

Idealpos 7.1 Build 3

Update Details:

- [IP-2646] - Yes/No Option - 24 Hour Time Format for Kitchen Prints
- [IP-2746] - User Permission to modify Stock Item Grid Default Settings
- [IP-2747] - Total Stock Level on Stock Items by Location form
- [IP-2771] - Supplier Enquiry to Allow for Filtering by stock location.
- [IP-2801] - Fast Pending Sale Function
- [IP-2811] - Stock Item - Long Description (Description3) Field
- [IP-2823] - Option to Inhibit ability to add value to existing Gift Vouchers
- [IP-2824] - Option to Expire Gift Vouchers after a Single Redemption
- [IP-2833] - Pending Sales - Voided Items sent to Kitchen Printers
- [IP-2834] - Over-Tendered Tenders can convert balance to Tips
- [IP-2852] - Home Screen support for Exit POS Password
- [IP-2864] - Pending Sales - Reprint to Kitchen Function
- [IP-2869] - Activity Enquiry - option to Show Only the Selected Type
- [IP-2870] - Dry Cleaning - Option to Only Print Receipt on Printer 2 when Tabs printed
- [IP-2881] - Birthday Coupon Promotions can be valid for a set number of days

Back Office

Activity Enquiry – Option to Show Only the Selected Type

The Activity Enquiry function allows any activity or event that took place on an Idealpos terminal to be viewed. This function adds a new option to the Activity Enquiry to show only the selected type of event. This can be useful when tracking down the same type of event and finding the exact dates and times of when the event occurred such settings being modified or an Incorrect Password attempt

To use this function, go to: Enquiry > Activity Log

The Activity Enquiry will be displayed.

If required, make any required selections in the Selection Criteria, including the date range that you want to query, then press the "Select" button to update the results in the Activity Enquiry.

Select an event from the list of events on the left-hand side, then enable the "Show Only the Selected Type" checkbox and press "Select".

The below example shows the "Incorrect Password" event selected from the list of events.

The screenshot shows the 'activity enquiry' window with a table of events and a 'Selection Criteria' panel. The 'Incorrect Password' event on 05 Mar 19 at 09:35:06 is highlighted in blue. In the 'Selection Criteria' panel, the 'Table' dropdown is set to 'Incorrect Password', the 'Show Only the Selected Type' checkbox is checked, and the 'Select' button is highlighted. A 'View All' button is also visible at the bottom right.

| Date | Time | POS | Clerk/User | Action Description |
|-----------|----------|-----|------------|------------------------------------|
| 01 Mar 19 | 04:00:46 | 1 | STAFF | Logged In : STAFF |
| 01 Mar 19 | 09:21:38 | 1 | STAFF | Logged Out : STAFF |
| 01 Mar 19 | 09:21:40 | 1 | Admin | Logged In : Admin |
| 01 Mar 19 | 10:11:04 | 1 | | New Build: 7.101.0106 |
| 01 Mar 19 | 10:11:04 | 1 | STAFF | Logged In : STAFF |
| 01 Mar 19 | 10:16:04 | 1 | STAFF | Logged In : STAFF |
| 01 Mar 19 | 10:18:44 | 1 | STAFF | Logged In : STAFF |
| 01 Mar 19 | 16:21:34 | 1 | STAFF | Logged In : STAFF |
| 02 Mar 19 | 04:00:41 | 1 | STAFF | Logged In : STAFF |
| 03 Mar 19 | 04:00:44 | 1 | STAFF | Logged In : STAFF |
| 04 Mar 19 | 04:00:45 | 1 | STAFF | Logged In : STAFF |
| 04 Mar 19 | 10:53:01 | 1 | STAFF | Logged In : STAFF |
| 04 Mar 19 | 10:56:19 | 1 | STAFF | Logged Out : STAFF |
| 04 Mar 19 | 10:56:21 | 1 | Admin | Logged In : Admin |
| 04 Mar 19 | 10:56:34 | 1 | Admin | POS Options Modify POS 1 |
| 04 Mar 19 | 14:28:20 | 1 | Admin | Logged In : Admin |
| 04 Mar 19 | 14:28:50 | 1 | Admin | Logged In : Admin |
| 04 Mar 19 | 15:08:15 | 1 | Admin | POS Options Modify POS 1 |
| 04 Mar 19 | 15:14:47 | 1 | Admin | Exit IPS |
| 04 Mar 19 | 15:15:04 | 1 | Admin | Logged In : Admin |
| 04 Mar 19 | 16:06:03 | 1 | Admin | Logged In : Admin |
| 04 Mar 19 | 16:50:38 | 1 | Admin | Logged Out : Admin |
| 04 Mar 19 | 16:51:48 | 1 | | New Build: 7.101.0063 |
| 05 Mar 19 | 09:35:06 | 1 | | Incorrect Password |
| 05 Mar 19 | 09:35:08 | 1 | Admin | Logged In : Admin |
| 05 Mar 19 | 09:53:03 | 1 | Admin | Modify Function 24 |
| 05 Mar 19 | 10:34:57 | 1 | Jeremy | Transaction 000621-1 = 70.99 |
| 05 Mar 19 | 10:34:57 | 1 | Jeremy | Sale 000621,1 sent to Kitchen |
| 05 Mar 19 | 10:35:51 | 1 | Admin | POS Options Modify POS 1 |
| 05 Mar 19 | 10:36:19 | 1 | Admin | Logged In : Admin |
| 05 Mar 19 | 11:01:29 | 1 | Admin | Logged In : Admin |
| 05 Mar 19 | 11:08:59 | 1 | Admin | Modify Function 66 |
| 05 Mar 19 | 11:09:16 | 1 | Admin | Logged In : Admin |
| 05 Mar 19 | 13:45:00 | 1 | Admin | Modified Buttons on Layout 1 |
| 05 Mar 19 | 13:52:22 | 1 | Admin | Modify Function 66 |
| 05 Mar 19 | 13:52:42 | 1 | Admin | Logged In : Admin |
| 05 Mar 19 | 13:53:25 | 1 | Admin | Modified Buttons on Layout 1 |
| 05 Mar 19 | 13:54:05 | 1 | Admin | Modify Function 66 |
| 05 Mar 19 | 14:00:29 | 1 | Admin | Logged In : Admin |
| 05 Mar 19 | 14:02:03 | 1 | Admin | Modify Function 24 |
| 05 Mar 19 | 14:02:09 | 1 | Admin | Modify Function 66 |
| 05 Mar 19 | 14:08:42 | 1 | Admin | Modify Function 24 |
| 05 Mar 19 | 14:17:51 | 1 | Admin | Modify Function 66 |
| 05 Mar 19 | 14:21:16 | 1 | Admin | Logged In : Admin |
| 05 Mar 19 | 14:38:34 | 1 | Admin | POS Options Modify POS 1 |
| 05 Mar 19 | 14:39:02 | 1 | Admin | Logged In : Admin |
| 05 Mar 19 | 16:14:15 | 1 | Admin | Modified Buttons on Layout 1 |
| 05 Mar 19 | 16:14:36 | 1 | Admin | Modified Buttons on Layout 1 |
| 05 Mar 19 | 16:27:08 | 1 | Jeremy | Transaction 000623-1 = 70.99 |
| 05 Mar 19 | 16:27:08 | 1 | Jeremy | Sale 000623,1 sent to Kitchen |
| 05 Mar 19 | 16:37:59 | 1 | Jeremy | Transaction 000625-1 = 70.99 |
| 05 Mar 19 | 16:37:59 | 1 | Jeremy | Sale 000625,1 sent to Kitchen |
| 05 Mar 19 | 16:48:55 | 1 | Jeremy | Live Button Programming:1048-10017 |
| 05 Mar 19 | 16:52:49 | 1 | Jeremy | Transaction 000627-1 = 7.10 |
| 05 Mar 19 | 16:52:49 | 1 | Jeremy | Sale 000627,1 sent to Kitchen |
| 06 Mar 19 | 08:48:13 | 1 | Admin | Logged In : Admin |
| 06 Mar 19 | 08:48:57 | 1 | Admin | Logged In : Admin |
| 06 Mar 19 | 08:49:44 | 1 | Admin | Logged In : Admin |
| 06 Mar 19 | 08:50:28 | 1 | Admin | Logged In : Admin |
| 06 Mar 19 | 08:52:11 | 1 | Admin | Logged In : Admin |
| 06 Mar 19 | 08:52:45 | 1 | Admin | Logged In : Admin |
| 06 Mar 19 | 08:53:21 | 1 | Admin | Logged In : Admin |
| 06 Mar 19 | 08:54:56 | 1 | Admin | Logged In : Admin |
| 06 Mar 19 | 08:58:32 | 1 | Admin | Logged In : Admin |
| 06 Mar 19 | 09:12:28 | 1 | | New Build: 7.101.0064 |
| 06 Mar 19 | 09:15:07 | 1 | Admin | Logged In : Admin |
| 06 Mar 19 | 09:15:12 | 1 | Admin | Logged Out : Admin |
| 06 Mar 19 | 09:15:16 | 1 | Admin | Logged In : Admin |
| 06 Mar 19 | 09:16:26 | 1 | Admin | POS Options Modify POS 1 |

Selection Criteria

Date: All Dates

Clerk: [Dropdown]

Function: [Dropdown]

POS: [Dropdown]

Location: [Dropdown]

Table: [Dropdown] Show Only the Selected Type

Top: 1000 records Filter Sales **Select**

Unpaid Balances: 5
 Transactions: 125
 Partial Payments: 1
 Stock Item Add: 1
 Stock Item Modify: 20
 Promotion Table Modify: 2
 Alert Level Modify: 24
 Customer Add: 1
 Customer Modify: 10
 Log Ins: 172
 Log Outs: 21
 Incorrect Password: 9
 Exit IPS: 4
 Void Entire Sale: 32
 Exit Sale with Items: 28
 Voids during Payment: 1
 Voids during Payment Amount: 13.00

View All

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After pressing the "Select" button, the list of events will be updated and will only show the event type that was selected. It is also possible to keep adjusting the Selection Criteria whilst the The below example shows all the occurrences of the Incorrect Password event.

The screenshot displays the 'activity enquiry' interface. On the left, a table lists activity events. The first row is highlighted in blue. The table columns are Date, Time, POS, Clerk/User, and Action Description. The right side of the interface features a 'Selection Criteria' panel with various filters and a 'Select' button. Below the criteria panel, a summary shows 'Incorrect Password' with a count of 20. A 'View All' button is located at the bottom right of the interface.

| Date | Time | POS | Clerk/User | Action Description |
|-----------|----------|-----|------------|--------------------|
| 05 Mar 19 | 09:35:06 | 1 | | Incorrect Password |
| 19 Mar 19 | 12:58:53 | 1 | | Incorrect Password |
| 19 Mar 19 | 12:58:58 | 1 | | Incorrect Password |
| 19 Mar 19 | 12:59:02 | 1 | | Incorrect Password |
| 19 Mar 19 | 12:59:06 | 1 | | Incorrect Password |
| 19 Mar 19 | 12:59:39 | 1 | | Incorrect Password |
| 19 Mar 19 | 12:59:45 | 1 | | Incorrect Password |
| 27 Mar 19 | 10:07:07 | 1 | | Incorrect Password |
| 03 Apr 19 | 10:17:58 | 1 | Admin | Incorrect Password |
| 11 Apr 19 | 14:19:42 | 1 | | Incorrect Password |
| 11 Apr 19 | 14:19:46 | 1 | | Incorrect Password |
| 11 Apr 19 | 14:19:47 | 1 | | Incorrect Password |
| 11 Apr 19 | 14:19:50 | 1 | | Incorrect Password |
| 12 Apr 19 | 08:54:35 | 1 | | Incorrect Password |
| 12 Apr 19 | 11:56:16 | 1 | | Incorrect Password |
| 15 Apr 19 | 09:02:02 | 1 | | Incorrect Password |
| 29 Apr 19 | 14:12:00 | 1 | Admin | Incorrect Password |
| 29 Apr 19 | 14:22:39 | 1 | Admin | Incorrect Password |
| 29 Apr 19 | 16:37:10 | 1 | Admin | Incorrect Password |
| 18 Jul 19 | 10:32:32 | 1 | | Incorrect Password |

Selection Criteria

Date: All Dates

Clerk: [Dropdown]

Function: [Dropdown]

POS: [Dropdown]

Location: [Dropdown]

Table: [Dropdown] Show Only the Selected Type

Top: 1000 records Filter Sales **Select**

Incorrect Password 20

View All

Coupon Promotions

Birthday Coupon Promotions can be valid for a set number of days

This function adds the ability to configure the number of days that you want a Birthday Coupon Promotion to be valid for. This feature can be used to force the customer to use their Birthday Coupon only on the day of their actual birthday or it can be used to specify a number of days after their birthday which the coupon is valid.

This ensures that the customer only redeems their Birthday Coupon within the allowed number of days as per your store policy.

To configure and use this function, go to:

File > Sales > Promotions > Coupon Promotions

Either select an existing Coupon Promotion from the list, then press the "Modify" button on the bottom-right corner. Alternatively, press the "Add" button on the bottom-right corner of the screen to create a new Promotion.

If creating a new Coupon Promotion, you will need to specify the Trip by Quantity (specify the number of items which need to be purchased from the list) or Trip by Amount (specify the dollar value that needs to be spent on the items from the list).

The below example shows a Birthday Bottle House Wine Coupon Promotion.

In the below example, when the customer purchases any item from the list of items under the Trip Conditions Set 1 (left-hand side of the screen), they will receive a 100% discount on a single item from the list of items that are displayed on the right-hand side (only applicable when triggered by the Birthday Coupon – more on this below).

coupon promotion 2 Promotion Advanced Coupon Design

Description: Birthday Bottle House Wine
Group: Coupons
POS: >
Customer Type: >
 Multiple Trips

From: 01/10/2016 00:00
to: 01/01/2020 00:00
 Continuous
 During Specific Times

Discount Type
% Discount off Items: 100
 One Item Only
 Serialized Tracking Print Only
Redeem at POS: >
Redeem from: 01 Oct 2016 00:00
to: 01 Oct 2019 00:00
OR 0 Days from Print Date

Trip Conditions Set 1
 Trip by Quantity: 1
 Trip by Amount
 of Anything
 of items below
228016 BANROCK STATION MOSCATO BTL
230001 JACOBS CREEK SHIRAZ BTL
226001 YELLOWGLEN BTL

Trip Conditions Set 2
 Trip by Quantity: 0
 Trip by Amount
 of items below

Apply Discount to
 All Items
 Only Items Below
228016 BANROCK STATION MOSCATO BTL
230001 JACOBS CREEK SHIRAZ BTL
226001 YELLOWGLEN BTL

Delete Promotion Link Enquiry Add Department Add Stock Item

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Once the Promotion has been created, click on the "Advanced" tab.

In the User-Defined Text field, enter [BIRTHDAY#], ensuring that you substitute # with the number of days after the Customer's birthday date which you want the Birthday Coupon to be available.

Examples:

[BIRTHDAY1] will allow the customer to redeem their Birthday Coupon Promotion only on the day of their birthday.

[BIRTHDAY30] will allow the customer to redeem their Birthday Coupon Promotion 30 days after their birthday has occurred.

[BIRTHDAY] will allow the customer to redeem their Birthday Coupon Promotion anytime within the calendar month that their birthday falls in.

The number of days that can be used in this setting are not restricted to 1 or 30 days; you can enter any number of days as required.

The below example shows the User-Defined configured with a [BIRTHDAY1] value, which will only allow the customer to redeem on the day of their Birthday.

The screenshot shows a software interface for configuring a coupon promotion. At the top, there are three tabs: 'coupon promotion 2', 'Promotion', and 'Advanced'. The 'Advanced' tab is selected and highlighted with a yellow box. Below the tabs, there are several sections: 'External Coupon Linking' with a text input field containing 'INVALID', 'Automatically Sell Stock Item when Triggered' with a 'Stock Item' dropdown menu, and 'Other Options' with checkboxes for 'Inhibit Points' and 'Show Customer Phone/Email on Coupon'. The 'User-Defined Text' field is highlighted with a yellow box and an arrow pointing to it, containing the value '[BIRTHDAY1]'. The 'Coupon Design' tab is also visible and highlighted with a yellow box.

After the User-Defined text has been updated, close the Coupon Redemption screen and when prompted, ensure that you press "Yes" to confirm and save any changes.

The screenshot shows a dark grey dialog box with the text 'Save Changes?' at the top. Below the text are two buttons: 'Yes' and 'No'. The 'Yes' button is highlighted with a yellow box and an arrow pointing to it.

The next step is to ensure that you have a Customer which has a Birthday occurring on the current day.
Go to: File > Customers > Customers
Select a Customer from the list, then press the "Modify" button on the bottom-right corner of the screen.

In the Birth Date field, ensure that the date and month matches the current date.
The below example shows a Birth Date of 08/08/1980 (8th August 1980).

The screenshot shows a 'modify customer' window with the following fields and values:

- Code:** 20
- Last Name:** CITIZEN
- Given Names:** JOHN
- Title:** Mr
- Customer Type:** MEMBERS
- Scan Code:** Auto
- Other Codes:** (empty)

The form is divided into several sections:

- Address Details:** Address, Suburb, State, Postcode.
- Delivery Address:** Delivery Address same as Above, Address, Suburb, State, Postcode.
- Contact Details:** Phone, Mobile, Fax, Email.
- Sales / Accounting:** Auto % Discount: 0, Price Level: 0, Bar Tab, Account, Credit Limit: 1000.00.
- Miscellaneous:** Company, Occupation, Next of Kin, Contact No, Birth Date: 08/08/1980 (highlighted with an orange arrow), Birth Date 2, Password, Gender: M, Marital Status, Mail Out, Discontinue, Comments, Sales Prompt.

A 'Save' button is located at the bottom right of the window.

Close the Modify Customer and Customers screens.

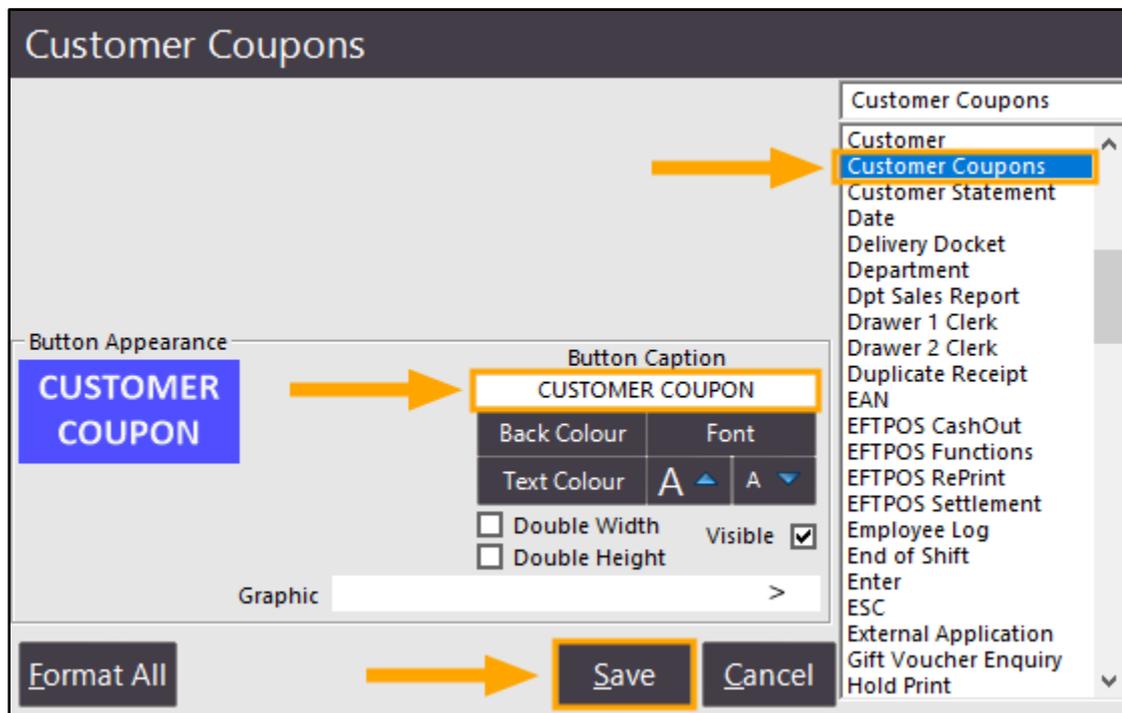
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In order to redeem Customer Coupons, you will need to ensure that you have a Customer Coupon button on your POS Screen.

This can be created by going to: Setup > POS Screen > POS Screen Setup > Select the POS Screen Layout > Buttons
Find an available/blank button on any desired POS Screen tab, then create the button as follows:

Select the "Customer Coupons" from the list of available functions in the list, enter a Button Caption "CUSTOMER COUPON" and update the button appearance if required/as necessary.

Once completed, press the "Save" button.



Close the POS Screen Layout, then go to the POS Screen.

Add a Customer to the sale which has a birthday that falls on the current day.
After adding the Customer to the sale, add any item to the sale which was included in the Birthday Coupon.

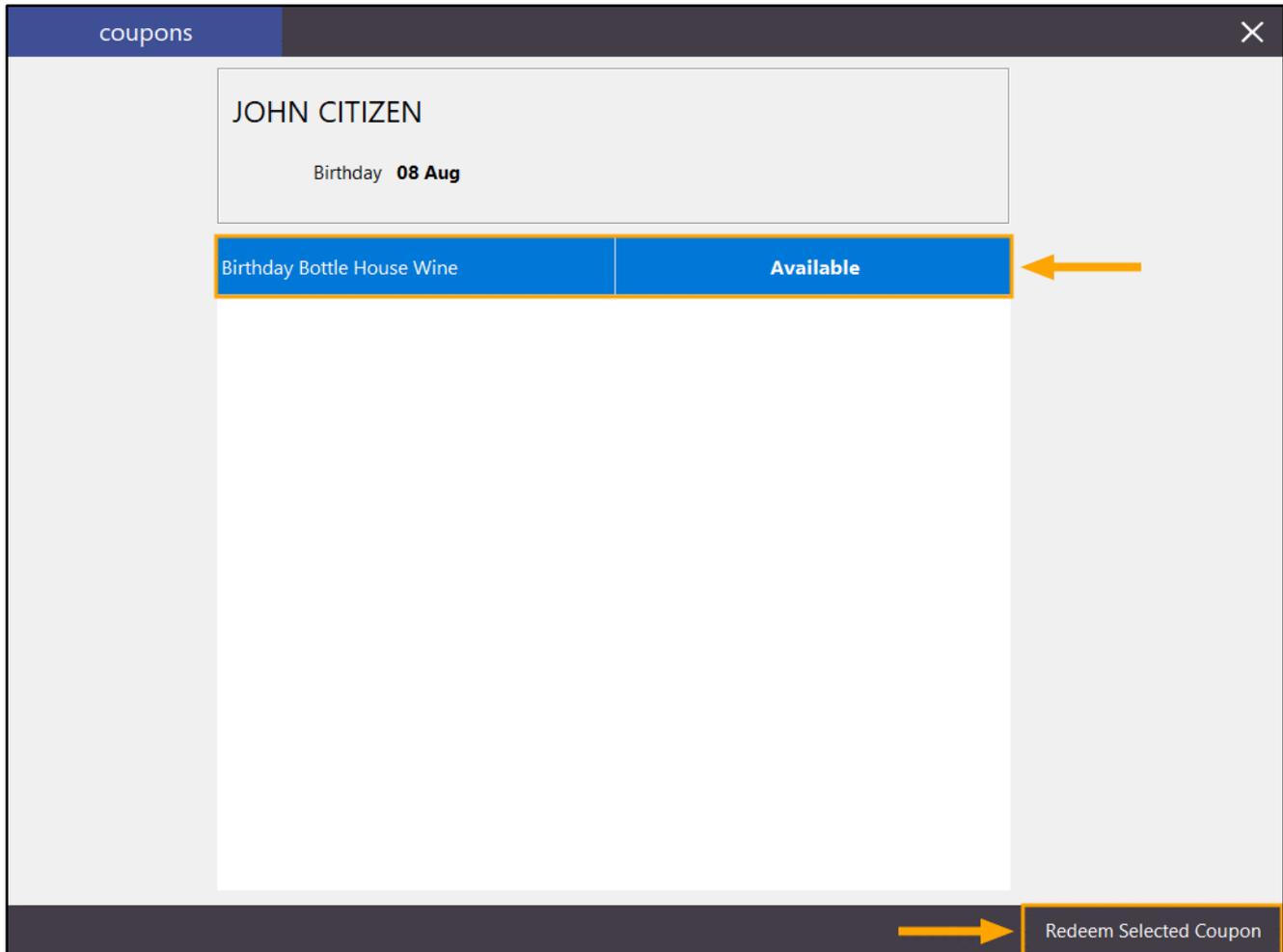
The screenshot shows a POS system interface with a black background. At the top left, it displays '08 Aug 14:08 Adult ID: 08-Aug-2001' and 'Jeremy PRICE 1'. In the top right corner, there are three yellow right-pointing chevrons '>>>'. Below this is a red horizontal bar with the text 'JOHN CITIZEN - 1 Points (\$0.10)'. Underneath the red bar is a table with one row: 'YELLOWGLEN BTL' on the left, '1' in the middle, and '35.00' on the right. A thick grey horizontal bar is positioned below the table. At the bottom of the screen, there is a black bar containing the text '1 Points (\$0.10)' and 'Min Layby Deposit : \$3.50' on the left, and '\$35.00' on the right.

| Item | Quantity | Price |
|----------------|----------|-------|
| YELLOWGLEN BTL | 1 | 35.00 |

Add the Coupon Promotion to the sale by going to the POS screen tab where the Customer Coupon button was created, then press the button.

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A screen similar to the below will be displayed containing a list of Coupons that the customer is entitled to redeem. Select the Birthday Coupon from the list, then press the "Redeem Selected Coupon" button on the bottom-right corner of the screen.



The Stock Item(s) that were included in the Coupon will be discounted by the amount configured in the Coupon Promotion and the Total amount displayed on the bottom-right corner of the transaction details.

08 Aug 14:12 Adult ID: 08-Aug-2001
Jeremy PRICE 1

JOHN CITIZEN - 1 Points (\$0.10)

| | | |
|------------------------------|---|--------|
| YELLOWGLEN BTL | 1 | 35.00 |
| COUPON: B2000200000000200819 | | -35.00 |

1 Points (\$0.10)
Min Layby Deposit : \$3.50

Discounts(+/-) -35.00
\$0.00

To finalise the Sale, press the "ENTER" button, then enter the amount.
If the Total amount is 0.00 (due to a 100% discount), press CASH to finalise the sale.

08 Aug 14:16 Adult ID: 08-Aug-2001
Jeremy PRICE 1

JOHN CITIZEN - 1 Points (\$0.10)

| | | |
|-----------------------------------|---|--------|
| YELLOWGLEN BTL | 1 | 35.00 |
| -35.00 Birthday Bottle House Wine | 1 | |
| COUPON: B2000200000000200819 | | -35.00 |
| Birthday Bottle House Wine | 1 | -35.00 |

1 Points (\$0.10)
Min Layby Deposit : \$3.50

Discounts(+/-) -35.00
\$0.00

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

| | |
|--------------|--|
| CASH | |
| EFTPOS | |
| ACCOUNT | |
| LAYBY | |
| GIFT VOUCHER | |
| CREDIT NOTE | |
| POINTS | |

0.00

Balance 0.00

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When attempting to redeem a Birthday Coupon using a Customer who has a birthday which has occurred after the number of days specified in the promotion, the Birthday Coupon will not be displayed and therefore unavailable for redemption.

The below example shows a Customer whose Birthday occurred on the 07/08/1980 (7th August 1980).

modify customer General Advanced ✕

Code Customer Type Scan Code
Last Name Other Codes
Given Names
Title

Address Details
Address
Suburb
State Postcode

Delivery Address
 Delivery Address same as Above
Address
Suburb
State Postcode

Contact Details
Phone
Mobile
Fax
Email

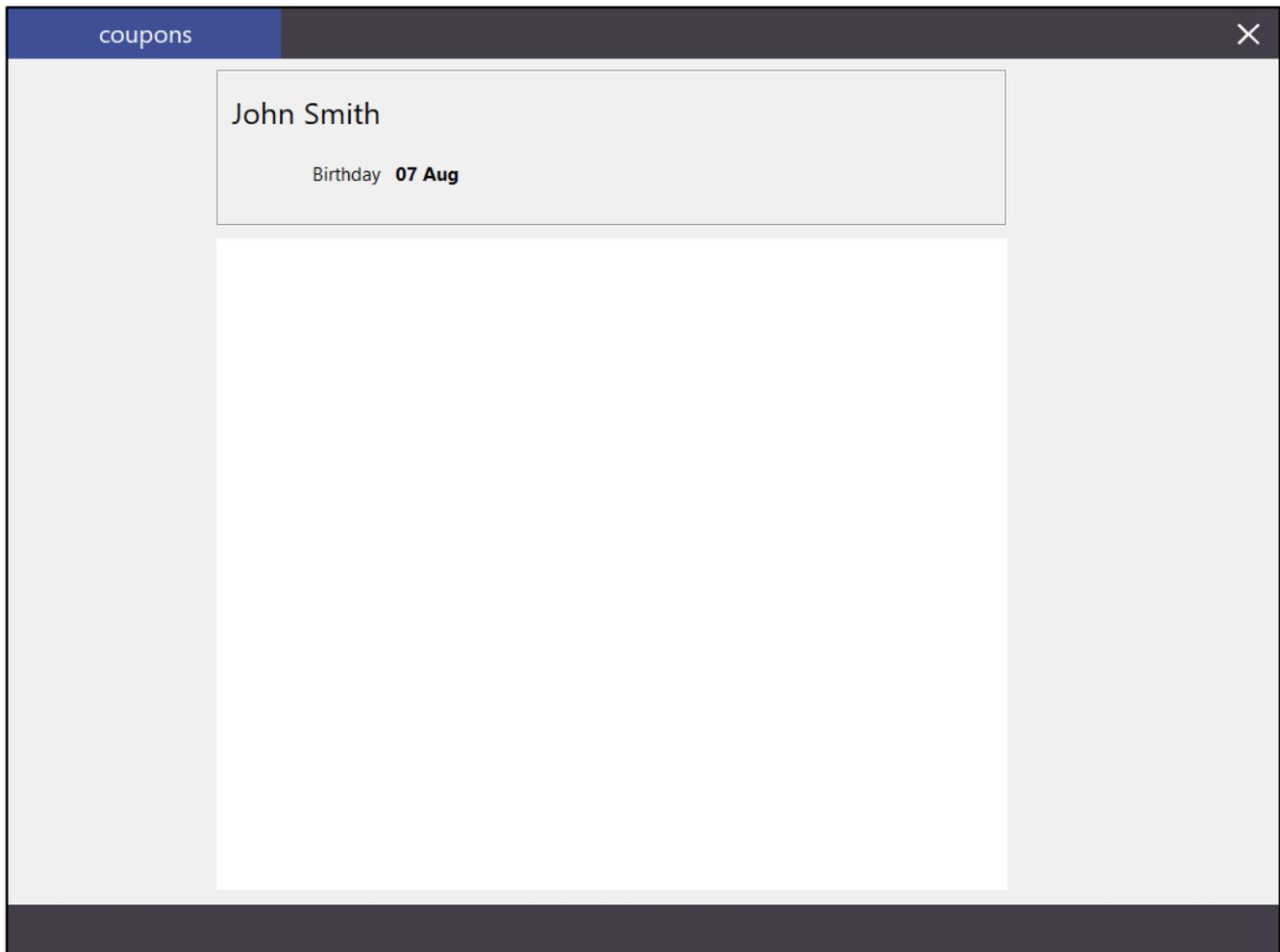
Sales / Accounting
Auto % Discount Account
Price Level Credit Limit
 Bar Tab

Miscellaneous
Company Birth Date
Occupation Birth Date 2
Next of Kin Password
Contact No Gender
Marital Status
 Mail Out
 Discontinue

Comments
Sales Prompt

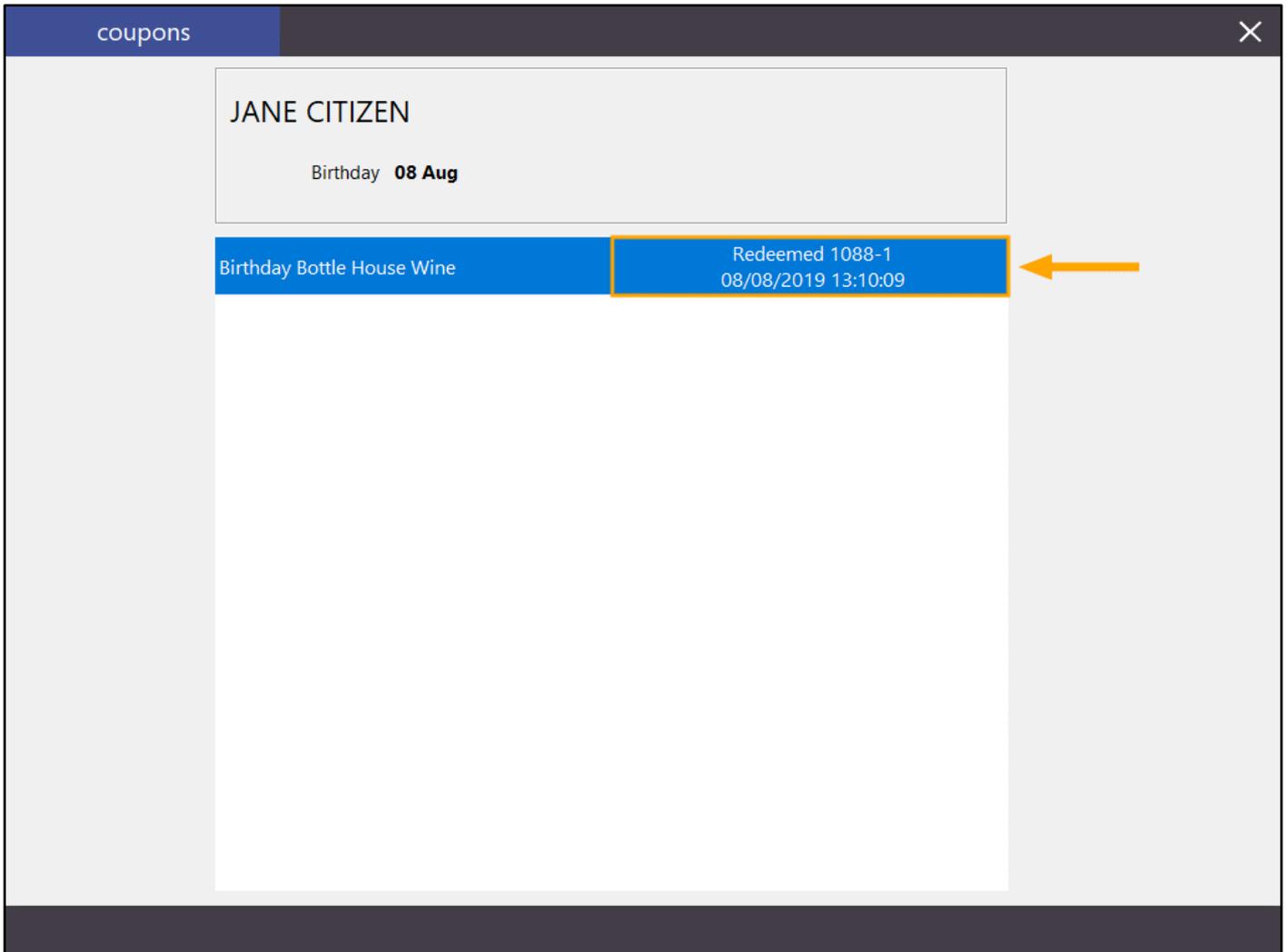
Save

With the current date being 08/08/2019, when adding the above Customer to the sale and attempting to trigger the Birthday Coupon Promotion, the Customer Coupons screen will show no available Coupons in the list.



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In addition, attempting to redeem a Birthday Coupon for a Customer who has already redeemed their Birthday Coupon for the current year will display the date and time when it was redeemed. The customer will need to wait for their next year's birthday before they can redeem the Birthday Coupon again.



The screenshot shows a window titled "coupons" with a close button (X) in the top right corner. The window displays the following information:

- Customer Name: JANE CITIZEN
- Customer Birthday: Birthday 08 Aug
- Coupon Item: Birthday Bottle House Wine
- Redemption Status: Redeemed 1088-1
- Redemption Date and Time: 08/08/2019 13:10:09

An orange arrow points to the redemption date and time, highlighting that the coupon has already been used for the current year.

Function Descriptors

Over-Tendered Tenders can convert balance to Tips

This function adds the ability to configure specific Tender Types to allow overcharging to tips. Any amount that exceeded the required total will be converted to a tip and a prompt will be displayed advising the clerk of the amount they have overtendered and whether they'd like to convert the amount to a Tip. This function is useful in regions or industries that encourage or rely on tipping.

To configure this function, go to:

Setup > Function Descriptors > Select a Tender between Tender 2 and Tender 18 > Modify
Enable "Allow Overcharging To Tips" then press "Save"

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 2". The "Description" field is "EFTPOS". The "# of Receipts" is "1". The "Exchange Rate" is "0". The "Lower Limit" is "0.00" and the "Upper Limit" is "9999.99". The "Scan Code" field is empty. The "Scan Code Amount" is "0.00". The "Surcharge" is "0.00" with a dropdown menu showing "%". The "Waive Surcharge Threshold" is "0.00". Below these fields is an "Override Receipt Footer" text area. At the bottom left is a "User-Defined Text" field. On the right side, there is a list of checkboxes:

- Rounding?
- Credit Function
- Allow Points per Dollar?
- Show in Banking
- Compulsory Amount
- Open Cash Drawer
- EFTPOS
- Account Tender
- Layby Tender
- Force Receipt
- GIFT VOUCHER Redemption
- Credit Note Tender
- Force Customer
- Force Reference
- Allow Overcharging To Tips

A yellow arrow points to the "Allow Overcharging To Tips" checkbox. At the bottom right, a yellow arrow points to a "Save" button.

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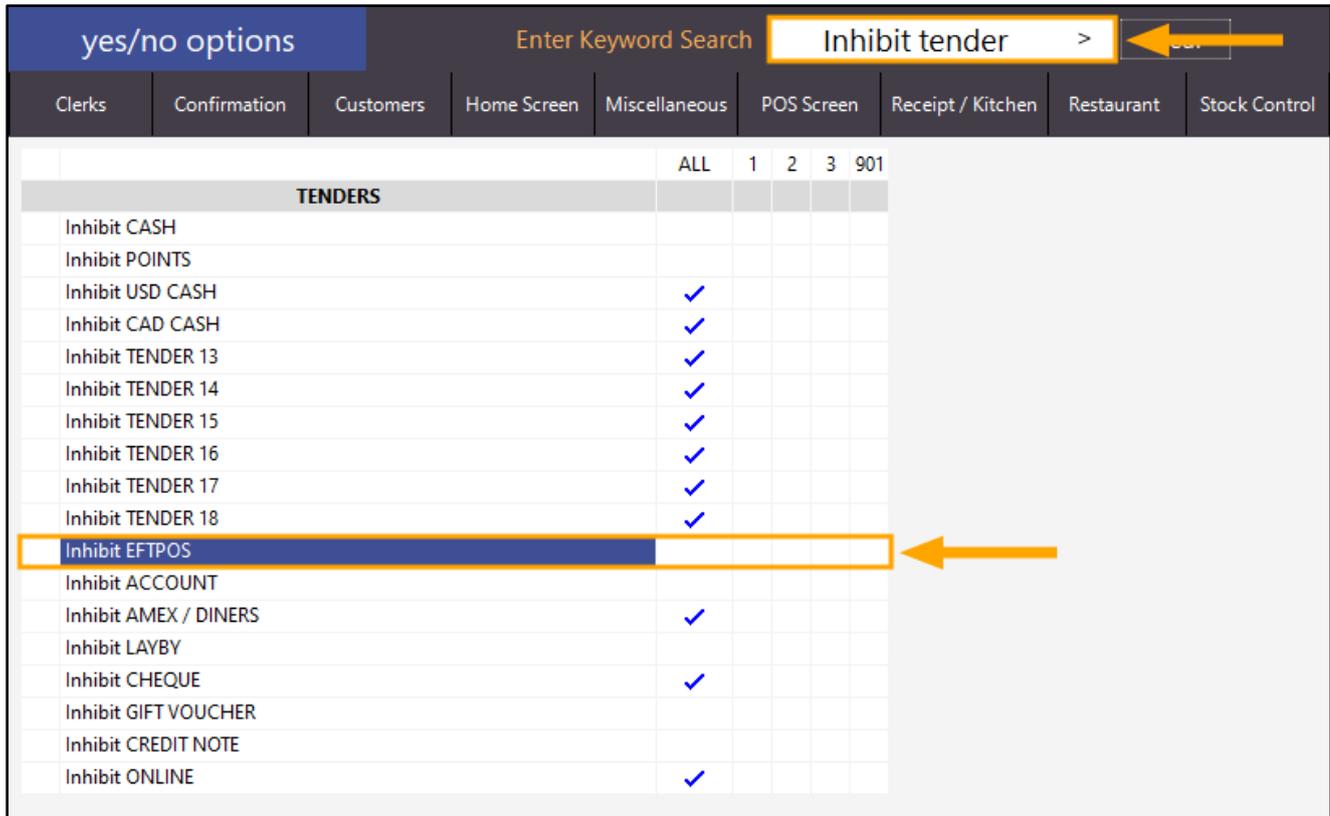
Ensure that the Tender being configured is enabled.

Go to: Setup > Yes/No Options

Enter Keyword Search: Inhibit tender

Ensure that you remove the checkbox for the Tender that you want to enable.

For this example, we'll be using EFTPOS



| yes/no options | | Enter Keyword Search | | Inhibit tender | | | | | |
|-----------------------|--------------|----------------------|-------------|----------------|------------|-------------------|------------|---------------|-----|
| Clerks | Confirmation | Customers | Home Screen | Miscellaneous | POS Screen | Receipt / Kitchen | Restaurant | Stock Control | |
| | | | | | ALL | 1 | 2 | 3 | 901 |
| TENDERS | | | | | | | | | |
| Inhibit CASH | | | | | | | | | |
| Inhibit POINTS | | | | | | | | | |
| Inhibit USD CASH | | | | | ✓ | | | | |
| Inhibit CAD CASH | | | | | ✓ | | | | |
| Inhibit TENDER 13 | | | | | ✓ | | | | |
| Inhibit TENDER 14 | | | | | ✓ | | | | |
| Inhibit TENDER 15 | | | | | ✓ | | | | |
| Inhibit TENDER 16 | | | | | ✓ | | | | |
| Inhibit TENDER 17 | | | | | ✓ | | | | |
| Inhibit TENDER 18 | | | | | ✓ | | | | |
| Inhibit EFTPOS | | | | | | | | | |
| Inhibit ACCOUNT | | | | | | | | | |
| Inhibit AMEX / DINERS | | | | | ✓ | | | | |
| Inhibit LAYBY | | | | | | | | | |
| Inhibit CHEQUE | | | | | ✓ | | | | |
| Inhibit GIFT VOUCHER | | | | | | | | | |
| Inhibit CREDIT NOTE | | | | | | | | | |
| Inhibit ONLINE | | | | | ✓ | | | | |

Close the Yes/No options, then go to the POS Screen.

Add items to the sale, then press the "ENTER" button to go to the Tender screen

29 Jul 16:26 Adult ID: 29-Jul-2001
Jeremy PRICE 1
✕

| | | | | | | |
|--|-------------|------------|-----|---|---|---------|
| FLAT WHITE 1 3.50 SHORT BLACK 1 3.00 LONG BLACK 1 3.50 | RECEIPT | CLERK | 7 | 8 | 9 | CL |
| | PRICE LEVEL | 5% ST DISC | 4 | 5 | 6 | NO SALE |
| | CUSTOMER | 5% ITEM | 1 | 2 | 3 | X |
| | BAR TAB | REFUND | | | | |
| | PENDING | VOID SALE | | | | |
| | TABLE MAP | VOID | 0 → | | | ENTER |

3x
\$10.00

| | | | | | | | | |
|---|---|---|---|---|---|--|---|---|
|  |  |  |  |  |  |  |  |  |
| CAPPUCCINO | FLAT WHITE | LATTE | CHAI | SHORT BLACK | LONG BLACK | MOCHA | HOT CHOC | TEA |
| EXTRA HOT | SKINNY | DECAF | 1 SUGAR | TAKEAWAY | SMALL | ICED DRINK | WATER | KEYBOARD |
| EXTRA CHOC | SOY | WEAK | 2 SUGAR | MARSH MALLOW | MEDIUM | MILKSHAKE | JUICE | ORDER NUMBER |
| NO CHOC | ALMOND | DOUBLE SHOT | 3 SUGAR | EQUAL | LARGE | SMOOTHIE | SOFTDRINK | REWARDS ENQUIRY |
| DRINKS | CAFE | TAP BEER | SPIRITS | COCKTAILS | FRUIT & VEG | GROCERY | RETAIL | MANAGER |
| | RESTAURANT | BOTTLE BEER & RTD | WINE | | | | SERVICES | ADMIN |

idealpos Update History

Enter the amount that you want to over-tender by using the on-screen numeric keypad. The amount entered will appear in the amount field next to the Fast-Cash tender buttons. After entering the amount, press the Tender Type that was configured above. In this example, the total amount due is \$10.00 and a tender amount of 20.00 has been entered.

The screenshot displays the Idealpos POS interface. At the top left, it shows the date and time '29 Jul 16:31' and the user 'Adult ID: 29-Jul-2001 Jeremy PRICE 1'. The receipt lists three items: 'FLAT WHITE' (1 @ 3.50), 'SHORT BLACK' (1 @ 3.00), and 'LONG BLACK' (1 @ 3.50). The total amount due is \$10.00. A numeric keypad is visible on the right, with the amount '20.00' entered. Below the keypad, the tender type 'EFTPOS' is selected, indicated by a yellow arrow. The interface also shows a 'Balance 10.00' and a stack of Australian banknotes (100, 50, 20, 10, 5).

| Item | Quantity | Price |
|-------------|----------|-------|
| FLAT WHITE | 1 | 3.50 |
| SHORT BLACK | 1 | 3.00 |
| LONG BLACK | 1 | 3.50 |

3x \$10.00

| | |
|---------------|---|
| CASH | |
| EFTPOS | ← |
| ACCOUNT | |
| LAYBY | |
| GIFT VOUCHER | |
| CREDIT NOTE | |
| POINTS | |

20.00

Balance 10.00

After selecting the Tender, Idealpos will display a prompt "You have OverTendered by \$##.## - Would you like to convert this to a Tip?". Press "Yes" to convert the overtendered amount into a Tip and proceed to Payment.

The screenshot shows a dark grey dialog box with the text "You have OverTendered by \$10.00 - Would you like to convert this to a Tip?". Below the text are two buttons: "Yes" and "No".

Pressing No will result in the extra amount being tendered towards the sale.
 Any overtendered amount will be counted as Change that is due to be given back to the customer.

29 Jul 16:43 Adult ID: 29-Jul-2001
 Jeremy PRICE 1

✕

| | | | | | | | | |
|--------------|---|-------|-------------|------------|---|---|-------|------------|
| CAPPUCCINO | 1 | 3.50 | RECEIPT | CLERK | 7 | 8 | 9 | CL |
| FLAT WHITE | 1 | 3.50 | PRICE LEVEL | 5% ST DISC | 4 | 5 | 6 | NO SALE |
| SHORT BLACK | 1 | 3.00 | CUSTOMER | 5% ITEM | 1 | 2 | 3 | X |
| GST Subtotal | | 10.00 | BAR TAB | REFUND | 0 | . | ENTER | |
| GST Amount | | 0.48 | PENDING | VOID SALE | | | | |
| | | | TABLE MAP | VOID | | | | |

| | |
|--------------|-------|
| CASH | |
| EFTPOS | 20.00 |
| ACCOUNT | |
| LAYBY | |
| GIFT VOUCHER | |
| CREDIT NOTE | |
| POINTS | |

Change

\$10.00

idealpos Update History

Any Tips that have been received will appear in the Financial Report under TIPS IN.
 Go to: Reports > Financial > Financial Report > Select the Period Required > View

| | | Quantity | Amount | | | Quantity | Amount |
|------------------------|---|----------|--------------|------------------------|------|----------|---------|
| Gross Sales | | 9.00 | 30.00 | Transactions | | 10 | |
| ST Discount | | 0 | 0.00 | Sales | | 3 | |
| ST Discount 2 | | 0 | 0.00 | No-Sales | | 0 | |
| ST Discount 3 | | 0 | 0.00 | | | | |
| ST Discount 4 | | 0 | 0.00 | Average \$ per Sale | | | 10.00 |
| Subtotal Surcharges | | 0 | 0.00 | Refunds | | 0 | 0.00 |
| Promotions | | 0 | 0.00 | Voids | | 1 | 3.50 |
| Item Discount | | 0 | 0.00 | Void Mode Transactions | | 0 | 0.00 |
| Item Disc 2 | | 0 | 0.00 | Void Entire Sales | | 7 | 92.75 |
| Item Disc 3 | | 0 | 0.00 | Non-Turnover Sales | | 0 | 0.00 |
| Item Disc 4 | | 0 | 0.00 | | | | |
| % Item Surcharges | | 0 | 0.00 | Cost of Sales | | | \$2.38 |
| Points Redemptions | | 0 | 0.00 | \$ Margin | | | \$26.18 |
| NETT Sales (incl. tax) | | | 30.00 | Gross Profit (%) | | | 91.7 |
| | | | | | | | |
| Rounding | | | 0.00 | <u>Tax Amounts</u> | | | |
| TIPS IN | 1 | | 10.00 | Amount | | | Sales |
| PAID IN | 0 | | 0.00 | GST | 1.44 | | 30.00 |
| GV PURCHASE | 0 | | 0.00 | | | | |
| RA 4 | 0 | | 0.00 | | | | |
| TIPS OUT | | | 0.00 | | | | |
| PAID OUT | | | 0.00 | | | | |
| PO 3 | | | 0.00 | | | | |
| PO 4 | | | 0.00 | | | | |
| | | | 40.00 | | | | |
| | | | | GST Reportable Sales | | | 30.00 |

Gift Vouchers

Option to Expire Gift Vouchers after a Single Redemption

This option adds the ability to Expire Gift Vouchers after a Single Redemption. This may be useful when you want to force customers to spend the entire value of their Gift Voucher in a single redemption. If the entire value of the Gift Voucher is not redeemed in the single redemption, any amount remaining on the voucher will be forfeited and no longer available after the single redemption has been performed.

When configuring and selling Gift Vouchers, it is important that you comply with any laws that govern the sale of Gift Vouchers in your Country or State that you reside.

As an example, you can view the requirements for [Australia](#), [New Zealand](#) and [Canada](#), however, this is obviously not an extensive list and you need to ensure that you research and understand the laws in your area.

As the complete end-to-end configuration of Gift Vouchers can be quite extensive and customisable, covering the complete setup and configuration of a Gift Voucher in the Update History is outside the scope.

The basics of selling and redeeming a Gift Voucher will be covered for the purposes of demonstrating this function. For complete details about setting up and configuring Gift Vouchers, refer to the Gift Voucher topic in the Idealpos User Guide by clicking [here](#).

To enable/toggle this option, go to:

Setup > Global Options > Credit Notes/Gift Vouchers > Gift Vouchers.

Enable checkbox: Expire Gift Voucher after a Single Redemption

The screenshot shows the 'global options' configuration page for 'site 1 (Site 1)'. The 'Credit Notes/Gift Vouchers' tab is selected. The 'Gift Vouchers' section contains a table with 20 rows, each representing a different voucher type. The 'Expire Gift Voucher after a Single Redemption' checkbox is checked and highlighted with a yellow box and an arrow. Below the table, there are several other options, including 'Use Programmable Barcodes' and 'Print Credit Notes on Receipt Printer'. The 'Credit Notes' section is also visible at the bottom of the page.

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

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

Company Logo: Idealpos_Gift_Voucher_Banner.jpg
Website: www.idealpos.com.au

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

Amount: _____
Type: _____

Customer Type: ACCOUNTS
Expiry Days: 90

| Reason | Item | Value |
|--------|----------------|-------|
| 1 | Item Returned | 6 |
| 2 | Item Damaged | 7 |
| 3 | Product Recall | 8 |
| 4 | | 9 |
| 5 | | 10 |

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

idealpos Update History

After enabling the above option, close the Global Options window.

Gift Vouchers are sold via the Received Account function. Idealpos supports up to four Received Account functions. At least one Received Account function must be enabled for GIFT VOUCHERS.

Go to: Setup: Function Descriptors > Received Account 1-4

Any Received Accounts that are already configured or used will contain a description representing the purpose that the function is being used for. Any unused Received Account Functions will typically have RA followed by the Received Account Number.

Find the next available and unused Received Account Function, then either select it and press the Modify button on the bottom-right corner of the screen, or double click on it to modify the function descriptor.

The below example shows the next available Received Account Function is 3, as highlighted below.

| function descriptors | |
|----------------------|-------------|
| Function | Description |
| PAID OUT 1 | TIPS OUT |
| PAID OUT 2 | PAID OUT |
| PAID OUT 3 | PO 3 |
| PAID OUT 4 | PO 4 |
| RECEIVED ACCOUNT 1 | TIPS IN |
| RECEIVED ACCOUNT 2 | PAID IN |
| RECEIVED ACCOUNT 3 | RA 3 |
| RECEIVED ACCOUNT 4 | RA 4 |
| NO SALE 1 | NO SALE |
| NO SALE 2 | NO SALE 2 |
| NO SALE 3 | NO SALE 3 |
| NO SALE 4 | NO SALE 4 |

When modifying the function, enter a Description and enable the GIFT VOUCHER checkbox.
For this example, we will use a Description of GV PURCHASE
Once the change has been made, press the "Save" button on the bottom-right corner.

The image shows a software interface window titled "function descriptors" with a close button (X) in the top right corner. The main content area contains the following fields and options:

- Function:** RECEIVED ACCOUNT 3
- Description:** GV PURCHASE
- GIFT VOUCHER
- Credit Note
- Allow % Tender Surcharges

At the bottom right of the window, there is a "Save" button. Orange arrows point to the "Description" field, the "GIFT VOUCHER" checkbox, and the "Save" button.

idealpos Update History

A Gift Voucher Tender will also need to be configured.
From the Function Descriptors screen, find the next available Tender.
Any unused Tenders will appear as TENDER ##.
In the below example, the next available tender is TENDER 7.

| function descriptors | |
|----------------------|---------------|
| Function | Description |
| RECEIVED ACCOUNT 4 | RA 4 |
| NO SALE 1 | NO SALE |
| NO SALE 2 | NO SALE 2 |
| NO SALE 3 | NO SALE 3 |
| NO SALE 4 | NO SALE 4 |
| VOID | VOID |
| REFUND | REFUND |
| %+ ITEM | %+ ITEM |
| %+ ST | %+ SUBTOTAL |
| TENDER 1 | CASH |
| TENDER 2 | EFTPOS |
| TENDER 3 | ACCOUNT |
| TENDER 4 | AMEX / DINERS |
| TENDER 5 | LAYBY |
| TENDER 6 | CHEQUE |
| TENDER 7 | TENDER 7 |
| TENDER 8 | TENDER 8 |
| TENDER 9 | TENDER 9 |

Either double-click on the next available tender, or select the tender then press the “Modify” button on the bottom-right corner of the screen.

Configure the tender as follows:

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 form is divided into several sections:

- Function:** A text box containing "TENDER 7".
- Description:** A text box containing "GIFT VOUCHER".
- # of Receipts:** A text box containing "1".
- Exchange Rate:** A text box containing "0".
- Lower Limit:** A text box containing "0.00".
- Upper Limit:** A text box containing "99999.99".
- Scan Code:** An empty text box.
- Scan Code Amount:** A text box containing "0.00".
- Surcharge:** A text box containing "0.00" with a percentage sign icon.
- Waive Surcharge Threshold:** A text box containing "0.00" with a dollar sign icon.
- Override Receipt Footer:** A large empty text area.
- User-Defined Text:** An empty text box.
- Checkboxes (Right Side):**
 - Rounding?
 - Credit Function
 - Allow Points per Dollar?
 - Show in Banking
 - Compulsory Amount
 - Open Cash Drawer
 - EFTPOS
 - Account Tender
 - Layby Tender
 - Force Receipt
 - GIFT VOUCHER Redemption
 - Credit Note Tender
 - Force Customer
 - Force Reference
 - Allow Overcharging To Tips

At the bottom right of the window, there is a "Save" button. Orange arrows in the original image point to the Description field, the Credit Function checkbox, the Open Cash Drawer checkbox, the GIFT VOUCHER Redemption checkbox, and the Save button.

Before a Gift Voucher can be sold and redeemed, Gift Voucher and Gift Voucher Enquiry buttons need to be created on the POS screen.

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

Click on a suitable POS Screen tab where you'd like the buttons created, then locate at least two blank POS Screen buttons on the tab. Configure the two available buttons as follows, ensuring to press "Save" when configuring each button:

The following button will be used for selling Gift Vouchers.

Button Function: Received on Account

Received on Account: "GV PURCHASE"

Gift Voucher Type: "Gift Voucher"

Button Caption: "GIFT VOUCHER"

Received on Account

Automatic Text

Received on Account: GV PURCHASE

Gift Voucher Type: Gift Voucher

Button Appearance

Button Caption: GIFT VOUCHER

Back Colour Font

Text Colour A A

Double Width Visible

Double Height

Graphic

Format All Save Cancel

Received on Account

- Receipt On/Off
- Received on Account
- Refund
- Register Closed Msg
- Replay Transaction
- Reservations
- Rewards Enquiry
- Reweigh
- Safe Drop
- Sale Reference
- Sale Type
- Scale On/Off
- Seat Number
- Send Message
- Stock Item
- Stock Item Edit
- Stock Item Sales
- Stock Item Search
- Stock Level Enquiry
- Stock Location
- Stock Notes
- Subtotal Discount

The following button will be used for Enquiring a Gift Voucher

Button Function: Gift Voucher Enquiry

Button Caption: "GIFT VOUCHER ENQUIRY"

Gift Voucher Enquiry

Button Appearance

Button Caption: GIFT VOUCHER ENQUIRY

Back Colour Font

Text Colour A A

Double Width Visible

Double Height

Graphic

Format All Save Cancel

Gift Voucher Enquiry

- External Application
- Gift Voucher Enquiry
- Hold Print
- Home Screen
- Item Discount
- Jackpot
- Journal Enquiry
- Journal History
- Layby Adjustment
- Layby Cancellation
- Layby Credit
- Layby Payment
- Machine Lookup
- Macro
- Manual Modifier
- Manual Tare
- Member Number
- No Sale
- None
- Order Number
- Pager System
- Paid Out

idealpos Update History

Once the POS Screen buttons have been configured, close the POS Screen Layout windows, then go to the POS Screen.

Click on the GIFT VOUCHER button created above.

Idealpos will display the following prompt to Scan or Enter Voucher Code, Enter the Amount, Customer Name and Email Address. Entering the Name and Email address is optional. If you enter an email address, the voucher will be sent to the entered email address. In order to use the Email Address, you need to configure Email Settings in Idealpos.

Refer to [Setting up Gift Vouchers](#) in the User Guide for more details.

Enter the Amount, then press OK.

GIFT VOUCHER Sale

Scan or Enter Voucher Code
9823214395523

Amount
50.00

Customer Name

Email Address

GIFT VOUCHER Type
Gift Voucher

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

The Gift Voucher will appear in the Idealpos Sale Screen.

23 Jul 16:34 Adult ID: 23-Jul-2001
Jeremy PRICE 1

| | | |
|-------------|---|-------|
| GV PURCHASE | 1 | 50.00 |
|-------------|---|-------|

\$50.00

Press the "ENTER" button to proceed to the Tender screen.
Finally, select a Tender amount to finalise the sale.

The Gift Voucher will be printed and will include the amount, Gift Voucher Number and Voucher barcode.



When redeeming the Gift Voucher, it will expire after a single redemption, meaning that any unspent and remaining value will be forfeited.

idealpos Update History

To redeem the voucher, first add any required items to the sale.
 In the below example, \$10.00 worth of items have been added to a sale.

| 24 Jul 11:14 Adult ID: 24-Jul-2001 Jeremy PRICE 1 | | |
|--|---|------|
| CAPPUCCINO | 1 | 3.50 |
| FLAT WHITE | 1 | 3.50 |
| SHORT BLACK | 1 | 3.00 |
| \$10.00 | | |

Press the ENTER button to go to the Tender screen, then press the "GIFT VOUCHER" button.

| 24 Jul 11:16 Adult ID: 24-Jul-2001 Jeremy PRICE 1 | | | | X | | | | |
|--|---|------|--|------------|---|---|-------|---------|
| CAPPUCCINO | 1 | 3.50 | RECEIPT | CLERK | 7 | 8 | 9 | CL |
| FLAT WHITE | 1 | 3.50 | PRICE LEVEL | 5% ST DISC | 4 | 5 | 6 | NO SALE |
| SHORT BLACK | 1 | 3.00 | CUSTOMER | 5% ITEM | 1 | 2 | 3 | X |
| | | | BAR TAB | REFUND | | | | |
| | | | PENDING | VOID SALE | | | | |
| | | | TABLE MAP | VOID | 0 | . | ENTER | |
| \$10.00 | | | | | | | | |
| 3x | | | | | | | | |
| CASH | | | <div style="text-align: center;">      </div> | | | | | |
| EFTPOS | | | | | | | | |
| ACCOUNT | | | | | | | | |
| LAYBY | | | | | | | | |
| GIFT VOUCHER | | | | | | | | |
| CREDIT NOTE | | | | | | | | |
| POINTS | | | <div style="text-align: center;"> 10.00 Balance 10.00 </div> | | | | | |

A GIFT VOUCHER prompt will be displayed to Scan or Enter the Voucher Code and will also show the Amount to Tender.

GIFT VOUCHER redemption

Scan or Enter Voucher Code

Amount to Tender **10.00**

Name Search

| | | |
|---|---|----|
| 7 | 8 | 9 |
| 4 | 5 | 6 |
| 1 | 2 | 3 |
| 0 | . | CL |

If a Customer Name was entered at the time the Gift Voucher was sold, you have the option to click on the "Name Search" button to find the voucher from the list. Otherwise, Scan or Enter the Voucher Code to proceed.

Once the Voucher Code has been scanned or entered, the balance of the voucher will be displayed along with buttons to Print, View History, Edit, Add or Email.

To add the Voucher to the sale, press the "Add" button.

GIFT VOUCHER redemption

Scan or Enter Voucher Code

9823214395523 >

Name Search

Amount to Tender **10.00**

Balance of Voucher 50.00

Bought 23/07/19 - \$50.00
Expires 22/07/20

Print View History Edit **Add** Email

| | | |
|---|---|----|
| 7 | 8 | 9 |
| 4 | 5 | 6 |
| 1 | 2 | 3 |
| 0 | . | CL |

idealpos Update History

After adding the Gift Voucher, the GIFT VOUCHER screen will show the Voucher Code, Redeeming Amount and the Total Voucher Redemption. Press the "Finalise" button to finalise the sale.

GIFT VOUCHER redemption ×

Scan or Enter Voucher Code >

Amount to Tender **0.00**

| | | |
|---|---|----|
| 7 | 8 | 9 |
| 4 | 5 | 6 |
| 1 | 2 | 3 |
| 0 | . | CL |

| Voucher Code | Redeeming Amount |
|---------------|------------------|
| 9823214395523 | 10.00 |

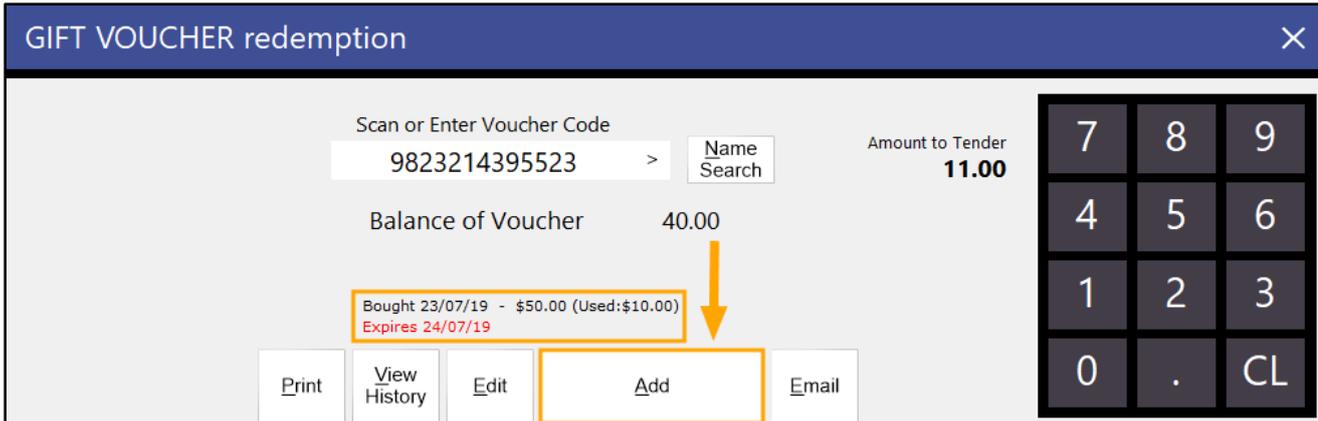
Total Voucher Redemption **10.00**



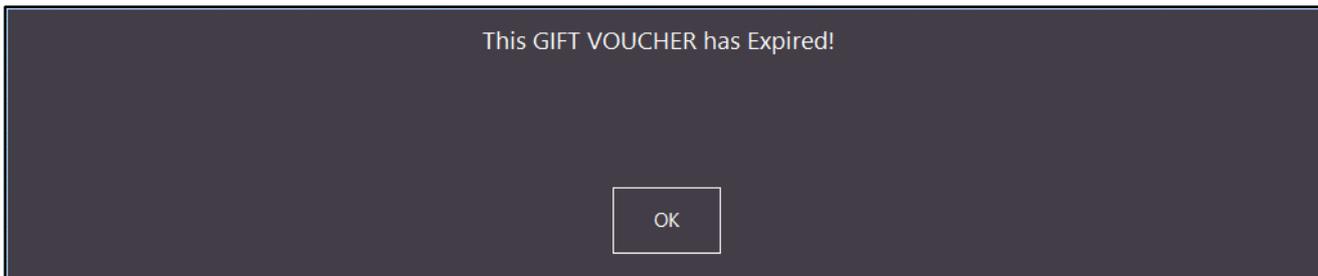
If Receipt printing is enabled, the Customer Receipt will print out showing the amount that was redeemed, along with the Voucher Code. If Receipt Printing is turned off, you can press the RECEIPT button on your POS Screen to print out a receipt.



Should any attempts be made to redeem the Gift Voucher after the single use redemption, the GIFT VOUCHER redemption screen will show the date which the voucher was used next to Expires.



Any attempts made to press the "Add" button as shown above will result in the following Gift Voucher expired message:



idealpos Update History

Should any special circumstances arise where you want to allow the customer to spend the remaining amount of the expired Gift Voucher, you have two options. Either edit the Expired Gift Voucher and adjust the expiry date to a future date, or you can add value to the expired Gift Voucher which will extend the Expiry Date by the number of days configured for the Gift Voucher Type.

To adjust the expiry date, the "Edit" button can be used to modify the expiry date of the Gift Voucher to a future date.

GIFT VOUCHER redemption

Scan or Enter Voucher Code
9823214395523 > Name Search

Amount to Tender
11.00

Balance of Voucher 40.00

Bought 23/07/19 - \$50.00 (Used:\$10.00)
Expires 24/07/19

Print View History **Edit** Add Email

| | | |
|---|---|----|
| 7 | 8 | 9 |
| 4 | 5 | 6 |
| 1 | 2 | 3 |
| 0 | . | CL |

The Edit GIFT VOUCHER screen will be displayed. Select a future date that you want the GIFT VOUCHER extended to, then press "Save". In this example, the next day of 25/07/2019 has been selected.

edit GIFT VOUCHER

GIFT VOUCHER Code **9823214395523**
Expiry Date **25/07/2019**

July 2019

| Mon | Tue | Wed | Thu | Fri | Sat | Sun |
|-----|-----|-----|-----|-----|-----|-----|
| 24 | 25 | 26 | 27 | 28 | 29 | 30 |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 | 1 | 2 | 3 | 4 |

Today: 24/07/2019

Email Address

Save

After pressing "Save", the GIFT VOUCHER redemption screen will show the new Expiry Date next to "Expires". After this point, you have the option to either close the GIFT VOUCHER redemption screen to allow the customer to come back at a date before the new expiry date to redeem the remainder of their Gift Voucher, or they can spend the remainder of the Gift Voucher by pressing the "Add" then "Finalise" buttons. If required, the Gift Voucher can also be re-printed by pressing the "Print" button. Note that the next time the Gift Voucher is redeemed, it will be subjected to the same setting/rule of being expired after a single redemption, regardless of whether or not the entire remaining balance is spent.

GIFT VOUCHER redemption

Scan or Enter Voucher Code
9823214395523 > Name Search

Amount to Tender
11.00

Balance of Voucher 40.00

Bought 23/07/19 - \$50.00 (Used:\$10.00)
Expires 25/07/19

Print View History Edit Add Email

| | | |
|---|---|----|
| 7 | 8 | 9 |
| 4 | 5 | 6 |
| 1 | 2 | 3 |
| 0 | . | CL |

Adding value to an existing Gift Voucher which has been expired will also trigger the Expiry Date of the voucher to be extended by the number of days that have been configured for the Gift Voucher Type. This is provided that the "Inhibit ability to add value to existing Gift Vouchers" option has not been enabled. The default number of days for each Gift Voucher Type and the "Inhibit ability to add value to existing Gift Vouchers" are both configured by going to: Setup > Global Options > Credit Notes/Gift Vouchers > Gift Vouchers

idealpos Update History

Option to Inhibit ability to add value to existing Gift Vouchers

This function adds the ability to stop additional value from being added/loaded onto any existing Gift Vouchers which have already been sold. This may be useful for any venues or stores that want to force their customers to purchase additional Gift Vouchers rather than adding value to existing vouchers that have already been sold.

When configuring and selling Gift Vouchers, it is important that you comply with any laws that govern the sale of Gift Vouchers in your Country or State that you reside.

As an example, you can view the requirements for [Australia](#), [New Zealand](#) and [Canada](#), however, this is obviously not an extensive list and you need to ensure that you research and understand the laws in your area.

Before enabling this option, it is assumed that your system is already configured for the sale and redemption of Gift Vouchers. If you need information on setting up Gift Vouchers, you can either refer to the [Setting up Gift Vouchers topic](#) in the User Guide. Alternatively, you can refer to the topic "Option to Expire Gift Vouchers after a Single Redemption" in this Update History document which also outlines the basics of setting up and enabling your system for the sale and redemption of Gift Vouchers.

To enable this function, go to:

Setup > Global Options > Credit Notes/Gift Vouchers > Gift Vouchers

Enable the checkbox: "Inhibit ability to add value to existing Gift Vouchers"

When the tickbox is ticked/enabled, the ability to add value to existing Gift Vouchers will be disabled/inhibited.

When the tickbox is unticked/disabled, the ability to add value to existing Gift Vouchers will be enabled/allowed.

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

Gift Vouchers

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

Message Terms and Conditions
- Vouchers redeemable up to and including the expiry date.
- Voucher is not redeemable for cash or to purchase another voucher.
- Vouchers can be redeemed at ANY one of

Company Logo Idealpos_Gift_Voucher_Banner.jpg
Website www.idealpos.com.au

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

Use Programmable Barcodes
Amount _____
Type _____

Credit Notes

Receipt Message _____

Customer Type ACCOUNTS
Expiry Days 90

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

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

Close the Global Options window to save the change.

To demonstrate this function, we will need to have an existing Gift Voucher that contains value. Go to the POS Screen and press the GIFT VOUCHER button to purchase a GIFT VOUCHER.

Enter an amount, then press OK.

GIFT VOUCHER Sale

Scan or Enter Voucher Code
9869185944315

Amount
5.00

Customer Name

Email Address

GIFT VOUCHER Type
Gift Voucher

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

The Gift Voucher will be added to the sale.

25 Jul 10:51 Adult ID: 25-Jul-2001
Jeremy PRICE 1

| Item | Quantity | Price |
|-------------|----------|-------|
| GV PURCHASE | 1 | 5.00 |

\$5.00

idealpos Update History

Press the ENTER button, then tender the sale.
The Gift Voucher will be printed.



After the Voucher has been printed and the sale finalised, press the "GIFT VOUCHER" button on your POS screen to sell another Gift Voucher.

Enter the Barcode of the existing Gift Voucher into the Scan or Enter Voucher Code field, then enter an amount. Finally, press the "OK" button.

GIFT VOUCHER Sale

Scan or Enter Voucher Code
9869185944315

Amount
10.00

Customer Name

Email Address

GIFT VOUCHER Type
Gift Voucher

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

After pressing "OK", Idealpos will display the following prompt, preventing any additional value from being added to the Gift Voucher.

This GIFT VOUCHER already exists! (Balance=5.00)
You cannot add more value to it.

OK

idealpos Update History

Home Screen

Home Screen support for Exit POS Password

This function adds the ability to close the Home Screen when an Exit POS Password is configured by pressing the Exit/X button on the top-right corner of the Home Screen. The password prompt will appear and after entering the correct password, the Home Screen will close and the Back-Office dashboard will be displayed.

Prior to this change, if an Exit POS Password was configured and the "Show Exit button on Home Screen" Yes/No option was enabled, the Clerk would still have to first login by entering their Clerk ID into the Home Screen, then they would have to press the "X" on the top right corner and enter the Exit POS Password. This change reduces the number of steps required to close the Home Screen, thereby speeding up this process.

In order to use this function, the following options must be enabled:

- Global Options – Exit POS Password
- Yes/No Options – Allow Home Screen and Show Exit button on Home Screen

Go to: Setup > Global Options > General

In the Exit POS Password, enter any password you'd like to use to exit the POS screen.

The screenshot shows the 'global options' window for 'site 1'. The 'General' tab is selected. The 'Exit POS Password' field is highlighted with a yellow box and an arrow pointing to it from the right. The password 'password' is entered in the field. Other fields include 'First Day of Week' (Monday), 'End of Day' (23:59:59), 'Decimal Places on Quantities' (4), 'Clerk Timeout' (0 sec), 'Reset Finalized Sale Time' (0 sec), 'Unlock Permissions Timeout' (sec), 'Tender Grid Button Height' (700), 'Tender Grid Font Size' (16), 'Tender Grid Line Width' (2), 'Venue ID', and checkboxes for 'NZ EFTPOS 200s' and 'Ice Terminal'.

Enter a password into the Exit POS Password field.

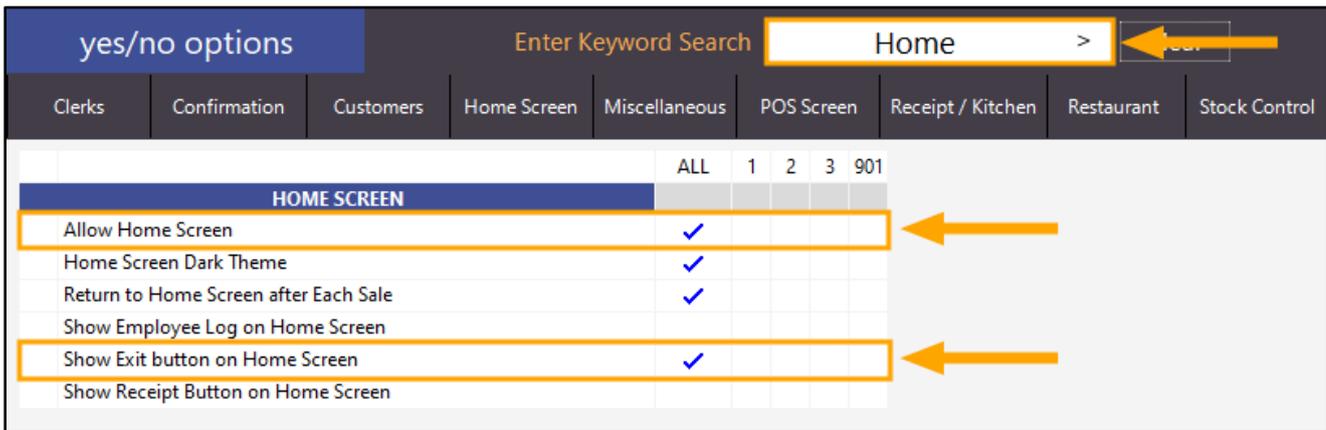
Note that the password will be displayed as plain text in the Exit POS Password field.

Only users which have access to the Setup > Global Options screen will be able to view it.

Close the Global Options window to save the change.

Go to: Setup > Yes/No Options > Enter "Home" into the "Enter Keyword Search" field
 Then enable the following Yes/No Options:

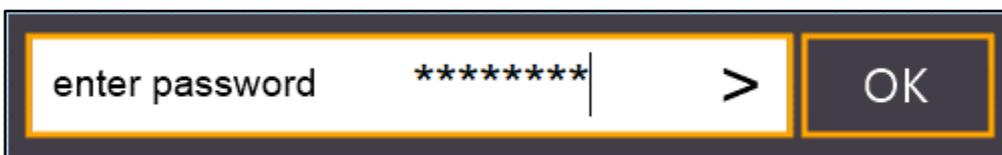
- Allow Home Screen
- Show Exit button on Home Screen



Close the Yes/No Options window, then go to the POS Screen.
 Click on the Exit/X button located on the top-right corner of the Home Screen.

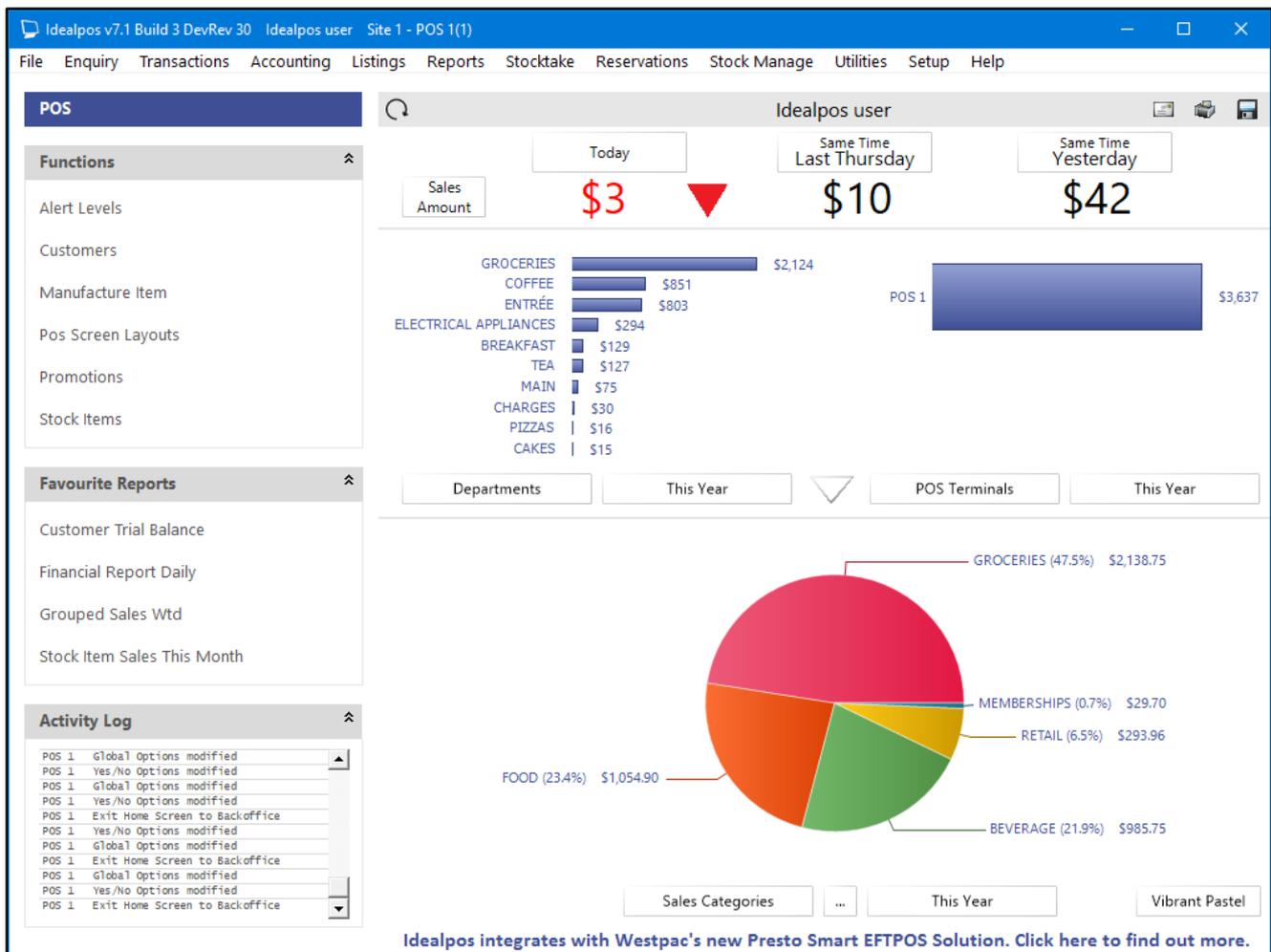


A Password prompt will be displayed.
 Enter the Password that was configured in Setup > Global Options > General > Exit POS Password
 Then press OK



idealpos Update History

The Back-Office dashboard will be displayed.



If the Exit POS Password is blank and not configured, pressing the X button on the top-right corner of the Home Screen will trigger the X to flash and the Home Screen will not close.

In order to close the Home Screen when the Exit POS Password is blank, the Clerk ID must be entered first, then the X button on the top-right corner of the Home Screen can be pressed to close the Home Screen and return to the Back-Office dashboard.

Pending Sales

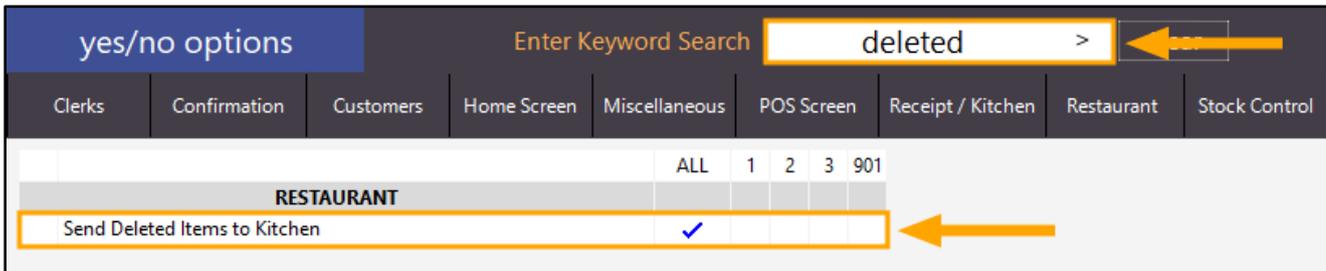
Pending Sales – Voided Items sent to Kitchen Printers

This function enables the ability for Voided Items to be sent to Kitchen Printers when using Pending Sales. This may be beneficial for the Kitchen staff to be aware of voided items so they don't cook or prepare any unrequired items.

As this function utilises an existing Yes/No option "Send Deleted Items to Kitchen", you may or may not need to perform additional configuration depending on how your system is configured.

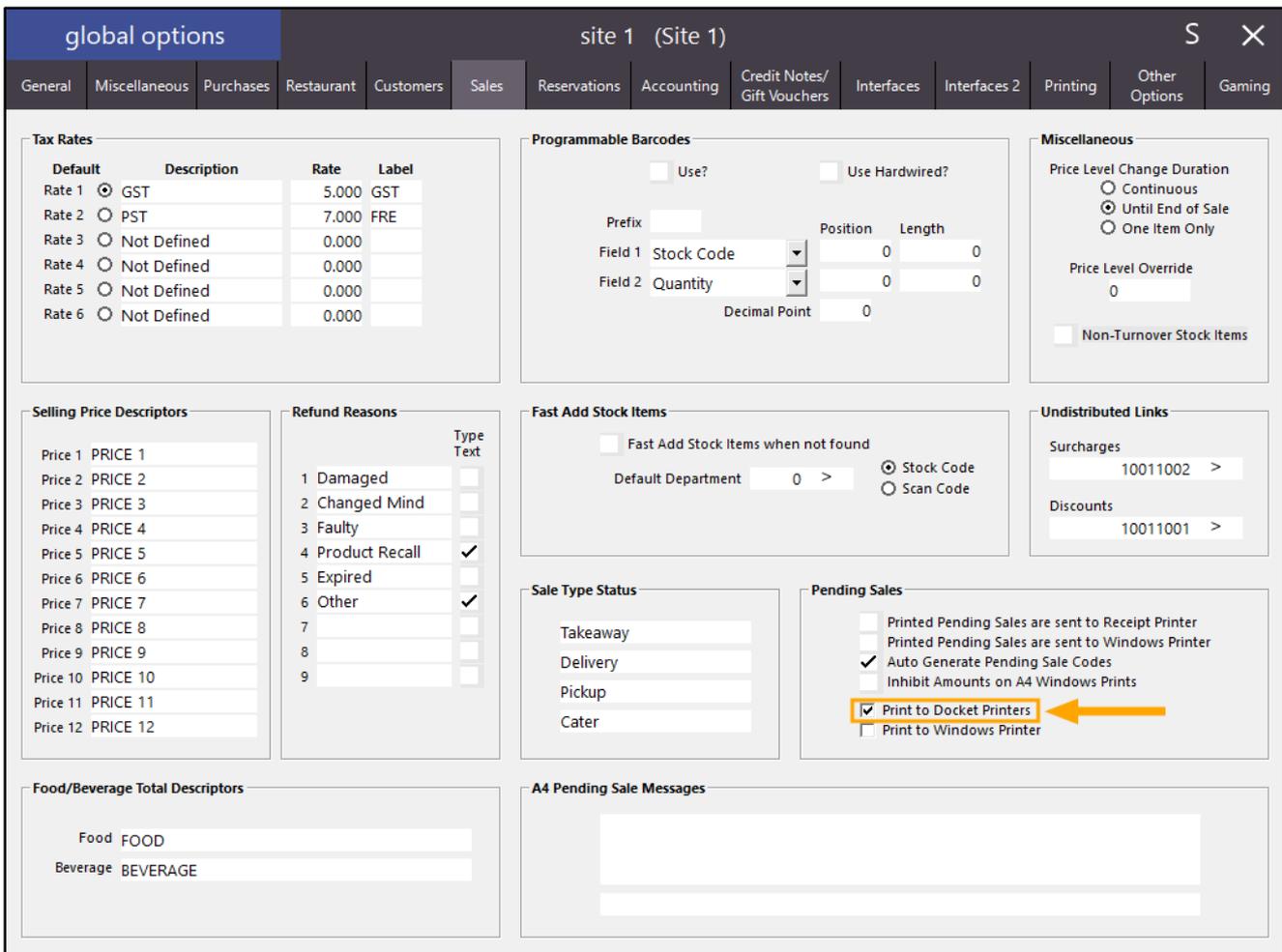
To configure this function, go to: Setup > Yes/No Options

Enter Keyword Search: "deleted", then ensure that the "Send Deleted Items to Kitchen" option is enabled



Close the Yes/No options window, then go to: Setup > Global Options > Sales > Pending Sales

Ensure that "Print to Docket Printers" is enabled. This will ensure that the Pending Sales are sent to the Kitchen Printers after the Pending Sale is saved, as well as any deletions will be sent to the printers that originally received the Pending Sale order.



idealpos Update History

Ensure that any Stock Items which need to be printed to Kitchen Printers are configured to do so.
Go to: File > Stock Control > Select the Item > Modify > Tick/Untick the Printers as required

The screenshot shows the 'stock items' configuration window for item '202001' (CAPPUCINO). The 'Printer Settings' section is highlighted with a yellow border and contains the following options:

- Receipt Printer
- KITCHEN
- BAR
- COFFEE
- IKM
- Kitchen Printer 5
- Kitchen Printer 6
- Kitchen Printer 7
- Kitchen Printer 8
- Kitchen Printer 9
- Kitchen Printer 10
- Kitchen Printer 11
- Kitchen Printer 12

Other sections visible in the window include:

- Selling Prices (inc Tax):** A table with columns for Price (PRICE 1-12) and Profit%. PRICE 1 is 3.50 with a profit of 91.17. All other prices are 0.00.
- Purchasing:** Purchase Category 2 > BEVERAGE
- Other Options:** Includes checkboxes for Stock Control, Indirect Item, Non-Accumulating, Scale, Indirect Components go to Kitchen Printers, Can't Buy with GIFT VOUCHER, Instruction, Print Red, Web Store, Inhibit Discounts, Inhibit Voids, and Manufactured Item.
- Cost Prices (ex Tax):** Standard Cost, Last Cost, and Average Cost are all 0.2942.
- Tax Settings (Selling):** Includes checkboxes for GST, PST, and Not Defined.
- Attributes:** A grid of dropdown menus.

Buttons for 'Keyboard' and 'Save' are located at the bottom of the window.

Printer Names displayed in the above example can be adjusted/modified by going to:

Setup > Global Options > Printing > Kitchen Printer Names

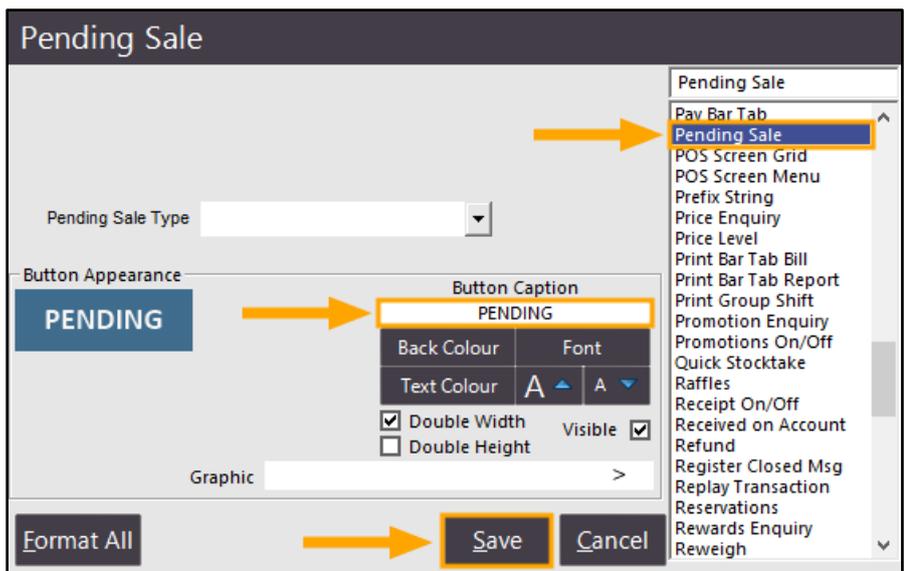
More information about Settings available in Global Options > Printing are available in the User Guide by clicking [here](#)

Printers can be configured by going to: Setup > Network Printers

More information about configuring Network Printers is available in the User Guide by clicking [here](#)

A Pending Sale button is also required to use Pending Sales.

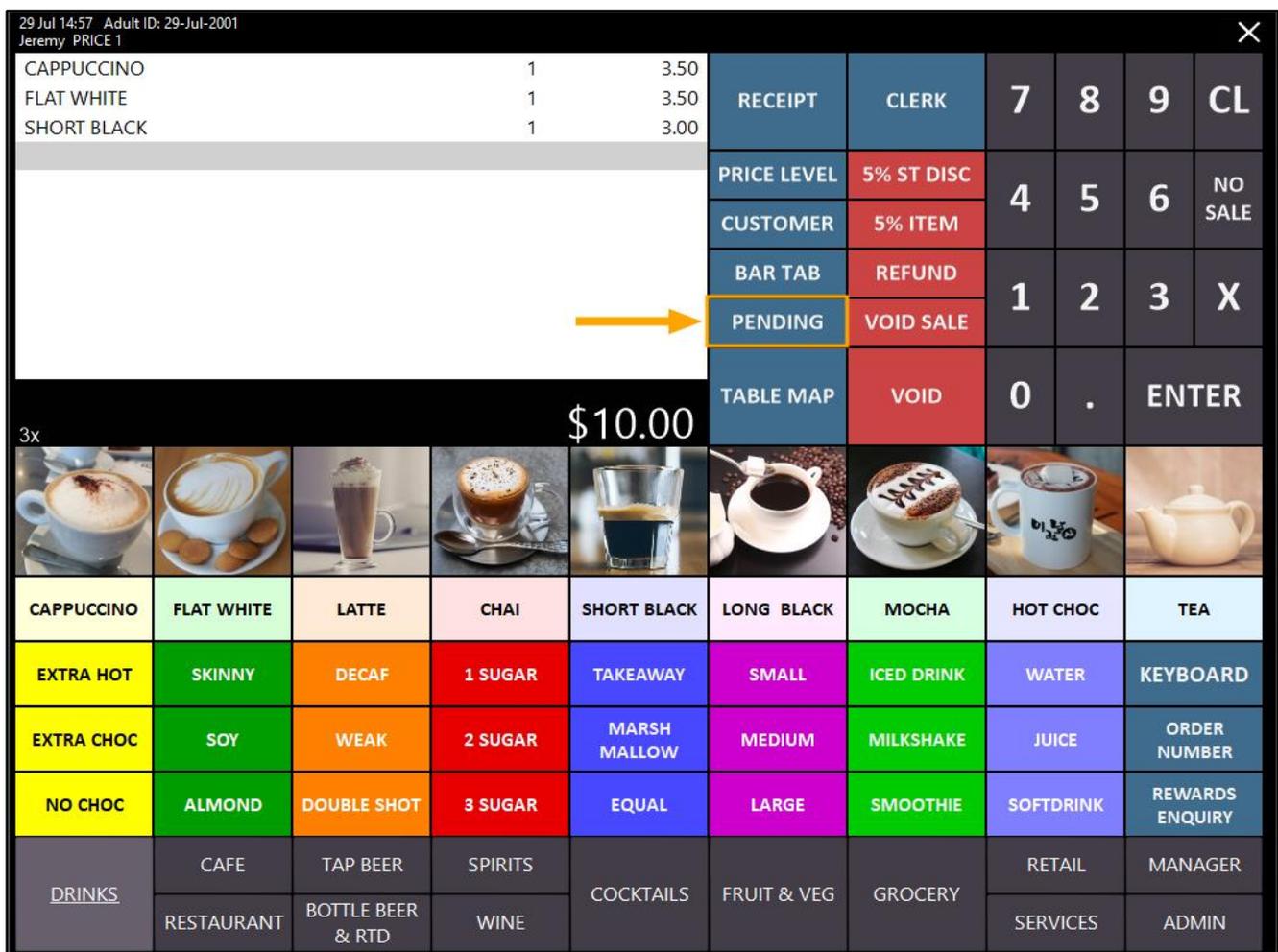
This can be configured by going to: Setup > POS Screen > POS Screen Setup > Select a POS Screen Layout > Buttons
 Find a blank button and configure it as follows:



Once the POS Screen button has been created, close the POS Screen Layout windows.

Then go to the POS Screen

Add Stock Items to the sale that will trigger a Kitchen Print, then press the PENDING button to save as a Pending Sale.



idealpos Update History

If the Yes/No Option "Fast Pending Sale" is disabled, you will see the following prompt. If required, enter details, then press the "Save" button to save the Pending Sale.

Save Table

Code 711

Name

Address

Suburb

State

Post Code

29/07/2019 14:58 +5 +10 +15

None
 Takeaway
 Delivery
 Pickup
 Cater

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

The Pending Sale will be printed to the Kitchen and will contain any Stock Items that are configured to print to the Kitchen Printer.

* Table 711 *

15:12:02 29-Jul-2019

Jeremy

29-Jul-2019 14:58

-----BEVERAGE-----

1x CAPPUCCINO

1x FLAT WHITE

1x SHORT BLACK

From the POS screen, click on the Pending button, select the Pending Sale from the list, then press the "OK" button.

Table ✕

Search For Code Clerk Name > Status ALL

| Code | Date | Clerk | Name | Address | Postcode | Status | Order Date | | |
|------|----------|--------|------|---------|----------|--------|----------------|-------------|-------|
| 602 | 17/06/19 | Jeremy | | | | | 17/06/19 09:20 | CAPPUCCINO | 3.50 |
| | | | | | | | | FLAT WHITE | 3.50 |
| | | | | | | | | SHORT BLACK | 3.00 |
| 697 | 29/07/19 | Jeremy | | | | | 29/07/19 10:56 | | 10.00 |
| 698 | 29/07/19 | Jeremy | | | | | 29/07/19 10:59 | | |
| 700 | 29/07/19 | Jeremy | | | | | 29/07/19 12:51 | | |
| 701 | 29/07/19 | Jeremy | | | | | 29/07/19 12:54 | | |
| 704 | 29/07/19 | Jeremy | | | | | 29/07/19 13:14 | | |
| 708 | 29/07/19 | Jeremy | | | | | 29/07/19 14:01 | | |
| 710 | 29/07/19 | Jeremy | | | | | 29/07/19 14:02 | | |
| 711 | 29/07/19 | Jeremy | | | | | 29/07/19 14:58 | | |

↓

Windows Print Transfer to Table Email Reprint Kitchen Modify Delete Print **OK**

idealpos Update History

The sale will be displayed on the POS Screen. Select any item that requires voiding, then press the "VOID" button.

29 Jul 15:18 Adult ID: 29-Jul-2001
Jeremy PRICE 1

Jeremy

✕

| | | | | | |
|--------------------|--|--|--|--|--|
| CAPPUCCINO 1 3.50 | | | | | |
| FLAT WHITE 1 3.50 | | | | | |
| SHORT BLACK 1 3.00 | | | | | |

Balance: \$10.00

\$10.00

3x

ENTER

| | | | | | | | | |
|---|---|---|---|---|---|--|---|---|
|  |  |  |  |  |  |  |  |  |
| CAPPUCCINO | FLAT WHITE | LATTE | CHAI | SHORT BLACK | LONG BLACK | MOCHA | HOT CHOC | TEA |
| EXTRA HOT | SKINNY | DECAF | 1 SUGAR | TAKEAWAY | SMALL | ICED DRINK | WATER | KEYBOARD |
| EXTRA CHOC | SOY | WEAK | 2 SUGAR | MARSH MALLOW | MEDIUM | MILKSHAKE | JUICE | ORDER NUMBER |
| NO CHOC | ALMOND | DOUBLE SHOT | 3 SUGAR | EQUAL | LARGE | SMOOTHIE | SOFTDRINK | REWARDS ENQUIRY |
| DRINKS | CAFE | TAP BEER | SPIRITS | COCKTAILS | FRUIT & VEG | GROCERY | RETAIL | MANAGER |
| | RESTAURANT | BOTTLE BEER & RTD | WINE | | | | SERVICES | ADMIN |

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

| | | | |
|---|-------|---|---------|
| 7 | 8 | 9 | CL |
| 4 | 5 | 6 | NO SALE |
| 1 | 2 | 3 | X |
| . | ENTER | | |

The item will be voided from the sale.
 Press the "PENDING" button to save the sale.

29 Jul 15:22 Adult ID: 29-Jul-2001
 Jeremy PRICE 1

| | | | | | | | | |
|------------|---|------|----------------|------------|---|---|---|---------|
| CAPPUCCINO | 1 | 3.50 | RECEIPT | CLERK | 7 | 8 | 9 | CL |
| FLAT WHITE | 1 | 3.50 | PRICE LEVEL | 5% ST DISC | 4 | 5 | 6 | NO SALE |
| | | | CUSTOMER | 5% ITEM | 1 | 2 | 3 | X |
| | | | BAR TAB | REFUND | | | | |
| | | | PENDING | VOID SALE | | | | |
| | | | TABLE MAP | VOID | 0 | . | | ENTER |

Balance: \$10.00
 2x **\$7.00**

| | | | | | | | | |
|------------|------------|-------------------|---------|--------------|-------------|------------|-----------|-----------------|
| | | | | | | | | |
| CAPPUCCINO | FLAT WHITE | LATTE | CHAI | SHORT BLACK | LONG BLACK | MOCHA | HOT CHOC | TEA |
| EXTRA HOT | SKINNY | DECAF | 1 SUGAR | TAKEAWAY | SMALL | ICED DRINK | WATER | KEYBOARD |
| EXTRA CHOC | SOY | WEAK | 2 SUGAR | MARSH MALLOW | MEDIUM | MILKSHAKE | JUICE | ORDER NUMBER |
| NO CHOC | ALMOND | DOUBLE SHOT | 3 SUGAR | EQUAL | LARGE | SMOOTHIE | SOFTDRINK | REWARDS ENQUIRY |
| DRINKS | CAFE | TAP BEER | SPIRITS | COCKTAILS | FRUIT & VEG | GROCERY | RETAIL | MANAGER |
| | RESTAURANT | BOTTLE BEER & RTD | WINE | | | | SERVICES | ADMIN |

The Pending Sale will be saved using the existing Pending Sale Code and the Kitchen Printer will print out a Kitchen Receipt showing the Stock Items that were deleted from the Pending Sale



idealpos Update History

Pending Sales – Reprint to Kitchen Function

This function adds an option to the Pending Sales screen to allow the Pending Sale to be reprinted to the Kitchen, therefore now making it possible to do this. Previous to this change, once a Pending Sale was printed to the Kitchen, it wasn't possible to re-print the pending sale to the kitchen.

This function can also be used for eCommerce/web orders. When being used with eCommerce orders, it is possible to configure your system so that eCommerce orders do not automatically print to the kitchen and to only print them manually by pressing the Reprint Kitchen button.

The "Reprint Kitchen" button does not need to be enabled; it will automatically appear in the Pending Sales screen. However, your system will need to be configured for Pending Sales, which also includes having a Kitchen Printer configured along with having the Stock Items configured so they print to a Kitchen Printer.

The same steps outlined in the above function "Pending Sales – Voided Items sent to Kitchen Printers" can be followed to setup your system for Pending Sales.

Once Pending Sales is configured, you can disable the automatic sending of eCommerce orders to Kitchen Printers (only disable this option if required and you want to stop this from happening).

To do this, go to: Setup > Global Options > Interfaces 2

Under the eCommerce Interface section, uncheck the option "Automatically Send Orders to Kitchen Printers".

The screenshot shows the 'Global Options' configuration screen for 'Site 1 (Site 1)'. The 'Interfaces 2' tab is selected. The 'eCommerce Interface' section is highlighted with an orange border. An orange arrow points to the checkbox for 'Automatically Send Orders to Kitchen Printers', which is currently checked. Other options in this section include 'Web Order Tender' (ONLINE), 'Web Order Location' (Current Store Location), 'Web Order Clerk' (Online), 'Default Customer Type' (ONLINE), 'Price Level' (PRICE 1), 'Unmatched Items Link' (1), 'Sale Type Link' (No Status, No Sale Type), 'Pick up' (Pickup), 'Eat in' (Pickup), 'Delivery' (Delivery), and 'Play Sound when Orders Arrive'. The 'Web Reporting' section includes 'Export Format' (No Web Reporting), 'Store ID', 'FTP Address', 'Automatically Upload Transactional Data Every' (15 Minutes), and 'Automatic Upload of File Data Time' (2:00). The 'Fuel Console Interface' section includes 'Interface Type' (No Fuel Console Interface), 'Attendant Password', and a list of grades (Grade 1 to Grade 15) with right-pointing arrows.

When you have a Web Order, press the Web Orders button on the top-right corner of the POS Screen.

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

In the case of a Pending Sale, press the "PENDING" button on the POS Screen.

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

idealpos Update History

A list of Pending Sales or Web Orders will be displayed.

The screen may vary slightly for a Pending Sale or Web Order.

Select the Web Order or Pending Sale from the list, then press the "Reprint Kitchen" button which is located at the bottom of the Pending Sale/Web Orders screen.

The screenshot shows the 'Table' screen in the idealpos system. At the top, there is a search bar with radio buttons for 'Code', 'Clerk', and 'Name', and a 'Status' dropdown menu set to 'ALL'. Below this is a table of orders. The last row, with code 757, is highlighted in blue and labeled 'Pending Sale'. At the bottom of the screen, a row of buttons includes 'Reprint Kitchen', which is highlighted with a yellow box and a yellow arrow pointing to it from the right.

| Code | Date | Clerk | Name | Address | Postcode | Status | Order Date |
|------|----------|--------|--------------|---------|----------|--------|----------------|
| 602 | 17/06/19 | Jeremy | | | | | 17/06/19 09:20 |
| 697 | 29/07/19 | Jeremy | | | | | 29/07/19 10:56 |
| 698 | 29/07/19 | Jeremy | | | | | 29/07/19 10:59 |
| 700 | 29/07/19 | Jeremy | | | | | 29/07/19 12:51 |
| 701 | 29/07/19 | Jeremy | | | | | 29/07/19 12:54 |
| 704 | 29/07/19 | Jeremy | | | | | 29/07/19 13:14 |
| 708 | 29/07/19 | Jeremy | | | | | 29/07/19 14:01 |
| 710 | 29/07/19 | Jeremy | | | | | 29/07/19 14:02 |
| 711 | 29/07/19 | Jeremy | | | | | 29/07/19 14:58 |
| 757 | 08/08/19 | Jeremy | Pending Sale | | | | 08/08/19 16:35 |

FLAT WHITE 3.50
LATTE 3.50

7.00

Buttons: Windows Print, Transfer to Table, Email, Reprint Kitchen, Modify, Delete, Print, OK

The Kitchen Docket will be re-printed to the Kitchen Printer(s).

Stock Items

Stock Item – Long Description (Description3) Field

This function adds a new Description field to the Stock Items screen (Description3).

This field supports a maximum of 100 characters and will be used as the Long Description for a Stock Item.

In addition, the Description 3 field will also be used by eCommerce integrations as the Stock Item Long Description.

As there is now a dedicated Long Description field in the Stock Items screen, the Yes/No option "Use Stock Notes field for Long Descriptions" will be retired and the Description 1 field will be returned to the standard maximum length of 30 characters. This also means that there will be some automatic migration performed in order to transfer long descriptions from Description 1 into the new Description 3 field. This may also result in Description 1 being truncated down to 30 characters depending on your system configuration before upgrading. See bullet point list further below for more information. We recommend that you review your Stock Item Descriptions after the upgrade and make any adjustments if necessary.

Changes that are included as part of the implementation of the Description 3 field:

- Removal of Yes/No Option "Use Stock Notes Field for Long Descriptions" from Idealpos 7.1 Build 3 and higher.
- The Description 1 for Stock Items is automatically migrated into the Description 3 field, dependent on several factors. See list of bullet points under "Possible Outcomes for the Description 1 and Description 3 fields after upgrading" in the below.
- The Stock Notes field in the Advanced tab of a Stock Item will be re-instated, regardless of whether or not you had the Yes/No option "Use Stock Notes Field for Long Descriptions" enabled prior to upgrading.
- By default, the Description 2 field will be labelled as "Kitchen Description" and the Description 3 field will be labelled as "Long Description". These descriptions can be changed by going to: Setup > Global Options > Other Options > Stock Item Descriptions.
- New Yes/No option "Description 3 is populated when adding new Stock Items". This will automatically populate the Description 3 field using the text that was entered into the Description 1 field when creating new Stock Items.
- New Yes/No option "Use Description 3 on Receipts/Invoices". This will use the Stock Item Description 3 on Receipts and A4 Customer Invoices.

Possible Outcomes for the Description 1 and Description 3 fields after upgrading:

- If the Yes/No Option "Use Stock Notes field for Long Descriptions" is enabled prior to upgrading, the Yes/No Option "Use Description 3 on Receipts/Invoices" will be automatically enabled.
- If the Yes/No Option "Use Stock Notes field for Long Descriptions" is enabled prior to upgrading, the Description 1 and Description 3 will be updated as follows:
 - If the Stock Item was created before the Yes/No Option "Use Stock Notes field for Long Descriptions" was enabled (and Stock Notes existed for the Stock Item), the contents of the Description 1 field will be reverted back to what was entered into the Description 1 field before the Yes/No option was enabled. The Description 3 field will be populated with the first 100 characters from the Stock Notes field.
 - If the Stock Item was created before the Yes/No Option "Use Stock Notes field for Long Descriptions" was enabled (and Stock Notes did not exist for the Stock Item), the contents of the Description 1 field will remain unchanged and the contents of the Description 1 field will be copied into the Description 3 field.
 - If the Stock Item was created after the Yes/No Option "Use Stock Notes field for Long Descriptions" was enabled, the entire contents of the Description 1 field will be copied into the Description 3 field, then the contents of the Description 1 field will be truncated to 30 characters.
- If the Yes/No Option "Use Stock Notes field for Long Descriptions" is disabled prior to upgrading, The Description 3 field will be populated with the text that has been entered into the Description 1 field.

The Description 3/Long Description field can be accessed by going to:

File > Stock Control > Stock Items > Select Item > Modify

idealpos Update History

Update the Long Description as required, then press the "Save" button on the bottom-right corner to save your changes.

stock items General Advanced Indirect Item Last Modified 06 Aug 2019 X

Stock Code 225005 Department 225 > COCKTAILS
Description CUCUMBER & THYME MARTINI (24) Scan Code Auto
Kitchen Description CUCUMBER & THYME MARTINI (24)
Long Description **Delicious Cucumber & Thyme Martini which includes 45ml 4 Pillars and 15ml St Germain** (84) ←

Selling Prices (inc Tax)

| | | Profit% |
|----------|-------|---------|
| PRICE 1 | 16.00 | 65.00 |
| PRICE 2 | 6.00 | 6.58 |
| PRICE 3 | 0.00 | |
| PRICE 4 | 7.00 | 20.03 |
| PRICE 5 | 0.00 | |
| PRICE 6 | 0.00 | |
| PRICE 7 | 0.00 | |
| PRICE 8 | 0.00 | |
| PRICE 9 | 0.00 | |
| PRICE 10 | 0.00 | |
| PRICE 11 | 0.00 | |
| PRICE 12 | 0.00 | |

Force Selling Price Entry

Printer Settings

- Receipt Printer
- KITCHEN
- BAR
- COFFEE
- IKM
- Kitchen Printer 5
- Kitchen Printer 6
- Kitchen Printer 7
- Kitchen Printer 8
- Kitchen Printer 9
- Kitchen Printer 10
- Kitchen Printer 11
- Kitchen Printer 12

Purchasing

Purchase Category 2 > BEVERAGE

Other Options

- Stock Control
- Indirect Item
- Non-Accumulating
- Scale
- Indirect Components go to Kitchen Printers
- Can't Buy with GIFT VOUCHER
- Instruction
- Print Red
- Web Store
- Inhibit Discounts
- Inhibit Voids
- Manufactured Item

Cost Prices (ex Tax)

| | |
|---------------|--------|
| Standard Cost | 5.4935 |
| Last Cost | 5.4935 |
| Average Cost | 5.3341 |

Tax Settings (Selling)

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

Attributes

| | |
|--|--|
| | |
| | |
| | |
| | |
| | |

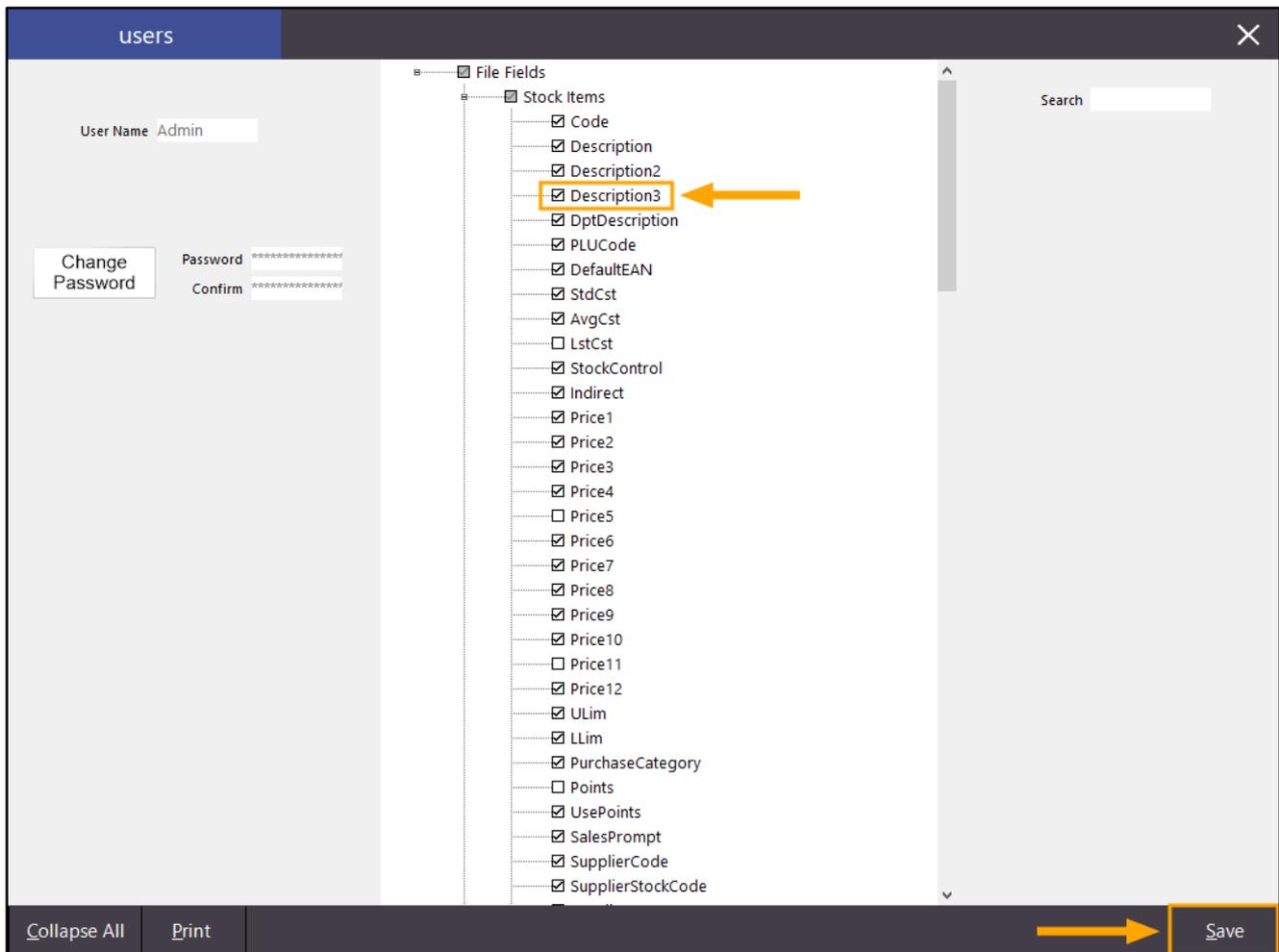
Keyboard Save

In addition to the Description 3 field being added to the Stock Items screen, it is also possible to search for Stock Items using this field via the Stock Items grid screen.

To enable searching by the Description 3 field, go to: Setup > Users > Select User > Modify
Then enable the checkbox next to the "Description3" field.

Description3 is located under File Fields > Stock Items > Description3

Press "Save" on the bottom-right corner to save the change.



Close the Users screen.

idealpos Update History

In addition to enabling the new Description3 field in the Stock Items search/grid screen, it is also possible to modify the Descriptor/Label that is used for the Description2 and Description3 fields.

By default, Description 2 will be set to "Kitchen Description" and Description 3 will be set to "Long Description".

The descriptor that you enter will appear in the Stock Items grid screen as well as in the Stock Item screen that is displayed when modifying a Stock Item.

To adjust or modify the descriptor used for the Description2 and Description3 fields, go to:

Setup > Global Options > Other Options > Stock Item Descriptions

The below example shows the Description 2 set to "Bar Description" and Description 3 set to "Extra Details"

The screenshot displays the 'global options' window for 'site 1 (Site 1)'. The 'Other Options' tab is active. The interface is divided into several sections:

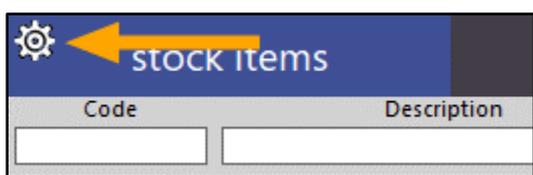
- Home Screen:** Includes fields for Home Screen Graphic (pictures folder), Last Transaction Timeout (20), Slideshow Start Time (60), and Seconds between images (30).
- Email Settings:** Includes fields for SMTP Outgoing Email Server, Sending Email Address, SMTP Username, SMTP Password, SMTP Port (25), and an 'Enable SSL/TLS Protocol' checkbox. It also has fields for 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]), and two text areas for default messages when sending Reports and Customer Statements/Invoices.
- Alerts:** Includes a field for Output from POS # (1).
- Mag Card Printing:** Includes a dropdown for Mag Card Printer and a dropdown for Format (Format 1).
- FTP Details:** Includes fields for Server Address, Folder, Username, and Password.
- Special Attribute Types:** Includes dropdowns for Stock Item Linking (Family) and Remove Tax (Remove Tax).
- Attribute Column Headers:** Includes a list of headers: 1 Container Type, 2 Country of Origin, 3 Dietary, 4 Spirit Varietal, and 5 Wine Varietals.
- Stock Item Descriptions:** This section is highlighted with a yellow box and an arrow. It contains two text input fields: 'Description 2 Bar Description' and 'Description 3 Extra Details'.

After enabling the Description3 field in the Stock Item Search Grid and updating the descriptors for both Description fields, the changes will be visible by going to: File > Stock Control > Stock Items

Items can be searched by entering text into either of the Description 2 or Description 3 fields.

| Code | Description | Bar Description | Extra Details | Department |
|--------|--------------------------|-------------------|--|------------|
| 225005 | CUCUMBER & THYME MARTINI | CUCUMBER & THYM | Delicious Cucumber & Thyme Martini which includes 45ml 4 Pillars and 15ml St Germain | COCKTAILS |
| 225006 | ESPRESSO MARTINI | ESPRESSO MARTINI | ESPRESSO MARTINI | COCKTAILS |
| 225007 | LEMON & BASIL MARTINI | LEMON & BASIL MA | LEMON & BASIL MARTINI | COCKTAILS |
| 225008 | ZESTY MISS | ZESTY MISS | ZESTY MISS | COCKTAILS |
| 225009 | WHISKY SOUR | WHISKY SOUR | WHISKY SOUR | COCKTAILS |
| 225010 | AMARETTO SOUR | AMARETTO SOUR | AMARETTO SOUR | COCKTAILS |
| 225011 | P/APPLE & THYME RUM SOUR | P/APPLE & THYME R | P/APPLE & THYME RUM SOUR | COCKTAILS |
| 225012 | OLD FASHIONED | OLD FASHIONED | OLD FASHIONED | COCKTAILS |

The column widths can also be adjusted in the Stock Items screen by clicking on the cog icon located on the top-left corner of the screen, then re-sizing the column widths as required:



| Code | Description | Bar Description | Extra Details |
|--------|--------------------------|--------------------------|--|
| 225005 | CUCUMBER & THYME MARTINI | CUCUMBER & THYME MARTINI | Delicious Cucumber & Thyme Martini which includes 45ml 4 Pillars and 15ml St Germain |
| 225006 | ESPRESSO MARTINI | ESPRESSO MARTINI | ESPRESSO MARTINI |
| 225007 | LEMON & BASIL MARTINI | LEMON & BASIL MARTINI | LEMON & BASIL MARTINI |

After the column widths have been re-sized, the Stock Items screen will need to be closed and opened again in order to continue using the Stock Items screen and to open or modify any item displayed in the grid.

idealpos Update History

When modifying a Stock Item, the new Descriptors that were configured for both the Description 2 and Description 3 fields will be visible as per the below example:

stock items
Last Modified 06 Aug 2019 ✕

Stock Code 225005

Description CUCUMBER & THYME MARTINI (24)

Bar Description CUCUMBER & THYME MARTINI (24)

Extra Details Delicious Cucumber & Thyme Martini which includes 45ml 4 Pillars and 15ml St Germain (84)

Department 225 > COCKTAILS

Scan Code Auto

Selling Prices (inc Tax)

| | | Profit% |
|----------|-------|---------|
| PRICE 1 | 16.00 | 65.00 |
| PRICE 2 | 6.00 | 6.58 |
| PRICE 3 | 0.00 | |
| PRICE 4 | 7.00 | 20.03 |
| PRICE 5 | 0.00 | |
| PRICE 6 | 0.00 | |
| PRICE 7 | 0.00 | |
| PRICE 8 | 0.00 | |
| PRICE 9 | 0.00 | |
| PRICE 10 | 0.00 | |
| PRICE 11 | 0.00 | |
| PRICE 12 | 0.00 | |

Force Selling Price Entry

Printer Settings

- Receipt Printer
- KITCHEN
- BAR
- COFFEE
- IKM
- Kitchen Printer 5
- Kitchen Printer 6
- Kitchen Printer 7
- Kitchen Printer 8
- Kitchen Printer 9
- Kitchen Printer 10
- Kitchen Printer 11
- Kitchen Printer 12

Purchasing

Purchase Category 2 > BEVERAGE

Other Options

- Stock Control
- Indirect Item
- Non-Accumulating
- Scale
- Indirect Components go to Kitchen Printers
- Can't Buy with GIFT VOUCHER
- Instruction
- Print Red
- Web Store
- Inhibit Discounts
- Inhibit Voids
- Manufactured Item

Cost Prices (ex Tax)

Standard Cost 5.4935

Last Cost 5.4935

Average Cost 5.3341

Tax Settings (Selling)

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

Attributes

| | |
|--|--|
| <div style="border: 1px solid gray; height: 15px; width: 100%;"></div> | <div style="border: 1px solid gray; height: 15px; width: 100%;"></div> |
| <div style="border: 1px solid gray; height: 15px; width: 100%;"></div> | <div style="border: 1px solid gray; height: 15px; width: 100%;"></div> |
| <div style="border: 1px solid gray; height: 15px; width: 100%;"></div> | <div style="border: 1px solid gray; height: 15px; width: 100%;"></div> |
| <div style="border: 1px solid gray; height: 15px; width: 100%;"></div> | <div style="border: 1px solid gray; height: 15px; width: 100%;"></div> |
| <div style="border: 1px solid gray; height: 15px; width: 100%;"></div> | <div style="border: 1px solid gray; height: 15px; width: 100%;"></div> |

Keyboard
Save

Full use of the Stock Notes field is now available, regardless of whether or not the Yes/No Option "Use Stock Notes Field for Long Descriptions" was enabled prior to upgrading to this build.

When modifying a Stock Item, click on the Advanced tab to access the Stock Notes.

stock items General **Advanced** Indirect Item Last Modified 06 Aug 2019 X

Sales Prompt | _____

Link to Menu 0 >
Link to Grid 0 > MAIN
Link Table 0 >

Amount Override Limits Location 1 Points by Price Level

| PRICE | Points |
|----------|--------|
| PRICE 1 | 14 |
| PRICE 2 | 0 |
| PRICE 3 | 0 |
| PRICE 4 | 0 |
| PRICE 5 | 0 |
| PRICE 6 | 0 |
| PRICE 7 | 0 |
| PRICE 8 | 0 |
| PRICE 9 | 0 |
| PRICE 10 | 0 |
| PRICE 11 | 0 |
| PRICE 12 | 0 |

Lower Limit 0.00 Profit%
Upper Limit 0.00

Stock Level 0 >>>
Recommended Level 0
Reorder Level 0

Use Special Points : 0
 Inhibit Points Accrual
 Inhibit Purchase With Points
 Print Promotional Ticket

Stock Notes

3 Chunks Cucumber
Thyme Sprigs
45ml 4 Pillars
15ml St Germain
Garnish: Cucumber Slice with a Sprig of Thyme on it
Glass: Martini

Muddle Cucumber and Thyme in a shaker. Add all other ingredients with ice. Shake and double strain into glass. Float cucumber slice on top

National Product Number 0
Receipt Tabs 0

Keyboard Save

idealpos Update History

Total Stock Level on Stock Items by Location form

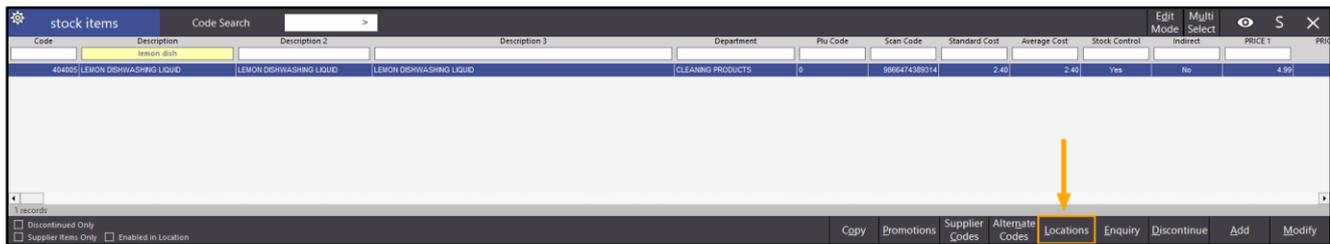
This function enhances the Stock Items by Location form so that it displays the total Stock Level of an item across all Stock Locations. This is useful for customers who have Stock Items with a Stock Level across multiple locations, allowing them to see an overall total without them having to manually sum up the Stock Level for each location.

There is no additional configuration required to enable this function; the User Interface has been updated and will be visible for all Users who access the Stock Items by Location screen.

To access this function, go to: File > Stock Control > Stock Items

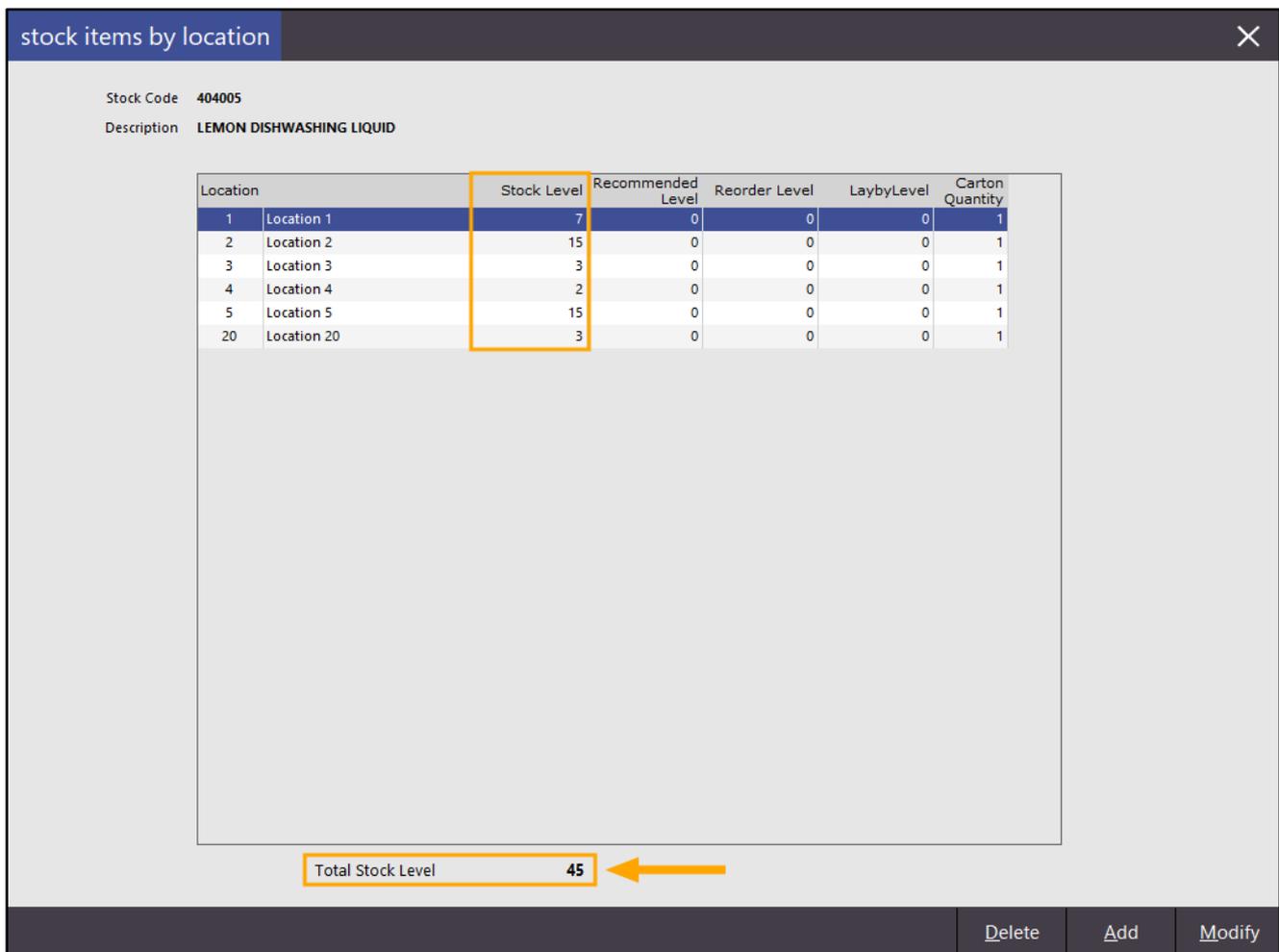
Search for the Stock Item you want to enquire, then select it by clicking on it.

After the item is highlighted, press the "Locations" button on the bottom-right corner of the screen.



The Stock Items by Location for the selected Stock Item will be displayed.

At the bottom of the window, you will see "Total Stock Level" along with the total Stock Level of all Stock Locations.



Suppliers

Supplier Enquiry to Allow for Filtering by Stock Location

This function adds a Stock Location dropdown box to the Supplier Enquiry screen, adding the ability to filter the Supplier Enquiry by the selected Stock Location.

The Supplier Enquiry screen is used to view a list or history of previous Invoices/Purchases that have been processed for either all suppliers or a specific Supplier Code.

When Stock is received via Transactions > Stock Control > Stock Purchases, a Location option exists which can be used to receive the Stock Items from the Invoice/Order into the specified Stock Location.

After those Invoices/Purchases have been processed, they will appear in the Supplier Enquiry screen.

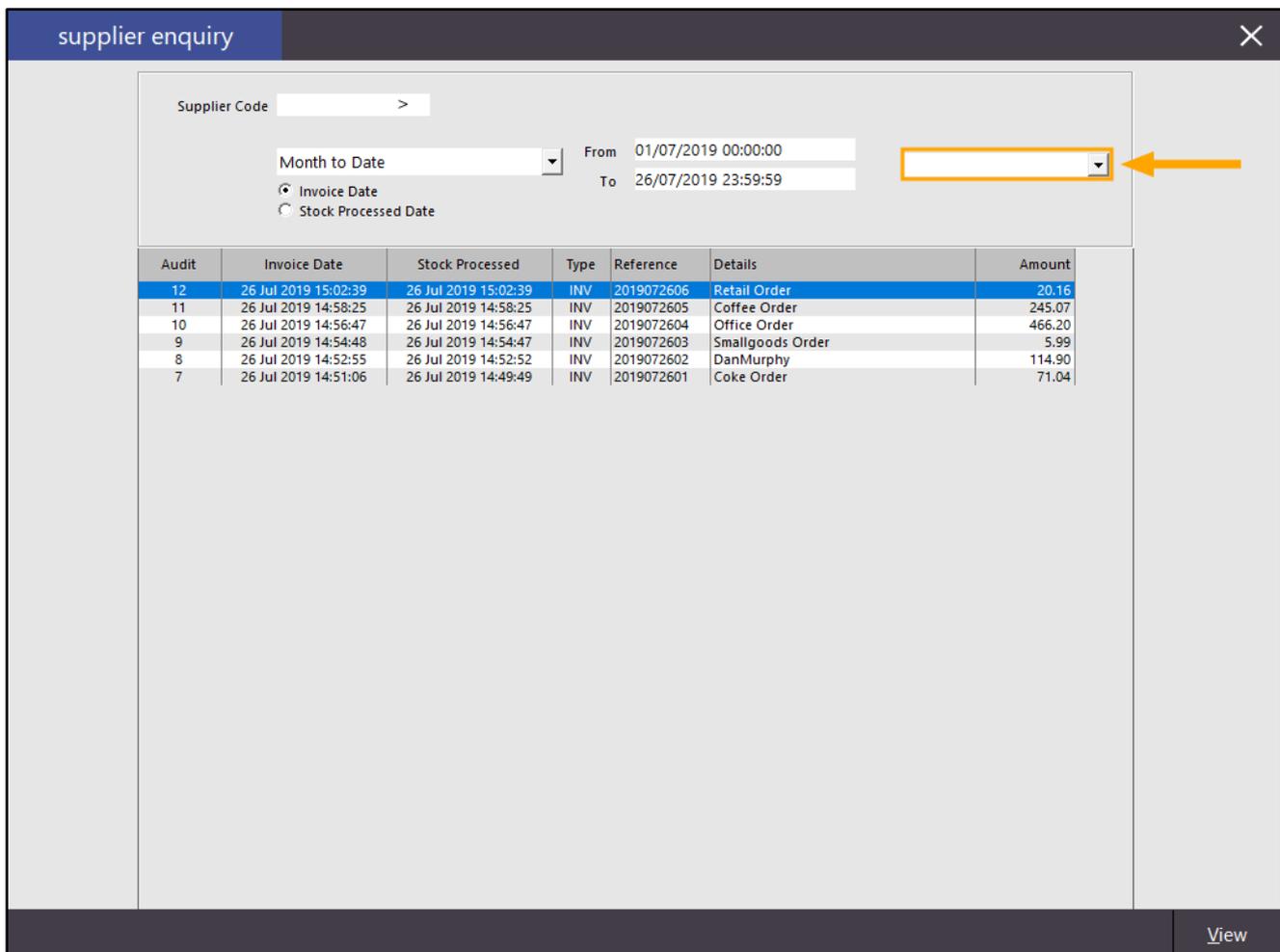
The option to filter the Supplier Enquiry by Stock Location can then be used to view the Invoices/Purchases that were received into the selected Stock Location.

This function can be used by venues which have multiple Stock Locations and receive their Orders/Invoices into those Locations.

To use this function, go to: Enquiry > Suppliers

The Location dropdown box is located towards the top-right corner of the Supplier Enquiry screen.

By default, the Stock Location dropdown box will default to a blank value, which will show Invoices that were received into all Stock Locations. The below example shows the Stock Location dropdown box in the default blank state, resulting in all invoices being displayed below.



The screenshot shows the 'supplier enquiry' interface. At the top, there is a search bar for 'Supplier Code' and a 'Month to Date' dropdown menu. Below these are date range fields for 'From' (01/07/2019 00:00:00) and 'To' (26/07/2019 23:59:59). A 'Stock Location' dropdown menu is highlighted with a yellow box and an arrow pointing to it. Below the filters is a table of invoices with columns for Audit, Invoice Date, Stock Processed, Type, Reference, Details, and Amount.

| Audit | Invoice Date | Stock Processed | Type | Reference | Details | Amount |
|-------|----------------------|----------------------|------|------------|------------------|--------|
| 12 | 26 Jul 2019 15:02:39 | 26 Jul 2019 15:02:39 | INV | 2019072606 | Retail Order | 20.16 |
| 11 | 26 Jul 2019 14:58:25 | 26 Jul 2019 14:58:25 | INV | 2019072605 | Coffee Order | 245.07 |
| 10 | 26 Jul 2019 14:56:47 | 26 Jul 2019 14:56:47 | INV | 2019072604 | Office Order | 466.20 |
| 9 | 26 Jul 2019 14:54:48 | 26 Jul 2019 14:54:47 | INV | 2019072603 | Smallgoods Order | 5.99 |
| 8 | 26 Jul 2019 14:52:55 | 26 Jul 2019 14:52:52 | INV | 2019072602 | DanMurphy | 114.90 |
| 7 | 26 Jul 2019 14:51:06 | 26 Jul 2019 14:49:49 | INV | 2019072601 | Coke Order | 71.04 |

idealpos Update History

After selecting a Stock Location from the Stock Location dropdown box, the list of invoices displayed in the Supplier Enquiry will be filtered by the selected Stock Location.

The below example shows a list of Invoices that were received into Stock Location 1

supplier enquiry

Supplier Code >

Month to Date From 01/07/2019 00:00:00 To 26/07/2019 23:59:59 Location 1

Invoice Date
 Stock Processed Date

| Audit | Invoice Date | Stock Processed | Type | Reference | Details | Amount |
|-------|----------------------|----------------------|------|------------|------------------|--------|
| 9 | 26 Jul 2019 14:54:48 | 26 Jul 2019 14:54:47 | INV | 2019072603 | Smallgoods Order | 5.99 |
| 8 | 26 Jul 2019 14:52:55 | 26 Jul 2019 14:52:52 | INV | 2019072602 | DanMurphy | 114.90 |
| 7 | 26 Jul 2019 14:51:06 | 26 Jul 2019 14:49:49 | INV | 2019072601 | Coke Order | 71.04 |

View

The below example shows a list of Invoices that were received into Stock Location 2:

supplier enquiry

Supplier Code >

Month to Date From 01/07/2019 00:00:00 To 26/07/2019 23:59:59 Location 2

Invoice Date
 Stock Processed Date

| Audit | Invoice Date | Stock Processed | Type | Reference | Details | Amount |
|-------|----------------------|----------------------|------|------------|--------------|--------|
| 11 | 26 Jul 2019 14:58:25 | 26 Jul 2019 14:58:25 | INV | 2019072605 | Coffee Order | 245.07 |
| 10 | 26 Jul 2019 14:56:47 | 26 Jul 2019 14:56:47 | INV | 2019072604 | Office Order | 466.20 |

View

User Permissions

User Permission to modify Stock Item Grid Default Settings

This function adds the ability to control whether or not a User has access to modify the Stock Item Grid Default Settings. Prior to the implementation of this function, Admin users were the only users who had access to this function. It is now possible to allow non-Admin users to configure the Stock Item Grid Default settings.

The Stock Item Grid Default settings refers to configuring the layout that used to display Stock Items on the Stock Items grid (which is accessible via File > Stock Control > Stock Items).

The layout includes column order, alignment, colours, etc.

Note that all users will still share the same Stock Item Grid settings/layout, regardless of whether the permission has been enabled or disabled for the user. Therefore, it is suggested that only the users who are trusted or required to modify the Stock Item Grid Default Settings be given access to this function.

To configure and use this function, go to: Setup > Users > Select a User > Modify

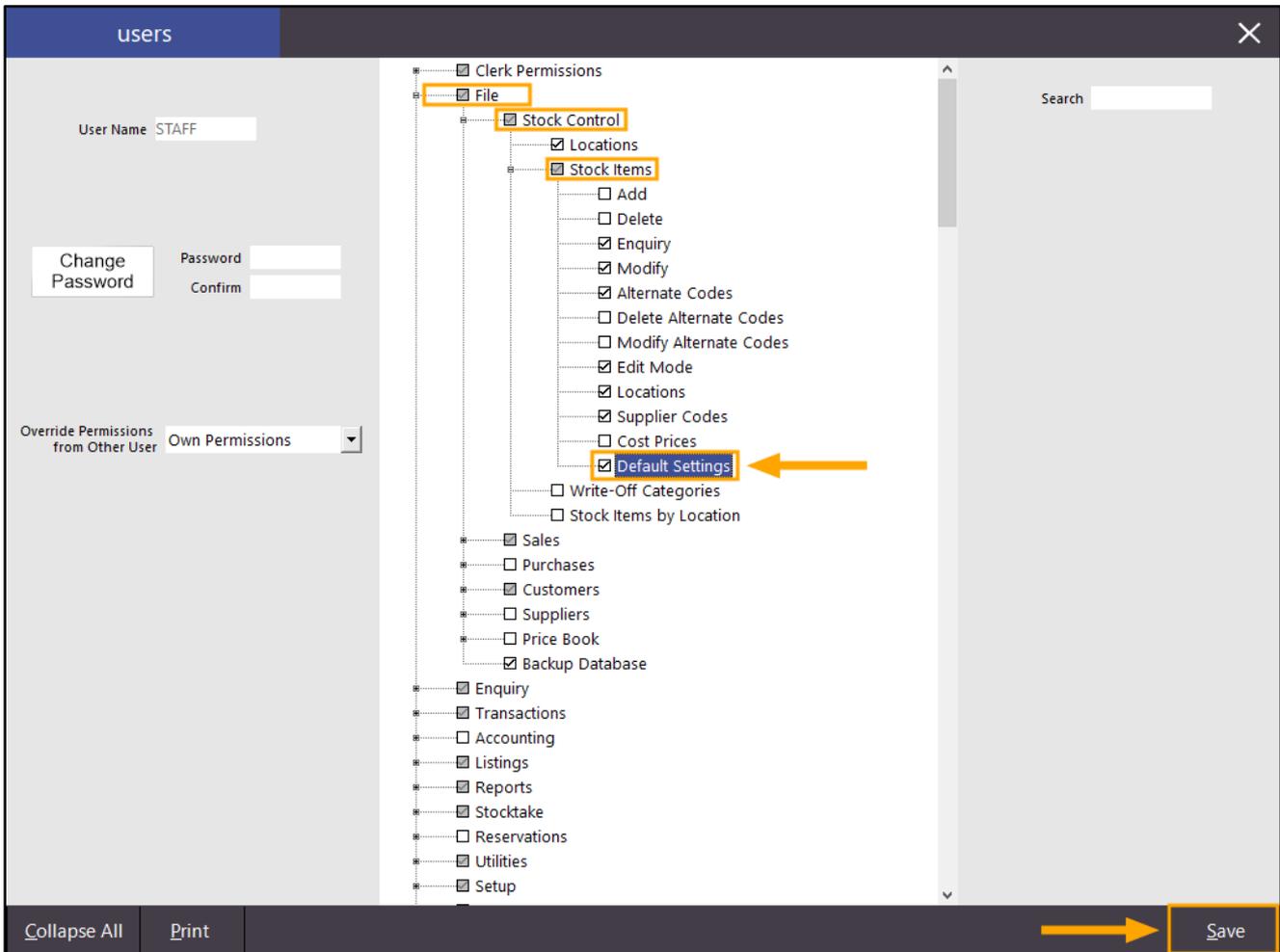
In the below example, we'll modify the STAFF User:



idealpos Update History

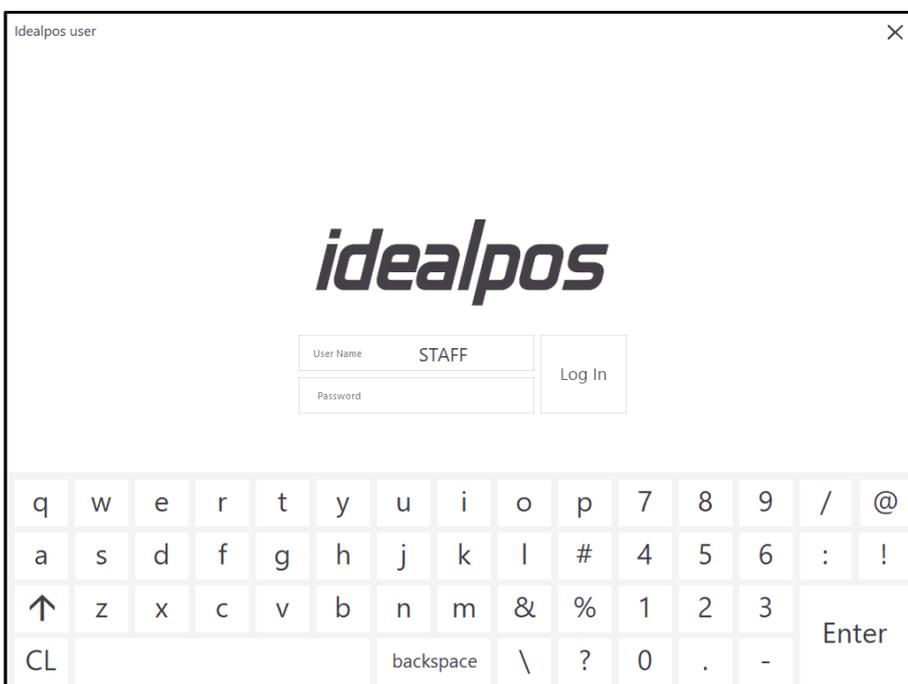
Expand File > Stock Control > Stock Items

Enable "Default Settings", then press the "Save" button on the bottom-right corner as indicated below:



Close the Users screen, then go to File > Log Out

Login as the User which the above change was applied to:



Go to: File > Stock Control > Stock Items

The top-left corner of the screen will contain a cog icon.

Pressing this icon will allow configuration of the Stock Item Grid Default Settings.



The screenshot shows the 'stock items' header with a cog icon on the left and a 'Code Search' field on the right. Below the header is a table with columns for Code, Description, and a third column. An orange arrow points to the cog icon.

| Code | Description | |
|--------|-------------------|-------|
| 101007 | CANADIAN PANCAKES | CANAD |
| 101008 | WAFFLES | WAFFL |
| 101009 | WAFFLES CHOCOLATE | WAFFL |

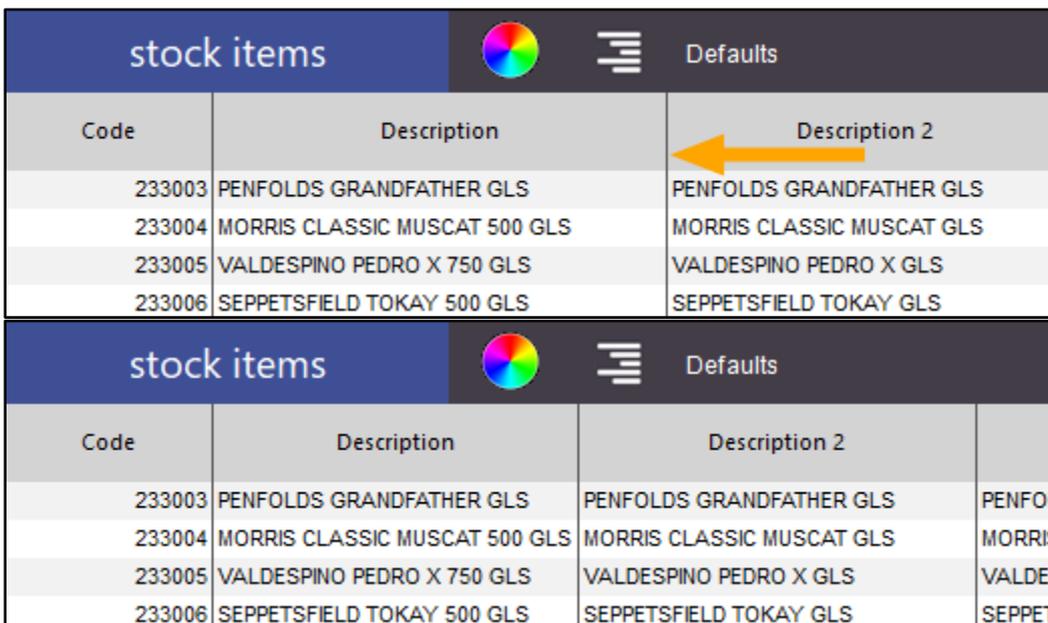
When the User permission to this function is disabled, the cog icon will simply not appear on the Stock Items screen.



The screenshot shows the 'stock items' header with a 'Code Search' field. The cog icon is absent. An orange arrow points to the 'stock items' text.

| Code | Description | |
|--------|---------------|-------|
| 102004 | EXTRA AVOCADO | EXTRA |
| 102005 | EXTRA CHEESE | EXTRA |
| 102006 | EXTRA SALMON | EXTRA |

When the User has access to this function and the cog icon is pressed, the Stock Items screen will be changed to a modify grid mode which can be used to adjust the column widths, column order, text alignment, text colours, etc. Drag column headers to the desired location, adjust column widths by hovering the mouse over the vertical line separating the column headers and click/drag the column to the desired width.



The top screenshot shows the 'stock items' header with a cog icon, a list icon, and a 'Defaults' button. The table has three columns: Code, Description, and Description 2. An orange arrow points to the 'Description 2' header.

| Code | Description | Description 2 |
|--------|-------------------------------|---------------------------|
| 233003 | PENFOLDS GRANDFATHER GLS | PENFOLDS GRANDFATHER GLS |
| 233004 | MORRIS CLASSIC MUSCAT 500 GLS | MORRIS CLASSIC MUSCAT GLS |
| 233005 | VALDESPINO PEDRO X 750 GLS | VALDESPINO PEDRO X GLS |
| 233006 | SEPPETSFIELD TOKAY 500 GLS | SEPPETSFIELD TOKAY GLS |

The bottom screenshot shows the same 'stock items' header with a cog icon, a list icon, and a 'Defaults' button. The table has four columns: Code, Description, Description 2, and a fourth column.

| Code | Description | Description 2 | |
|--------|-------------------------------|---------------------------|--------|
| 233003 | PENFOLDS GRANDFATHER GLS | PENFOLDS GRANDFATHER GLS | PENFOL |
| 233004 | MORRIS CLASSIC MUSCAT 500 GLS | MORRIS CLASSIC MUSCAT GLS | MORRIS |
| 233005 | VALDESPINO PEDRO X 750 GLS | VALDESPINO PEDRO X GLS | VALDES |
| 233006 | SEPPETSFIELD TOKAY 500 GLS | SEPPETSFIELD TOKAY GLS | SEPPET |

idealpos Update History

Text alignment in each column can be adjusted by clicking on the column header, then pressing the alignment button repeatedly to adjust the text alignment to the desired setting.

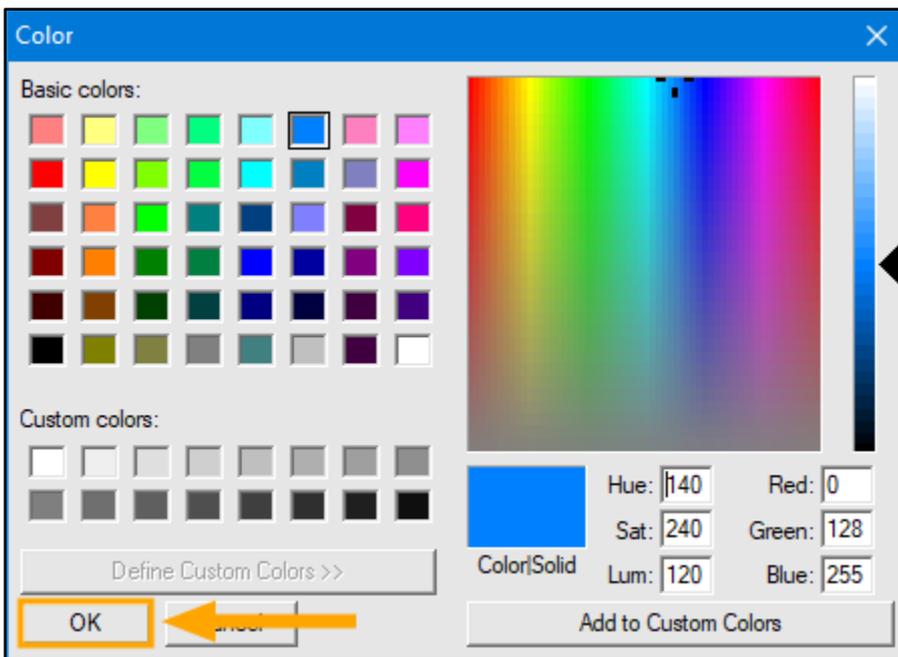
| stock items | | | |
|-------------|-------------|---------------|---------|
| Code | Description | Description 2 | |
| 234001 | COKE | COKE ADD | COKE |
| 234002 | DIET COKE | DIET COKE ADD | DIET CO |
| 234003 | COKE ZERO | COKE ZERO ADD | COKE Z |
| 234004 | SPRITE | SPRITE ADD | SPRITE |

| stock items | | | |
|-------------|-------------|---------------|---------|
| Code | Description | Description 2 | |
| 234001 | COKE | COKE ADD | COKE |
| 234002 | DIET COKE | DIET COKE ADD | DIET CO |
| 234003 | COKE ZERO | COKE ZERO ADD | COKE Z |
| 234004 | SPRITE | SPRITE ADD | SPRITE |

| stock items | | | |
|-------------|-------------|---------------|---------|
| Code | Description | Description 2 | |
| 234001 | COKE | COKE ADD | COKE |
| 234002 | DIET COKE | DIET COKE ADD | DIET CO |
| 234003 | COKE ZERO | COKE ZERO ADD | COKE Z |
| 234004 | SPRITE | SPRITE ADD | SPRITE |

The colour for the text used in each column can also be adjusted by selecting the column header so that it is highlighted, then press the colour wheel and select a desired colour. The colour will be changed for the text shown in the selected column. This process can be repeated for each column as required.

| Code | Description | Description 2 | |
|--------|-------------|---------------|---------|
| 234001 | COKE | COKE ADD | COKE |
| 234002 | DIET COKE | DIET COKE ADD | DIET CO |
| 234003 | COKE ZERO | COKE ZERO ADD | COKE Z |
| 234004 | SPRITE | SPRITE ADD | SPRITE |



| Code | Description | Description 2 | |
|--------|-------------|---------------|---------|
| 234001 | COKE | COKE ADD | COKE |
| 234002 | DIET COKE | DIET COKE ADD | DIET CO |
| 234003 | COKE ZERO | COKE ZERO ADD | COKE Z |

In order to return to the normal Stock Items grid view (non-modify mode), you will need to close the Stock Items screen and re-open it again via File > Stock Control > Stock Items.

idealpos Update History

The Grid can also be reset to Defaults by pressing the "Defaults" button at the top of the screen.

| stock items | | | |
|-------------|-------------|---------------|---------|
| Code | Description | Description 2 | |
| 234001 | COKE | COKE ADD | COKE |
| 234002 | DIET COKE | DIET COKE ADD | DIET CO |
| 234003 | COKE ZERO | COKE ZERO ADD | COKE Z |

A prompt will be displayed to confirm that you want to reset the grid to its default settings

Are you sure you wish to Reset the grid to its Defaults?

| stock items | | | |
|-------------|-------------|---------------|--|
| Code | Description | Description 2 | |
| 234001 | COKE | COKE ADD | |
| 234002 | DIET COKE | DIET COKE ADD | |
| 234003 | COKE ZERO | COKE ZERO ADD | |

Yes/No Options

Yes/No Option – 24 Hour Time Format for Kitchen Prints

This function adds the ability to control what time format is used when printing dockets to the Kitchen. By default, this Yes/No option is disabled, meaning that all Kitchen Prints will be printed in the 12-hour format of am/pm. When this Yes/No option is enabled, all Kitchen Prints will be printed in the 24-hour time format.

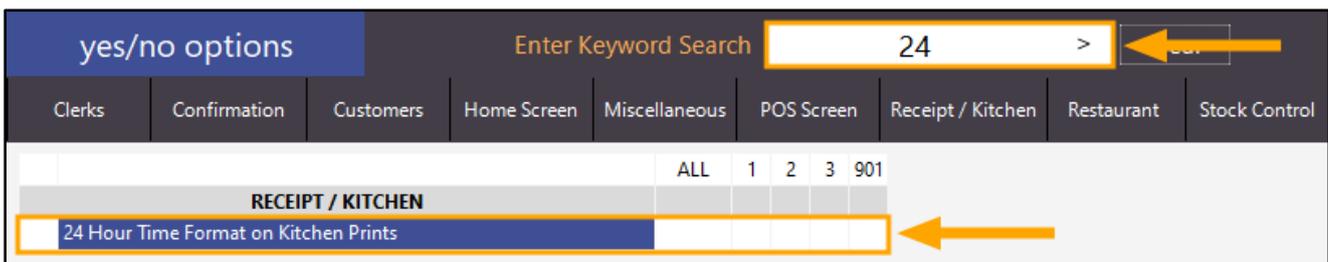
Previous to this change, all Kitchen Docket Formats would use the 24-hour time format, except for "Group Instructions by Seat" which would use the 12-hour time format.

To configure this function, go to:

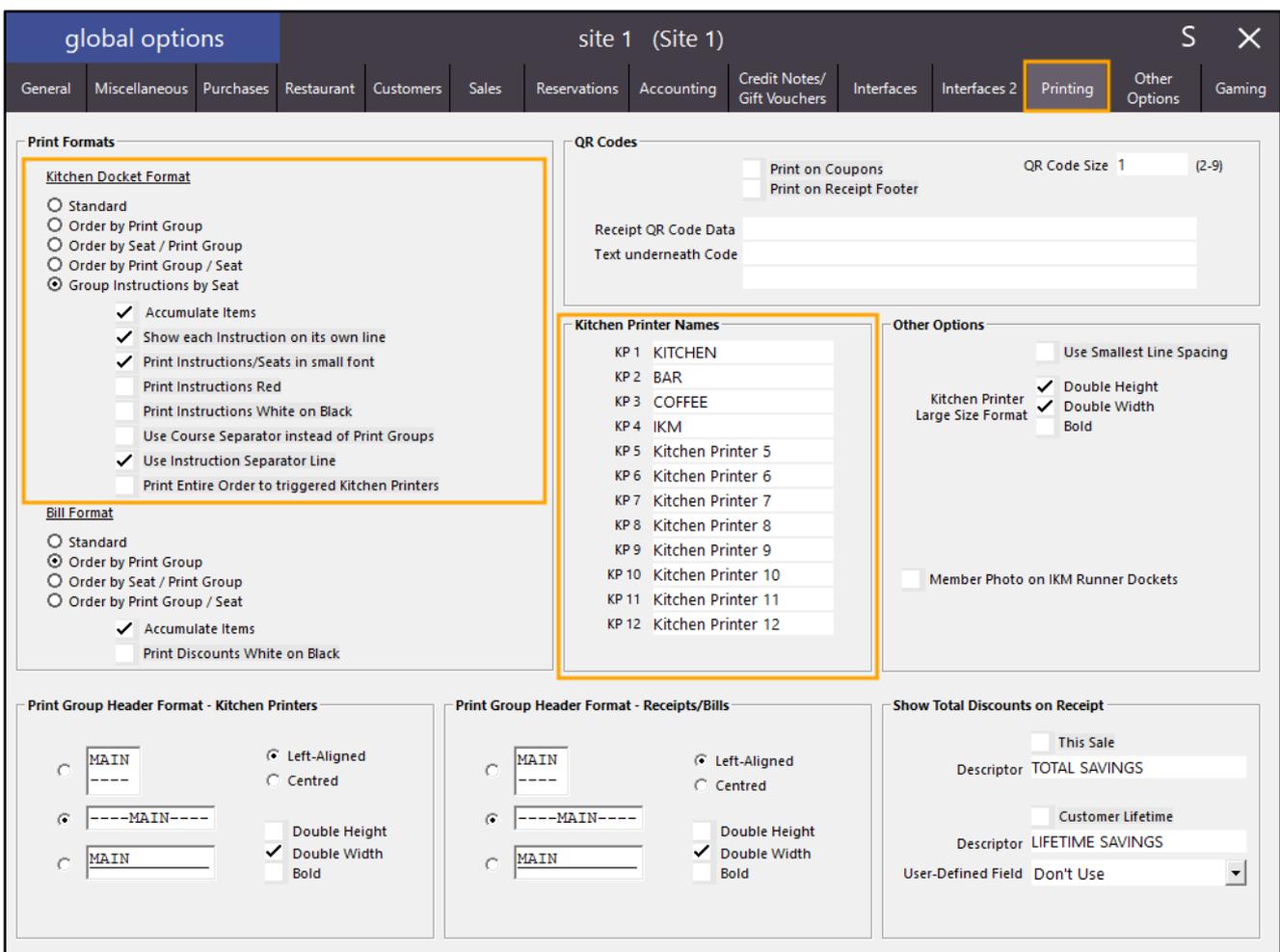
Setup > Yes/No Options > Enter "24" into the "Enter Keyword Search" field.

Enable "24 Hour Time Format on Kitchen Prints" to print the time in 24-hour format on Kitchen prints

Disable "24 Hour Time Format on Kitchen Prints" to print the time in 12-hour am/pm format on Kitchen prints



You may also want to review your Kitchen Docket format and Printer Names, then make any adjustments as necessary. This can be done by going to: Setup > Global Options > Printing > Print Formats/Kitchen Printer Names



idealpos Update History

Kitchen Printers are configured via Setup > Network Printers

Make any adjustments as necessary. Printers can be modified by selecting the required printer, then pressing the Modify button.

Controlling which printer each POS uses is configured at the bottom of the Network Printers screen and can be updated by dragging the required printer from the top of the Network Printers screen into the grid at the bottom of the screen.

| Name | POS Terminal | Printer Type | Connection | Settings | Redirect Printer |
|---------|--------------|--------------|------------|--------------------|------------------|
| Printer | Printer | Epson TM-188 | Ethernet | 192.168.15.73,9100 | None |

Buttons: Add, Modify, Delete, Test

Site: Site 1

| POS Description | Receipt Printer | KITCHEN | BAR | COFFEE | IKM | Kitchen Printer 5 | Kitchen Printer 6 | Kitchen Printer 7 | Kitchen Printer 8 | Kitchen Printer 9 | Kitchen Printer 10 | Kitchen Printer 11 | Kitchen Printer 12 |
|-----------------|-----------------|---------|---------|---------|-----|-------------------|-------------------|-------------------|-------------------|-------------------|--------------------|--------------------|--------------------|
| 1 POS 1 | Printer | Printer | Printer | Printer | | | | | | | | | |
| 2 POS 2 | | | | | | | | | | | | | |
| 3 POS 3 | | | | | | | | | | | | | |

Kitchen Printing is controlled per-Stock Item.

Go to: File > Stock Control > Stock Items > Select the Item > Modify

Under Printer Settings, ensure that you have the required Kitchen Printers enabled for the Stock Item.

The first printer in the list is always the Receipt Printer, and the other printers in the list are either Kitchen or Bar printers as configured in the above steps.

Printer Settings

- Receipt Printer
- KITCHEN
- BAR
- COFFEE
- IKM
- Kitchen Printer 5
- Kitchen Printer 6
- Kitchen Printer 7
- Kitchen Printer 8
- Kitchen Printer 9
- Kitchen Printer 10
- Kitchen Printer 11
- Kitchen Printer 12

Go to the POS Screen, then add items which are configured to print to Kitchen and/or Bar Printers.

26 Jul 08:34 Adult ID: 26-Jul-2001
Jeremy PRICE 1

| | | | | | | | | |
|------------|---|-------|-------------|------------|---|---|-------|---------|
| CAPPUCCINO | 1 | 3.50 | RECEIPT | CLERK | 7 | 8 | 9 | CL |
| FLAT WHITE | 1 | 3.50 | | | | | | |
| PORK | 1 | 13.00 | | | | | | |
| LAMB | 1 | 12.00 | | | | | | |
| | | | | | | | | |
| | | | PRICE LEVEL | 5% ST DISC | 4 | 5 | 6 | NO SALE |
| | | | CUSTOMER | 5% ITEM | 1 | 2 | 3 | X |
| | | | BAR TAB | REFUND | 0 | . | ENTER | |
| | | | PENDING | VOID SALE | | | | |
| | | | TABLE MAP | VOID | | | | |

Discounts(+/-) -4.00
4x \$28.00

| | | | | | | | | |
|------------|------------|-------------------|---------|--------------|-------------|------------|-----------|-----------------|
| | | | | | | | | |
| CAPPUCCINO | FLAT WHITE | LATTE | CHAI | SHORT BLACK | LONG BLACK | MOCHA | HOT CHOC | TEA |
| EXTRA HOT | SKINNY | DECAF | 1 SUGAR | TAKEAWAY | SMALL | ICED DRINK | WATER | KEYBOARD |
| EXTRA CHOC | SOY | WEAK | 2 SUGAR | MARSH MALLOW | MEDIUM | MILKSHAKE | JUICE | ORDER NUMBER |
| NO CHOC | ALMOND | DOUBLE SHOT | 3 SUGAR | EQUAL | LARGE | SMOOTHIE | SOFTDRINK | REWARDS ENQUIRY |
| DRINKS | CAFE | TAP BEER | SPIRITS | COCKTAILS | FRUIT & VEG | GROCERY | RETAIL | MANAGER |
| | RESTAURANT | BOTTLE BEER & RTD | WINE | | | | SERVICES | ADMIN |

Press the "TABLE MAP" button, then select a table from the list to save the items to the selected table.

The Kitchen Docket will print at the Kitchen Printer.

The example on the left shows the Kitchen Docket with the Yes/No "24 Hour Time Format for Kitchen Prints disabled, and the example on the right shows the Kitchen Docket with the Yes/No option enabled. Both were produced with the Kitchen Docket Format set to Group Instructions by Seat.

TABLE 43
9:22am 26-Jul-2019
Jeremy

-----ENTREE-----
1x PORK
1x LAMB

TABLE 43
9:22am 26-Jul-2019
Jeremy

-----BEVERAGE-----
1x CAPPUCCINO
1x FLAT WHITE

TABLE 43
09:23:17 26-Jul-2019
Jeremy

-----ENTREE-----
1x PORK
1x LAMB

TABLE 43
09:23:18 26-Jul-2019
Jeremy

-----BEVERAGE-----
1x CAPPUCCINO
1x FLAT WHITE

idealpos Update History

Dry Cleaning Receipt on Second Receipt Printer when Tabs

This option will work when the Dry Cleaning Tabs are printed on Receipt Printer 2. If Tabs exist for this transaction, then the Receipt will also print on Receipt Printer 2.

To enable this option, go to: Setup > Yes/No Options

Enter Keyword Search: "Dry"

Enable the option "Dry Cleaning Receipt on Second Receipt Printer when tabs"

You will also need to ensure that "Dry Cleaning Tabs print on Second Receipt Printer" is enabled for this to work.

The screenshot shows the 'yes/no options' configuration screen. At the top, there is a search bar with the keyword 'Dry' and a 'Clear' button. Below the search bar is a navigation menu with categories: Clerks, Confirmation, Customers, Home Screen, Miscellaneous, POS Screen, Receipt / Kitchen, Restaurant, and Stock Control. The main area displays a table of options. The 'RECEIPT / KITCHEN' section is highlighted, and the option 'Dry Cleaning Receipt on Second Receipt Printer when Tabs' is checked, indicated by a blue checkmark and a yellow arrow pointing to it. Other options in the same section include 'Dry Cleaning Features' and 'Dry Cleaning Tabs print on Second Receipt Printer', both also checked. The table has columns for 'ALL', '1', '2', '3', and '901'.

| | ALL | 1 | 2 | 3 | 901 |
|--|-----|---|---|---|-----|
| MISCELLANEOUS | | | | | |
| Dry Cleaning Features | ✓ | | | | |
| RECEIPT / KITCHEN | | | | | |
| Dry Cleaning Receipt on Second Receipt Printer when Tabs | ✓ | | | | |
| Dry Cleaning Tabs print on Second Receipt Printer | ✓ | | | | |

Printers are configured in: Setup > Network Printers

After configuring the second printer, leave it at the top of the network printers screen and don't drag it to a column at the bottom.

After the second receipt printer has been configured in Network Printers, you can specify which printer you want to use as the Second Receipt Printer by going to: Setup > POS Terminals > Modify > Receipt Printer

Ensure that you enable the checkbox "Use Second Receipt Printer"

The screenshot shows the 'pos terminals' configuration screen. The 'Receipt Printer' section is at the top, with 'Type' set to 'Epson TM-T88' and 'Connection' set to '-Printer'. Below it, the 'Second Receipt Printer' section is highlighted with a yellow border. In this section, the checkbox 'Use Second Receipt Printer' is checked. Other settings include 'Type' set to 'Epson TM-T88', 'Connection' set to 'COM1', and 'Settings' set to '19200,n,8,1'. The 'Receipt Header/Footer' section shows the header text: '@#IDEALPOS', '@1/212 Curtin Ave West', '@Eagle Farm QLD 4009', '@Australia', '@TAX INVOICE', and the footer text: '*indicates taxable supply', '@Powered by Idealpos'. The 'Bill Header/Footer (if different from Receipt)' section is also visible at the bottom.

Receipt Tabs for a Dry Cleaning Item are configured in File > Stock Control > Stock Items > Select Item > Modify
 When modifying the Stock Item, click on the Advanced tab and ensure that the number of tabs required have been entered in the Receipt Tabs field:

The screenshot shows the 'stock items' application window with the 'Advanced' tab selected. The interface includes several sections:

- General:** Sales Prompt field.
- Advanced:**
 - Link to Menu: 0 >
 - Link to Grid: 0 > MAIN
 - Link Table: 0 >
- Points by Price Level:** A list of 12 price levels (PRICE 1 to PRICE 12), each with a value of 0.
- Amount Override Limits:** Lower Limit: 0.00, Upper Limit: 0.00, Profit% field.
- Location 1:** Stock Level: 0 >>>, Recommended Level: 0, Reorder Level: 0.
- Points Settings:**
 - Use Special Points: 0
 - Inhibit Points Accrual
 - Inhibit Purchase With Points
 - Print Promotional Ticket
- Stock Notes:** A large empty text area.
- Miscellaneous:** National Product Number field, and Receipt Tabs: 1 (highlighted with an orange arrow).

At the bottom of the window, there are 'Keyboard' and 'Save' buttons.

When adding any Stock Items to a sale which have a value specified in the Receipt Tabs as shown above, the Receipt will only be printed to the Second Receipt Printer.

As most Dry Cleaning establishments will charge the customer only after the garments have been cleaned, the customer will pay for their Dry Cleaning when picking up their garments.

Therefore, when the customer picks up and pays their account, the final payment receipt will be printed to the first receipt printer.

For more information about using Dry Cleaning features, refer to the [Dry Cleaning topic](#) in the User Guide.

idealpos Update History

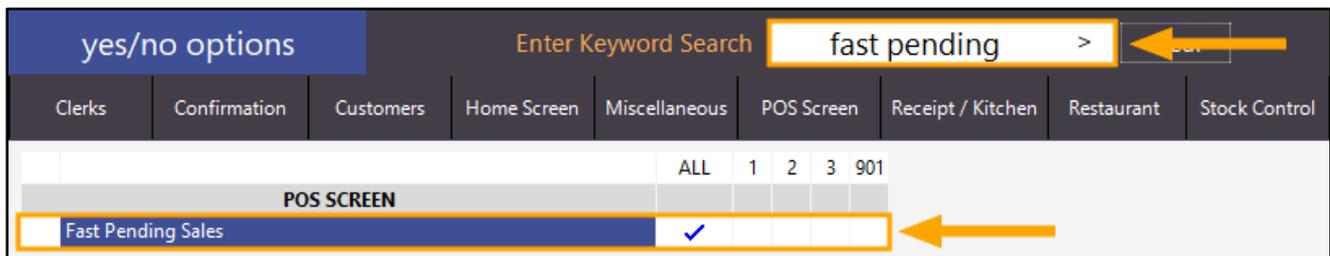
Fast Pending Sale Function

This function adds the ability to bypass the Pending Sale Save screen. This allows the pending sale to be saved automatically without any additional user input. This function may be useful when used with the Kiosk module or when additional details for the Pending Sale are not required.

When enabling this function, the "Auto Generate Pending Sale Codes" option must also be enabled which is outlined in the below steps.

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

Enter Keyword Search: "Fast Pending" then enable the "Fast Pending Sales" Yes/No option



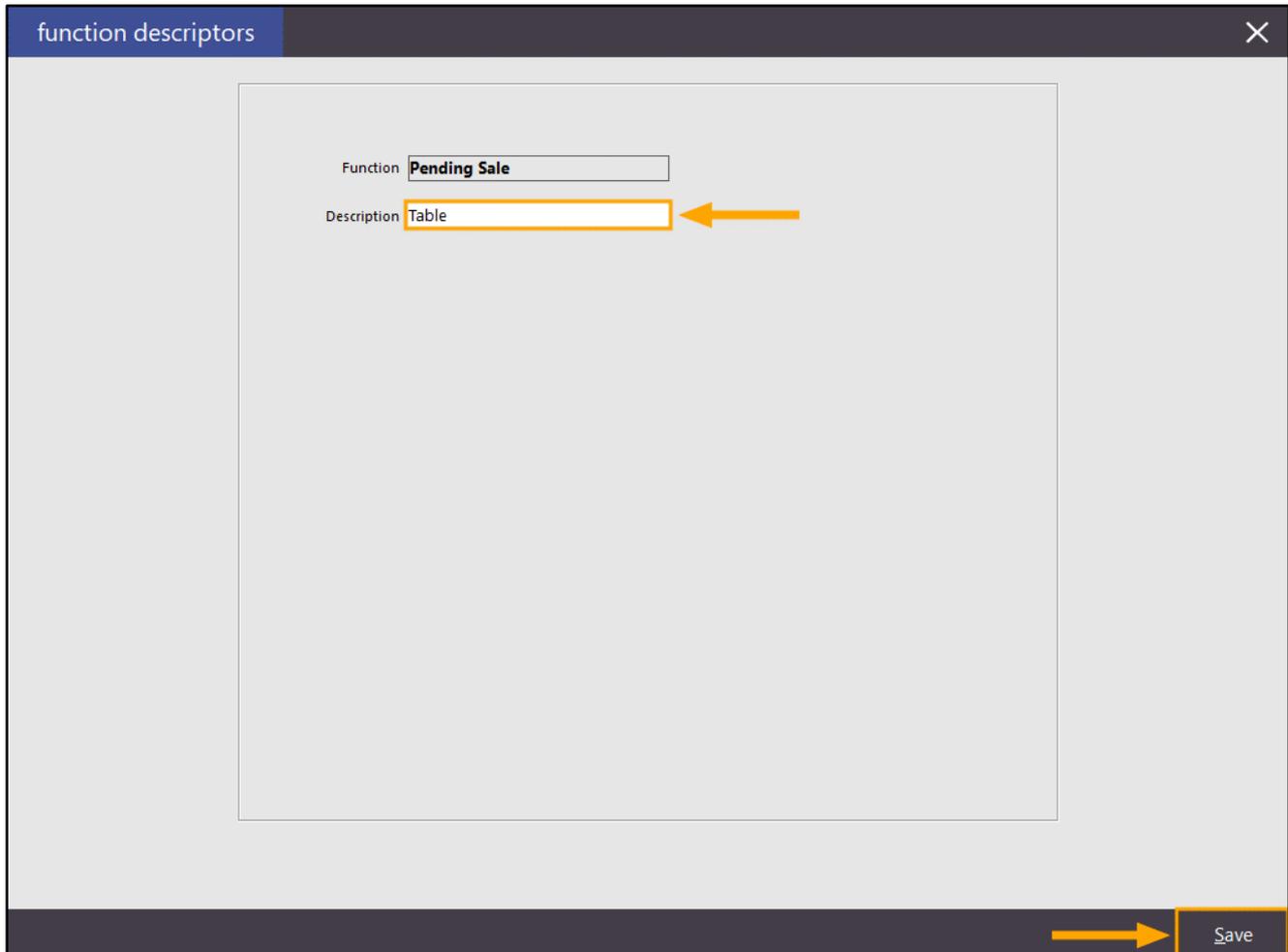
The screenshot shows the 'yes/no options' window. At the top, there is a search bar with the text 'fast pending' and a search button. Below the search bar is a navigation menu with categories: Clerks, Confirmation, Customers, Home Screen, Miscellaneous, POS Screen, Receipt / Kitchen, Restaurant, and Stock Control. The 'POS SCREEN' category is selected. Below the navigation menu is a table with columns: ALL, 1, 2, 3, 901. The row for 'Fast Pending Sales' is highlighted, and a checkmark is visible in the 'ALL' column. A yellow arrow points to the search bar, and another yellow arrow points to the checkmark.

Close the Yes/No options window.

If required, you may want to change the description for Pending Sales.

By default, a description of "Table" will be used, but this can be changed by going to: Setup > Function Descriptors. Find the "Pending Sale" function in the list, select it, then press the "Modify" button on the bottom-right corner of the screen.

Enter a description that you want to use for the Pending Sales function. This description will be included at the top of any Pending Sale receipts. Press the "Save" button on the bottom-right corner of the window.



The screenshot shows the 'function descriptors' window. At the top, there is a title bar with the text 'function descriptors' and a close button. Below the title bar is a form with two fields: 'Function' and 'Description'. The 'Function' field contains the text 'Pending Sale'. The 'Description' field contains the text 'Table'. A yellow arrow points to the 'Description' field. At the bottom right of the window, there is a 'Save' button. A yellow arrow points to the 'Save' button.

When saving a Pending Sale, Idealpos needs to be able to generate a code automatically. Therefore, Auto Generate Pending Sale Codes must be enabled.

To enable this setting, go to: Setup > Global Options > Sales > Pending Sales.

Enable "Auto Generate Pending Sale Codes" under the Pending Sales section.

Whilst on this screen, you may also want to adjust the behaviour for printing Pending Sales.

Information about the behaviour of the checkboxes and options available in Pending Sales is shown below:

Printed Pending Sales are sent to Receipt Printer - When this option is enabled, any Pending Sales that are printed will also be sent to the Receipt Printer and will be printed in the format of a 'bill'.

In order for this option to take effect, the "Print to Docket Printers" option must be enabled.

Printed Pending Sales are sent to Windows Printer - When this option is enabled and the Yes/No option "Automatically Print to Kitchen" is disabled, a Pending sale that is saved to a Table will be sent to the Windows Printer when selecting the Table from the Table Map and pressing the "Kitchen" button.

Auto Generate Pending Sale Codes - When this option is enabled, Idealpos will automatically generate a Pending Sale Code when creating the Pending Sale. **This option must be enabled for the Fast Pending Sale function.**

Inhibit Amounts on A4 Windows Prints - When this option is enabled, any amounts such as the Unit Price, Amount and Total Amount will not be printed on A4 Windows Prints of the Pending Sale

Print to Docket Printers - When this option is enabled, Idealpos will send the Pending Sale to the Kitchen printers after the Pending Sale has been saved. Note that in order for this to happen, the Stock Items added to the Pending Sale must also be configured to print to Kitchen Printers. If required, update/configure any Stock Items that need to be printed to a Kitchen Printer by going to: File > Stock Control > Modify. Enable any Kitchen/Bar Printer checkboxes as required.

Print to Windows Printer - When this option is enabled, Idealpos will send the Pending Sale to the Windows printer after the Pending Sale has been saved.

The screenshot shows the 'global options' window for 'site 1 (Site 1)'. The 'Sales' tab is selected. The 'Pending Sales' section is highlighted with a yellow box, and the 'Auto Generate Pending Sale Codes' checkbox is checked and pointed to by a yellow arrow. Other options in the 'Pending Sales' section include 'Printed Pending Sales are sent to Receipt Printer', 'Printed Pending Sales are sent to Windows Printer', 'Inhibit Amounts on A4 Windows Prints', 'Print to Docket Printers', and 'Print to Windows Printer'.

| Default | Description | Rate | Label |
|---------|--------------------------------------|-------|-------|
| Rate 1 | <input checked="" type="radio"/> GST | 5.000 | GST |
| Rate 2 | <input type="radio"/> PST | 7.000 | FRE |
| Rate 3 | <input type="radio"/> Not Defined | 0.000 | |
| Rate 4 | <input type="radio"/> Not Defined | 0.000 | |
| Rate 5 | <input type="radio"/> Not Defined | 0.000 | |
| Rate 6 | <input type="radio"/> Not Defined | 0.000 | |

| Price | Description | Type |
|----------|-------------|------|
| Price 1 | PRICE 1 | Text |
| Price 2 | PRICE 2 | Text |
| Price 3 | PRICE 3 | Text |
| Price 4 | PRICE 4 | Text |
| Price 5 | PRICE 5 | Text |
| Price 6 | PRICE 6 | Text |
| Price 7 | PRICE 7 | Text |
| Price 8 | PRICE 8 | Text |
| Price 9 | PRICE 9 | Text |
| Price 10 | PRICE 10 | Text |
| Price 11 | PRICE 11 | Text |
| Price 12 | PRICE 12 | Text |

| Refund Reason | Type |
|------------------|------|
| 1 Damaged | Text |
| 2 Changed Mind | Text |
| 3 Faulty | Text |
| 4 Product Recall | Text |
| 5 Expired | Text |
| 6 Other | Text |
| 7 | Text |
| 8 | Text |
| 9 | Text |

| Sale Type | Status |
|-----------|--------|
| Takeaway | |
| Delivery | |
| Pickup | |
| Cater | |

| Food/Beverage Total | Description |
|---------------------|-------------|
| Food | FOOD |
| Beverage | BEVERAGE |

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When saving Pending Sales, Idealpos will automatically generate a Pending Sale code from a pre-configured range. The range can be configured/modified by going to: Setup > POS Terminals > Select Terminal > Modify
Go to the Miscellaneous Settings tab, then adjust the Pending Sales From/To field with the code range that you want Idealpos to use when saving a Pending Sale. Codes are assigned in chronological order and once the code range has been exhausted, Idealpos will restart assigning pending sale codes from the beginning of the entered range.

The screenshot shows the 'pos terminals' configuration window with the 'Miscellaneous Settings' tab selected. The 'Pending Sales From' field is highlighted with an orange box and an arrow pointing to it from the right.

General

Points per Dollar
Point Redemption Value
Delete Points when Customer Inactive for Months
Lock Price Level to
Default Table Map
Default User
Customer Codes From
Stock Item Codes From to
Show Order to
Pending Sales From to ←
Force Order Menu
Force Receipt Amount
 Auto Expand Activity

Gaming Override Options

Price Level Remote POS Ticket Threshold
System ID 2nd
Username
Password

| | Enable | Description | Code | Points Per \$ | Point Value |
|----|--------------------------|-------------|------|---------------|-------------|
| 1 | <input type="checkbox"/> | | | | |
| 2 | <input type="checkbox"/> | | | | |
| 3 | <input type="checkbox"/> | | | | |
| 4 | <input type="checkbox"/> | | | | |
| 5 | <input type="checkbox"/> | | | | |
| 6 | <input type="checkbox"/> | | | | |
| 7 | <input type="checkbox"/> | | | | |
| 8 | <input type="checkbox"/> | | | | |
| 9 | <input type="checkbox"/> | | | | |
| 10 | <input type="checkbox"/> | | | | |

POS Server

POSServer Override IP
 Automatically Reconnect

Cash Declaration

Print to Receipt Printer
 Print to Windows Printer
 Don't Print
 Include Stock Item Sales Report

Dashboard

Sales in Locations >
 Shortcut Bar Small Font

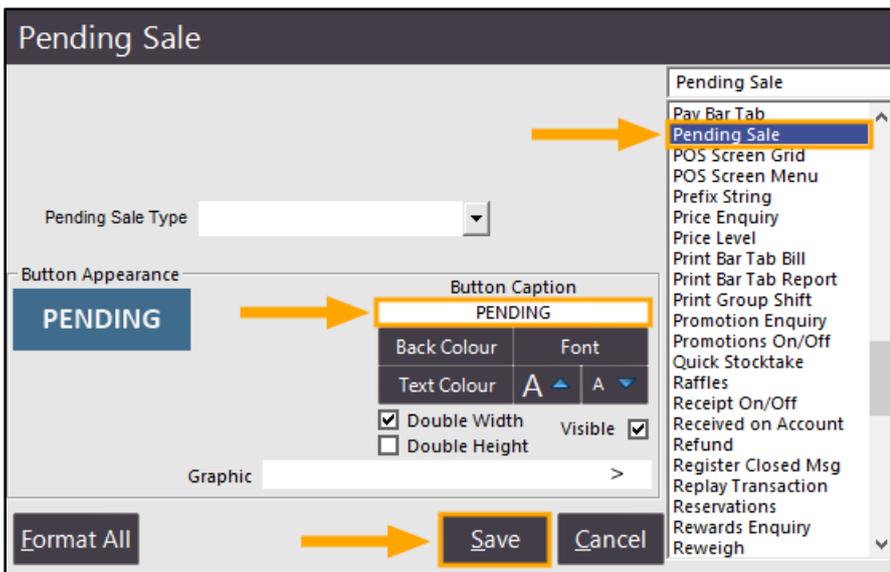
Handhelds

Force Food to Print
Force Drinks to Print
Force Bills Printer
Item Graphic Location
Handheld Background

Keyboard

Before the Pending function can be used, a button must also be configured on the POS screen if it doesn't exist already.

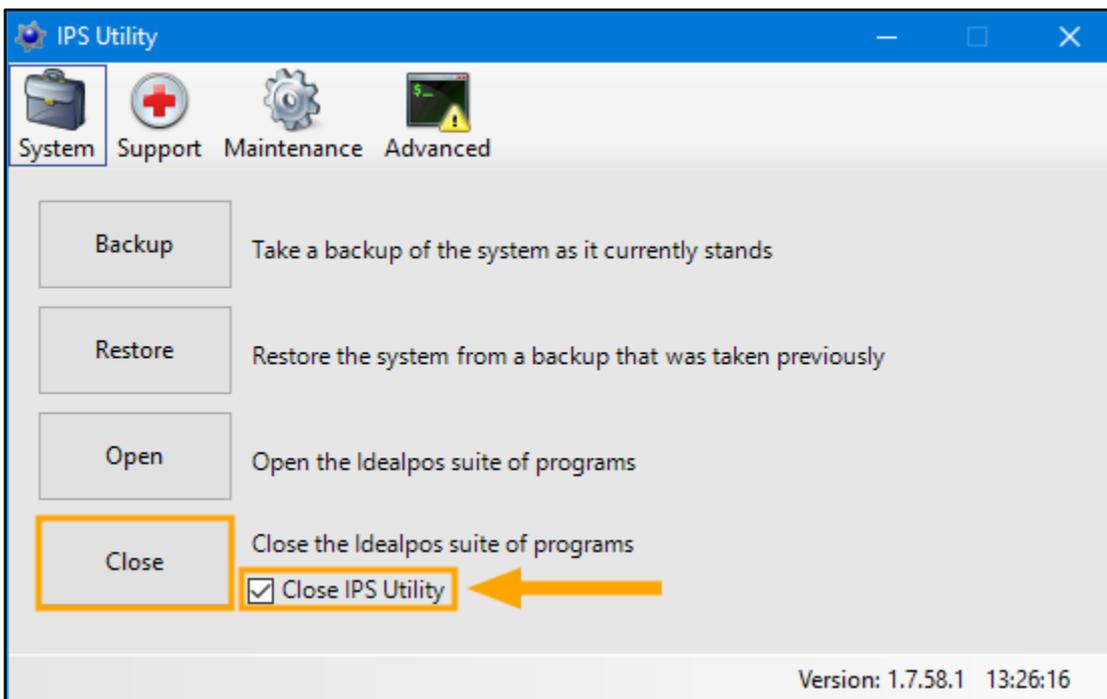
Go to: Setup > POS Screen > POS Screen Setup > Select a POS Screen Layout > Buttons
Find a blank POS Screen button and click on it, then configure as follows:



After the PENDING button has been created, close the POS Screen Layout windows.

To ensure that any changes to the Pending Sales options have taken effect, Idealpos will need to be restarted. Close the Idealpos Suite via IPS Utils.

Go to: Start > Idealpos > IPSUtils > Enable the "Close IPS Utility" checkbox then press the "Close" button



idealpos Update History

Start Idealpos either via the Idealpos icon on the desktop, or click on Start > Idealpos > Idealpos
Go to the POS screen, add items to the sale, then press the "PENDING" button

The sale will be cleared and the POS screen will be ready for the next sale/transaction.
The Pending Sale receipt will also be printed if configured to do so as per the settings in:
Setup > Global Options > Sales > Pending Sales
The top of the Pending Sale will show the Pending Sale descriptor followed by the code assigned to the Pending Sale.



To resume the Pending Sale, press the PENDING button on the POS Screen, select the Pending Sale from the list, then press OK.

Table
✕

Search For

Code
 Clerk
 Name

Status ALL ▼

| Code | Date | Clerk | Name | Address | Postcode | Status | Order Date | |
|------|----------|--------|------|---------|----------|--------|----------------|--|
| 602 | 17/06/19 | Jeremy | | | | | 17/06/19 09:20 | CAPPUCCINO 3.50 FLAT WHITE 3.50 SHORT BLACK 3.00 |
| 697 | 29/07/19 | Jeremy | | | | | 29/07/19 10:56 | 10.00 |
| 698 | 29/07/19 | Jeremy | | | | | 29/07/19 10:59 | |
| 700 | 29/07/19 | Jeremy | | | | | 29/07/19 12:51 | |
| 701 | 29/07/19 | Jeremy | | | | | 29/07/19 12:54 | |
| 704 | 29/07/19 | Jeremy | | | | | 29/07/19 13:14 | |
| 705 | 29/07/19 | Jeremy | | | | | 29/07/19 13:15 | |

Windows Print
Transfer to Table
Email
Reprint Kitchen
Modify
Delete
Print
OK

The items in the Pending Sale will be added to the sale. If required, additional items can be added to the sale, then the sale can be finalised by pressing the ENTER button and selecting a Tender Type/Amount.

29 Jul 13:36 Adult ID: 29-Jul-2001
Jeremy PRICE 1

| | | |
|-------------|---|------|
| CAPPUCCINO | 1 | 3.50 |
| FLAT WHITE | 1 | 3.50 |
| SHORT BLACK | 1 | 3.00 |

Balance: \$10.00
\$10.00

3x