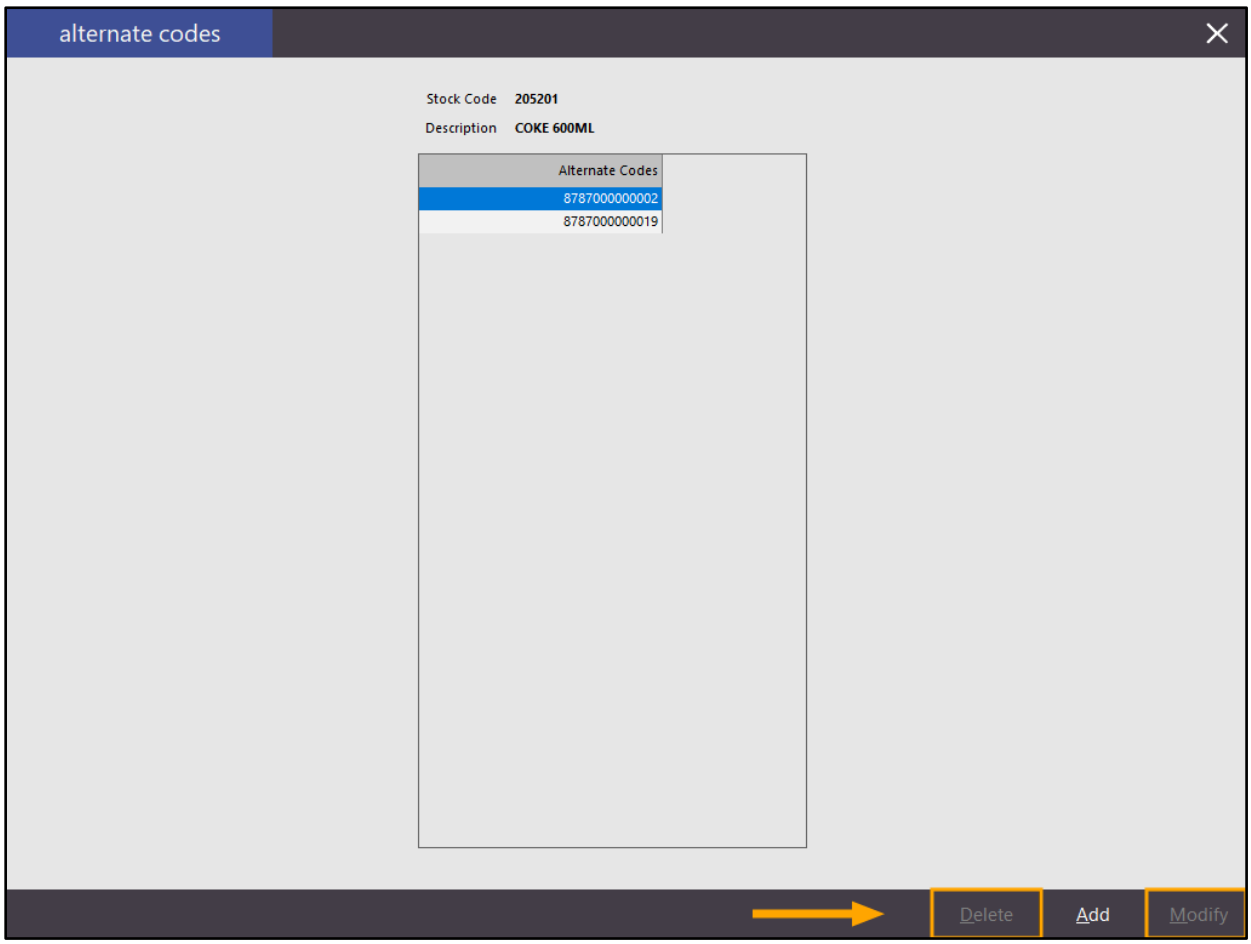
Close the Users screen, then go to: File > Log Out
Login as a User which the Delete Alternate Codes/Modify Alternate Codes functions were disabled.

idealpos7 Update History

Go to File > Stock Control > Stock Items > Select Item that contains Alternate Codes > Alternate Codes



After pressing the "Alternate Codes" button, the Alternate Codes are displayed and access to the Delete/Modify buttons is either greyed out or available, depending on whether the user has permission to access those functions.

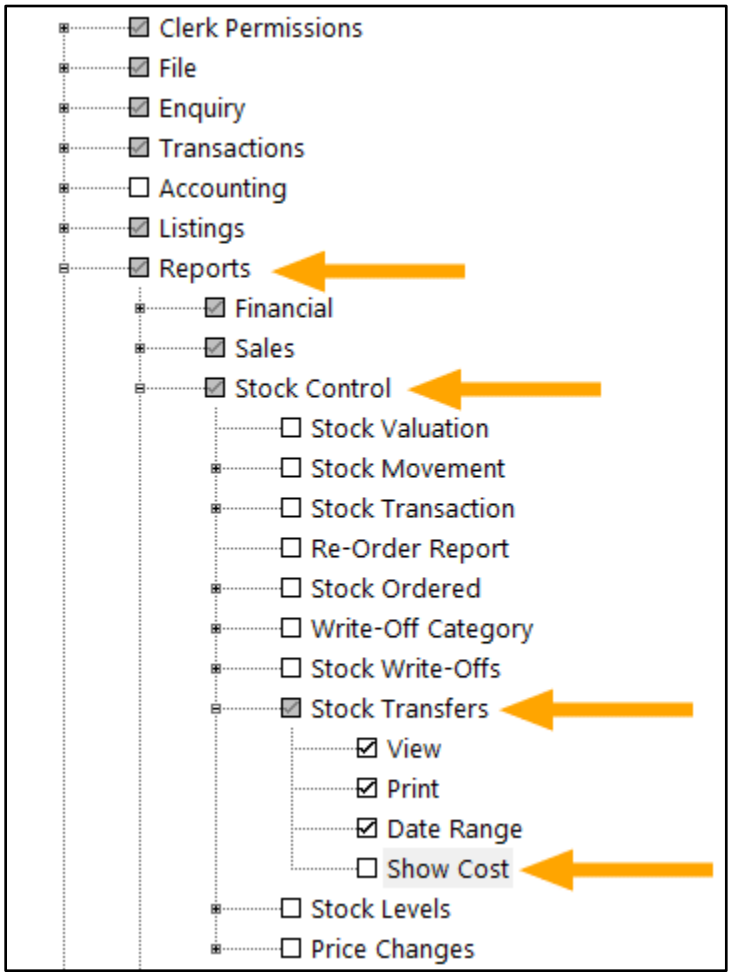


Stock Transfer Reports – User Permission to Show/Hide Cost

This function adds the ability to control whether a User has access to the "Show Cost" button when running the Stock Transfer Report. When this option is disabled for a User, the "Show Cost" button will be greyed out and when running the Stock Transfer Report, the Cost will be hidden from the Report.

To configure this option, go to: Setup > Users > Select User Name > Modify

Under Reports, expand Stock Control > Stock Transfers
To disable access to the Show Cost function, clear the tickbox for the "Show Cost" option

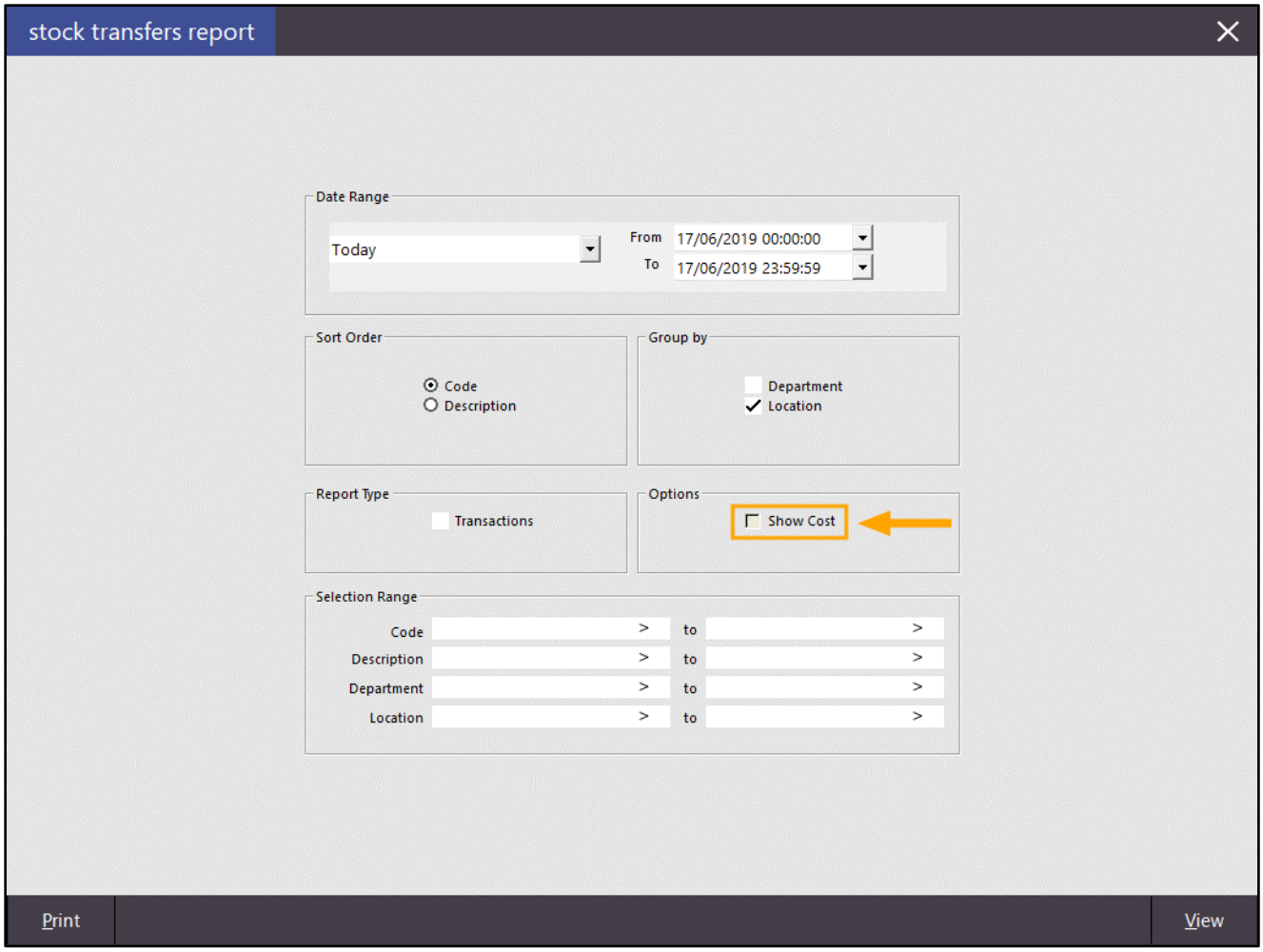


To save changes, press the "Save" button on the bottom-right corner.

idealpos7 Update History

Go to File > Log Out
Login using the Username which the Show Cost setting was disabled.
Go to: Reports > Stock Control > Stock Transfers

The “Show Cost” option will be greyed out and unavailable



When running the Report, the Cost is also hidden.

Idealpos user (pos1)

Stock Transfers Report

17 Jun 2019 00:00:00 to 17 Jun 2019 23:59:59

Printed 17/06/2019 14:28:35

Code	Description	Transfer In	Transfer Out	Total
Location 1 - Location 1				
402007	LEMON SPREAD	0.0000	1.0000	-1.0000
402008	HONEY SQUEEZE	0.0000	2.0000	-2.0000
402009	HONEY JAR	0.0000	3.0000	-3.0000
402010	HONEY TUB 1KG	0.0000	4.0000	-4.0000
		0.0000	**10.0000**	**-10.0000**
Location 2 - Location 2				
402007	LEMON SPREAD	1.0000	0.0000	1.0000
402008	HONEY SQUEEZE	2.0000	0.0000	2.0000
402009	HONEY JAR	3.0000	0.0000	3.0000
402010	HONEY TUB 1KG	4.0000	0.0000	4.0000
		10.0000	**0.0000**	**10.0000**
		10.00	**10.00**	**0.00**

idealpos7 Update History

User Permission to Hide Stock Item Sales button on Journal Enquiry function from POS

This function adds the ability to hide the Stock Item Sales button when accessing the Journal Enquiry function from POS screen.
This may be useful in cases where you need to restrict either a single Clerk or all Clerks linked to a specific User from accessing the Stock Item Sales button.
When a Clerk has access to the Stock Item Sales button and they press it, the Stock Item Sales Report for the current day will be displayed.
When a Clerk does not have access to the button, the button will be completely hidden, preventing access to this function.

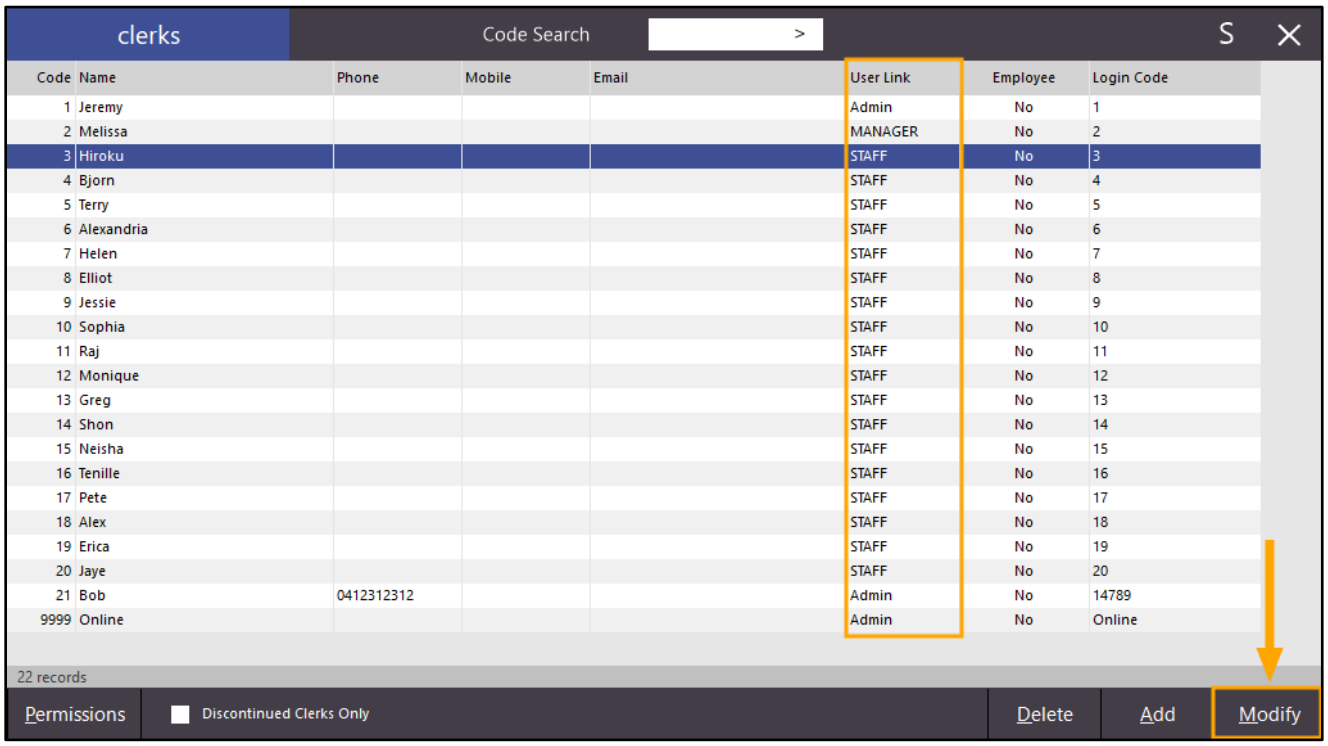
That this function can be configured in one of the two ways:

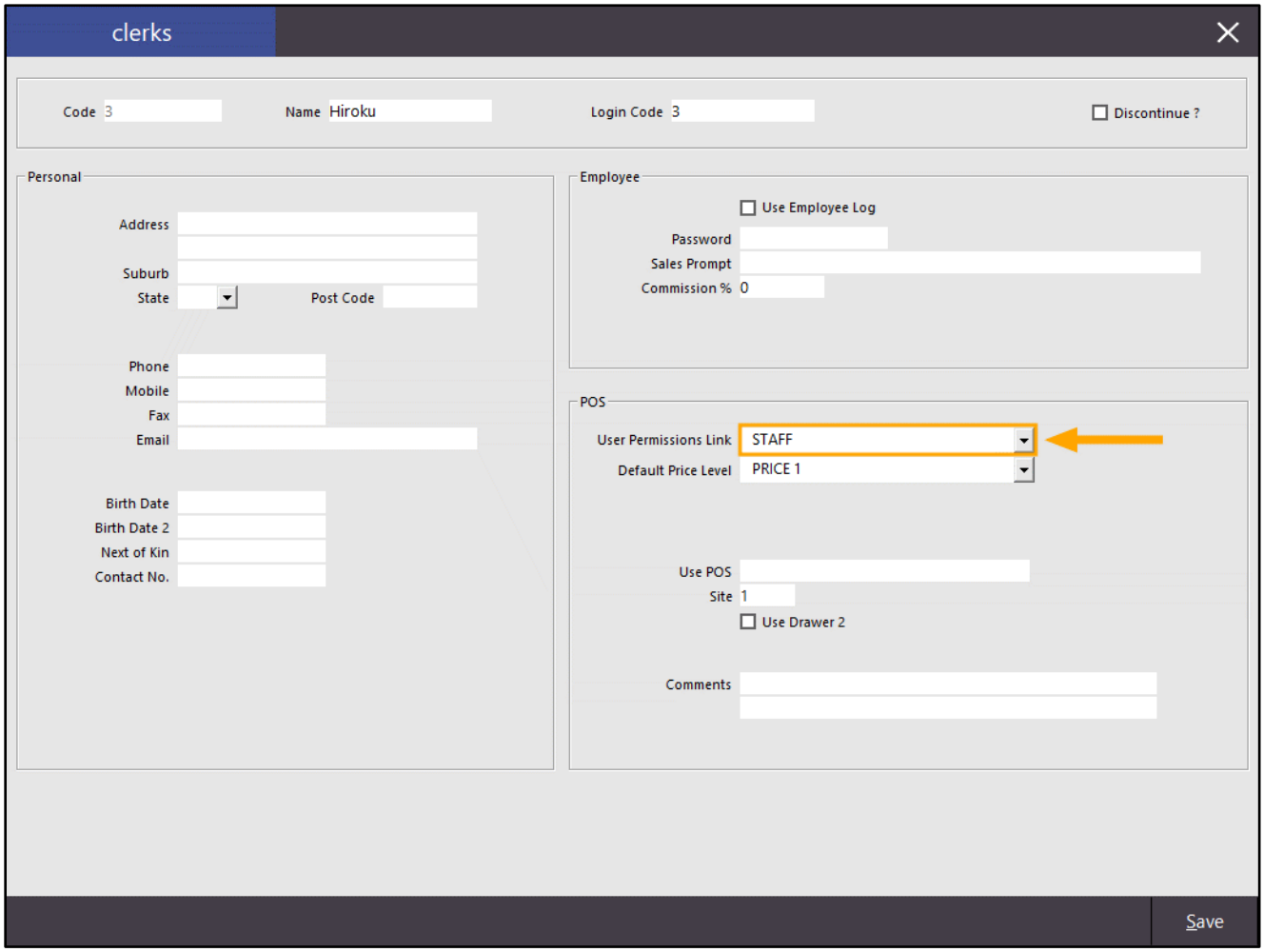
- All Clerks linked to a User (all Clerks linked to a User are restricted from accessing the function)
- Per-Clerk basis (specific Clerks linked to a User are restricted from accessing the function)

Before configuring this function, note that any permissions configured against a User supersede permissions that are configured for a specific Clerk.

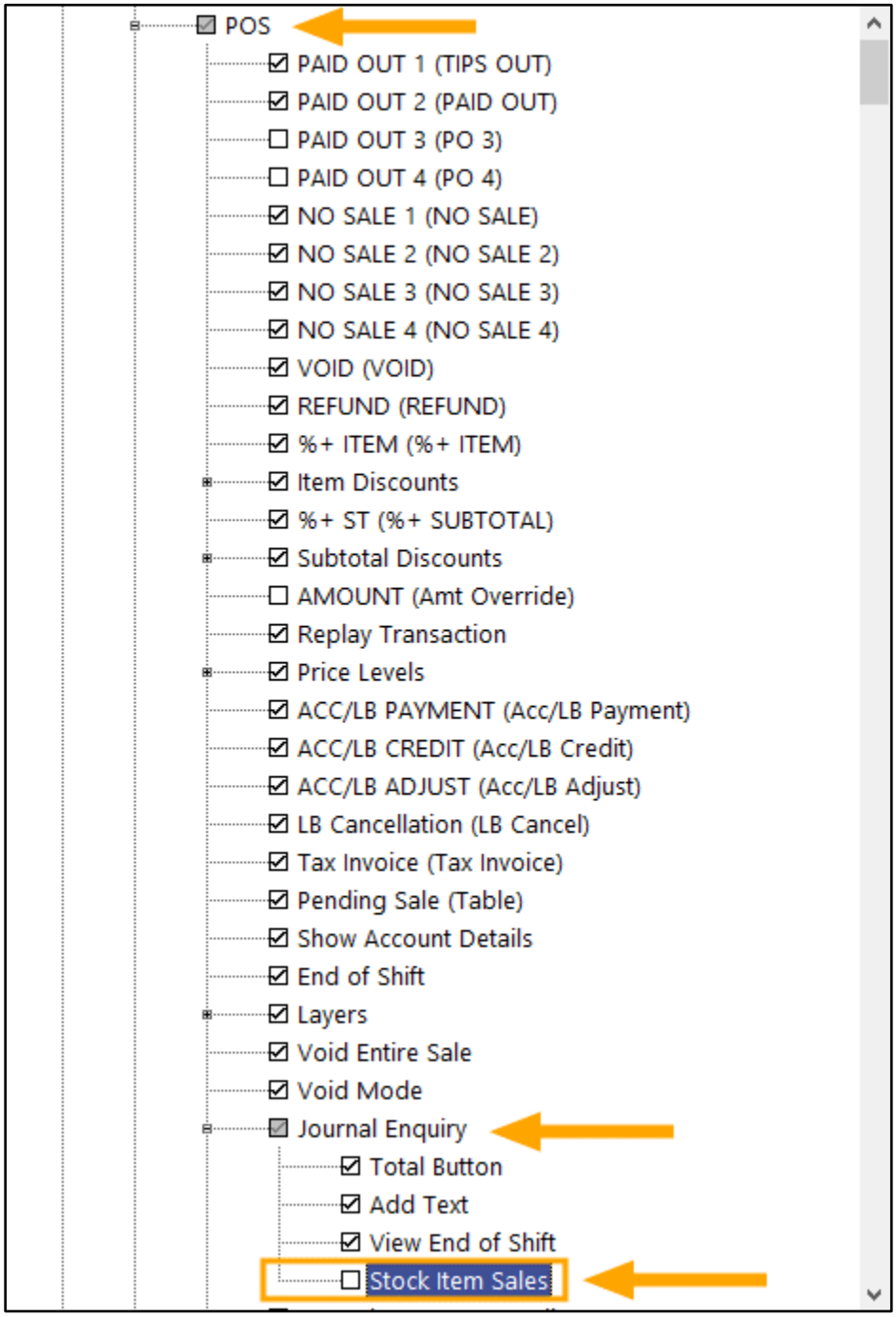
To configure this function for all Clerks that are linked to a particular User, first, you will need to determine which User the Clerks are linked to.

Go to: Setup > Clerks
Each Clerk will be linked to a User and this is determined by the User Link column as shown in the below example.
A User Link can be modified by selecting a Clerk then clicking on the “Modify” button on the bottom-right corner of the screen.



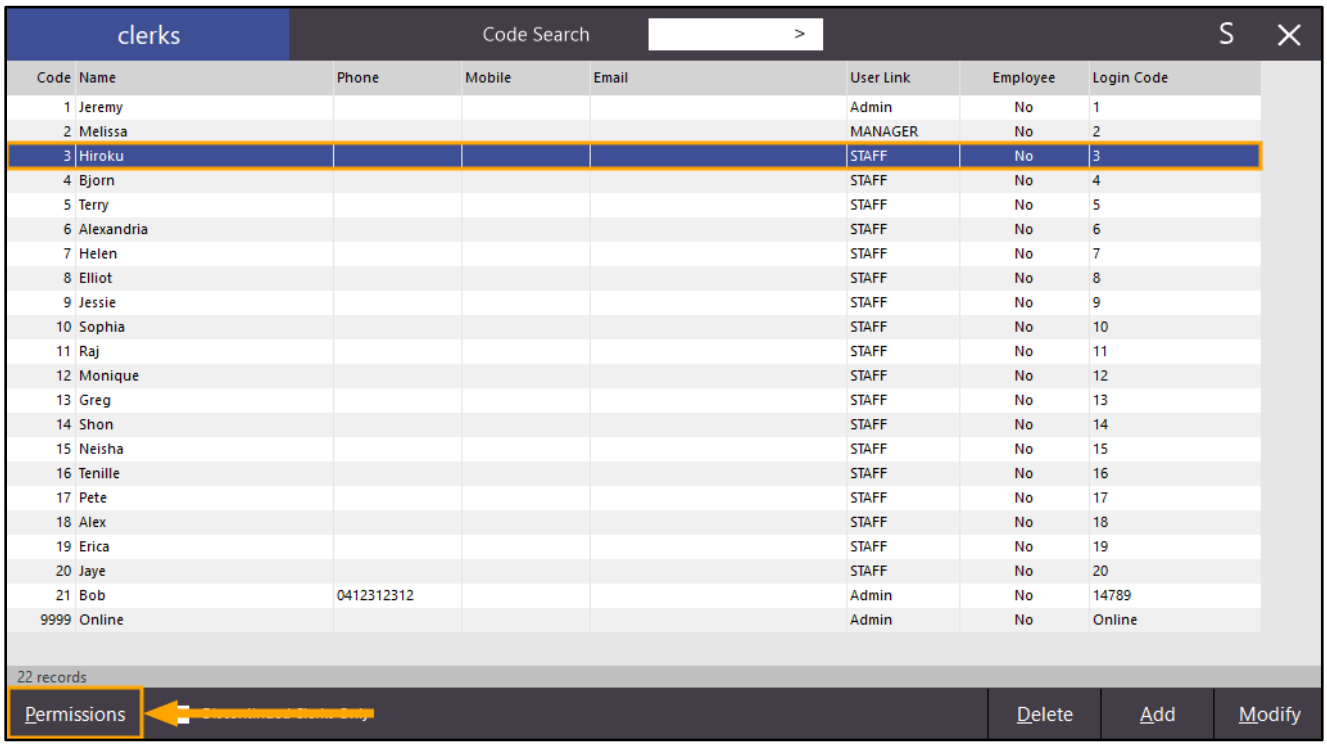


Once you have established which User the Clerks are linked to, go to:
Setup > Users > Select User Name > Modify
Under the POS section, expand Journal Enquiry then uncheck the “Stock Item Sales” option.

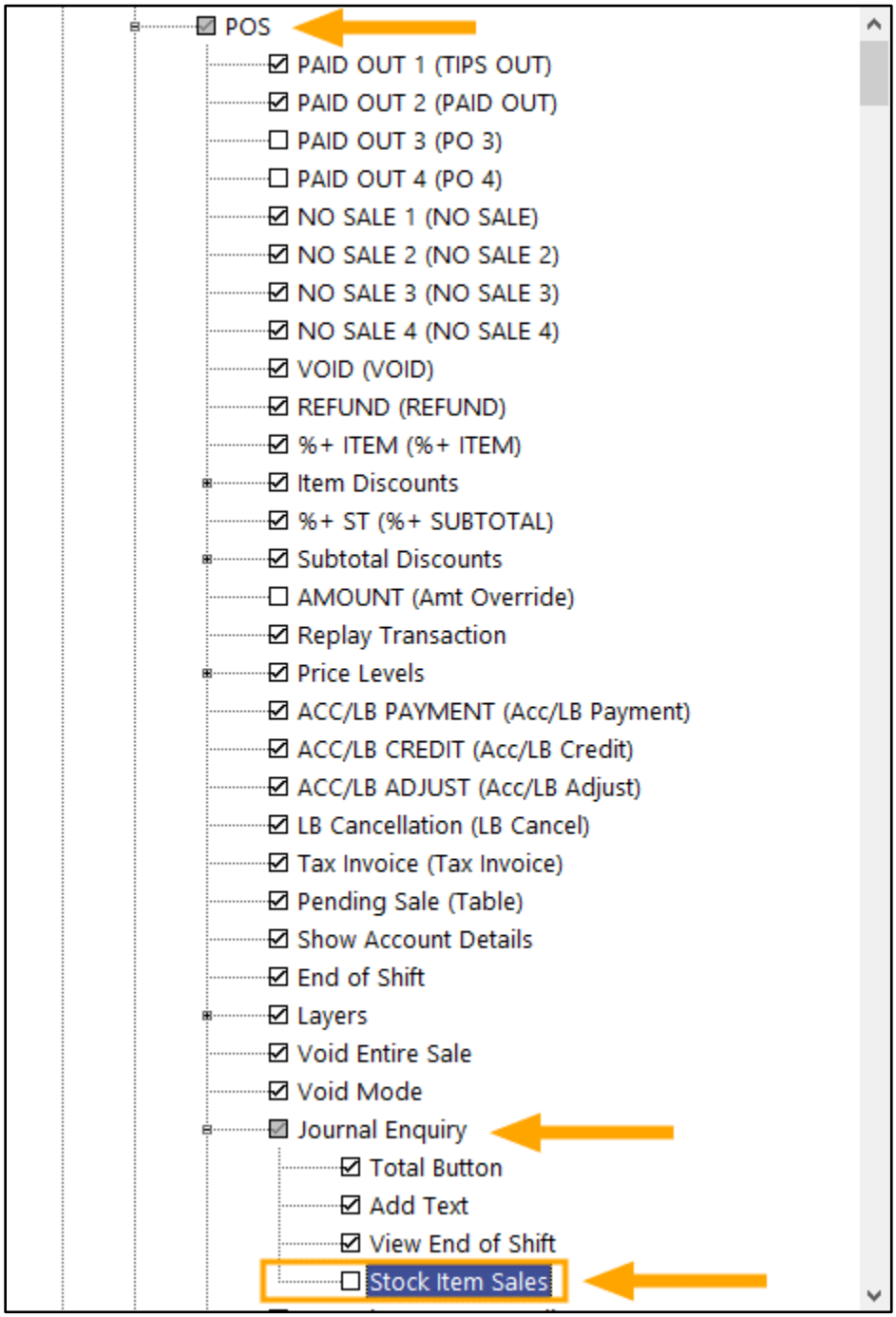


After the change has been made, press the “Save” button on the bottom-right corner of the Users screen.
Close the remaining Users screen.
This function will be disabled for all Clerks that are linked to the above User.

To disable access to this function on a per-Clerk basis, go to:
Setup > Clerks > Select the Clerk > Permissions



Under the POS section, expand Journal Enquiry then uncheck the "Stock Item Sales" option.

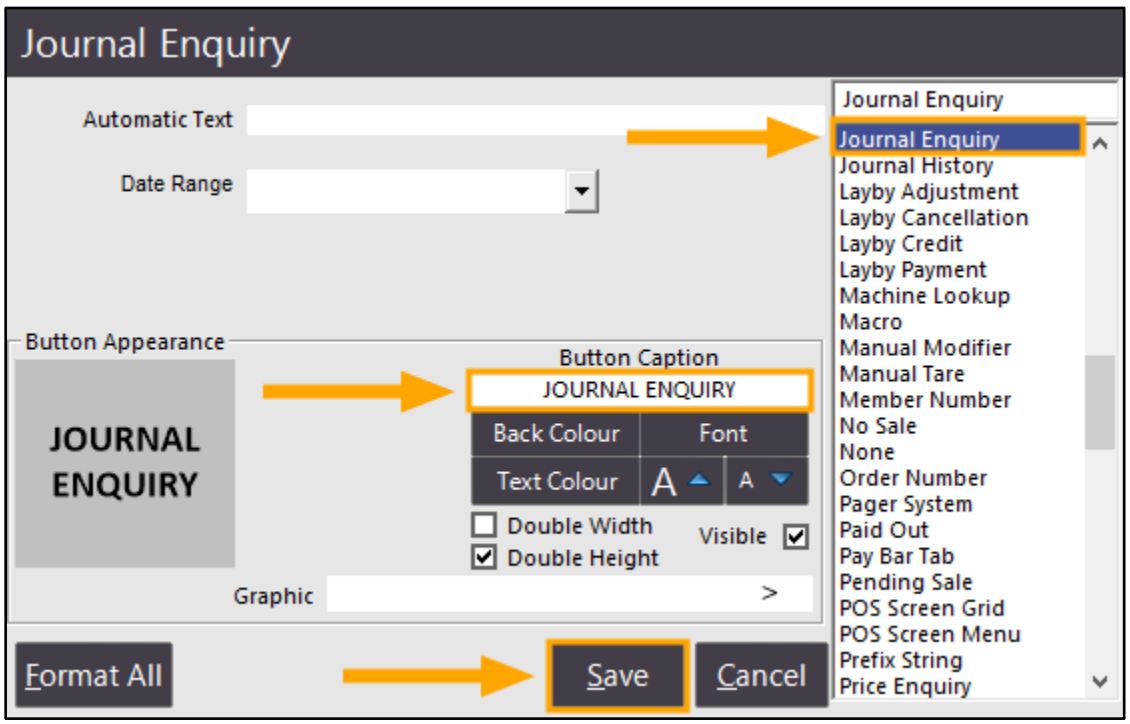


This will disable the function for only the selected Clerk.
Note that the permission which has been assigned to a specific Clerk will override the permission that has been assigned to the User that a Clerk is linked to.
E.g. Clerk "John Smith" is linked to User STAFF.
When access to Stock Item Sales is disabled for Clerk "John Smith" but Stock Item Sales is enabled for STAFF.
Clerk "John Smith" will not have access to the Stock Item Sales function.
Any other Clerks that are linked to the STAFF user will continue to have access to the Stock Item Sales function.

Also note that permissions configured for a User will supersede the permissions that are configured for a Clerk.
E.g. If the Stock Item Sales function is disabled for a User and you try enabling access to this function for a Clerk linked to the User, the Clerk will not have access to the function.

The Stock Item Sales function is accessed via the Journal Enquiry function within the POS screen.
You will need to ensure that you have a Journal Enquiry button on the POS Screen.
To configure this, go to: Setup > POS Screen > POS Screen Setup > Select POS Screen Layout > Buttons

In the Demo Database, this function is listed on the MANAGER tab of the POS Screen, however, you may choose to add it to any desired tab.
Select a tab on the bottom of the POS Screen, then find a blank button and select it.
The Journal Enquiry button is configured as follows:

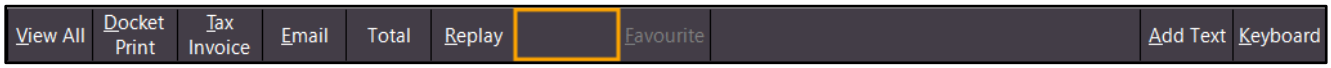


Once you have ensured that a button to the Journal Enquiry function exists, open the POS screen.

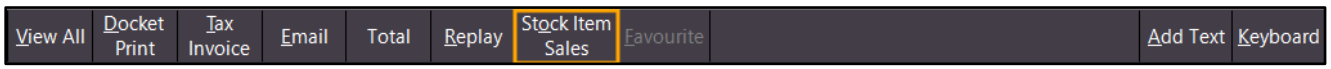
idealpos7 Update History

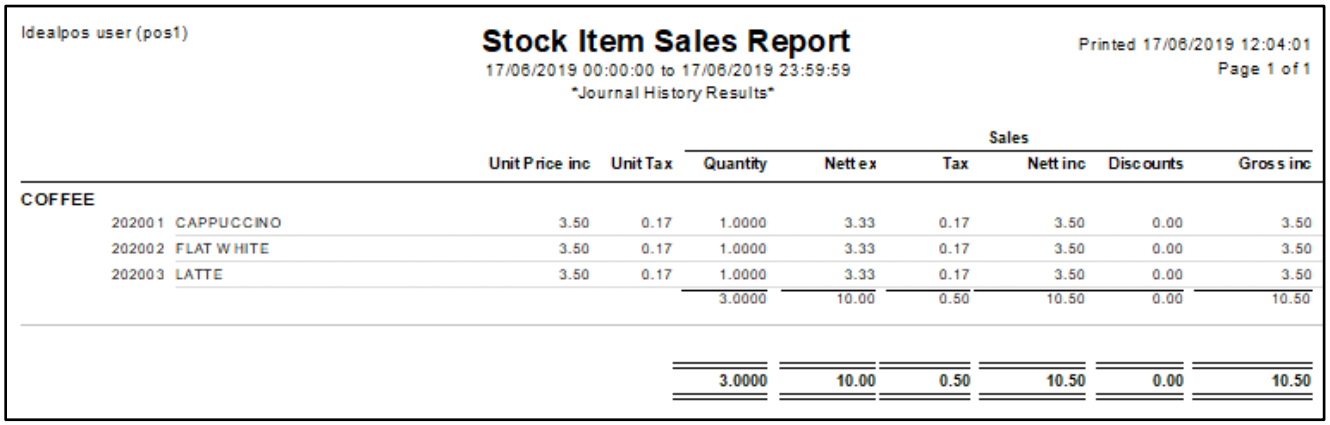
Enter a Clerk ID which does not have access to the Stock Item Sales function, then click on the "Journal Enquiry" button.

The Stock Item Sales button will be hidden from the bottom of the Journal History Enquiry screen.



Close the Journal History Enquiry screen.
Enter a Clerk ID which has access to the Stock Item Sales function, then click on the "Journal History Enquiry" button.
The Stock Item Sales button will be displayed and available.





Idealpos user (pos1)

Stock Item Sales Report

17/06/2019 00:00:00 to 17/06/2019 23:59:59

Journal History Results

Printed 17/06/2019 12:04:01

Page 1 of 1

				Sales					
		Unit Price inc	Unit Tax	Quantity	Nett ex	Tax	Nett inc	Discounts	Gross inc
COFFEE									
202001	CAPPUCCINO	3.50	0.17	1.0000	3.33	0.17	3.50	0.00	3.50
202002	FLAT WHITE	3.50	0.17	1.0000	3.33	0.17	3.50	0.00	3.50
202003	LATTE	3.50	0.17	1.0000	3.33	0.17	3.50	0.00	3.50
				3.0000	10.00	0.50	10.50	0.00	10.50
				3.0000	**10.00**	**0.50**	**10.50**	**0.00**	**10.50**

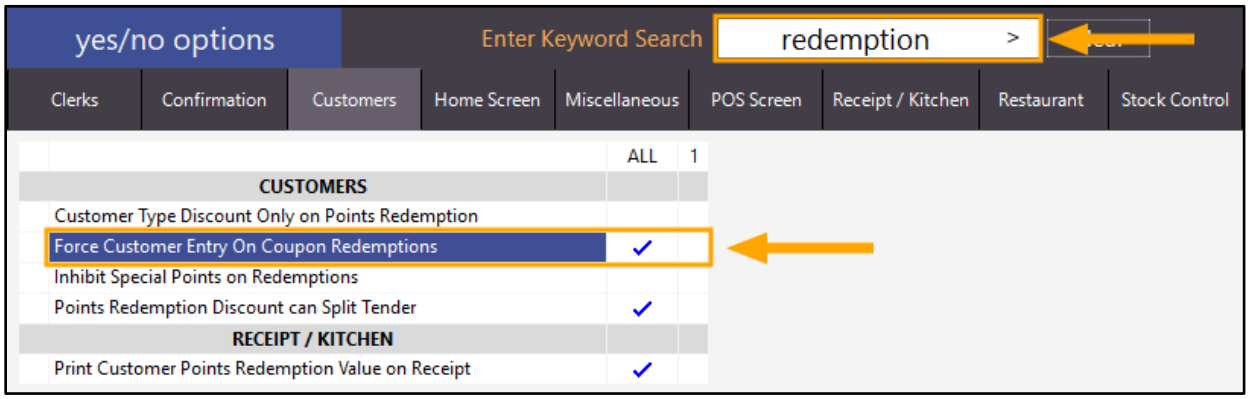
Yes/No Options

Yes/No Option – Force Customer Entry On Coupon Redemptions

When the Yes/No option "Force Customer Entry On Coupon Redemptions" is enabled, Idealpos will check to see if a Customer has been added to the sale when redeeming Coupons. If a Customer has not been added to the sale when redeeming Coupons, it will force the Customer to be added. This function is applicable to both Serialized Tracking Coupons and Print Only Coupons.

For more information about setting up Coupons, please refer to the Coupons Topic in our User Guide - https://userguide.idealpos.com.au/#Coupon Promotions/Coupon Promotions.htm

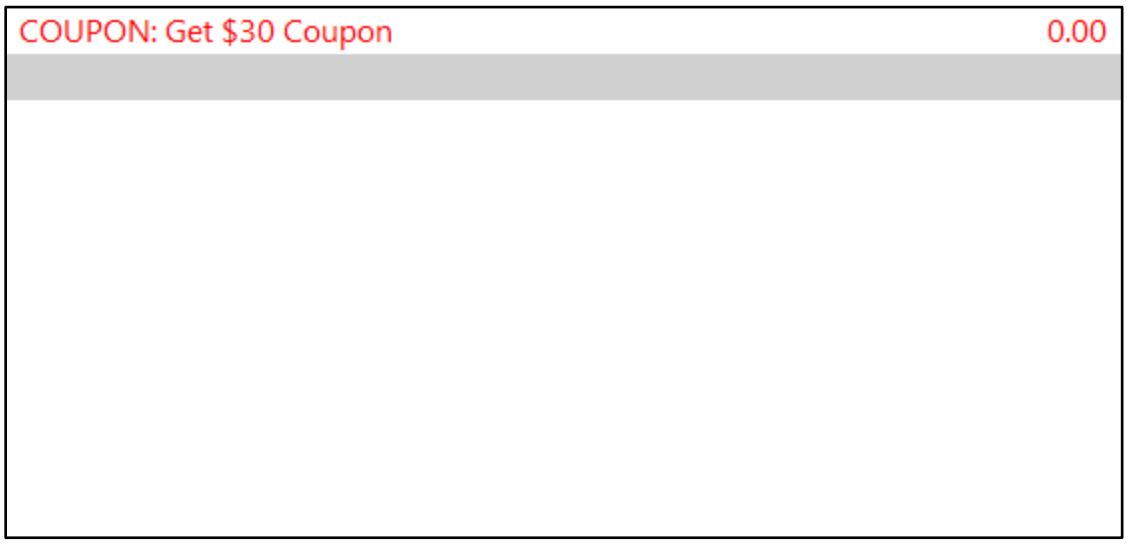
To use this function, go to: Setup > Yes/No Options > In the Enter Keyword Search field, enter "redemption" > Enable "Force Customer Entry On Coupon Redemptions"



Close the Yes/No Options screen, then go to the Idealpos POS screen.

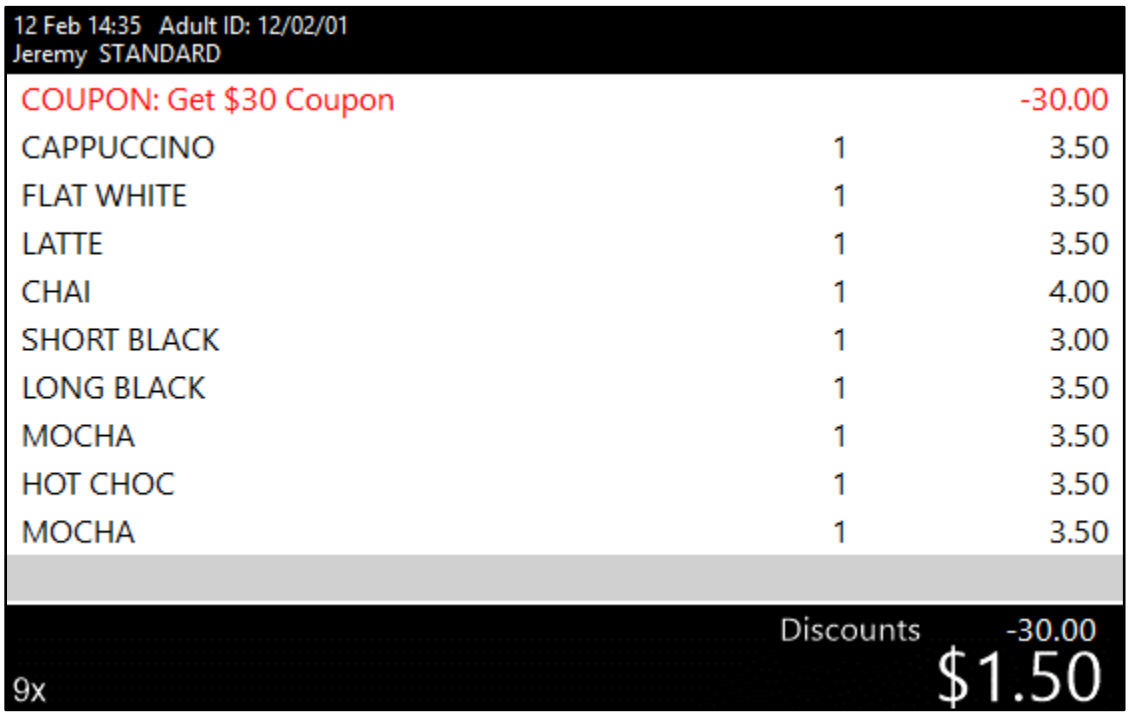
A Coupon can be redeemed at any time during the transaction. This is done by scanning a Serialized Coupon Barcode or entering the Serialized Coupon barcode followed by pressing the Coupon Promotion button on the POS Screen. Alternatively, the Coupon Promo Code can be manually entered from a Print Only Coupon followed by pressing the Coupon Promotion button on the POS Screen to apply the coupon.

After a Coupon is added to the sale, the Idealpos POS screen will show the Coupon description at the top of the sale screen.

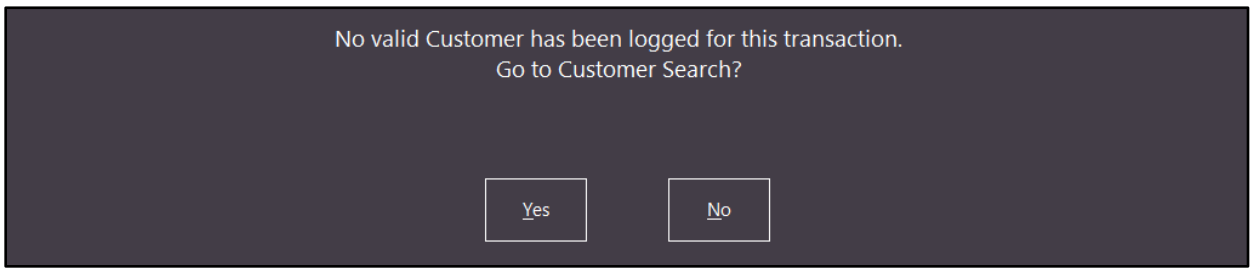


idealpos7 Update History

Add Items to the sale then redeem the coupon. Items will appear in the sale screen and the coupon discount amount will be shown on the sale screen.

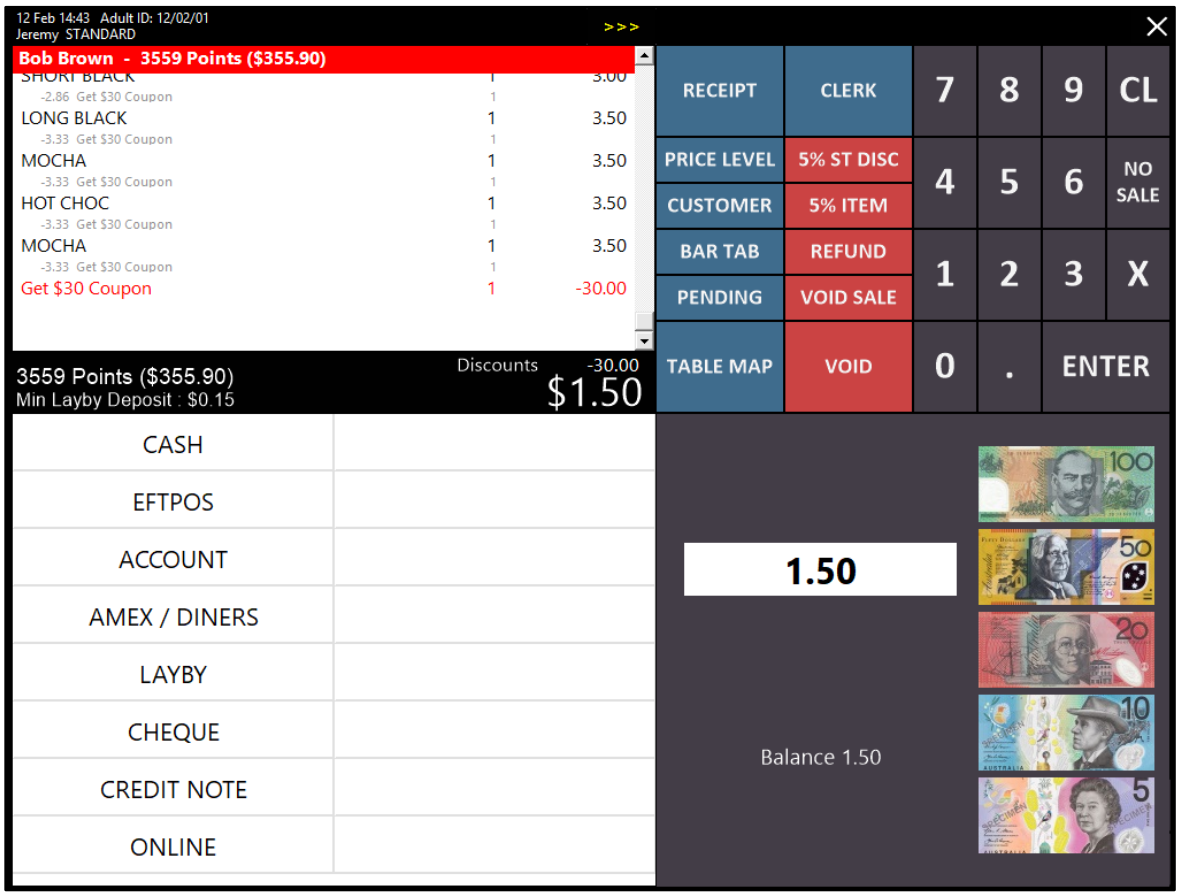


Finally, press the Enter button on the POS screen which would normally take you to the Tender screen. However, as a Customer has not been added to the sale and the Force Customer Entry On Coupon Redemptions Yes/No option is enabled, Idealpos will show the following prompt:



Pressing the "No" button will return to the Sale screen.
Pressing the "Yes" button will take you to the Customer Search screen

Select a Customer from the Customer Search. Idealpos will then display the Tender screen, including the selected Customer. Select a Tender method/amount to finalise the sale.



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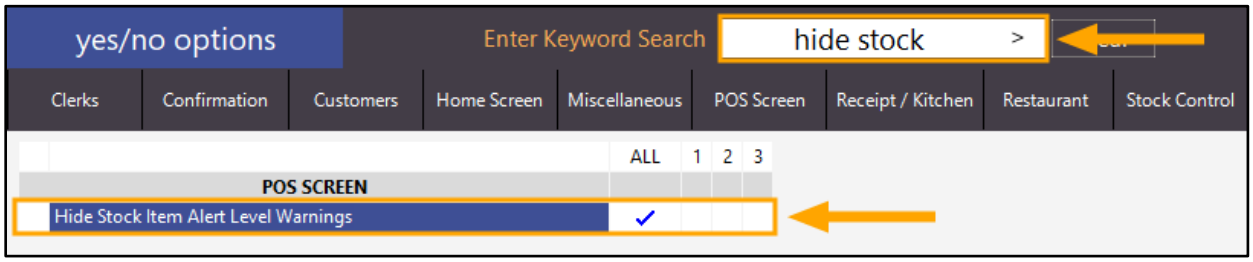
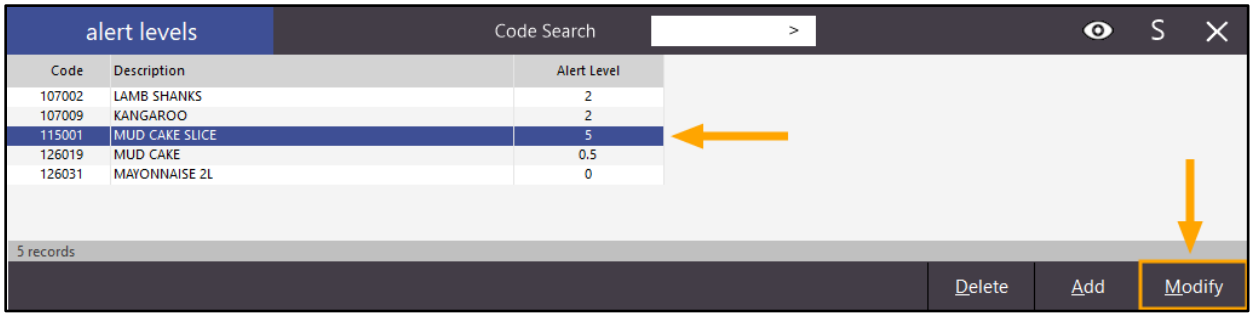
Yes/No Option – Hide Alert Level Warnings

This option will hide the warning that stock item alert levels give when they reach the alert level trigger (and beyond).

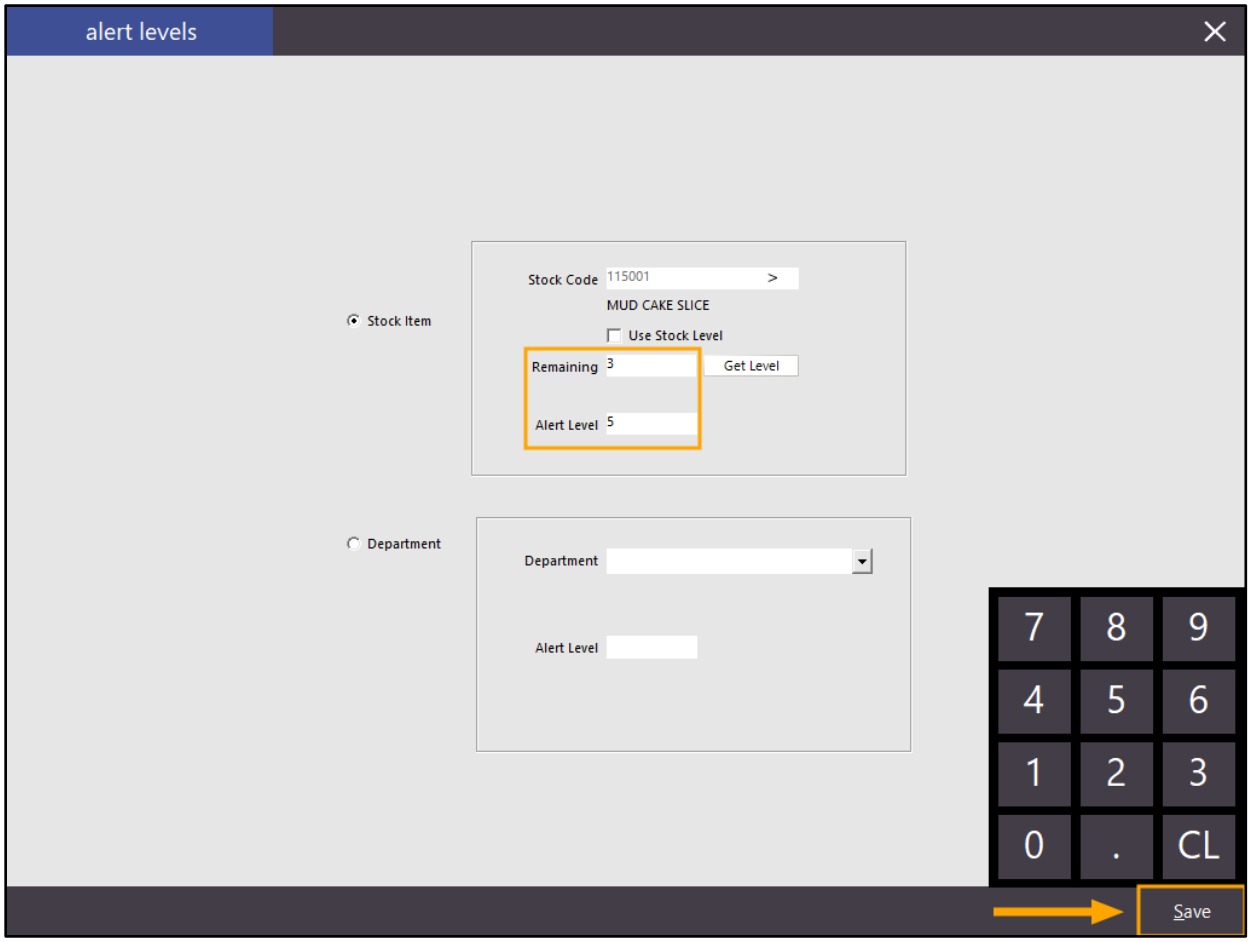
To enable this option, go to: Setup > Yes/No Options > In the "Enter Keyword Search" field, enter "hide stock" > Enable "Hide Stock Item Alert Level Warnings"



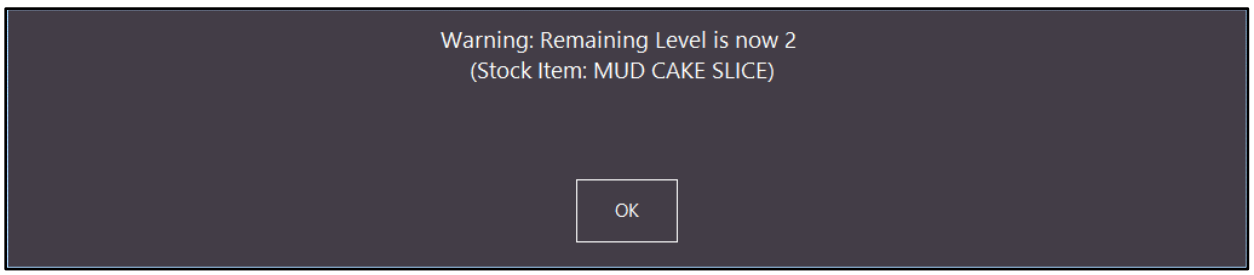
Close the Yes/No options screen to save the change, then go to: File > Sales > Stock Item Alert Levels
Select a Stock Item from the list, then press the "Modify" button on the bottom-right corner of the screen.
Alternatively, you can press the "Add" button on the bottom-right corner to setup a new Alert Level for a Stock Item.



Ensure that the amount entered in the Remaining field is less than or lower than the amount entered in the Alert Level field. You may also want to take note of the Stock Code, then press the "Save" button on the bottom-right corner of the screen.



Go to the POS screen and add the Stock Item to the sale by entering the Stock Code or pressing the Stock Item button on the POS screen. The Stock Item will be added to the sale and the Alert Level Warning will not be displayed as per the Yes/No Option which has been enabled.
Should you wish to show the Alert Level, disable the Yes/No Option "Hide Stock Item Alert Level Warnings".
When the Yes/No option is disabled and an Alert Level Warning is triggered, it will appear similar to the below example and will be reflective of the Remaining Level and the Stock Item that triggered the alert level warning.



For more detailed information about Alert Levels, please refer to the Alert Levels topic in the Idealpos User Guide.

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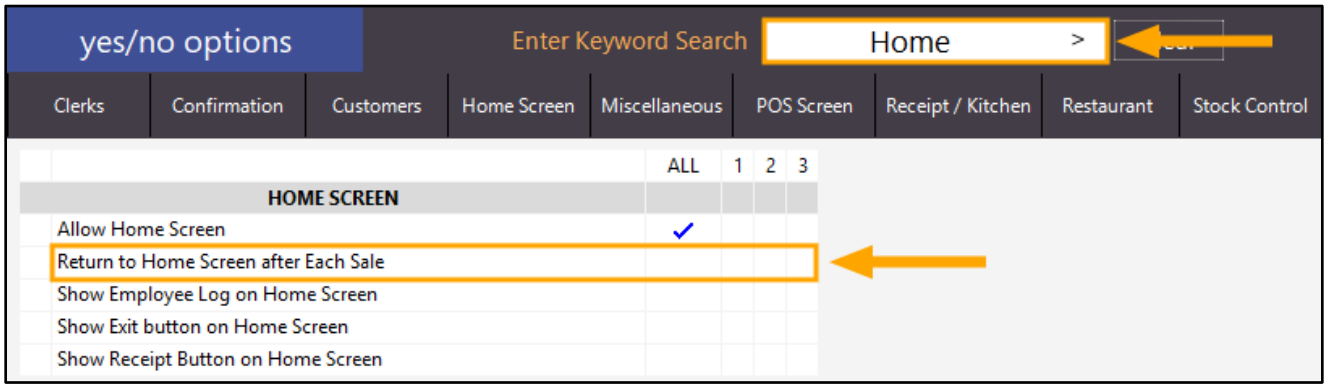
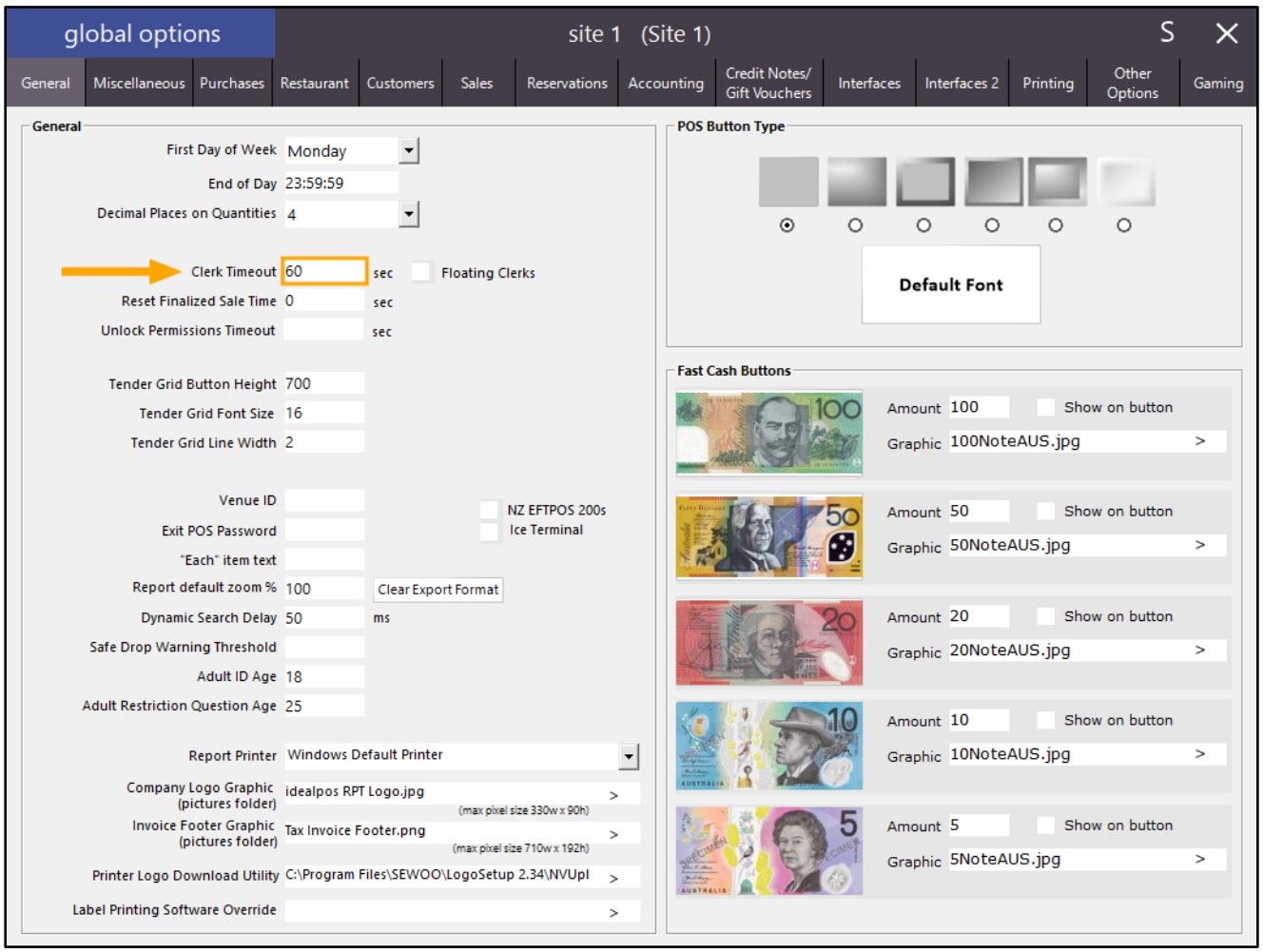
Yes/No Option – Inhibit returning to Home Screen after each sale

This function adds the ability to control whether the Home Screen will be displayed after each sale.
This may be useful in environments where a Clerk needs to stay signed in when serving multiple customers, but after they walk away, the terminal should return to the Home Screen after a pre-set delay.

To configure this function, go to:
Setup > Yes/No Options > Enter "Home" in the Keyword Search
Ensure that "Allow Home Screen" is enabled
Then either enable or disable the setting "Return to Home Screen after Each Sale"
If Return to Home Screen after each sale is enabled, the Home Screen will be shown after each sale is completed.
If Return to Home Screen after each sale is disabled, the Home Screen will not be shown after each sale is completed.



If you disable the option “Return to Home Screen after Each Sale”, you have the option to configure a Clerk Timeout where Idealpos will automatically display the Home Screen after a period of inactivity (note that this will only occur if there are no items added to a sale and the POS screen is left to idle).
To configure this, ensure that “Return to Home Screen after Each Sale” and “Compulsory Clerk” are both unchecked in the Yes/No options, then close the Yes/No options and go to:
Setup > Global Options > General > Clerk Timeout
Enter the desired timeout in seconds. Setting the Clerk Timeout as 0 will result in no timeout.
The below example shows a timeout of 60 seconds (1 minute).
Close the Global Options window to save changes.



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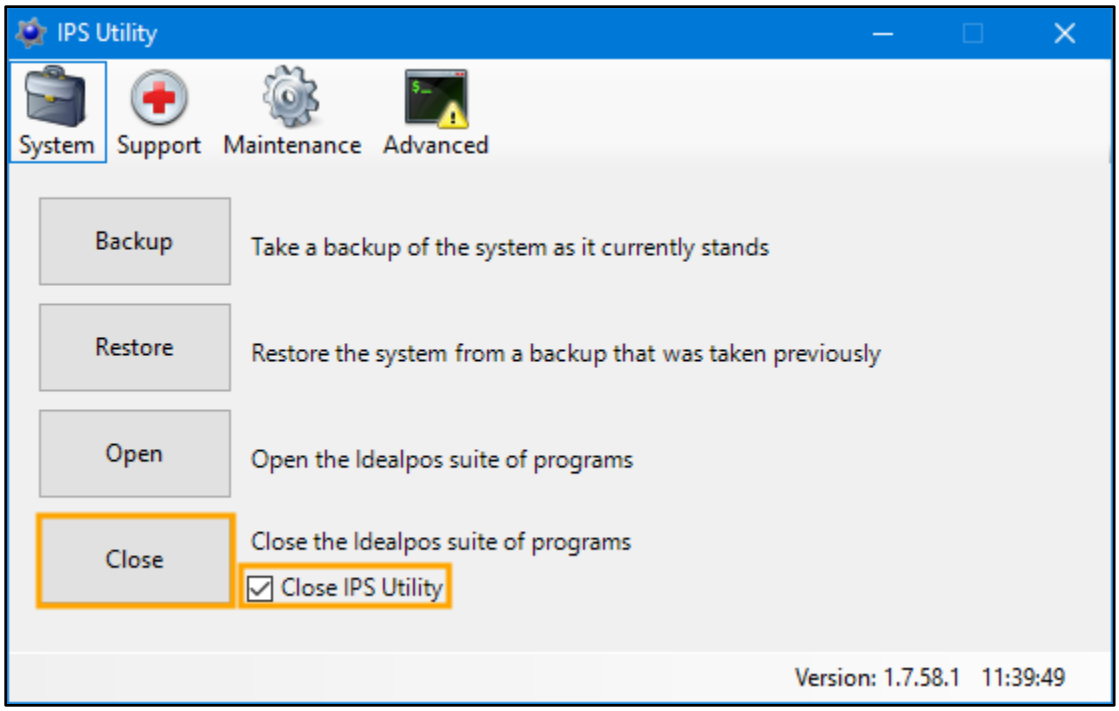
In order for these changes to apply, Idealpos will need to be restarted.
Open IPSUtils (open the Windows Start Menu and search for IPSUtils), tick the option “Close IPS Utility” then press the “Close” button within the IPS Utility.



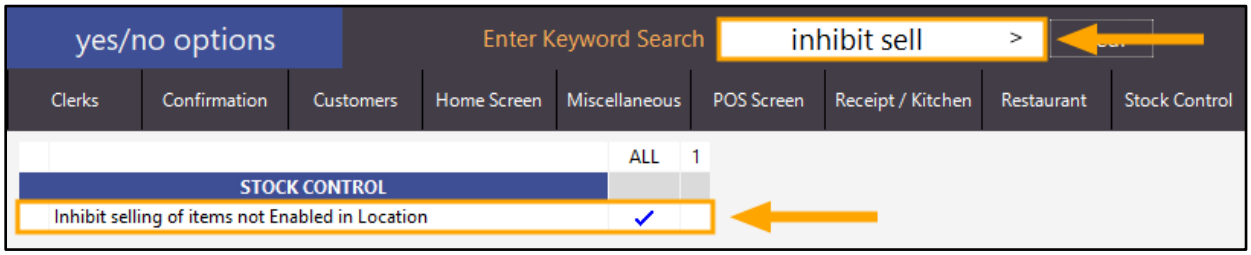
Once Idealpos has closed, you may start Idealpos again and the changes will now take effect.
From the Home Screen, enter a Clerk ID or select a Clerk Image to login to Idealpos.
Add items to a sale, then finalise the sale by taking payment.

If the “Return to Home Screen after Each Sale” option is disabled, the sale screen will appear after completing a sale.
If you configured a Clerk Timeout other than 0, the POS will automatically display the Home Screen when there are no items added to the sale and the timeout period lapses.
If the Return to Home Screen after Each Sale option is enabled, the Home Screen will appear after completing a sale.

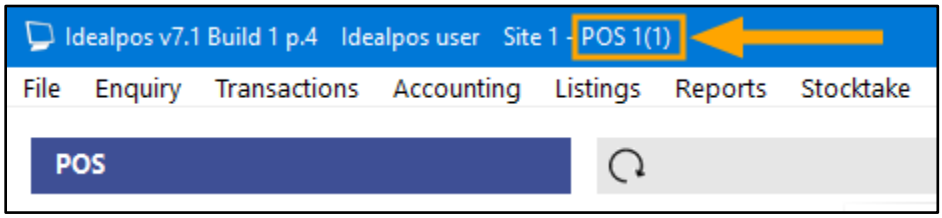
Yes/No Option – Inhibit selling of items not Enabled in Location

This function will restrict the user from selling an item that is not enabled in the current location.
When the user attempts to sell an item that is not enabled in the current location, a prompt will be displayed and the item will not be added to the sale. This function may be useful in cases where a Location within a venue is not permitted to sell restricted items such as Alcohol or Tobacco, but other locations at the venue are allowed.

To use this function, go to: Setup > Yes/No Options > In the Enter Keyword Search field, enter "inhibit sell"

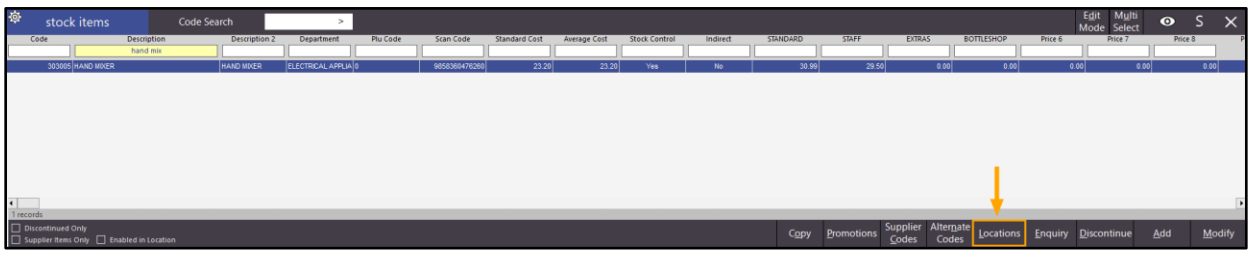


Close the Yes/No options screen.
Your POS Terminal Description and POS Terminal Code is displayed at the top of the Idealpos screen:

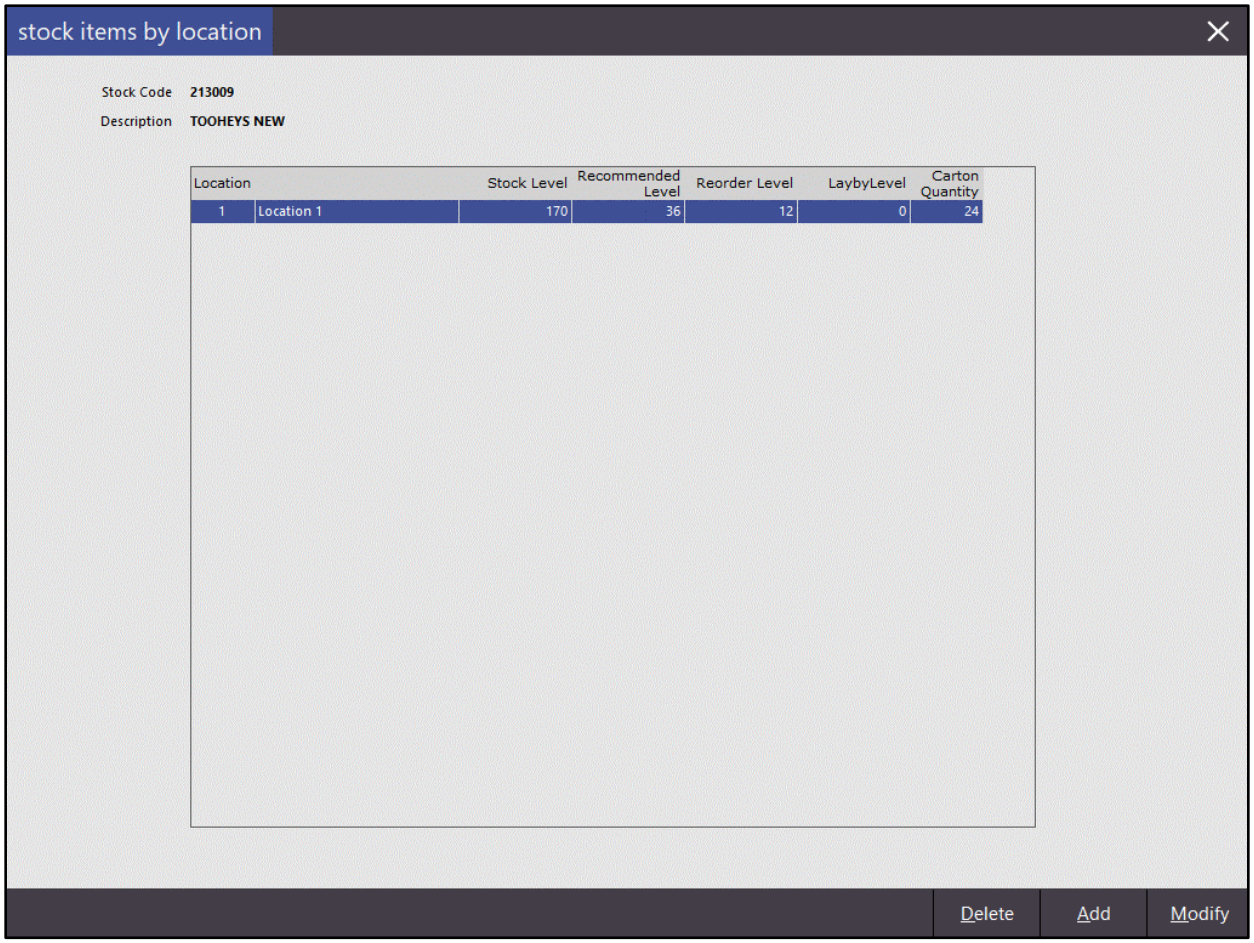


Once you have determined the POS Terminal Description and POS Terminal Code, go to:
Setup > POS Terminals > Locate your POS terminal in the list
The POS Terminal Location is displayed in the Location column:

Close the POS Terminals screen, then go to: File > Stock Control > Stock Items
Search for a Stock Item that is not enabled in the current location which your POS terminal is located.
To view the list of Locations that a Stock Item is enabled in, search and select the Stock Item so that it is highlighted, then press the "Locations" button at the bottom-right corner of the Stock Items screen.



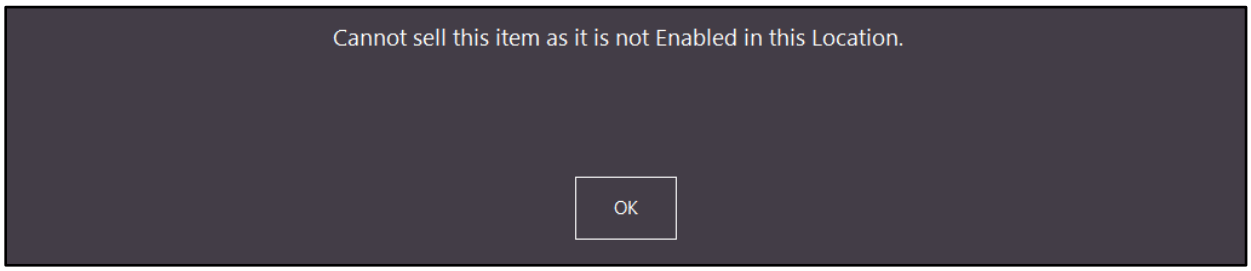
A list of Locations which the Stock Item is enabled at will be displayed:



If you want to disable the item in a Location, it needs to be removed from that Location by selecting the Location and pressing the "Delete" button. Note that the Stock Location entry also contains Stock Level data that is associated with it. It is only possible to delete a Location from a Stock Item if the Stock Item's Stock Level is zero, otherwise Idealpos will display a prompt and prevent you from deleting the Location. Therefore, the existing Stock Levels in a Location will need to be transferred to another Location. Please use caution when transferring Stock between Locations and modifying Stock Item Locations, and take note of the Stock Levels of any item that you are modifying.
For more information about transferring Stock Levels between Locations, please refer to Stock Transfers in the Idealpos User Guide here - https://userguide.idealpos.com.au/#Stock Transfers/Stock Transfers.htm

Once you have either identified a Stock Item that is not available or moved a Stock Level to another Location and removed the current Location from a Stock Item, go to the POS screen.

When selling a Stock Item that is not enabled in the Current Location, Idealpos will display the below prompt:

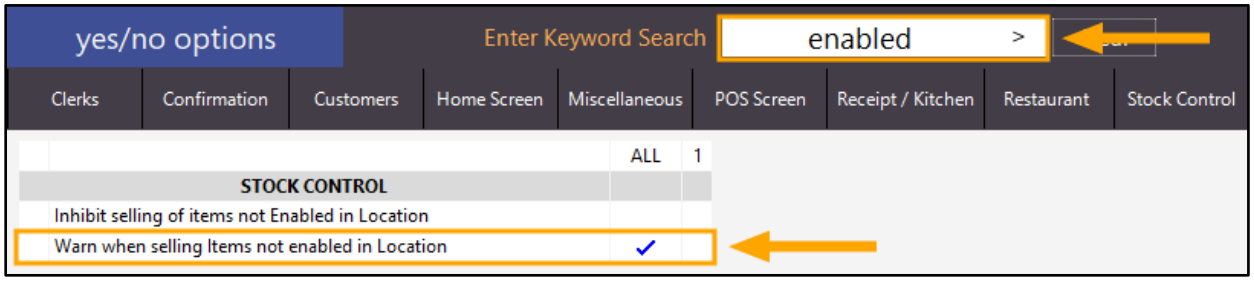


This will prevent the sale of the Stock Item in the current Location.

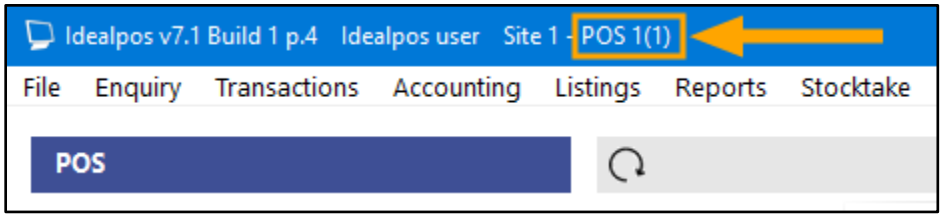
Yes/No Option – Warn when selling Items not enabled in Location

This function adds the ability to enable a warning when selling items that are not enabled in the current Location. When a Stock Item is not enabled in the current location and the operator tries to sell the item by either scanning the Stock Item barcode, entering the Stock Item Code or pressing the Stock Item button on the POS screen, Idealpos will display a warning that the item is not enabled in the location and will ask the operator if they are sure they want to add the item to the sale. The operator will then have the option to press "Yes" to add the item to the sale, or they can press "No" to cancel adding the item to the sale. If the operator chooses to add the item to the sale, the item will be enabled in the location only after the sale is finalised; this means if the item is added multiple times to the sale, the prompt will be displayed each time the item is added, however, the prompt will not appear in any future transactions which the item is sold. In the event that the operator chooses to add the item to the sale but they then void the entire sale or void the item from the sale, the item will not be enabled in the location.

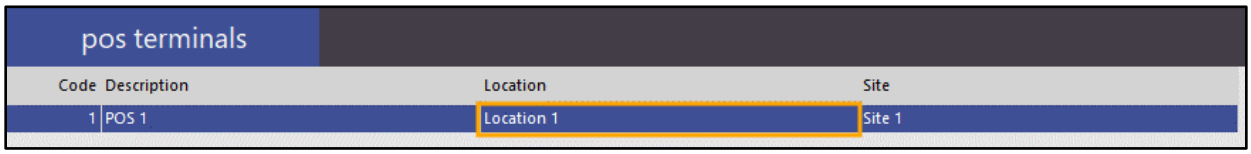
To use this function, go to: Setup > Yes/No Options > In the Enter Keyword Search field, enter "enabled" > Enable "Warn when selling Items not enabled in Location"



Close the Yes/No options screen.
Your POS Terminal Description and POS Terminal Code is displayed at the top of the Idealpos screen:



Once you have determined the POS Terminal Description and POS Terminal Code, go to:
Setup > POS Terminals > Locate your POS terminal in the list
The POS Terminal Location is displayed in the Location column:



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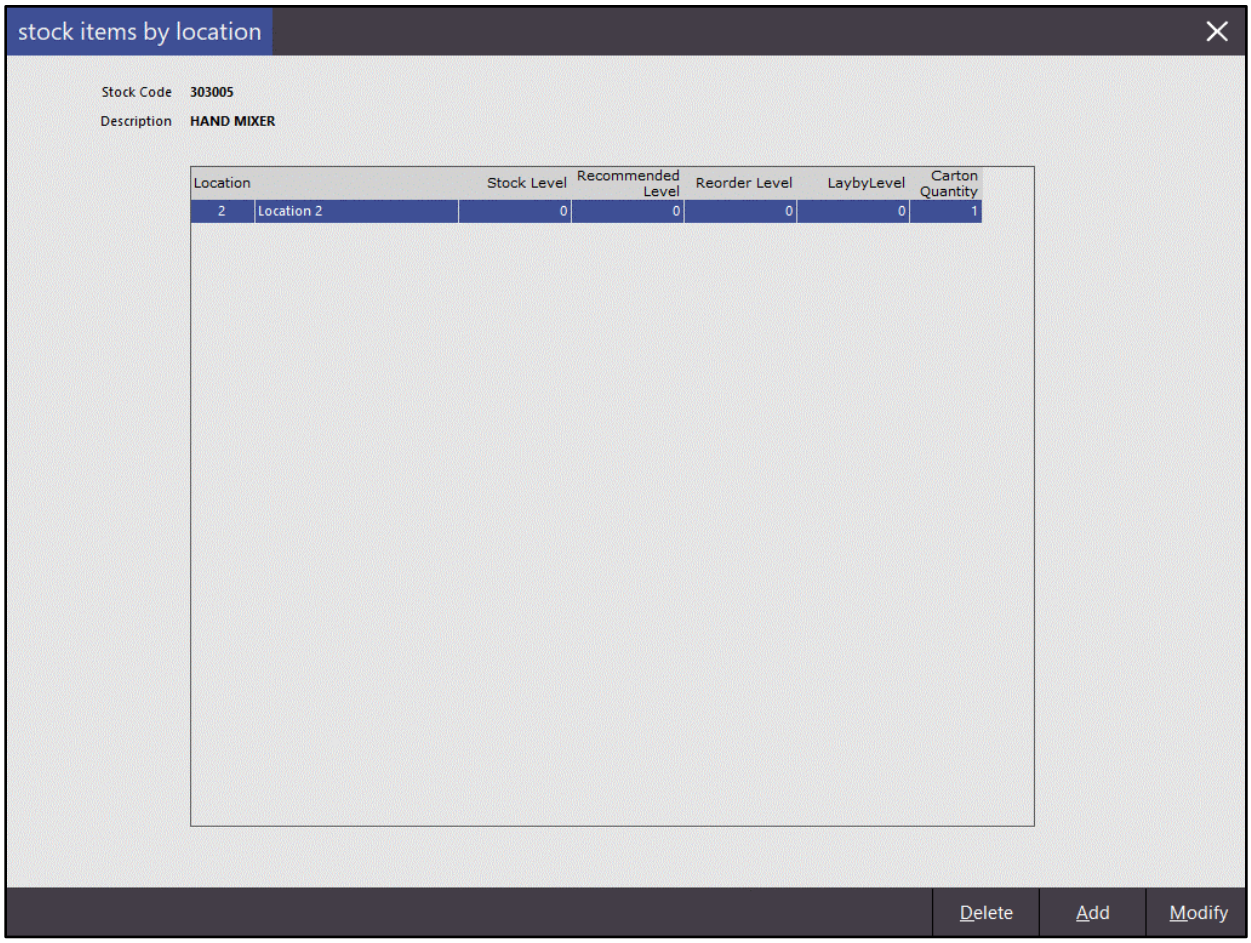
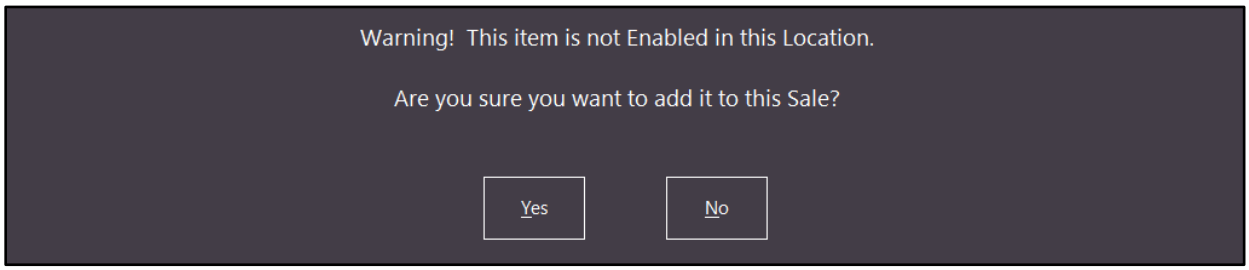
Close the POS Terminals screen, then go to: File > Stock Control > Stock Items
Search for a Stock Item that is not enabled in the current location which your POS terminal is located.
To view the list of Locations that a Stock Item is enabled in, search and select the Stock Item so that it is highlighted, then press the “Locations” button at the bottom-right corner of the Stock Items screen.

A list of Locations which the Stock Item is enabled at will be displayed:



When selling the item via the POS Screen (pressing the Stock Item button or entering the Stock Item Code and pressing Enter), the following prompt will be displayed > Press “Yes” to add the item to the sale or press “No” to cancel:



After pressing “Yes”, the item is added to the sale.

Press the “Enter” button to go to the tender screen > Select a tender amount/option to finalise the sale. Idealpos will then enable the item in the current location.

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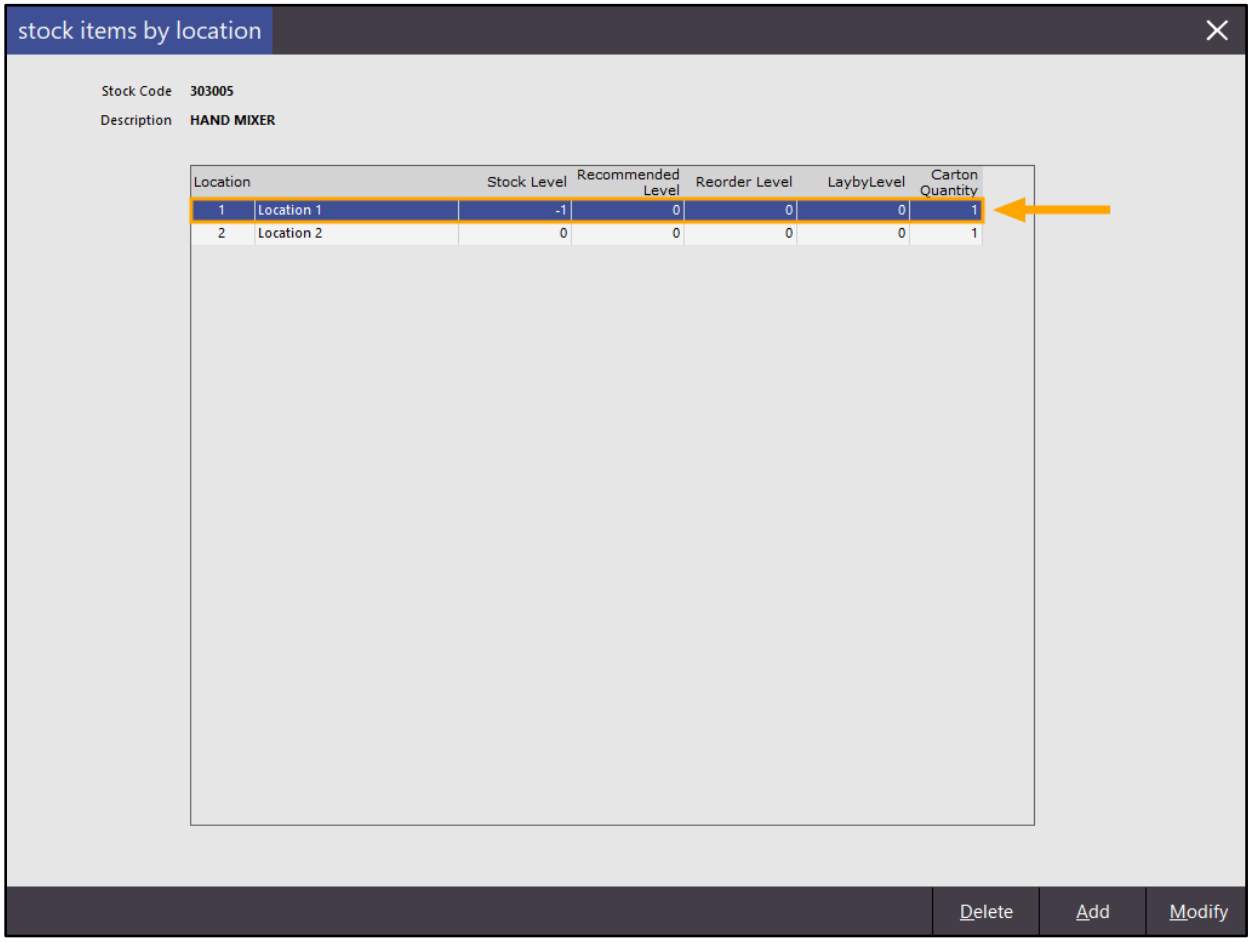
Go to File > Stock Control > Stock Items > Search for the Stock Item > Select Item > Press Locations button
The item is now enabled in the current Location:



When adding the item to a sale in the POS screen, the Warning prompt is no longer displayed for the item as the item is now enabled in the current location.