

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 displays the 'activity enquiry' window. On the left, a table lists various events. The event '05 Mar 19 09:35:06 1 Admin Incorrect Password' is highlighted in blue. On the right, the 'Selection Criteria' panel is visible. The 'Date' is set to 'All Dates'. The 'Table' dropdown is set to 'Incorrect Password', and the 'Show Only the Selected Type' checkbox is checked. The 'Top' dropdown is set to '1000 records'. The 'Select' button is highlighted. Below the table, a summary of event counts is shown:

Event Type	Count
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

A 'View All' button is located at the bottom right of the summary table.

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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 Action Description for all rows is 'Incorrect Password'. The right panel, titled 'Selection Criteria', contains several dropdown menus for Date, Clerk, Function, POS, and Location. It also has a 'Table' dropdown, a checked 'Show Only the Selected Type' checkbox, a 'Top 1000 records' field, a 'Filter Sales' checkbox, and a 'Select' button. Below the criteria panel, a summary box 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

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
Buy: 1
 Trip by Quantity
 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
And Buy: 0
 Trip by Quantity
 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:

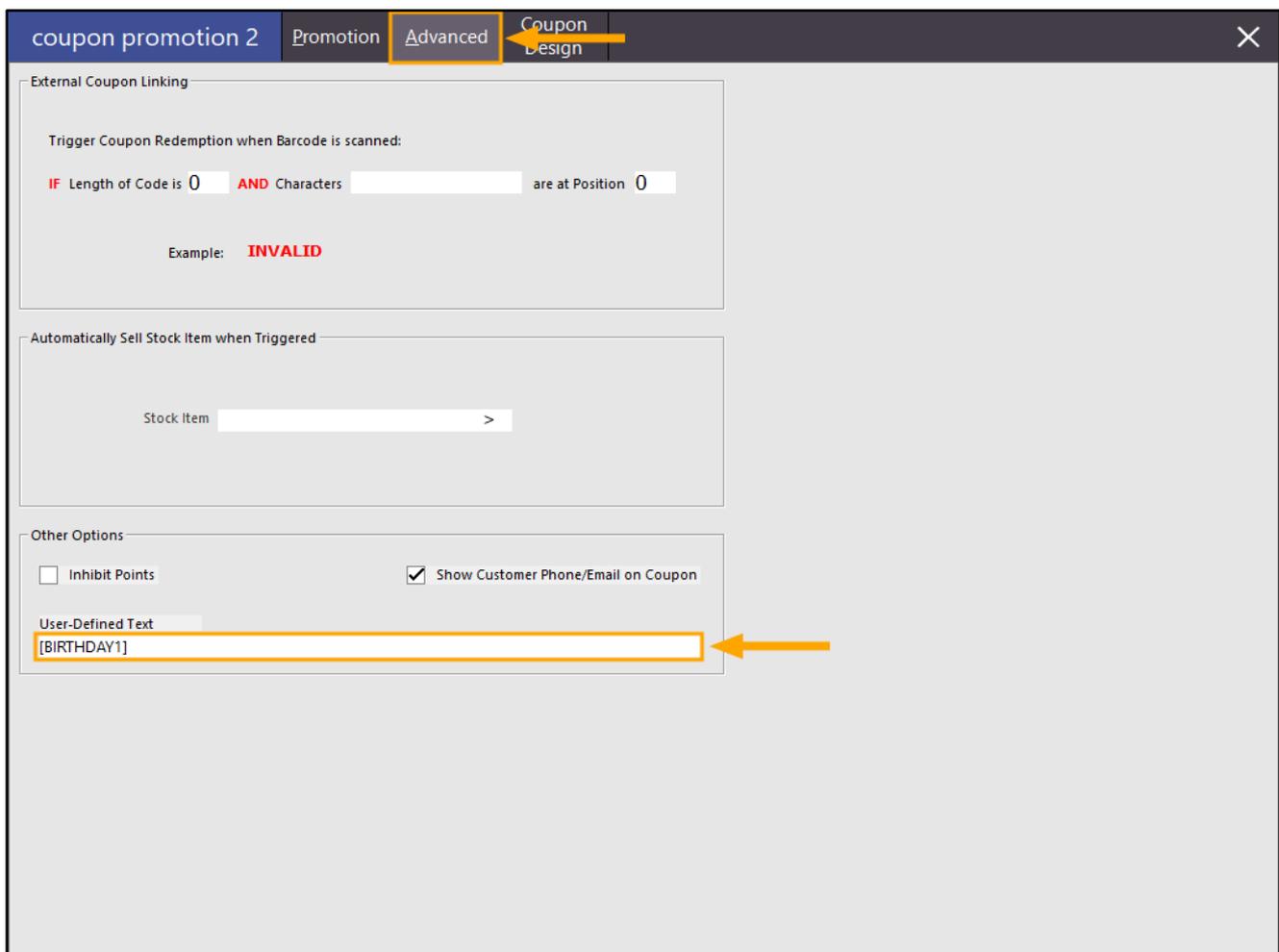
[BIRTHDAY1] will allow the customer to redeem their Birthday Coupon Promotion only on the day of their birthday.

[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.

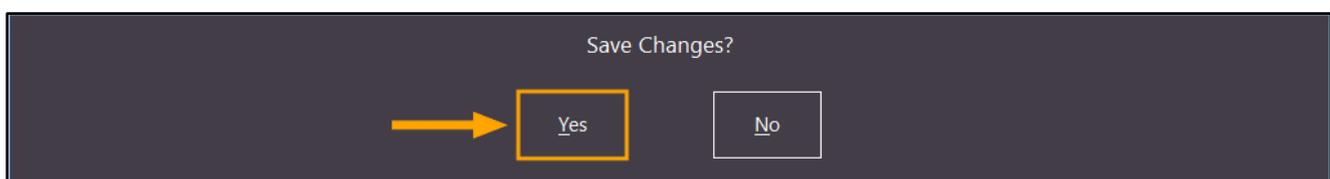
The below example shows the User-Defined configured with a [BIRTHDAY1] value, which will only allow the customer to redeem on the day of their Birthday.



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:** Contains a section for "Trigger Coupon Redemption when Barcode is scanned:" with fields for "IF Length of Code is 0", "AND Characters", and "are at Position 0". Below this is an example: "Example: INVALID".
- Automatically Sell Stock Item when Triggered:** Contains a "Stock Item" dropdown menu.
- Other Options:** Contains two checkboxes: "Inhibit Points" (unchecked) and "Show Customer Phone/Email on Coupon" (checked).
- User-Defined Text:** A text input field containing "[BIRTHDAY1]", which is highlighted with a yellow box and pointed to by a yellow arrow.

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 title "Save Changes?". At the bottom, there are two buttons: "Yes" and "No". The "Yes" button is highlighted with a yellow box, and a yellow arrow points to it from the left.

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)

Address Details:

- Address: (empty)
- Suburb: (empty)
- State: (dropdown)
- Postcode: (empty)

Delivery Address:

- Delivery Address same as Above
- Address: (empty)
- Suburb: (empty)
- State: (dropdown)
- Postcode: (empty)

Contact Details:

- Phone: (empty)
- Mobile: (empty)
- Fax: (empty)
- Email: (empty)

Sales / Accounting:

- Auto % Discount: 0
- Price Level: 0
- Bar Tab
- Account
- Credit Limit: 1000.00

Miscellaneous:

- Company: (empty)
- Occupation: (empty)
- Next of Kin: (empty)
- Contact No: (empty)
- Birth Date: 08/08/1980 (highlighted with an orange arrow)
- Birth Date 2: (empty)
- Password: (empty)
- Gender: M
- Marital Status: (dropdown)
- Mail Out
- Discontinue
- Comments: (empty)
- Sales Prompt: (empty)

Save button is located at the bottom right.

Close the Modify Customer and Customers screens.

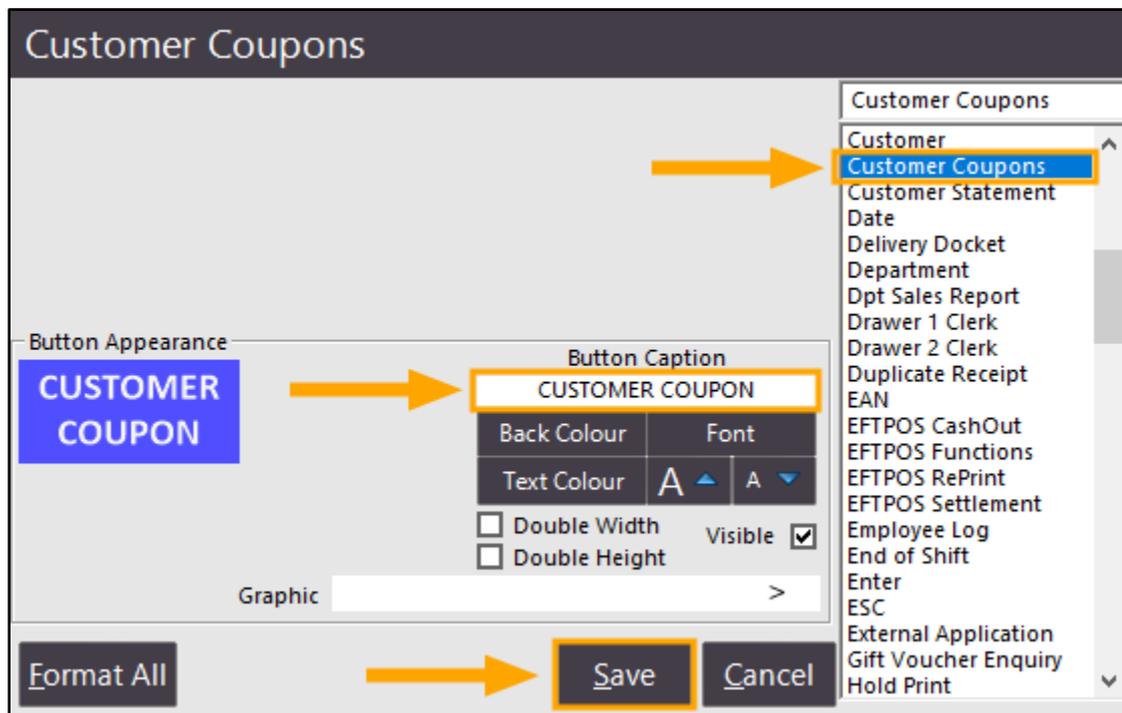
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In order to redeem Customer Coupons, you will need to ensure that you have a Customer Coupon button on your POS Screen.

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 interface with a black background. At the top left, it displays '08 Aug 14:08 Adult ID: 08-Aug-2001' and 'Jeremy PRICE 1'. At the top right, there are three yellow chevrons '>>>'. Below this is a red header bar with the text 'JOHN CITIZEN - 1 Points (\$0.10)'. Underneath is a table with one row: 'YELLOWGLEN BTL', '1', and '35.00'. At the bottom left, it shows '1 Points (\$0.10)' and 'Min Layby Deposit : \$3.50'. At the bottom right, the total amount '\$35.00' is displayed in a large font.

JOHN CITIZEN - 1 Points (\$0.10)		
YELLOWGLEN BTL	1	35.00

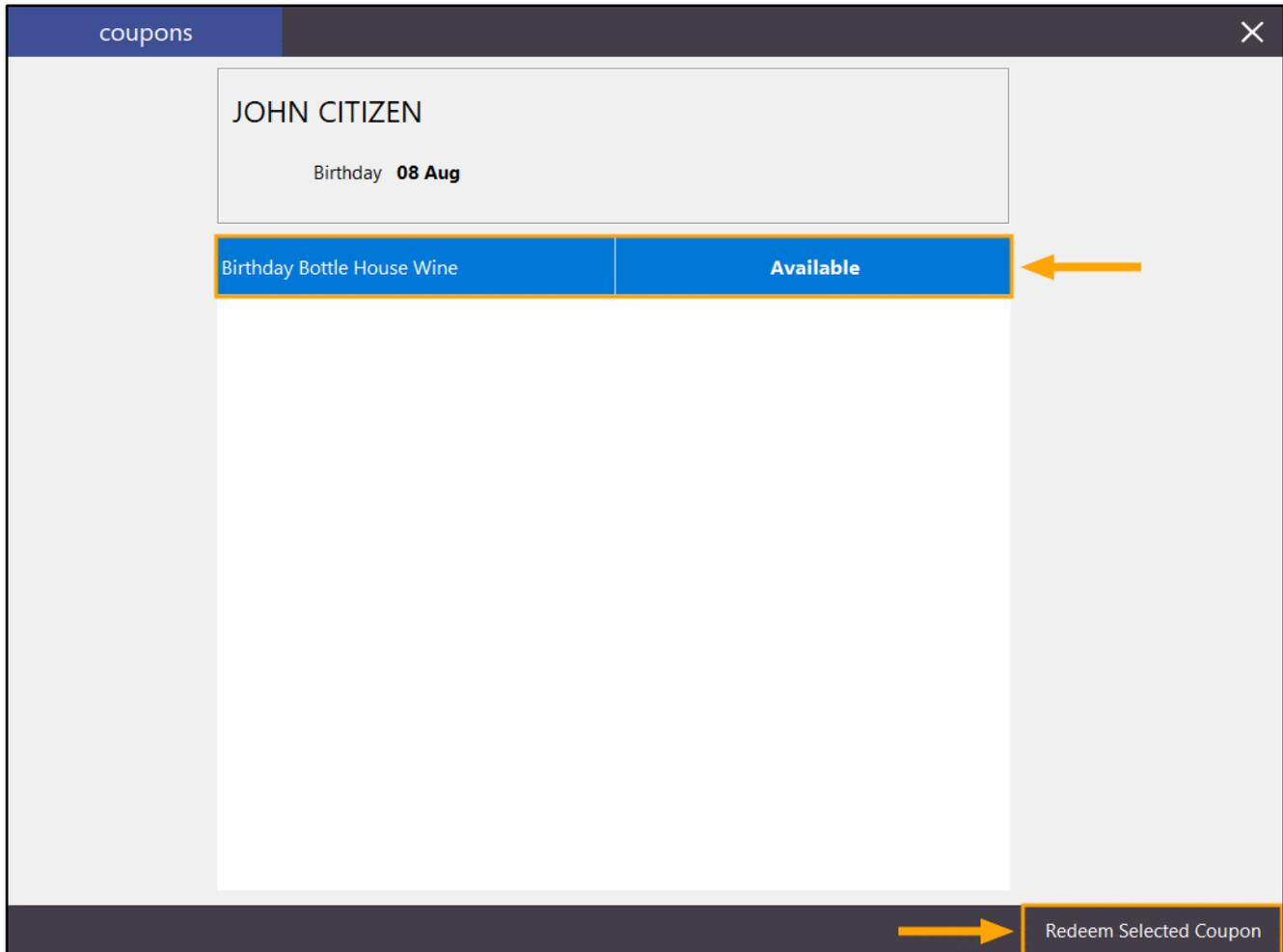
1 Points (\$0.10)
Min Layby Deposit : \$3.50

\$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) Discounts(+/-) -35.00
Min Layby Deposit : \$3.50 **\$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 >>> X

JOHN CITIZEN - 1 Points (\$0.10)			RECEIPT	CLERK	7	8	9	CL
YELLOWGLEN BTL	1	35.00	PRICE LEVEL	5% ST DISC	4	5	6	NO SALE
-35.00 Birthday Bottle House Wine	1		CUSTOMER	5% ITEM	1	2	3	X
COUPON: B2000200000000200819		-35.00	BAR TAB	REFUND	0	.	ENTER	
Birthday Bottle House Wine	1	-35.00	PENDING	VOID SALE				
			TABLE MAP	VOID				

1 Points (\$0.10) Discounts(+/-) -35.00
Min Layby Deposit : \$3.50 **\$0.00**

CASH		<div style="text-align: center; font-size: 2em; font-weight: bold;">0.00</div> <div style="text-align: center;">Balance 0.00</div> 
EFTPOS		
ACCOUNT		
LAYBY		
GIFT VOUCHER		
CREDIT NOTE		
POINTS		

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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

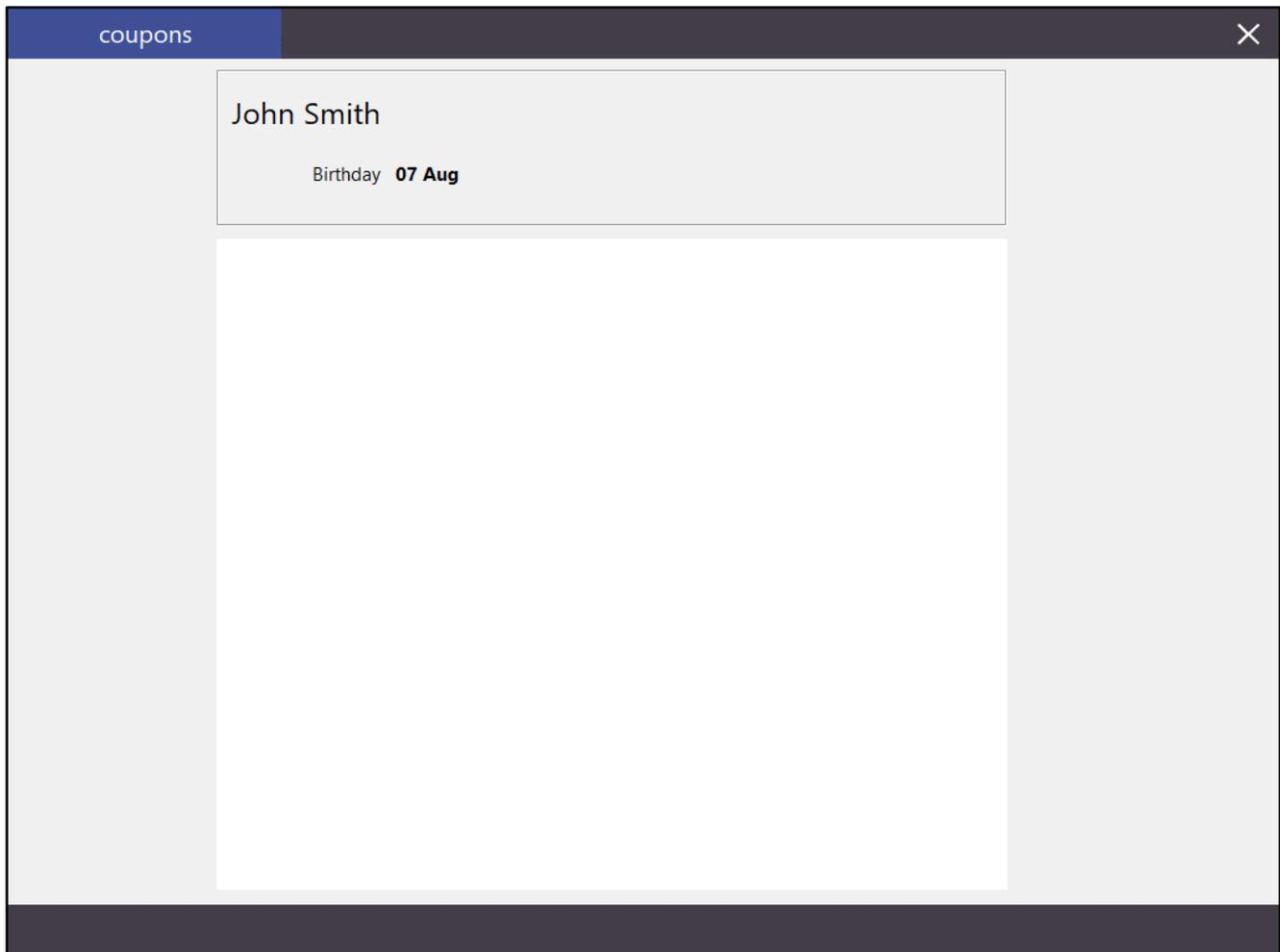
Sales / Accounting
Auto % Discount Account
Price Level Credit Limit
 Bar Tab

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 main content area is divided into two sections. The top section is a light gray box containing the text "JANE CITIZEN" and "Birthday 08 Aug". Below this is a blue horizontal bar with two parts: "Birthday Bottle House Wine" on the left and "Redeemed 1088-1 08/08/2019 13:10:09" on the right. A yellow arrow points to the right side of the "Redeemed" text. The bottom section of the window is a large white empty space.

Customer Name	Birthday	Coupon Description	Redeemed Status
JANE CITIZEN	08 Aug	Birthday Bottle House Wine	Redeemed 1088-1 08/08/2019 13:10:09

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" and the "Description" is "EFTPOS". Other fields include "# of Receipts" (1), "Exchange Rate" (0), "Lower Limit" (0.00), "Upper Limit" (9999.99), "Scan Code", "Scan Code Amount" (0.00), "Surcharge" (0.00), and "Waive Surcharge Threshold" (0.00). There are radio buttons for currency selection (% and \$). A list of checkboxes is on the right, with "Allow Overcharging To Tips" checked and highlighted by a yellow box and an arrow. Other checkboxes include "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", and "Force Reference". At the bottom, there is a "User-Defined Text" field and a "Save" button, both highlighted with yellow boxes and arrows.

Function	TENDER 2
Description	EFTPOS
# of Receipts	1
Exchange Rate	0
Lower Limit	0.00
Upper Limit	9999.99
Scan Code	
Scan Code Amount	0.00
Surcharge	0.00
Waive Surcharge Threshold	0.00

- 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

User-Defined Text

Save

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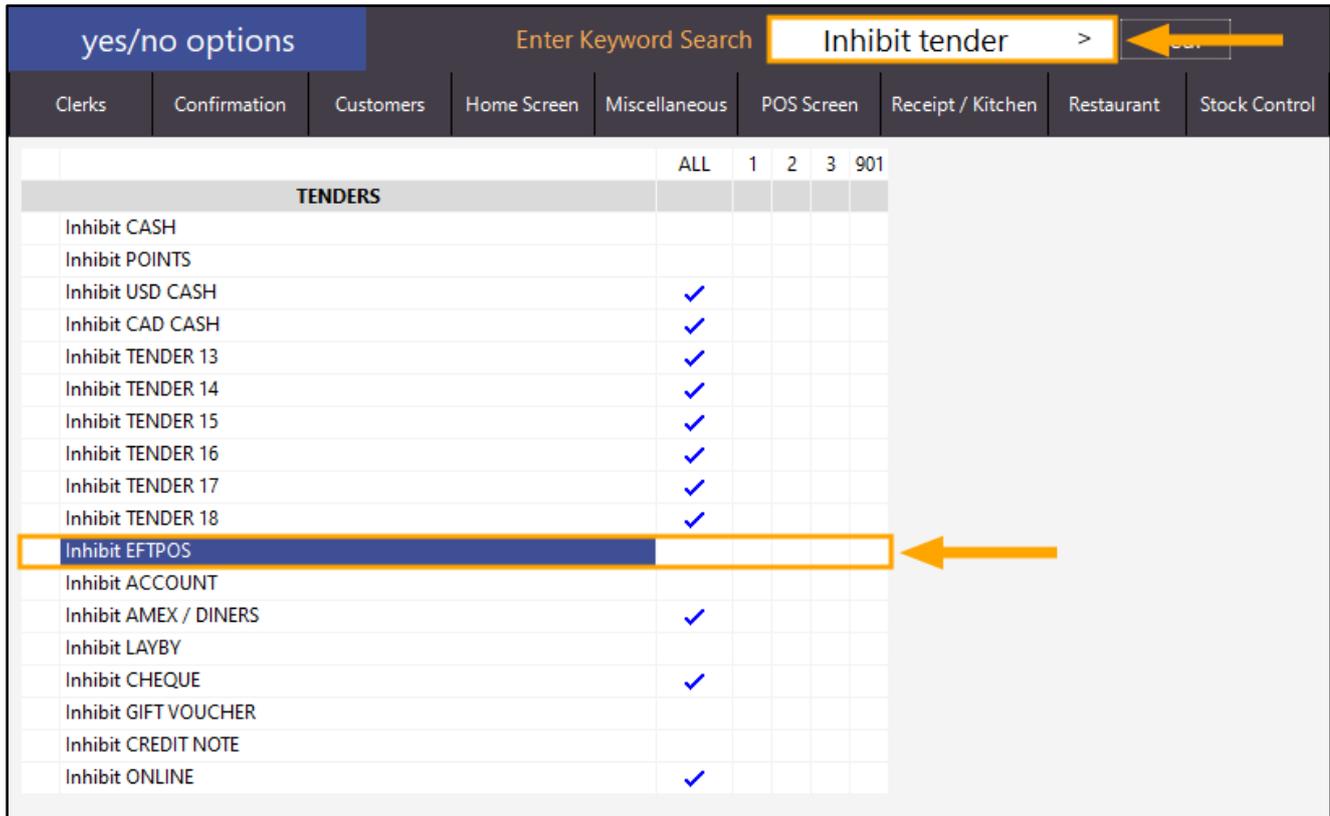
Ensure that the Tender being configured is enabled.

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

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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 shows the Idealpos POS interface. At the top left, it displays 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. The interface includes a numeric keypad with buttons for digits 0-9, a decimal point, and function keys like 'RECEIPT', 'CLERK', 'PRICE LEVEL', 'CUSTOMER', 'BAR TAB', 'PENDING', 'TABLE MAP', '5% ST DISC', '5% ITEM', 'REFUND', 'VOID SALE', 'VOID', 'NO SALE', and 'ENTER'. Below the keypad, a list of tender types is shown: 'CASH', 'EFTPOS' (highlighted with a yellow arrow), 'ACCOUNT', 'LAYBY', 'GIFT VOUCHER', 'CREDIT NOTE', and 'POINTS'. To the right of the tender list, the amount '20.00' is displayed in a yellow box, and the balance 'Balance 10.00' is shown. Below the amount, there are images of Australian banknotes for 100, 50, 20, 10, and 5 dollars.

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?". At the bottom of the dialog, there 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				

3x

CASH	
EFTPOS	20.00
ACCOUNT	
LAYBY	
GIFT VOUCHER	
CREDIT NOTE	
POINTS	

Change

\$10.00

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 elements:

- Function:** A text input field containing "RECEIVED ACCOUNT 3".
- Description:** A text input field containing "GV PURCHASE".
- Options:** A list of checkboxes:
 - 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 window titled "function descriptors" with a close button (X) in the top right corner. The window contains the following fields and options:

- Function: **TENDER 7**
- Description: **GIFT VOUCHER**
- # of Receipts: 1
- Exchange Rate: 0
- Lower Limit: 0.00
- Upper Limit: 99999.99
- Scan Code: [Empty]
- Scan Code Amount: 0.00
- Surcharge: 0.00 %
- Waive Surcharge Threshold: 0.00 \$
- Override Receipt Footer: [Empty text area]
- User-Defined Text: [Empty text area]
- Options:
 - 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

Orange arrows point to the following elements:

- Description: GIFT VOUCHER
- Credit Function (checked)
- Open Cash Drawer (checked)
- GIFT VOUCHER Redemption (checked)
- 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								
CASH			<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid black; padding: 5px;"> <p>10.00</p> <p>Balance 10.00</p> </div>  </div>					
EFTPOS								
ACCOUNT								
LAYBY								
GIFT VOUCHER								
CREDIT NOTE								
POINTS								

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

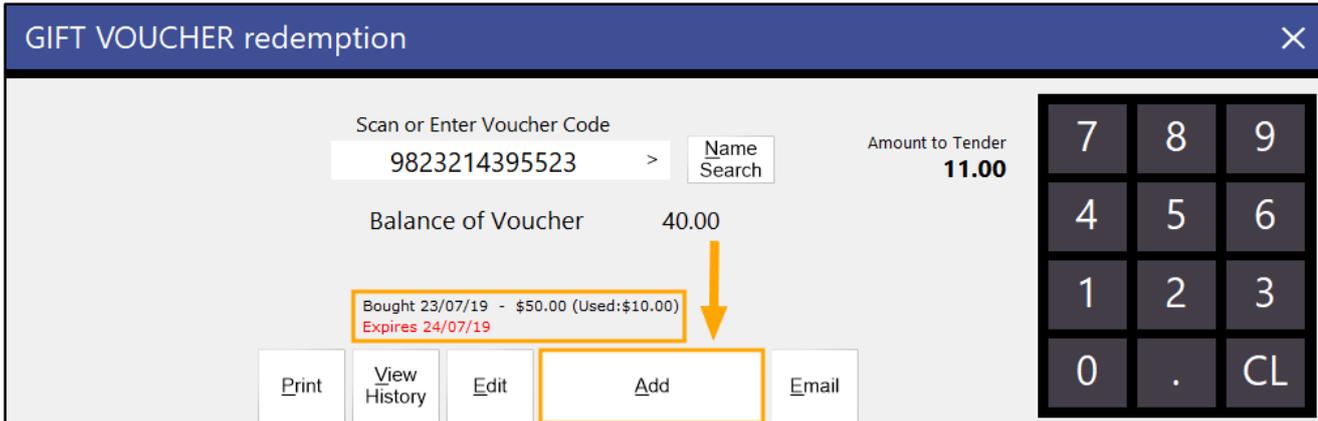
Total Voucher Redemption **10.00**



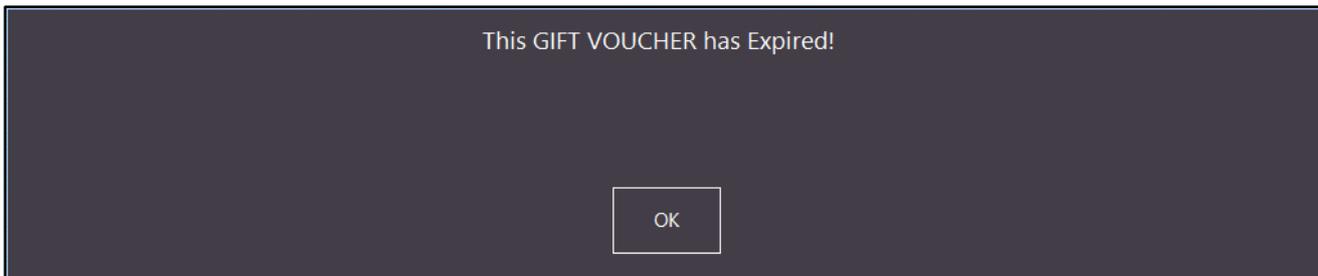
If Receipt printing is enabled, the Customer Receipt will print out showing the amount that was redeemed, along with the Voucher Code. If Receipt Printing is turned off, you can press the RECEIPT button on your POS Screen to print out a receipt.



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.

The screenshot shows the 'global options' interface for 'site 1 (Site 1)'. The 'Credit Notes/Gift Vouchers' menu is selected. The 'Gift Vouchers' section includes a table with columns for Gift Voucher Type, Expiry Days, Receipt Printer Logo, and PDF Logo. The table lists 20 voucher types with varying expiry periods (30, 90, and 365 days). To the right of the table are settings for Message, Company Logo, Website, and a list of checkboxes. The checkbox 'Inhibit ability to add value to existing Gift Vouchers' is checked and highlighted with an orange box and arrow. Below this is the 'Credit Notes' section, which includes a 'Receipt Message' field, a 'Customer Type' dropdown set to 'ACCOUNTS', and an 'Expiry Days' field set to '90'. There is also a table for 'Reason 1' with columns for 'Item Returned' and values ranging from 6 to 10.

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: _____

Receipt Message: _____

Customer Type: ACCOUNTS
Expiry Days: 90

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

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' interface 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. The password entered is 'password'. Other visible 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 'Each' item text. There are also checkboxes for 'Floating Clerks', 'NZ EFTPOS 200s', and 'Ice Terminal'.

Enter a password into the Exit POS Password field.

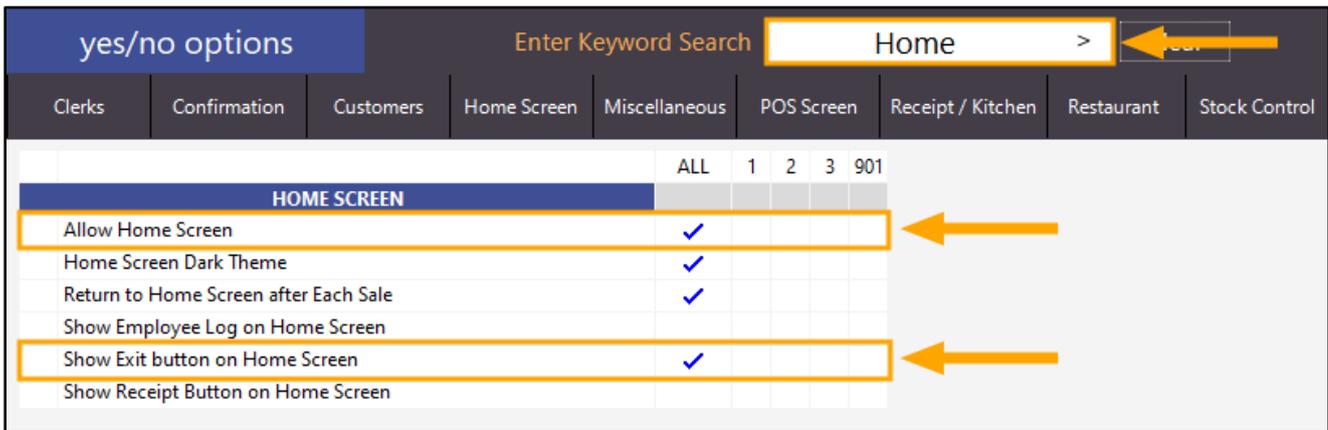
Note that the password will be displayed as plain text in the Exit POS Password field.

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:

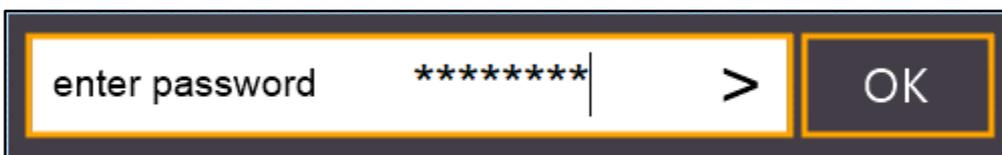
- Allow Home Screen
- Show Exit button on Home Screen



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.

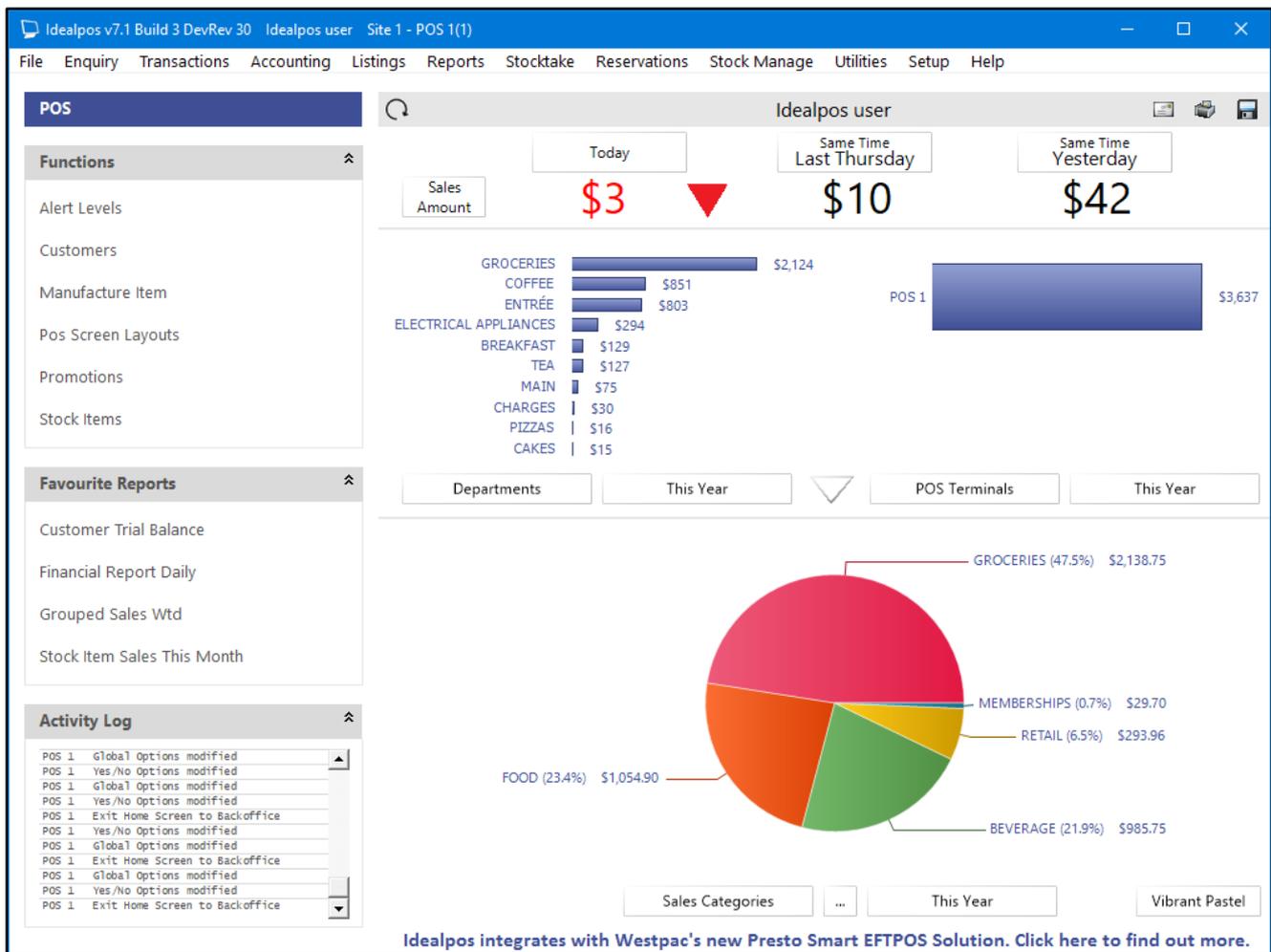


A Password prompt will be displayed.
 Enter the Password that was configured in Setup > Global Options > General > Exit POS Password
 Then press OK



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

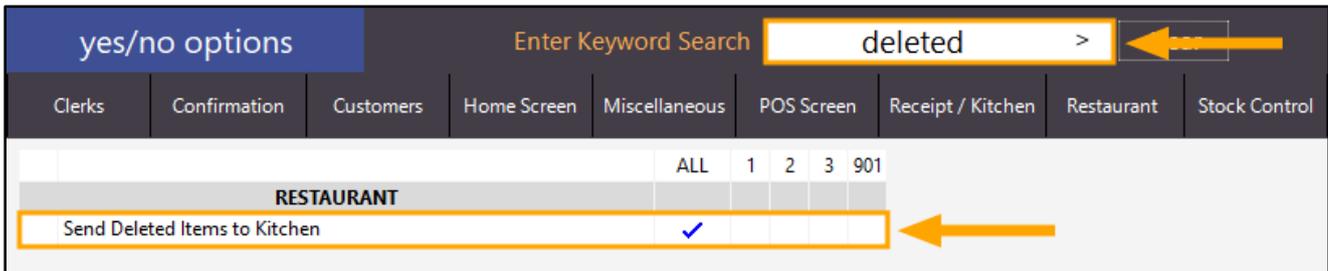
Pending Sales – Voided Items sent to Kitchen Printers

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.

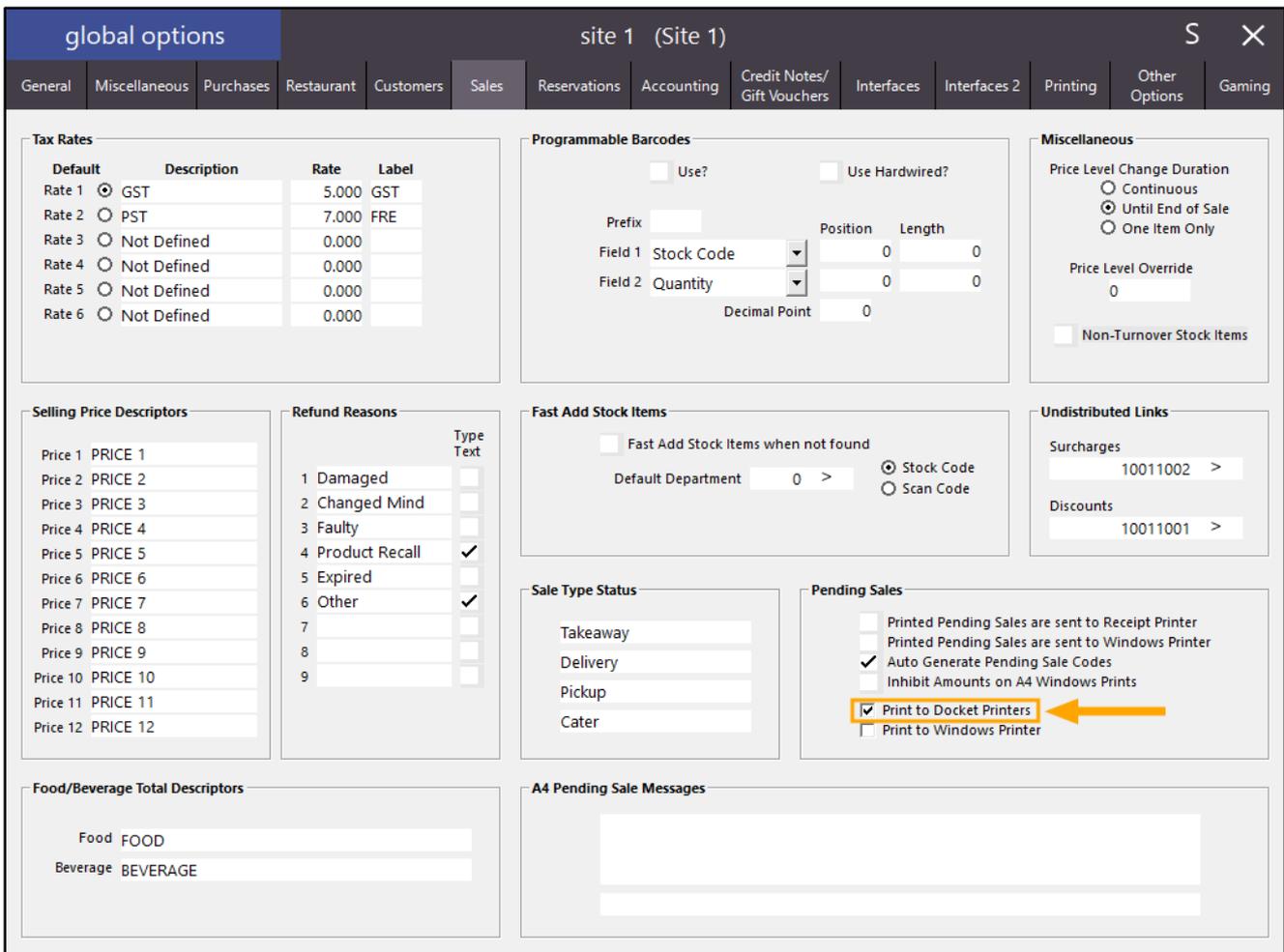
To configure this function, go to: Setup > Yes/No Options

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 with the following details:

- Stock Code:** 202001
- Department:** 202 > COFFEE
- Description:** CAPPUCCINO (10)
- Kitchen Description:** CAPPUCCINO (10)
- Long Description:** CAPPUCCINO (10)
- Scan Code:** Auto
- Purchasing:** Purchase Category 2 > BEVERAGE
- Printer Settings (highlighted):**
 - 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 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: 0.2942
 - Last Cost: 0.2942
 - Average Cost: 0.2942
- Tax Settings (Selling):**
 - GST
 - PST
 - Not Defined
 - Not Defined
 - Not Defined
 - Not Defined
- Attributes:** Five dropdown menus.
- Buttons:** Keyboard, Save

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

Setup > Global Options > Printing > Kitchen Printer Names

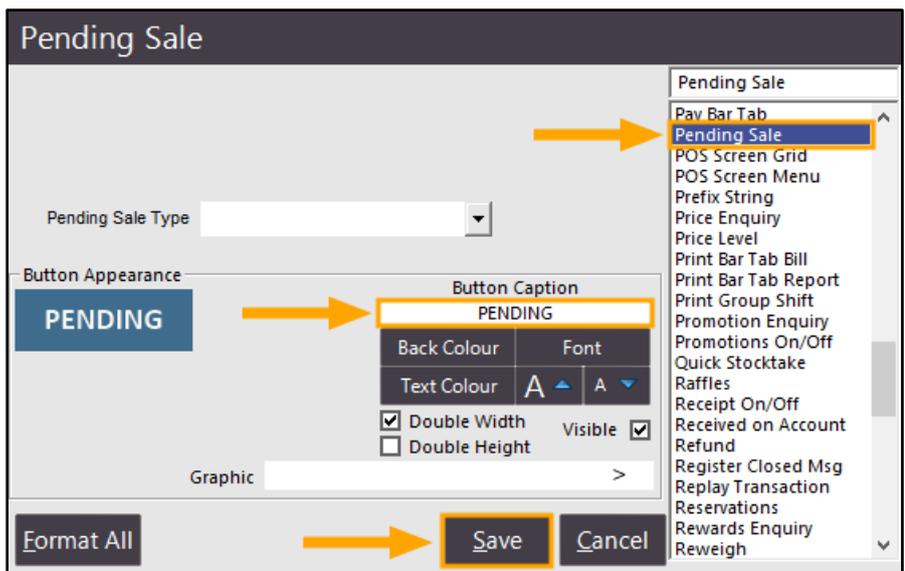
More information about Settings available in Global Options > Printing are available in the User Guide by clicking [here](#)

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.

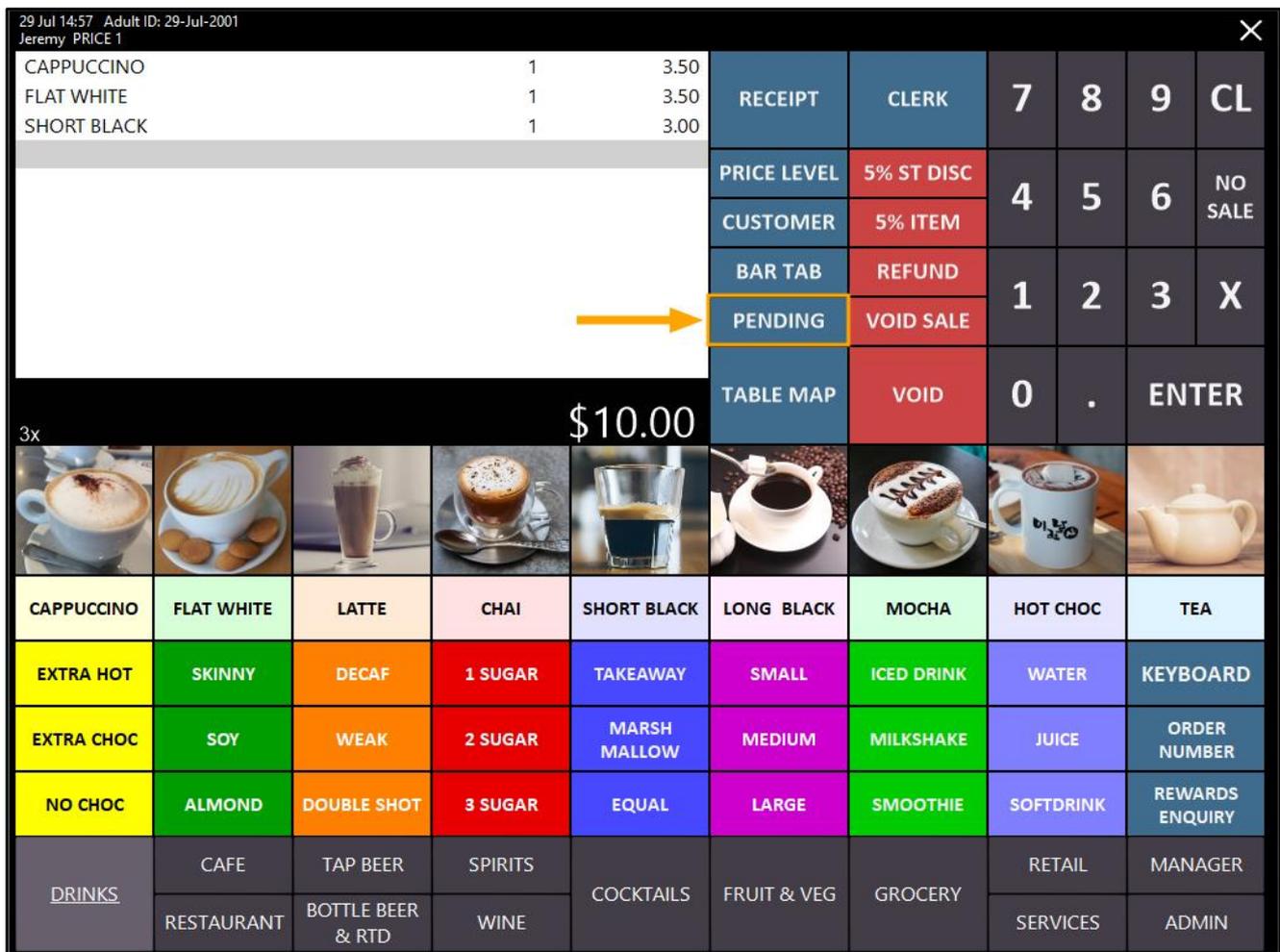
This can be configured by going to: Setup > POS Screen > POS Screen Setup > Select a POS Screen Layout > Buttons
 Find a blank button and configure it as follows:



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

\$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

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		

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			4	5	6	NO SALE
			PRICE LEVEL	5% ST DISC	1	2	3	X
			CUSTOMER	5% ITEM				
			BAR TAB	REFUND	0	.	ENTER	
			PENDING	VOID SALE				
Balance: \$10.00			TABLE MAP	VOID				
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 'Automatically Finalize Prepaid Web Orders' (checked). 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. The 'Customer Interface' section includes 'Interface Type' (No Customer Interface), 'Tender Type Link' (No Tender Type), and fields for 'IP Address/Host', 'Username', 'Password', and 'Venue ID'.

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

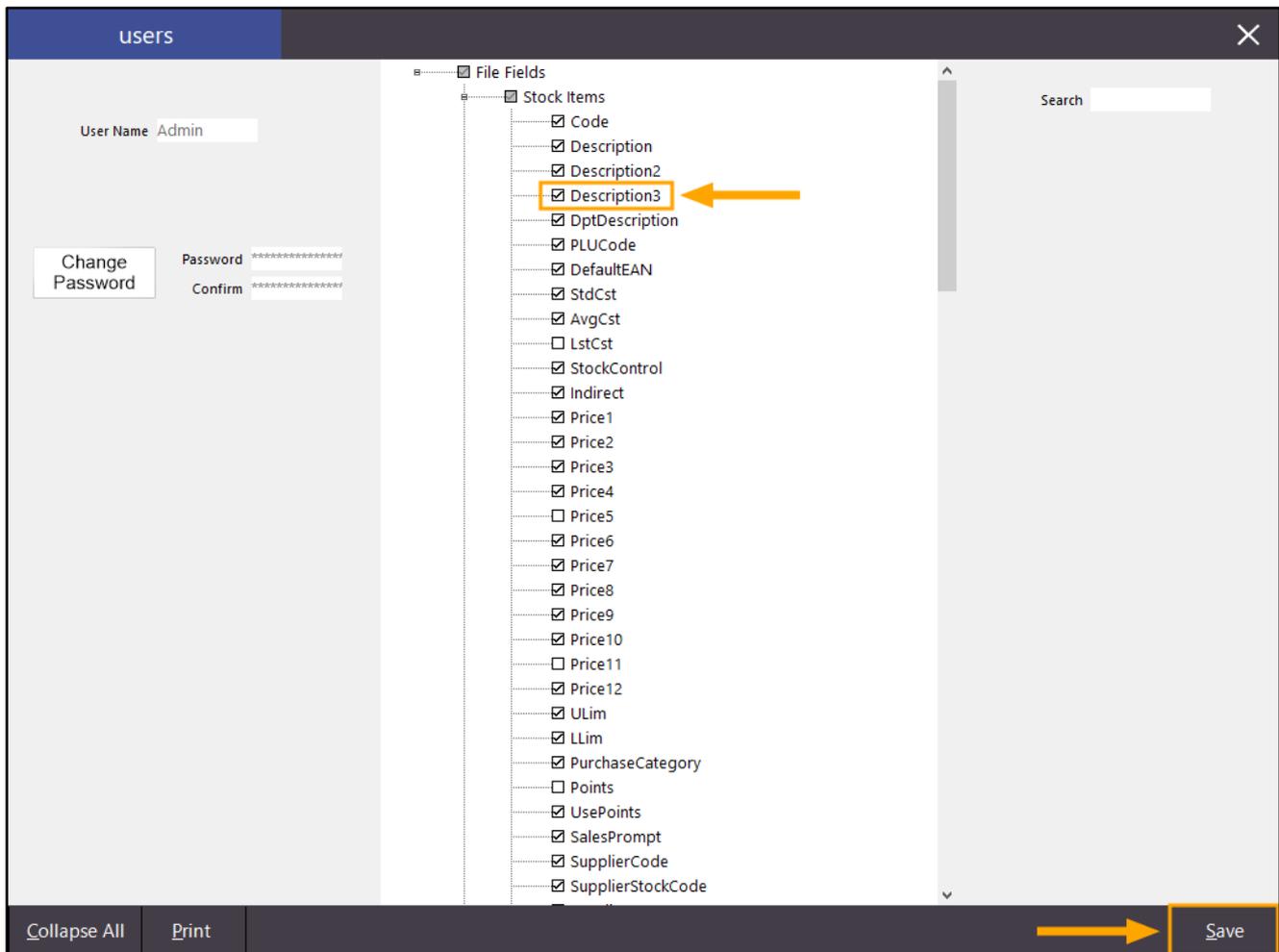
Keyboard Save

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' interface for 'site 1 (Site 1)'. The 'Other Options' tab is active. The 'Stock Item Descriptions' section at the bottom right contains the following configuration:

Field	Value
Description 2	Bar Description
Description 3	Extra Details

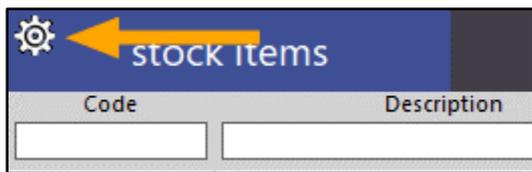
A yellow arrow points to the 'Description 2' and 'Description 3' fields.

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 General Advanced Indirect Item Last Modified 06 Aug 2019 X

Stock Code Department >

Description (24) Scan Code

Bar Description (24)

Extra Details (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 >

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

Last Cost

Average Cost

Tax Settings (Selling)

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

Attributes

<input type="text"/>	<input type="text"/>

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 >

Points by Price Level

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

Amount Override Limits

	Profit%
Lower Limit	0.00
Upper Limit	0.00

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

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

Miscellaneous

National Product Number	0
Receipt Tabs	0

Keyboard Save

idealpos Update History

Total Stock Level on Stock Items by Location form

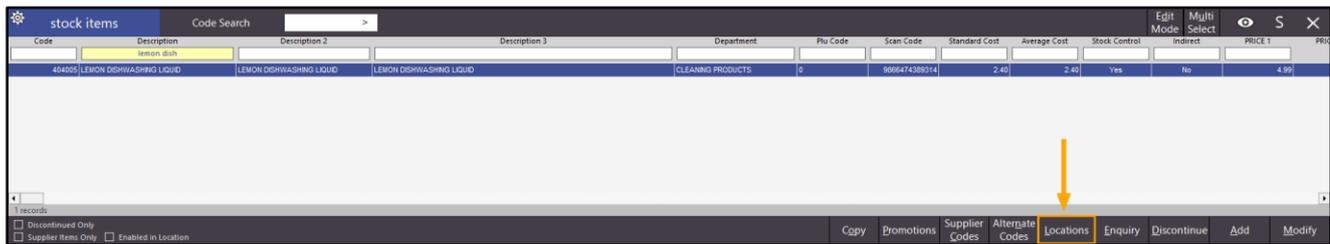
This function enhances the Stock Items by Location form so that it displays the total Stock Level of an item across all Stock Locations. This is useful for customers who have Stock Items with a Stock Level across multiple locations, allowing them to see an overall total without them having to manually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

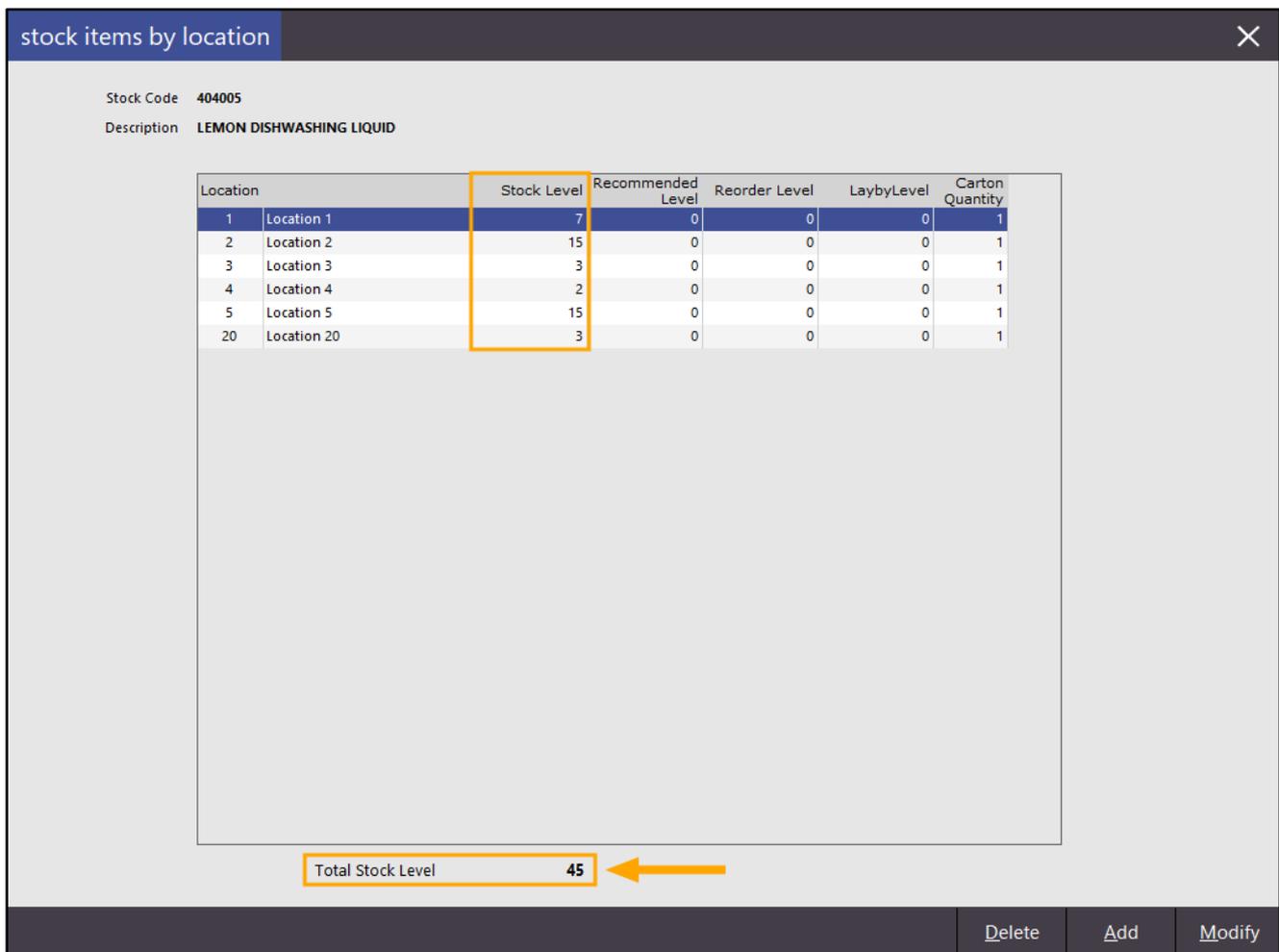
Search for the Stock Item you want to enquire, then select it by clicking on it.

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.

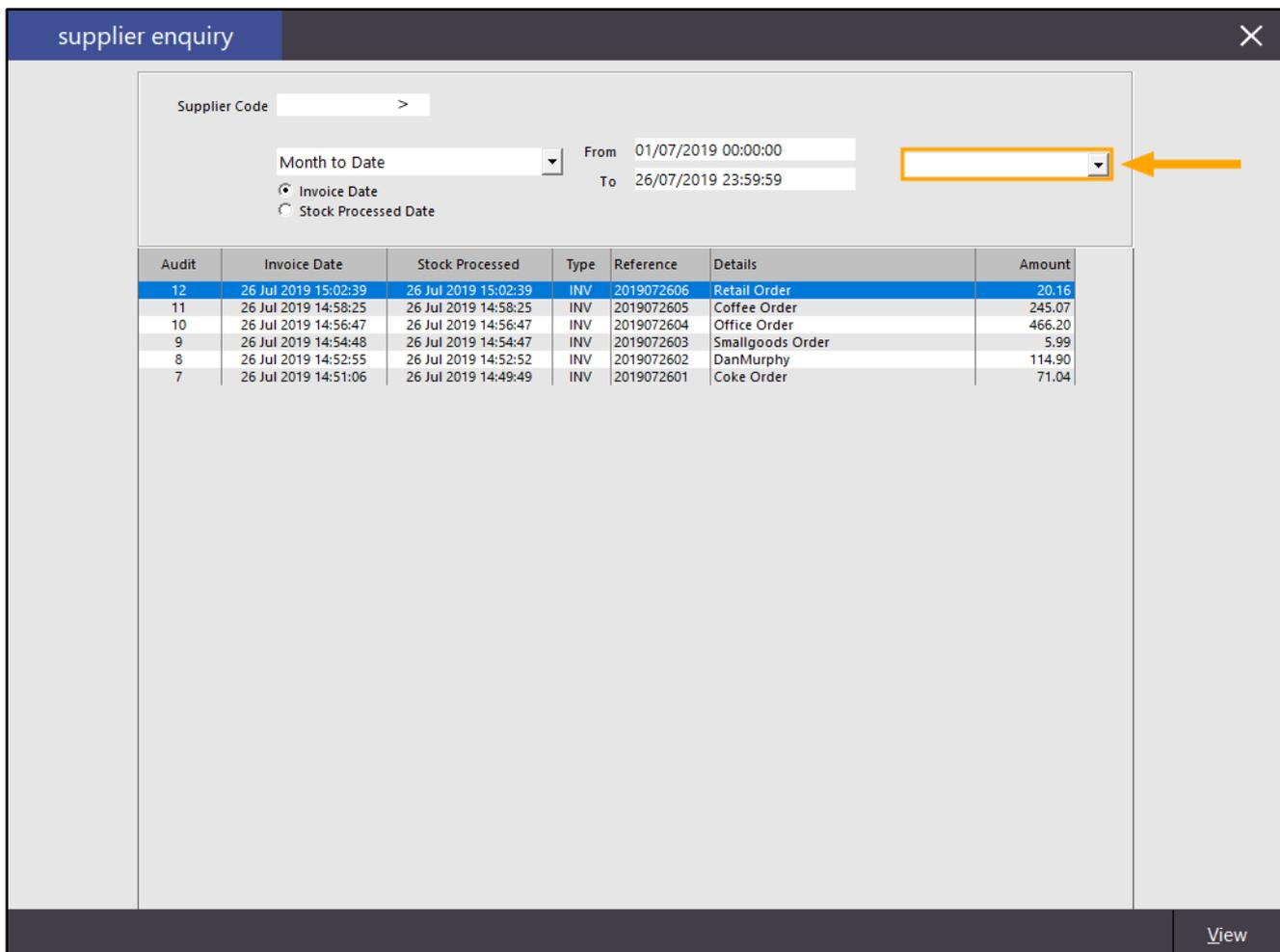
The option to filter the Supplier Enquiry by Stock Location can then be used to view the Invoices/Purchases that were received into the selected Stock Location.

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 filters 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: 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

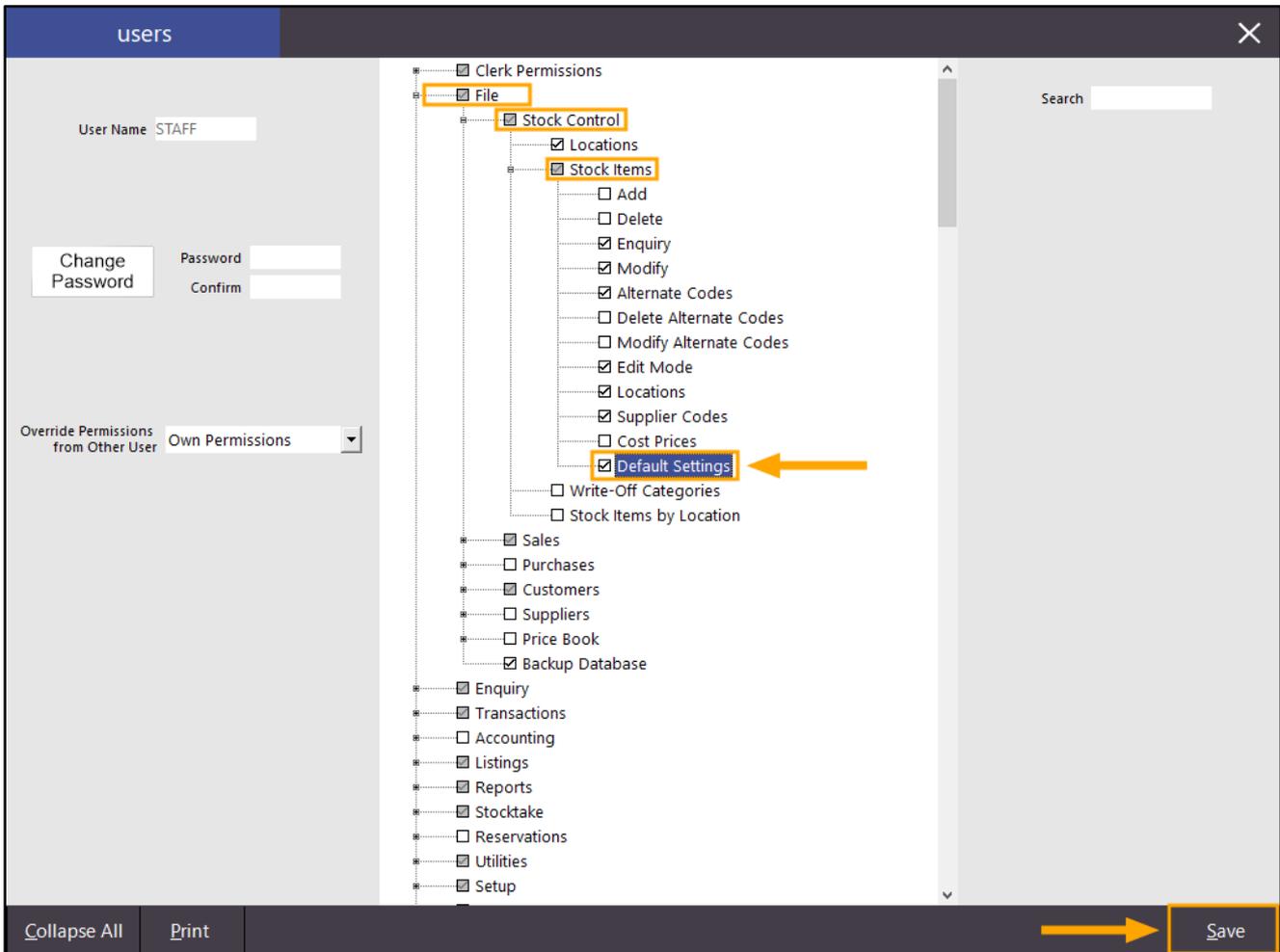
In the below example, we'll modify the STAFF User:



idealpos Update History

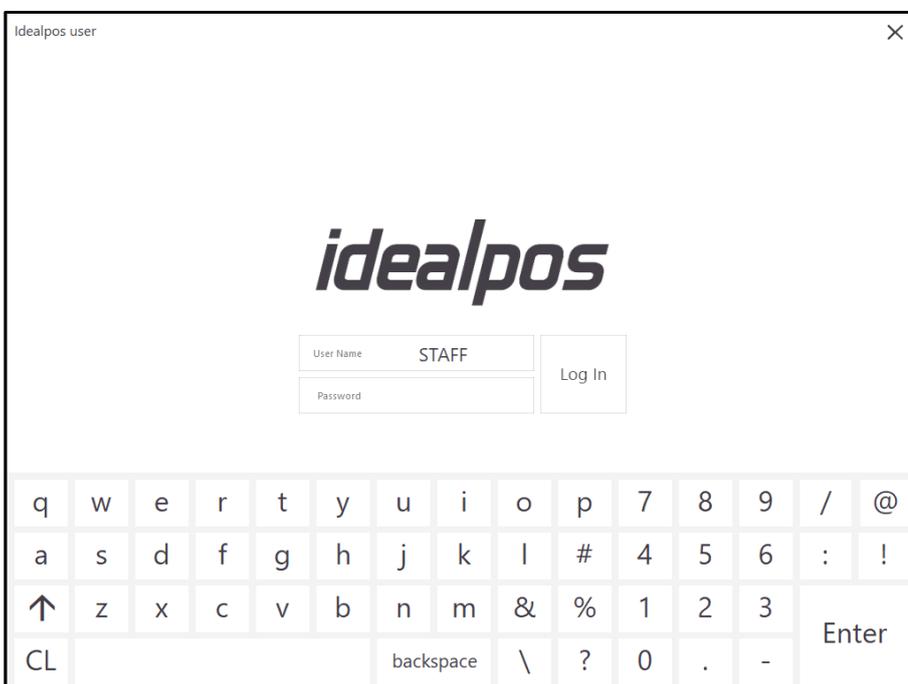
Expand File > Stock Control > Stock Items

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 'Code Search' on the right. Below the header is a table with columns 'Code' and 'Description'. The table contains three rows of data:

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

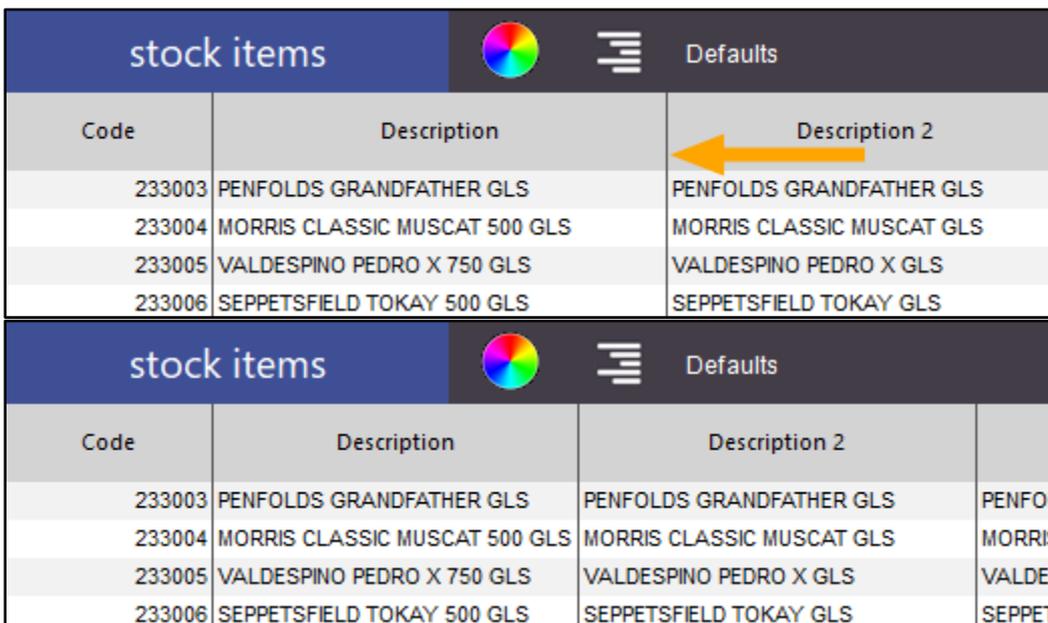
When the User permission to this function is disabled, the cog icon will simply not appear on the Stock Items screen.



The screenshot shows the 'stock items' header with 'Code Search' on the right. Below the header is a table with columns 'Code' and 'Description'. The table contains three rows of data:

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 screenshot shows the 'stock items' header with a cog icon, a color wheel, and a 'Defaults' button. Below the header is a table with columns 'Code', 'Description', and 'Description 2'. The table contains four rows of data:

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

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.

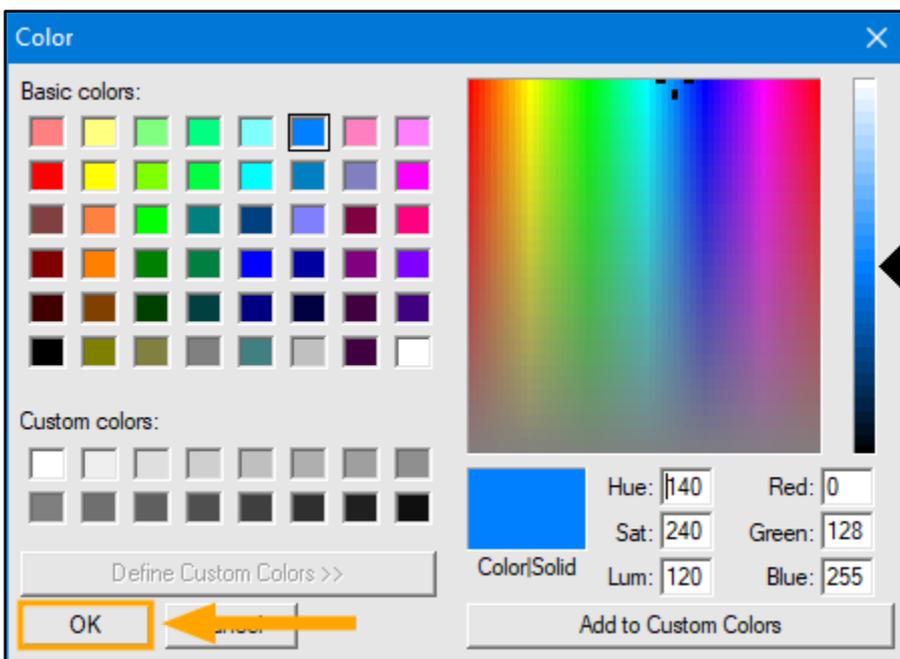
stock items			
Code	Description	Description 2	
234001	COKE	COKE ADD	COKE
234002	DIET COKE	DIET COKE ADD	DIET CO
234003	COKE ZERO	COKE ZERO ADD	COKE Z
234004	SPRITE	SPRITE ADD	SPRITE

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.

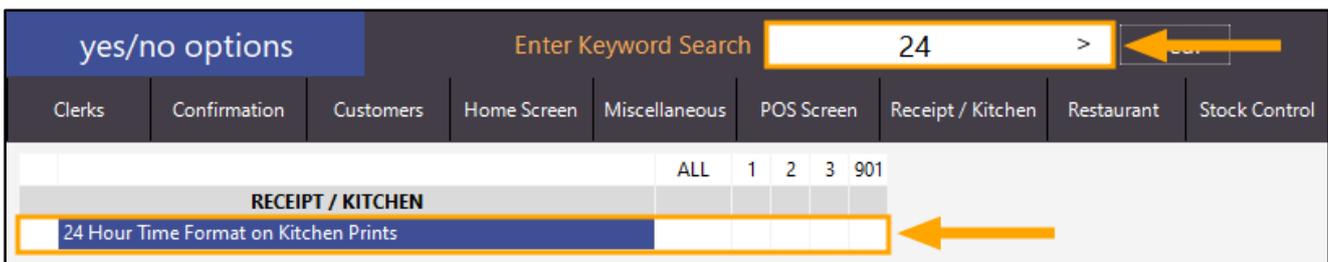
Previous to this change, all Kitchen Docket Formats would use the 24-hour time format, except for "Group Instructions by Seat" which would use the 12-hour time format.

To configure this function, go to:

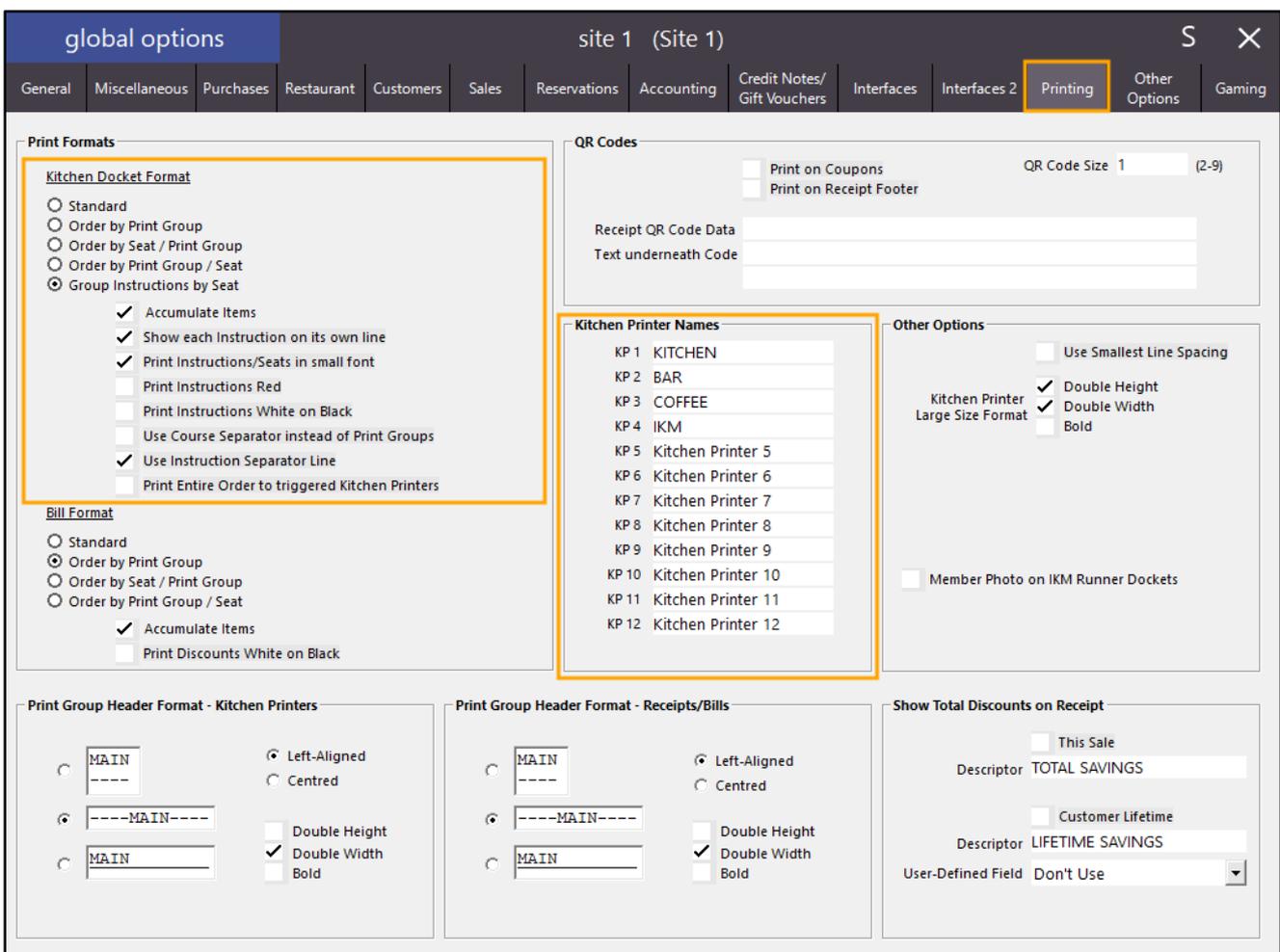
Setup > Yes/No Options > Enter "24" into the "Enter Keyword Search" field.

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												
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				
			BAR TAB	REFUND	1	2	3	X
			PENDING	VOID SALE				
			TABLE MAP	VOID	0	.	ENTER	

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

	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"

pos terminals Main Settings POS Settings Receipt Printer Kitchen Printers Display / Kiosk Customer Readers Other Peripherals EFTPOS Settings Import / Export Miscellaneous Settings X

Receipt Printer
Type: Epson TM-T88 Test
Connection: -Printer

Second Receipt Printer
 Use Second Receipt Printer
Type: Epson TM-T88 Test
Connection: COM1
Settings: 19200,n,8,1
Start Chr: 0 End Chr: 0 Live Output:

Receipt Header/Footer
Header Logo Graphic (pictures folder): IdealposHeaderLogo.jpg
Header: @#IDEALPOS
@1/212 Curtin Ave West
@Eagle Farm QLD 4009
@Australia
@TAX INVOICE
Footer: *indicates taxable supply
@Powered by Idealpos
Footer Logo Graphic (pictures folder):
Empty Lines: 4 Footer Logo #:

Account Footer
Redeem Points Footer

Bill Header/Footer (if different from Receipt)
Header Logo Graphic (pictures folder):
Header:
Footer:
Footer Logo Graphic (pictures folder):

Keyboard

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:

- Sales Prompt:** A text input field.
- Link to Menu, Grid, Table:** Three dropdown menus, all set to '0'. The 'Link to Grid' dropdown also shows 'MAIN' as an option.
- Amount Override Limits:** Fields for 'Lower Limit' (0.00), 'Upper Limit' (0.00), and 'Profit%'.
- Location 1:** Fields for 'Stock Level' (0), 'Recommended Level' (0), and 'Reorder Level' (0).
- Points by Price Level:** A list of 12 price levels (PRICE 1 to PRICE 12), each with a corresponding value of 0.
- Points Settings:** Four checkboxes: 'Use Special Points' (0), 'Inhibit Points Accrual', 'Inhibit Purchase With Points', and 'Print Promotional Ticket'.
- Stock Notes:** A large empty text area.
- Miscellaneous:** Fields for 'National Product Number' and 'Receipt Tabs' (set to 1). An orange arrow points to the 'Receipt Tabs' field.

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

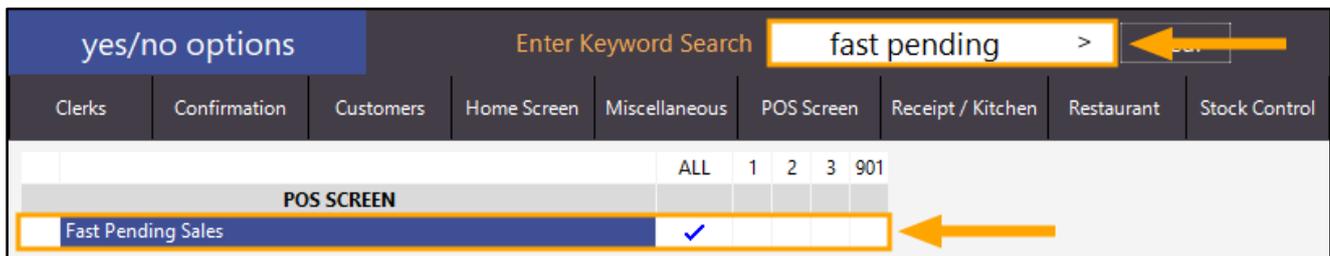
Fast Pending Sale Function

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



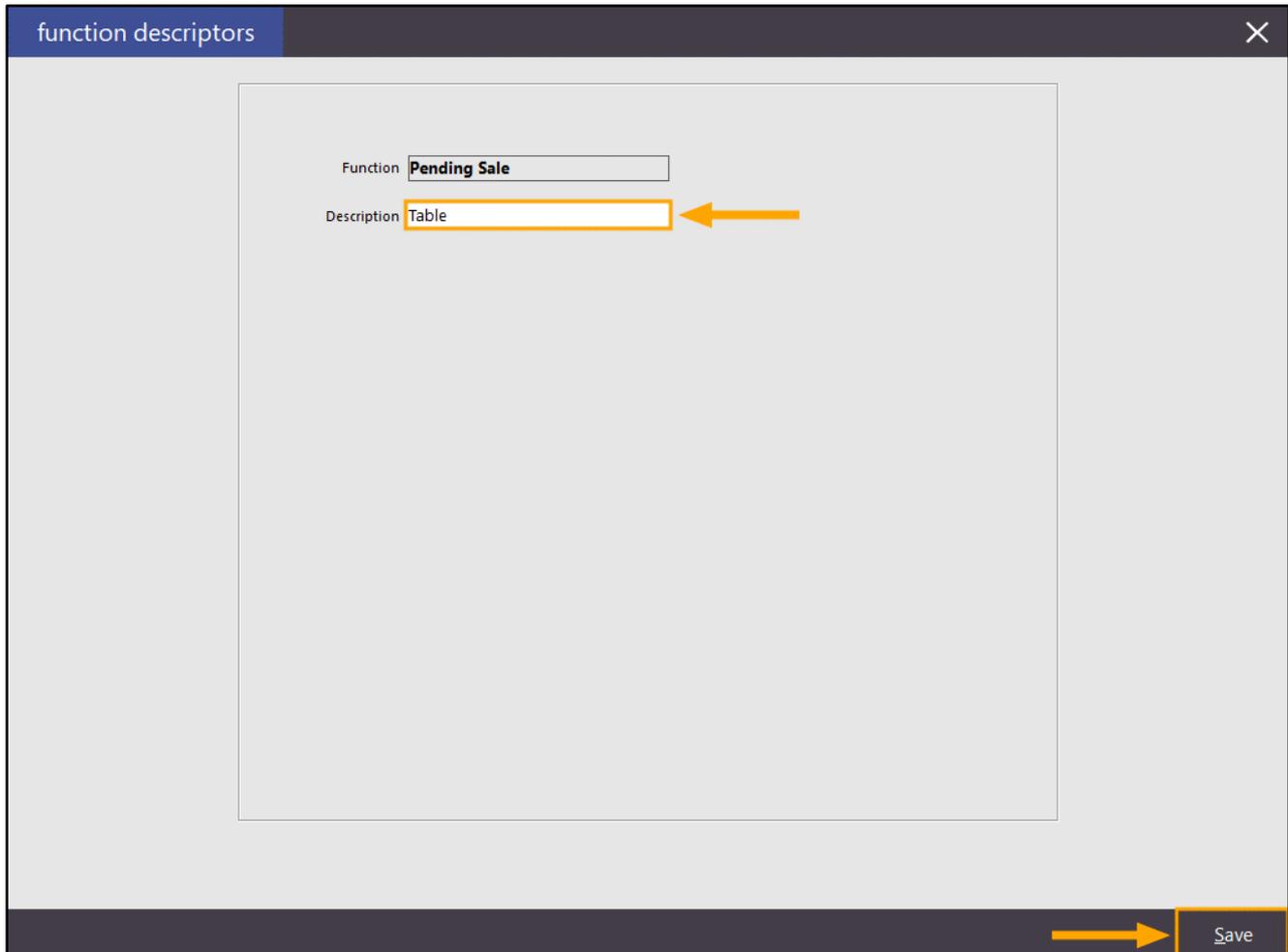
The screenshot shows the 'yes/no options' window. At the top, there is a search bar with the text 'fast pending' and a search button. Below the search bar are several tabs: 'Clerks', 'Confirmation', 'Customers', 'Home Screen', 'Miscellaneous', 'POS Screen', 'Receipt / Kitchen', 'Restaurant', and 'Stock Control'. The 'POS SCREEN' tab is selected. Below the tabs is a table with columns for 'ALL', '1', '2', '3', and '901'. The row for 'Fast Pending Sales' is highlighted in blue, 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 large text area. In the text area, there are two fields: 'Function' with the value 'Pending Sale' and 'Description' with the value '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 this 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	

Prefix	Position	Length
Field 1: Stock Code	0	0
Field 2: Quantity	0	0

Price Level	Change Duration
	<input type="radio"/> Continuous
	<input checked="" type="radio"/> Until End of Sale
	<input type="radio"/> One Item Only

Price Level Override
0

Refund Reasons	Type	Text
1 Damaged	<input type="checkbox"/>	
2 Changed Mind	<input type="checkbox"/>	
3 Faulty	<input type="checkbox"/>	
4 Product Recall	<input checked="" type="checkbox"/>	
5 Expired	<input type="checkbox"/>	
6 Other	<input checked="" type="checkbox"/>	
7	<input type="checkbox"/>	
8	<input type="checkbox"/>	
9	<input type="checkbox"/>	

Sale Type Status
Takeaway
Delivery
Pickup
Cater

Food/Beverage Total Descriptors
Food: FOOD
Beverage: BEVERAGE

idealpos Update History

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 'General' section contains the following fields:

- Points per Dollar: 1
- Point Redemption Value: 0.10
- Delete Points when Customer Inactive for: 0 Months
- Lock Price Level to: [empty]
- Default Table Map: 1
- Default User: Admin
- Customer Codes From: [empty]
- Stock Item Codes From: 0 to [empty]
- Show Order: [empty] to [empty]
- Pending Sales From: 1 to 999** (highlighted with an orange box and an arrow pointing to it from the right)
- Force Order Menu: [empty]
- Force Receipt Amount: [empty]
- Auto Expand Activity

The 'Gaming Override Options' section includes:

- Price Level: 0
- Remote POS:
- Ticket Threshold: 0
- System ID: 0
- 2nd: 0
- Username: [empty]
- Password: [empty]

The 'Dashboard' section has:

- Sales in Locations: [empty] >
- Shortcut Bar Small Font

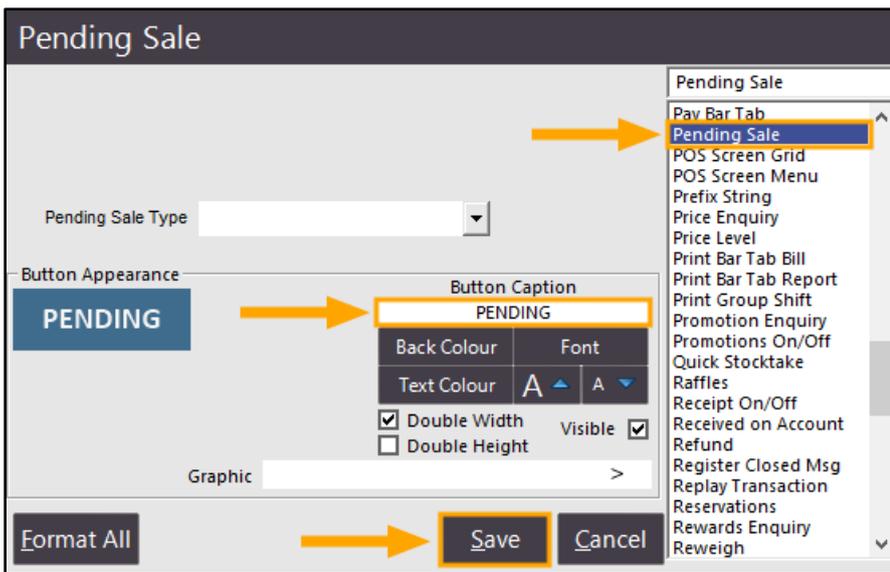
The 'Handhelds' section has:

- Force Food to Print: [empty]
- Force Drinks to Print: [empty]
- Force Bills Printer: [empty]
- Item Graphic Location: <https://www.idealpos.com.au/idealpos/media/Handheld/>
- Handheld Background: <https://www.idealpos.com.au/idealpos/media/Handheld/TableMap.jpg>

The 'Keyboard' section is visible at the bottom left.

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

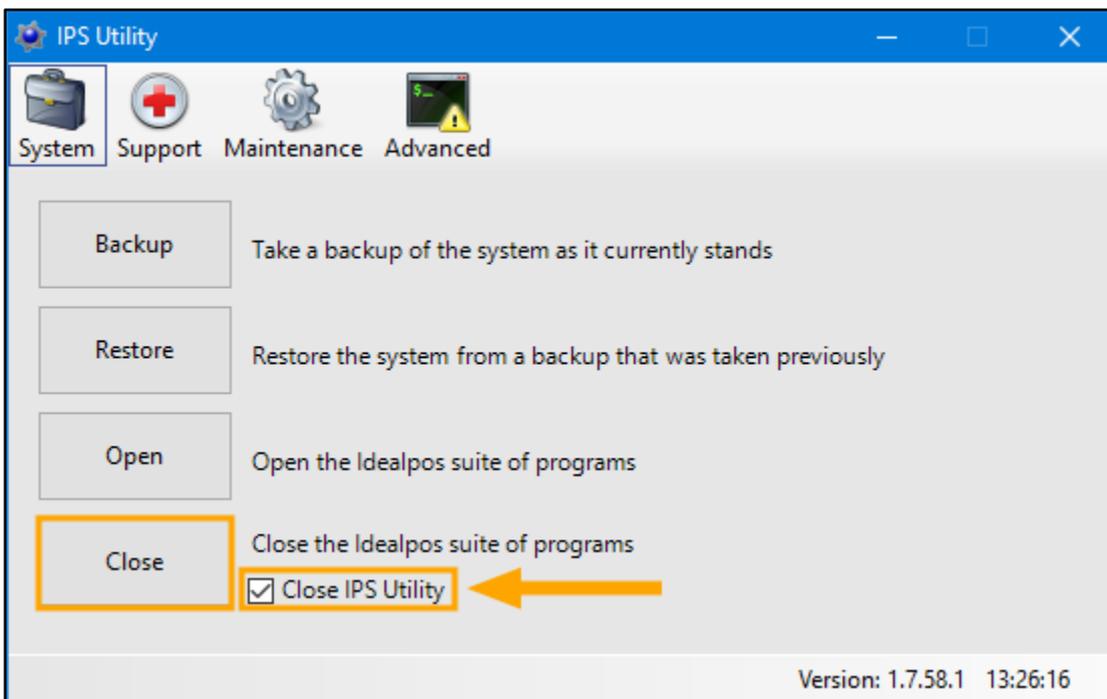
Go to: Setup > POS Screen > POS Screen Setup > Select a POS Screen Layout > Buttons
Find a blank POS Screen button and click on it, then configure as follows:



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

29 Jul 10:54 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
			BAR TAB	REFUND	0	.	ENTER	
			PENDING	VOID SALE				
			TABLE MAP	VOID				

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

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
✕

Code
 Search For 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
								10.00
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	
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