

Build

Update Details:

** Enhancements

- * [IP-145] - POS Screen setup - allow stock item buttons to link directly to Grids
- * [IP-165] - PC-EFTPOS Aus - Support for MOTO transactions
- * [IP-175] - Promotions screen - filter by Expiry Date
- * [IP-192] - Paymenttree Eftpos support for Pinpad Surcharge
- * [IP-193] - Stock Item Sales Report - Gross Amount and Discount fields added
- * [IP-201] - Export 'Tare' value for items that are marked as scale
- * [IP-203] - Option to Exclude Barcodes during POS Screen Button Programming
- * [IP-205] - Emailed Customer Invoices include Invoice number in the Filename
- * [IP-210] - Open Stock Item - option to get Description before the Price
- * [IP-211] - Yes/No Option - New Customers require entry of Email address
- * [IP-216] - Stock Valuation Report - support for Attribute Grouping and Filtering
- * [IP-217] - Stocktake Forms - ability to Group by Attribute
- * [IP-219] - Stock Item Sales - support for Multiple Attributes in Selection Criteria
- * [IP-223] - Ability to create Shortcut to Clerks Add/Modify screen
- * [IP-226] - Stock Item Filter numeric fields support Greater/Less Than (<>) symbols
- * [IP-228] - Yes/No Option - Fast Customer Modify can modify Credit Limit
- * [IP-229] - Customer Type Macro functionality
- * [IP-230] - Clipp Discounts can be linked to Promotion Reports
- * [IP-239] - Export Stock Items supports Stock Level Total for All Locations
- * [IP-243] - Export Stock Items supports Department Description and Supplier Name
- * [IP-249] - Gift Voucher Redemptions Report can be Grouped by POS
- * [IP-252] - Grid Link removed from Grid "None" function
- * [IP-255] - Description2 field displays next to Description field in Stock Item List
- * [IP-256] - Grid File Data available on Grids, Functions, Table Maps and Users screens
- * [IP-258] - Modified Handshaking between POS and Handhelds
- * [IP-266] - Customer Name and Type on POS Screen - small font is blurry
- * [IP-282] - Dynamic Search Delay support for Stock Item field search fields
- * [IP-283] - Customer Account Transactions Report - Grouped by Location
- * [IP-285] - Financial Summary Report - added Tender Banking figures

Reports

Stock Item Sales Report - Gross Amount and Discount fields added

This report now includes additional fields for each item to show more information.

Idealpos user (pos1)		Stock Item Sales Report										Printed 07/07/2016 14:24:31			
		07 Jul 2016 00:00:00 to 07 Jul 2016 23:59:59										Page 1 of 1			
		Sales										Cost of Sales		Gross Profit	
	Unit Price inc	Unit Tax	Quantity	Nett ex	Tax	Nett inc	Discounts	Gross inc	%	Amount	%	Amount	%		
SOFTDRINK															
332	Coke	2.50	0.23	4.0000	9.09	0.91	10.00	0.00	10.00	4.56	4.72	51.92	4.37	48.08	
333	Diet Coke	2.50	0.23	3.0000	6.59	0.66	7.25	0.25	7.50	3.30	3.54	53.71	3.05	46.29	
336	Fanta	2.50	0.23	7.0000	15.91	1.59	17.50	0.00	17.50	7.98	0.00	0.00	15.91	100.00	
				14.0000	31.59	3.16	34.75	0.25	35.00	15.84	8.26	26.15	23.33	73.85	
SALADS															
1336	Caesar Salad w Smoked Salmon	12.91	1.18	4.0000	46.94	4.70	51.64	7.96	59.60	23.54	0.00	0.00	46.94	100.00	
				4.0000	46.94	4.70	51.64	7.96	59.60	23.54	0.00	0.00	46.94	100.00	
PIZZA															
1342	Supreme Pizza	19.00	1.73	2.0000	34.55	3.45	38.00	0.00	38.00	17.32	0.00	0.00	34.55	100.00	
1343	Salmon Pizza	19.00	1.73	1.0000	17.27	1.73	19.00	0.00	19.00	8.66	0.00	0.00	17.27	100.00	
1344	Chicken Avo Pizza	19.00	1.73	4.0000	69.09	6.91	76.00	0.00	76.00	34.64	0.00	0.00	69.09	100.00	
				7.0000	120.91	12.09	133.00	0.00	133.00	60.62	0.00	0.00	120.91	100.00	
				<u>25.0000</u>	<u>199.44</u>	<u>19.95</u>	<u>219.39</u>	<u>8.21</u>	<u>227.60</u>		<u>8.26</u>	<u>4.14</u>	<u>191.18</u>	<u>95.86</u>	

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Gift Voucher Redemptions Report can be Grouped by POS

This feature allows you to group only Gift Voucher Redemptions by POS terminal.

Go to Reports > Sales > Gift Voucher Report > Gift Voucher Redemptions > Tick: Group by POS.

Report Type	
<input type="radio"/> GIFT VOUCHER	<input checked="" type="radio"/> GIFT VOUCHER Redemptions
	<input checked="" type="checkbox"/> Group by POS

Idealpos user (pos1)	GIFT VOUCHER Redemptions Report						Printed 13/07/2016 10:29:05	
	All Dates						Page 1 of 1	
Purchase Date	Audit	Code	Name	Voucher Amount	Balance	Redemption Date	Redemption Amount	
<u>POS 1 : POS TERMINAL 1</u>								
<u>Type 1 : Gift Voucher Type 1</u>								
12/07/2016 11:32:38	43-1	9843529260231	Frank	35.00	0.70	12/07/2016 11:33:51	21.50	
12/07/2016 11:32:09	44-1	9881921208235	Test	50.00	30.10	12/07/2016 11:37:15	2.50	
<u>POS 2 : POS 2</u>								
<u>Type 1 : Gift Voucher Type 1</u>								
12/07/2016 11:32:38	4-2	9843529260231	Frank	35.00	0.70	12/07/2016 11:35:22	12.80	
12/07/2016 11:32:09	3-2	9881921208235	Test	50.00	30.10	12/07/2016 11:32:54	14.90	
						12/07/2016 11:37:29	2.50	

Stock Item Sales - support for Multiple Attributes in Selection Criteria

There is a new field on the Stock Item Sales Report which allows you to filter the report to include or exclude Attributes.

Go to Reports > Sales > Stock Item Sales Report > Selection Range > Attributes.

Selection Range

Price Level

Code > to >

Description > to >

Supplier > to >

Department >

Location >

POS System >

Attributes +

Show Exclude

Select the Attribute Type and the corresponding Attribute and press the + to add them to the report. The Attribute will be added to the box below, and you can select more.

Attributes +

Show Exclude

Attributes +

Show Exclude

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Select on the left to Show or Exclude these attributes from the report and press View.

Idealpos user (pos1)		Stock Item Sales Report				Printed 13/07/2016 12:08:43			
		11 Jul 2016 00:00:00 to 13 Jul 2016 23:59:59				Page 1 of 1			
		Cartons,Kegs,Grenache							
		Unit Price inc	Unit Tax	Quantity	Nett ex	Tax	Nett inc	Discounts	Gross inc
KEG BEER									
1	CARLTON MID KEG	0.00	0.00	1.0000	0.00	0.00	0.00	0.00	0.00
5	BECKS KEG	16.67	1.52	6.0000	90.91	9.09	100.00	2,000.00	2,100.00
				7.0000	90.91	9.09	100.00	2,000.00	2,100.00
PACKAGED BEER									
61	BECKS 375ML	2.00	0.18	2.0000	6.78	0.68	7.46	4.54	12.00
64	CARBINE STOUT 375ML	2.00	0.18	3.0000	5.45	0.55	6.00	4.20	10.20
67	CARLTON COLD 375ML	2.00	0.18	2.0000	3.64	0.36	4.00	6.00	10.00
70	CARLTON MIDSTRENGTH 375ML	2.00	0.18	1.0000	1.82	0.18	2.00	1.00	3.00
				8.0000	17.69	1.77	19.46	15.74	35.20
GRENACHE & BLENDS									
590	La Curio Reserve Grenache 2003	49.40	4.49	3.0000	134.73	13.47	148.20	22.80	171.00
591	Old Station Grenache 2000	28.80	2.62	7.0000	183.27	18.33	201.60	50.40	252.00
				10.0000	318.00	31.80	349.80	73.20	423.00
				<u>25.0000</u>	<u>426.60</u>	<u>42.66</u>	<u>469.26</u>	<u>2,088.94</u>	<u>2,558.20</u>

Stock Valuation Report - support for Attribute Grouping and Filtering

There is a new field on the Stock Valuation report which allows you to filter the report to include or exclude Attributes.

Go to Reports > Stock Control > Stock Valuation > Selection Range > Attributes.

Selection Range

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

Attributes +

Show X

Exclude

Select the Attribute Type and the corresponding Attribute and press the + to add them to the report. The Attribute will be added to the box below, and you can select more.

Attributes Beer Supplied Type Cartons +

Show Cartons X

Exclude

Attributes Red Wine Grenache +

Show Cartons, Kegs, Grenache X

Exclude

Only the items linked to the attributes will display, or be excluded.

Idealpos user (pos1) Printed 14/07/2016 15:02:40

Stock Valuation Report Page 1 of 1

Code	Description	Stock Level	L/B Level	Avg Cost	Stock Value
<u>PACKAGED BEER (2)</u>					
61	BECKS 375ML	-3.0000	0.0000	1.60	-4.80
64	CARBINE STOUT 375ML	24.0000	0.0000	1.30	31.20
67	CARLTON COLD 375ML	35.0000	0.0000	1.97	68.95
70	CARLTON MIDSTRENGTH 375ML	36.0000	0.0000	1.44	51.84
		92.0000	0.0000		147.19
<u>GRENACHE & BLENDS (18)</u>					
590	La Curio Reserve Grenache 2003	11.0000	0.0000	19.89	218.79
591	Old Station Grenache 2000	23.0000	0.0000	11.28	259.44
		34.0000	0.0000		478.23
		126.0000	0.0000		625.42

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Customer Account Transactions Report - Grouped by Location

This report allows you to see the Customer Account Transactions by Location. You cannot view the report grouped by Customer and Location. To view the report by Location, untick the Group by Customer option.

Go to Reports > Customers > Customer Account Transactions > Group by: untick Customer.

Group by

Customer

Idealpos user (pos1) **Customer Account Transactions** Printed 14/07/2016 14:52:07
14 Jul 2016 00:00:00 to 14 Jul 2016 23:59:59 Page 1 of 1

Code	Customer Name	Date	Reference	Debit	Credit
LOCATION 1 (1)					
12	Adam	14/07/2016 14:28:09	INV 53	5.00	
12	Adam	14/07/2016 14:33:47	INV 54	7.50	
				<u>12.50</u>	<u>0.00</u>
LOCATION 2 (2)					
12	Adam	14/07/2016 14:28:52	INV 9	19.70	
12	Adam	14/07/2016 14:34:30	INV 10	28.80	
				<u>48.50</u>	<u>0.00</u>
				<u><u>61.00</u></u>	<u><u>0.00</u></u>

Financial Summary Report - added Tender Banking figures

This report now has the ability to view the Tenders with all grouping options.

Go to Reports > Financial > Financial Summary Report > Report Options > Tender (1-18).

Report Options

Cost of Sales

Margin

GST

GST FREE

Number of Transactions

Number of Sales

Covers

Total FOOD

Total BEVERAGE

Other Categories

Tender 1 in Drawer [CASH]

Tender 2 in Drawer [POINTS]

Tender 3 in Drawer [MASTERCARD]

Tender 4 in Drawer [AMEX]

Tender 5 in Drawer [DINERS]

Tender 6 in Drawer [EFTPOS]

Tender 7 in Drawer [ACCOUNT]

Tender 8 in Drawer [LAYBY]

Tender 9 in Drawer [GIFT VOUCHER]

Tender 10 in Drawer [CREDIT NOTE]

Tender 11 in Drawer [CLIPP]

Tender 12 in Drawer [TENDER 12]

Tender 13 in Drawer [TENDER 13]

Tender 14 in Drawer [TENDER 14]

Tender 15 in Drawer [TENDER 15]

Tender 16 in Drawer [TENDER 16]

Tender 17 in Drawer [TENDER 17]

Tender 18 in Drawer [TENDER 18]

Selected Fields (max 12)

Tender 1 in Drawer [CASH]

Tender 2 in Drawer [POINTS]

Tender 3 in Drawer [MASTERCARD]

Tender 4 in Drawer [AMEX]

Tender 5 in Drawer [DINERS]

Tender 6 in Drawer [EFTPOS]

Tender 7 in Drawer [ACCOUNT]

Tender 8 in Drawer [LAYBY]

Tender 9 in Drawer [GIFT VOUCHER]

Tender 10 in Drawer [CREDIT NOTE]

Tender 11 in Drawer [CLIPP]

Up

Down

Group **POS**

Date Filter **Weekly**

Sub Groups (max 2)

Location

DateTime

Clerk

Condensed format

One page per group

Idealpos user (pos1) Printed 15/07/2016 09:50:32

Financial Summary Report
11 Jul 2016 00:00:00 to 15 Jul 2016 23:59:59
Group by: POS

Page 1 of 1

	CASH	POINTS	MASTERCARD	AMEX	DINERS	EFTPOS	ACCOUNT	LAYBY	GIFT VOUCHER	CREDIT NOTE	CLIPP
1: POS TERMINAL 1											
1: LOCATION 1	470.85	0.00	38.90	0.00	0.00	590.50	\$0.00	\$0.00	\$55.91	0.00	30.00
Total	470.85	0.00	38.90	0.00	0.00	590.50	\$0.00	\$0.00	\$55.91	0.00	30.00
2: POS 2											
1: LOCATION 1	40.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00	\$32.70	0.00	0.00
2: LOCATION 2	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00	\$0.00	0.00	0.00
Total	40.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00	\$32.70	0.00	0.00
	<u>510.85</u>	<u>.00</u>	<u>38.90</u>	<u>.00</u>	<u>.00</u>	<u>590.50</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$88.61</u>	<u>.00</u>	<u>30.00</u>

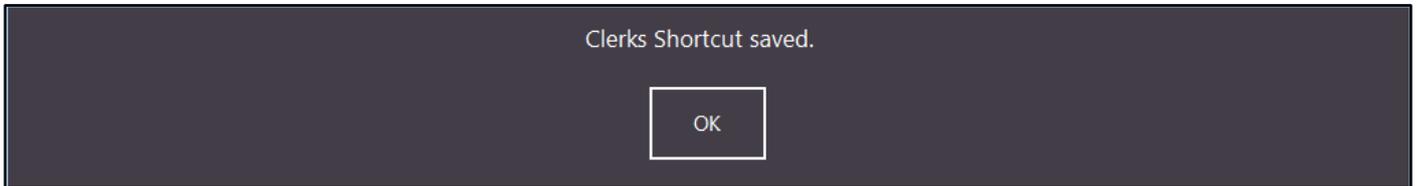
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Back Office

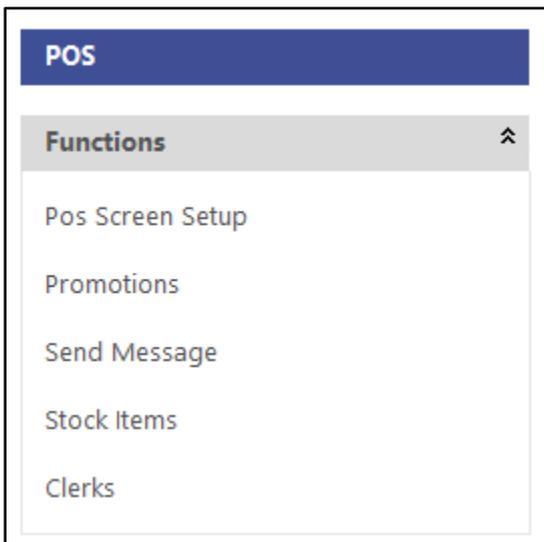
Ability to create Shortcut to Clerks Add/Modify screen

The Clerks can now be selected to be added as a shortcut to the Dashboard to quickly access them for adding/editing Clerks.

Go to Setup > Clerks > "S" create shortcut.

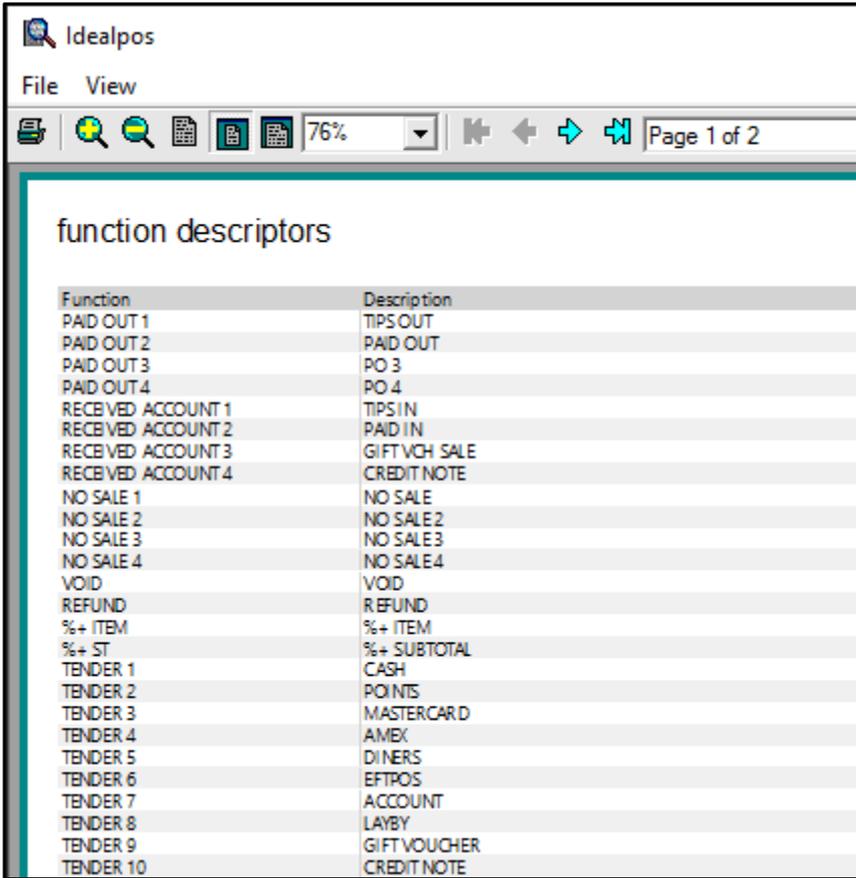


Clerks will be added to the list of available shortcuts.



Grid File Data available on Grids, Functions, Table Maps and Users screens

The additional screens are all now able to print the grid data that is displayed. To view the data go to any of the screens and press the eye icon. From there you can print the details.



The screenshot shows the Idealpos application window. The title bar reads 'Idealpos'. Below the title bar is a menu bar with 'File' and 'View'. A toolbar contains icons for print, search, zoom, and navigation, along with a zoom level of 76% and a page indicator 'Page 1 of 2'. The main content area is titled 'function descriptors' and contains a table with two columns: 'Function' and 'Description'.

Function	Description
PAD OUT 1	TIPS OUT
PAD OUT 2	PAID OUT
PAD OUT 3	PO 3
PAD OUT 4	PO 4
RECEIVED ACCOUNT 1	TIPS IN
RECEIVED ACCOUNT 2	PAID IN
RECEIVED ACCOUNT 3	GIFT VCH SALE
RECEIVED ACCOUNT 4	CREDIT NOTE
NO SALE 1	NO SALE
NO SALE 2	NO SALE2
NO SALE 3	NO SALE3
NO SALE 4	NO SALE4
VOID	VOID
REFUND	REFUND
%+ ITEM	%+ ITEM
%+ ST	%+ SUBTOTAL
TENDER 1	CASH
TENDER 2	POINTS
TENDER 3	MASTERCARD
TENDER 4	AMEX
TENDER 5	DINERS
TENDER 6	EFTPOS
TENDER 7	ACCOUNT
TENDER 8	LAYBY
TENDER 9	GIFT VOUCHER
TENDER 10	CREDIT NOTE

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Stock Items

Stock Item Filter numeric fields support Greater/Less Than (<>) symbols

This feature allows you to search for items in the Stock List that are Greater/Less Than using the (<>) symbols to narrow down the items you are looking for. It will only work for fields that are numerical such as Price, Cost, Points, and Stock Level etc. Multiple fields can be used at the same time with this filtering.

Go to File > Stock Control > Stock Items.

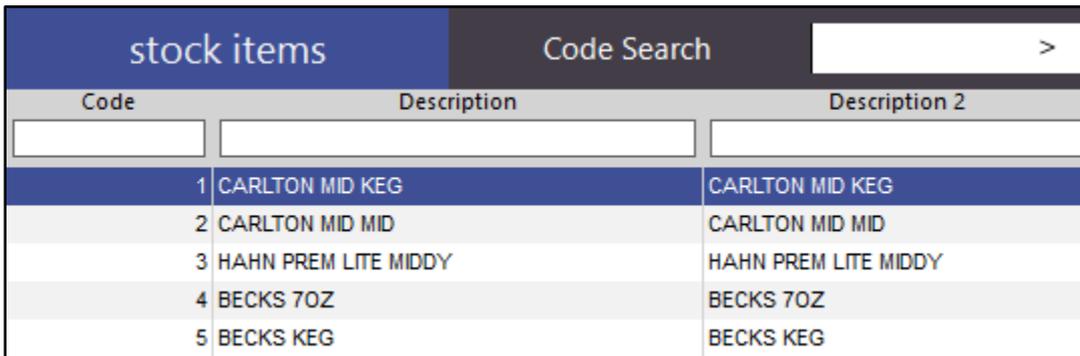


Code	Description	Department	Average	Stock Control	Indirect	PRICE 1	PRICE 2	PRICE 3	GST	Stock Level
280	COKE NRB 250ML	SOFTDRINK	1.16	Yes	No	2.25	2.00	2.00	Yes	48
282	COKE POST MIX 7OZ	SOFTDRINK	0.00	Yes	No	1.50	1.30	1.30	Yes	0
283	COKE POST MIX ADD 7OZ	SOFTDRINK	0.00	Yes	No	1.10	0.95	0.95	Yes	0
284	COKE POST MIX ADD SCH	SOFTDRINK	0.00	Yes	No	1.50	1.30	1.30	Yes	0
286	COKE POST MIX SCH	SOFTDRINK	0.00	Yes	No	2.35	2.05	2.05	Yes	0
287	DIET COKE NRB 250ML	SOFTDRINK	0.86	Yes	No	2.25	2.00	2.00	Yes	0
289	DIET COKE POST MIX 7OZ	SOFTDRINK	0.00	Yes	No	1.50	1.30	1.30	Yes	0
290	DIET COKE POST MIX ADD 7OZ	SOFTDRINK	0.00	Yes	No	1.10	0.95	0.95	Yes	0
291	DIET COKE POST MIX ADD SCH	SOFTDRINK	0.00	Yes	No	1.50	1.30	1.30	Yes	0
293	DIET COKE POST MIX SCH	SOFTDRINK	0.00	Yes	No	2.35	2.05	2.05	Yes	0
294	DS OJ PASSIONFRUIT NRB 330ML	SOFTDRINK	0.90	Yes	No	2.25	2.00	2.00	Yes	0

Description 2 field displays next to Description field in Stock Item List

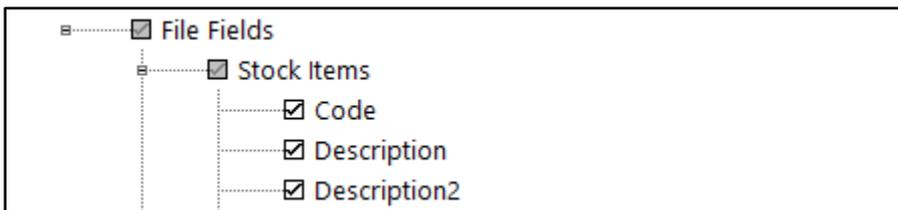
The Description 2 field has been moved to display next to Description on the Stock Item List. It does not need to display and can be toggled on/off in User Permissions. In User Permissions it is now located directly after Description and is a permanent change.

Go to File > Stock Control > Stock Items.



Code	Description	Description 2
1	CARLTON MID KEG	CARLTON MID KEG
2	CARLTON MID MID	CARLTON MID MID
3	HAHN PREM LITE MIDDY	HAHN PREM LITE MIDDY
4	BECKS 7OZ	BECKS 7OZ
5	BECKS KEG	BECKS KEG

Go to Setup > Users > select User > File Fields > Stock Items.



Dynamic Search Delay support for Stock Item field search fields

This feature slows down the searching so that more characters can be entered before searching starts. In large databases with a lot of stock items, you want to be able to type a few characters before searching starts, otherwise it can cause your system to lag just a little while it re-displays all the matching products. This function has now been added to include the search boxes located at the top of each Stock Item field in the Stock List.

stock items		Code Search				
Code	Description	Department	Average	Stock Control	Indirect	PRICE 1
<input type="text"/>						
1	CARLTON MID KEG	KEG BEER	107.70	Yes	No	0.00

Go to Setup > Global Options > General > General > Dynamic Search Delay > Enter a value in milliseconds. The value is 50 by default, but for larger databases we would recommend 200.

Dynamic Search Delay	<input type="text" value="50"/>	ms
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Customers

Customer Type Macro functionality

This function is used to trigger a macro whenever a customer linked to this Customer Type is added to the sale.

Go to File > Customers > Customer Types > Add/Modify > Macro > enter the macro that you have created. You may need to create a keyboard program to use all the features you want.

customer types

Code 1

Description Members

Use Points System

Point Multiplication Factor 1

Auto % Discount

Auto Discount POS Range >

Price Level

Gaming Rating Grade

Auto Populate Tender Spend Limit Credit (1)

Auto Populate Tender Spend Limit Credit (2)

Macro 10{f8}406006~

Save

idealpos7 Update History

Emailed Customer Invoices include Invoice number in the Filename

Go to Reports > Customers > Customer Invoices > Selection Range > Code: enter the range of codes required > press Email at the bottom of the page.

customer invoices report

Date Range

Today From 29/06/2016 00:00:00 To 29/06/2016 23:59:59

Select Printer

Windows Default
 Receipt

Options

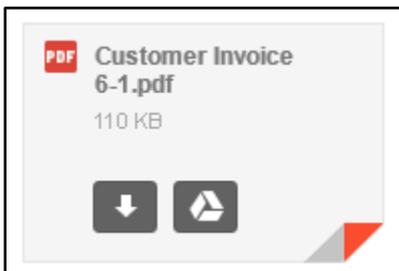
Show Only Customer Invoices
 Consolidated Invoices
 Hide Payments/Adjustments

Selection Range

Code 12 > to 12 >
Last Name > to >
Company > to >
Invoice to

Print Email Print if no Email Address View

The .pdf file attached to the email will be named "Customer Invoice x-y.pdf" where x is the Invoice Number and y is the POS Terminal code.



If you have the Yes/No Option selected (Automatically Email Customer Invoices) and there is an email address linked to the customer, the email will send the invoice straight away at the end of the sale processing.

	ALL	1
CUSTOMERS		
Automatically Email Customer Invoices	<input checked="" type="checkbox"/>	

EFTPOS

PC-Eftpos Aus - Support for MOTO transactions

Go to Setup > Functions > Tender (select a spare Tender) > Desc: MOTO > EFTPOS: tick.

The screenshot shows a software window titled "function descriptors" with a close button (X) in the top right corner. The window contains a form for configuring a tender. The "Function" field is set to "TENDER 12" and the "Description" field is set to "MOTO". Other fields include "# of Receipts" (1), "Exchange Rate" (0), "Lower Limit" (0.00), "Upper Limit" (99999.99), "Scan Code" (empty), "Scan Code Amount" (0.00), and "Surcharge" (0 with radio buttons for % and \$). On the right side, there is a list of checkboxes: "Rounding?" (unchecked), "Credit Function" (checked), "Allow Points per Dollar?" (unchecked), "Show in Banking" (checked), "Compulsory Amount" (unchecked), "Open Cash Drawer" (unchecked), "EFTPOS" (checked), "Account Tender" (unchecked), "LayBy Tender" (unchecked), "Force Receipt" (unchecked), "GIFT VOUCHER Redemption" (unchecked), "Credit Note Tender" (unchecked), and "Force Customer" (unchecked). A "Save" button is located in the bottom right corner of the window.

Go to Setup > Yes/No Options > Tenders > Ensure MOTO is not inhibited.

29	Inhibit ROOM CHARGE	✓		
30	Inhibit MOTO			
31	Inhibit TENDER 13	✓		

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Process a sale and press the MOTO tender.

Enter MOTO Details ×

Card Number
1256698275896325

Date Expiry (mmyy)
0618

Mail Order
 Telephone Order

7	8	9
4	5	6
1	2	3
0	C	OK

Export Data

Export 'Tare' value for items that are marked as scale

The Tare figure has always been exported under a different heading, but has now been renamed to make it easier to use. This can be used if you need to check the data for NMI audit purposes.

Go to Utilities > Export Data > Stock Items > Export: All Items > Options: Select Export Folder and Filename.

Export All Items

Options

Export Folder C:\Users\Adam Schell\Desktop\ >

Filename export.csv

Append Date/Time to filename

Append Site Name to filename

Append Venue ID to filename

Include Headers

Include Discontinued Items

The Tare field should be located at position CF. You can delete any unnecessary columns to more easily view the data you wish to use.

CE	CF	CG
WEBSTOR	TARE	EXTRAFLA
FALSE	5	FALSE
FALSE	0	FALSE
FALSE	0	FALSE
FALSE	0	FALSE

idealpos7 Update History

Export Stock Items supports Stock Level Total for All Locations

This function allows you to export the Stock Level Total for All Locations using the Specific Fields by Range option only.

Go to Utilities > Export Data > Stock Items > Export: Specific Fields by Range > Export Specific Fields by Range: Stock Level Total.

export stock items
✕

Export Specific Fields by Range

Options

Export Folder C:\Users\Adam Schell\Desktop\ >

Filename export.csv

Append Date/Time to filename
 Include Headers

Append Site Name to filename
 Include Discontinued Items

Append Venue ID to filename

Export Specific Fields by Range

1 CODE	2 DESCRIPTION	3 SCAN CODE	4 STANDARD COST
5 STOCK LEVEL TOTAL	6 	7 	8
9 	10 	11 	12
13 	14 	15 	16
17 	18 	19 	20
21 	22 	23 	24

Clear

Code > to >

Description > to >

Department > to >

Save as Default
OK

	A	B	C	D	E	F
1	CODE	DESC	SCAN	STDCST	STOCKLEVELTOTAL	
2	1	CARLTON MID KEG		106	11.57	
3	2	CARLTON MID MID		0.424	0	
4	3	HAHN PREM LITE MIDDY		0.6148	0	
5	4	BECKS 7OZ		0.64	0	
6	5	BECKS KEG		160	12	
7	6	BECKS MIDDY		0.928	0	
8	7	BECKS SCH		1.376	0	
9	8	CARLTON DRAUGHT 7OZ		0.52	0	
10	9	CARLTON DRAUGHT JUG		2.99	0	
11	10	CARLTON DRAUGHT KEG	4.961E+12	130	12	
12	11	CARLTON DRAUGHT MIDDY		0.754	0	

Export Stock Items supports Department Description and Supplier Name

This option allows the Department Description and Supplier Name to be exported alongside fields such as Department (Code) and Supplier (Code). These options are available only when using the Specific Fields by Range option.

Go to Utilities > Export Data > Stock Items > Export: Specific Fields by Range > Export Specific Fields by Range: SUPPLIER NAME, DPT DESCRIPTION.

export stock items
✕

Export Specific Fields by Range

Options

Export Folder

Filename

Append Date/Time to filename
 Include Headers

Append Site Name to filename
 Include Discontinued Items

Append Venue ID to filename

Export Specific Fields by Range

1 <input style="width: 90%;" type="text" value="CODE"/>	2 <input style="width: 90%;" type="text" value="DESCRIPTION"/>	3 <input style="width: 90%;" type="text" value="SUPPLIER CODE"/>	4 <input style="width: 90%;" type="text" value="SUPPLIER NAME"/>
5 <input style="width: 90%;" type="text" value="DPT"/>	6 <input style="width: 90%;" type="text" value="DPT DESCRIPTION"/>	7 <input style="width: 90%;" type="text" value=""/>	8 <input style="width: 90%;" type="text" value=""/>
9 <input style="width: 90%;" type="text" value=""/>	10 <input style="width: 90%;" type="text" value=""/>	11 <input style="width: 90%;" type="text" value=""/>	12 <input style="width: 90%;" type="text" value=""/>
13 <input style="width: 90%;" type="text" value=""/>	14 <input style="width: 90%;" type="text" value=""/>	15 <input style="width: 90%;" type="text" value=""/>	16 <input style="width: 90%;" type="text" value=""/>
17 <input style="width: 90%;" type="text" value=""/>	18 <input style="width: 90%;" type="text" value=""/>	19 <input style="width: 90%;" type="text" value=""/>	20 <input style="width: 90%;" type="text" value=""/>
21 <input style="width: 90%;" type="text" value=""/>	22 <input style="width: 90%;" type="text" value=""/>	23 <input style="width: 90%;" type="text" value=""/>	24 <input style="width: 90%;" type="text" value=""/>

Code > to

Description > to

Department > to

	A	B	C	D	E	F
1	CODE	DESC	DPT	DPTDESCRIPTION	SUPP	SUPPLIERNAME
2	1	CARLTON MID KEG	1	KEG BEER	CUB	CARLTON UNITED BREWERIES
3	2	CARLTON MID MID	1	KEG BEER		
4	3	HAHN PREM LITE MIDDY	1	KEG BEER		

idealpos7 Update History

Yes/No Options

Yes/No Option - New Customers require entry of Email address

When a new customer is added, this option forces the user to enter an Email address.

Go to Setup > Yes/No Options > Customers > New Customers Require Email Address.

New Customers Require Email Address

Attempting to save a customer without an email address will display the following message.

Please enter an Email Address before saving.

OK

Customer imports will not require an email address to be entered, only customers entered through the POS screen will be forced.

Open Stock Item - option to get Description before the Price

Open Stock Items ask for the Description before the Price.

Go to Setup > Yes/No Options > POS Screen > Open Stock Items get Description First.

Open Stock Items get Description First

Yes/No Option - Fast Customer Modify can modify Credit Limit

When modifying a Customer through the Fast Customer screen, this option allows the Credit Limit to be modified. Any Customer Type that has a credit limit (Bar Tabs, Accounts) can be affected by this selection.

Go to Setup > Yes/No Options > Customers > Fast Customer Modify can modify Credit Limit.

Fast Customer Modify can modify Credit Limit

Go to POS > Customer > When you edit a Customer and this option is selected, the Credit Limit field will be visible.

Last Name	Test	Phone	
First Name		Mobile	
Scan Code		DOB	
Email			
Address			
Suburb			
State	<input type="checkbox"/> Mail Out	Post Code	
Company			
Customer Type	Members		
Credit Limit	1000.00		

idealpos7 Update History

POS Screen Setup

Option to Exclude Barcodes during POS Screen Button Programming

A new option has been added to the drop-down menu on the POS Screen Setup to Exclude Barcodes. Items that do not contain a barcode will not display in the list, as they do not need a button made for them.

Go to Setup > POS Screen Setup > POS Screen > Layouts > Buttons > drop-down.

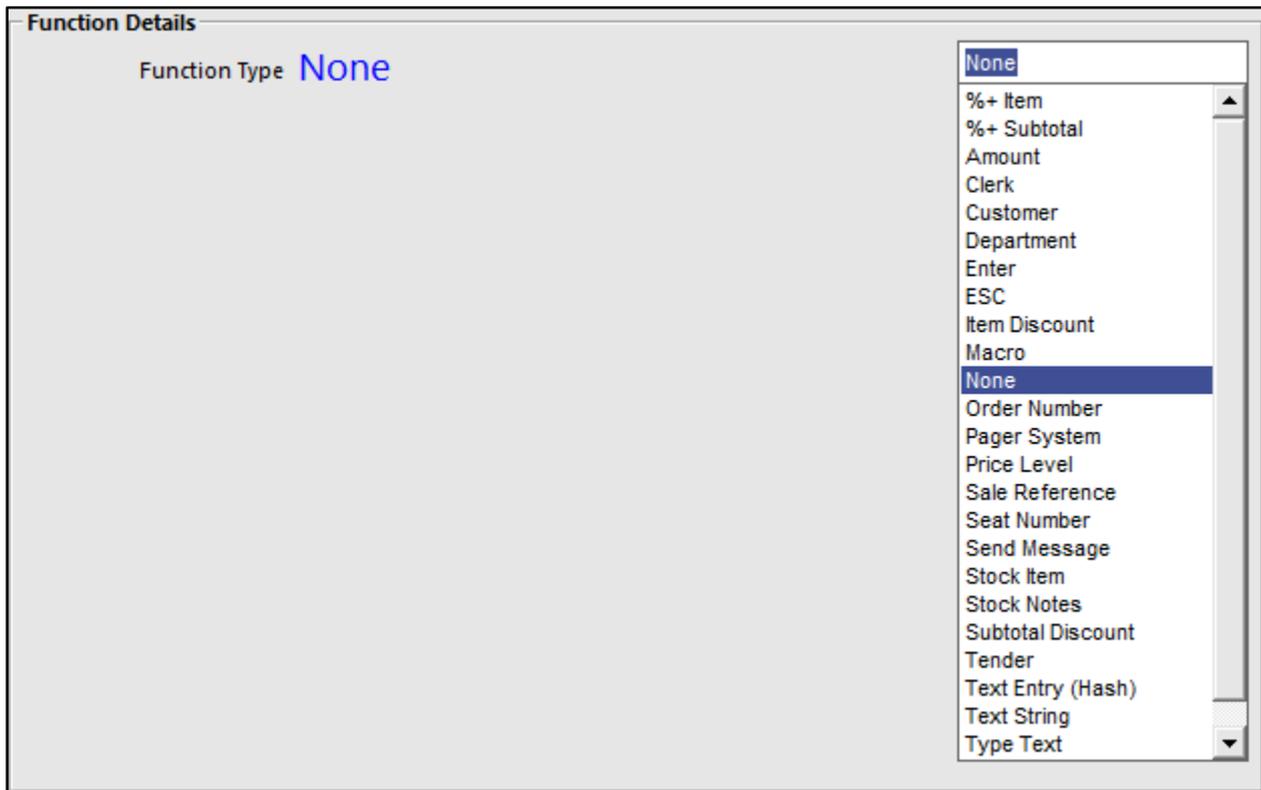
The screenshot displays the POS Screen Setup interface. At the top, there is a header with the text "drag stock items onto buttons" and "POS SCREEN". A dropdown menu is open, showing the following options: "Exclude Barcodes", "Search Code like", "Search Description like", and "Search Department like". The "Exclude Barcodes" option is currently selected. Below the dropdown is a list of items with columns for item ID, item name, and category. To the right of the list is a numeric keypad with buttons for 0, ., 1, 2, 4, 5, 7, and 8. At the bottom of the screen, there are several colored buttons representing different menu items: CAPPUCCINO (orange), SKINNY (yellow), ENGLISH BREAKFAST (red), COKE (blue), RST BEEF BAGEL (orange), and CAESAR SALAD (green).

Item ID	Item Name	Category
	MID	KEG BEER
	TE MIDDY	KEG BEER
	JUG	KEG BEER
19	CASCADE PREM LIGHT SCH	KEG BEER
22	GUINNESS KEG	KEG BEER
23	GUINNESS MIDDY	KEG BEER
332	Coke	SOFTDRINK
333	Diet Coke	SOFTDRINK
334	Lemonade	SOFTDRINK
335	Squash	SOFTDRINK
336	Fanta	SOFTDRINK
337	Lift	SOFTDRINK
900	Bacardi Rum	STANDARD SPIRITS
918	Absolut Vanilla 700ml	SPIRITS DELUXE
932	Roast Beef & Horseradish Bagel	SANDWICHES
935	Absolut Vanilla	SPIRITS DELUXE
1145	Pot of Tea	COFFEE / TEA

Buttons at the bottom: CAPPUCCINO, SKINNY, ENGLISH BREAKFAST, COKE, RST BEEF BAGEL, CAESAR SALAD

Grid Link removed from Grid "None" function

This function has been updated so that when copying grids, buttons do not have to be re-programmed with the Grid Link for the new grid. This will allow for faster programming of the POS Screen.



idealpos7 Update History

POS Screen setup - allow stock item buttons to link directly to Grids

This allows Stock Items that are programmed on the POS Screen Tabs to link directly to a grid. This makes it easier to configure rather than having to go into the Stock Item programming and link it through there.

Go to Setup > POS Screen > POS Screen Setup > Layouts > Buttons > Stock Item Button > POS Screen Grid.

Stock Item

Automatic Text

Stock Item 23 > GUINNESS MIDDY

POS Screen Grid TAP BEER

Button Appearance

GUINNESS MIDDY

Button Caption
GUINNESS MIDDY

Back Colour	Font
Text Colour	A ▲ A ▼

Double Width Visible

Double Height

Auto Create Grid Graphic >

Format All Save Cancel

- Stock Item
- Stock Item
- Stock Item Edit
- Stock Item Sales
- Stock Item Search
- Stock Notes
- Subtotal Discount Table
- Table
- Table Summary
- Tax Invoice
- Tax Shift
- Tender
- Tender Correct
- Text Entry (Hash)
- Text String
- Transfer Mode
- Type Text
- Unlock Permissions
- User-Defined
- Validation Print
- Void
- Void Entire Sale
- Void Last Item

Stocktake

Stocktake Forms - ability to Group by Attribute

This option allows you to group the Stocktake forms and print them out by Attribute. You are able to use Department or Supplier in conjunction with the Attribute grouping.

Go to Stocktake > Stocktake Forms > Group By > Attribute: Select from the drop-down menu.

The screenshot shows a configuration window for Stocktake Forms. It is divided into three main sections: 'Sort Order', 'Group by', and 'Options'.
- **Sort Order:** Two radio buttons are present: 'Code' (selected) and 'Description'.
- **Group by:** Two checkboxes are present: 'Department' (checked) and 'Supplier' (unchecked). Below them is a dropdown menu currently showing 'Attribute: Red Wine'. A secondary dropdown menu is open below it, showing 'Attribute: Red Wine' and 'Attribute: Wine Region'.
- **Options:** Two checkboxes are present: 'Show Stock Levels' (unchecked) and 'Include Indirect Items' (unchecked).

Idealpos user (pos1) **Stocktake Forms** Printed 11/07/2016 4:19PM
Page 1 of 1

Code	Description	Stocktake Quantity
Location 1 LOCATION 1		
<u>Dpt 18 GRENACHE & BLENDS</u>		
Grenache		
590	La Curio Reserve Grenache 2003	
591	Old Station Grenache 2000	
Other		
593	Cotes du Rhone E.Guigal 2001	
Rose		
592	Tavel Domaine Lafond Rose 2003	

idealpos7 Update History

Promotions

Promotions screen - filter by Expiry Date

This feature allows you to filter your promotions by the expiry date. A drop-down menu is available at the top of the screen where you can choose from This Week, Next Week, This Month, Next Month and This Year. When selected, only those promotions within that selection will display. This field can be used in conjunction with all other fields.

Go to File > Sales > Promotions > Promotions > Expiring.

promotions												
			<input type="text" value="All Promotions"/>	<input type="text" value=">"/>	<input type="text" value="This Week"/>						S	×
Code	Description	Group	Discount	Date Range	Time Range	Days	POS Range	Cust Type Range	Priority			
1	Buy 2 Beers for \$4	Buy 2 Beers for \$4	\$4.00 Price	01 Oct 09 - 14 Jul 16	All Day	Every Day			7			

promotions												
			<input type="text" value="All Promotions"/>	<input type="text" value=">"/>	<input type="text" value="Next Week"/>						S	×
Code	Description	Group	Discount	Date Range	Time Range	Days	POS Range	Cust Type Range	Priority			
9	Tooheys 10% off over \$10	Tooheys Promotion	10% off	01 Oct 09 - 21 Jul 16	All Day	Every Day			10			

promotions												
			<input type="text" value="All Promotions"/>	<input type="text" value=">"/>	<input type="text" value="This Month"/>						S	×
Code	Description	Group	Discount	Date Range	Time Range	Days	POS Range	Cust Type Range	Priority			
1	Buy 2 Beers for \$4	Buy 2 Beers for \$4	\$4.00 Price	01 Oct 09 - 14 Jul 16	All Day	Every Day			7			
9	Tooheys 10% off over \$10	Tooheys Promotion	10% off	01 Oct 09 - 21 Jul 16	All Day	Every Day			10			

promotions												
			<input type="text" value="All Promotions"/>	<input type="text" value=">"/>	<input type="text" value="This Year"/>						S	×
Code	Description	Group	Discount	Date Range	Time Range	Days	POS Range	Cust Type Range	Priority			
3	Beer	Buy 2 Beers for \$4	Bonus Item	01 Jul 16 - 01 Aug 16	All Day	Every Day			1			
1	Buy 2 Beers for \$4	Buy 2 Beers for \$4	\$4.00 Price	01 Oct 09 - 14 Jul 16	All Day	Every Day			7			
9	Tooheys 10% off over \$10	Tooheys Promotion	10% off	01 Oct 09 - 21 Jul 16	All Day	Every Day			10			

Clipp Interface

Clipp Discounts can be linked to Promotion Reports

When you are running promotions through the Clipp app, they will be recorded and processed through Clipp, and the discounts reported on the Promotions Report.

Go to your Clipp Admin Portal > Select Venue > Setup Promotions.

Venue Customers Discount Reports ▾ Promo Codes Payments Open Tabs

IdealPOS Demo (Demo Room) / Staff + Corporate Discounts

[Venue Details](#) [Dash Deals](#) [Staff + Corp Discounts](#)

Staff + Corporate Discount Group

Venue Group

Discount Group Name

Max Discount

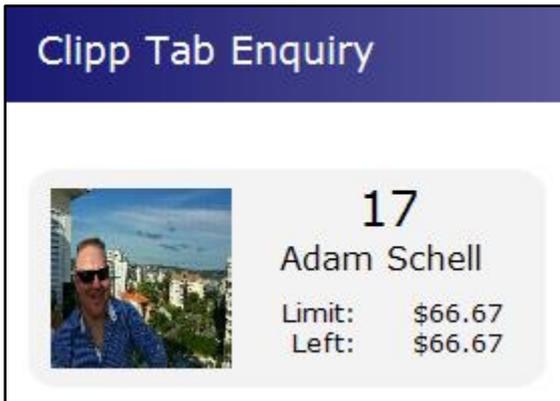
Discount Type

[+ Add Discount Group](#)

Discount Group	Max Discount	Details	Discount Matrix
Idealpos Demo Room Corp Discount Test (Corporate Discount)	\$100.00	Edit Details	Edit Matrix
IDEALPOS DEMO ROOM (Staff Discount)	\$250.00	Edit Details	Edit Matrix

idealpos7 Update History

When a Customer opens a tab and is linked to one of the promotions, their tab will open and display on Idealpos through Clipp Tab Enquiry. If the Customer opens a tab for \$50 and receives a Corporate Discount of 25%, the Clipp tab in Idealpos will show a total of \$66.67.

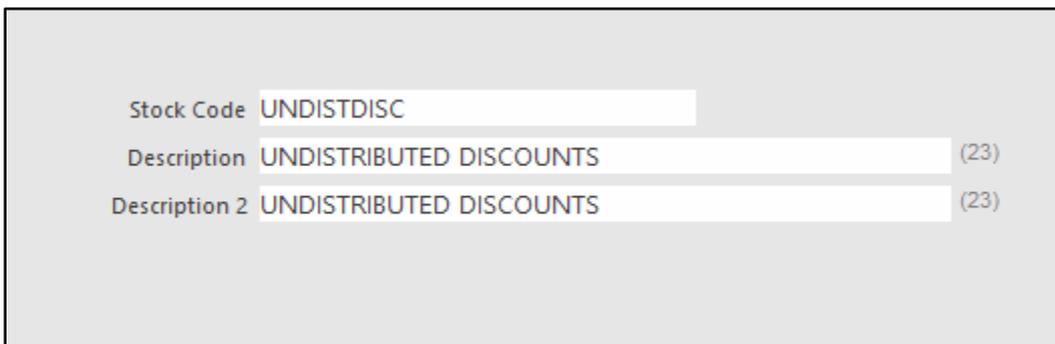


Where x is the total able to spend in Idealpos, y is the tab amount and z is the discount amount.

$$x = y / (1 - z)$$

$$66.67 = 50 / (1 - 0.25)$$

Go to File > Stock Control > Stock Items > Add > Create a Stock Item for the Discount to be allocated to so the Sales Reports match the Financial Reports, or all discounts will be allocated to the first Stock Item in the database.



Go to File > Sales > Promotions > Promotion Groups > CLIPP is added automatically when a Promotion has been triggered.

promotion groups	
Code	Description
0	Automatic Customer Discounts
1	Buy 2 Beers for \$4
2	Milk and Bread
3	Wine Promotion
4	Tooheys Promotion
5	Buy 2 Coffees Get 10 % Off
6	Main Meal Buy 1 Get 1 Free
7	Stella Carton Promotion
8	Burger Combo's
9	Salad Deal \$1.99 Off
10	Pizza & Garlic Bread for \$19
11	Gift Basket 10% Off Promotion
12	Customer Rewards
13	Coupon Promotions
14	CLIPP

Go to File > Sales > Promotions > Promotions > Any Promotions used from Clipp will be created.

promotions		CLIPP	>			
Code	Description	Group	Discount	Date Range	Time Range	Days
3	Staff Discount	CLIPP	\$0.00 off	11 Jul 16 - 19 Oct 16	All Day	Every Day
21	Corporate Discount	CLIPP	\$0.00 off	13 Jul 16 - 21 Oct 16	All Day	Every Day
22	Dash Deal	CLIPP	\$0.00 off	13 Jul 16 - 21 Oct 16	All Day	Every Day

idealpos7 Update History

Go to Reports > Sales > Promotions > Report Type: Promotion Summary by Type.

promotions report
✕

Date Range

Today ▾

From ▾
 To ▾

Group by

POS Terminal

Site

Report Type

Promotion Summary by Type

Promotion Details by Item

Selection Range

Promotion Group >

Site >

POS System >

Print
View

Idealpos Demo (pos1)	Promotions Report	Printed 13/07/2016 11:42AM	
	13 Jul 2016 00:00:00 to 13 Jul 2016 23:59:59	Page 1 of 1	
Code	Description	Quantity	Amount
Promotion Group 14 : CLIPP			
Dollar Discounts Promotions			
21	Corporate Discount	2	-21.67
22	Dash Deal	1	-40.00
3	Staff Discount	1	-14.10
		4	-75.77
		4	-75.77
		4	-75.77