

Build 50

Update Details:

** Enhancements

- * [IP-220] - Ability to Import Stock Item Attributes by Code or Description
- * [IP-801] - Adult Age Restriction functionality
- * [IP-1193] - Customer Type triggers prompt in POS
- * [IP-1194] - Customer Type can be printed on Kitchen Printer docket
- * [IP-1352] - Promotion Group Customer Limit - ability to limit by Amount
- * [IP-1354] - Manual Modifier Grid functionality by Stock Item
- * [IP-1369] - New Stock Item Label 3x8 format with larger price
- * [IP-1376] - EMV Datacap Eftpos - support for DisableContactless option
- * [IP-1386] - Wristband printing on Zebra HC100 supports DATE tag
- * [IP-1387] - Location Listing to include Stock Location and Site descriptors
- * [IP-1397] - IBA Interface to support upgraded web service security
- * [IP-1420] - Support for Tiering on Maxetag Gaming Interface
- * [IP-1433] - Nitro Eftpos option to Not Print Eftpos Receipt Automatically
- * [IP-1439] - Yes/No Option to Inhibit Back button on Grids
- * [IP-1444] - Clubline Export - support for Supplier Discount fields
- * [IP-1454] - Schedules - ability to Send Message to other terminals
- * [IP-1485] - Increased Speed of Stock Purchase Invoice printing
- * [IP-1493] - SQL Data - Waiting for Library Initialization message has stronger wording
- * [IP-1498] - Enter Stocktake can filter by Department Range
- * [IP-1500] - Quick Stocktake Function
- * [IP-1501] - Kitchen Print Item Priority Order
- * [IP-1509] - Yes/No Option - Automatically send Gift Voucher Email if email address is present
- * [IP-1510] - Yes/No Option - Inhibit Zero Priced Items on Bill Prints
- * [IP-1518] - Manual Export of Sales Data in Generic format
- * [IP-1521] - Warning about nearing the 10GB SQL Server Express database limit
- * [IP-1537] - Automatic Stock Items Export - Filter by Attribute Type
- * [IP-1539] - Export Stock Items - ability to save a specific Automatic Export Format
- * [IP-1540] - Export Stock Items - Scale Unit field added
- * [IP-1541] - Export Stock Items - Attribute Codes and Description Fields added
- * [IP-1546] - Attributes Listing
- * [IP-1547] - Attributes Setup - Attribute / Attribute Type Codes displayed
- * [IP-1548] - Range Programming - Support for Stock Item Attributes
- * [IP-1549] - Attribute Types - Ability to Lock Type to specific Stock Item Columns
- * [IP-1550] - Ability to Override Attribute Column Headers
- * [IP-1555] - New Zealand Region - removed taxable supply indicator from receipts
- * [IP-1556] - Stock Levels by Location Report - option to Hide Cost Prices

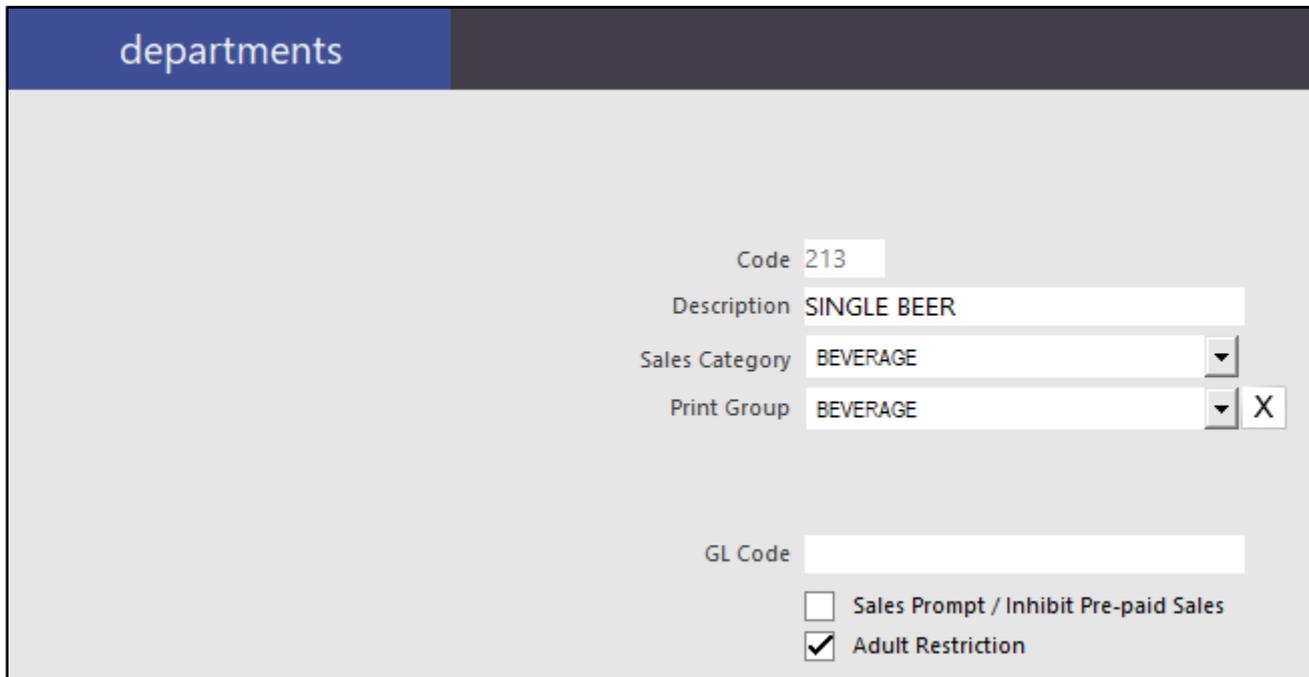
idealpos7 Update History

Adult Age Restrictions

Adult Age Restriction functionality

This functionality allows you to record an ID against a sale if the customer is deemed to look under the age specified. It is configured by Department, and anything sold from that Department will prompt the operator to choose if they need to see an ID or not. If an ID is not produced, any sales from linked departments will not be allowed and the sale will be cancelled. This functionality can be turned on or off using a Yes/No Option.

Go to File > Sales > Departments > Select Department > Tick: Adult Restriction.



departments

Code 213

Description SINGLE BEER

Sales Category BEVERAGE

Print Group BEVERAGE

GL Code

Sales Prompt / Inhibit Pre-paid Sales

Adult Restriction

You can toggle the display of the prompt on specific terminals using a Yes/No Option: Inhibit the Adult Restriction Prompt.

Go to Setup > Yes/No Options > POS Screen > Inhibit the Adult Restriction Prompt.

Inhibit the Adult Restriction Prompt

Go to Setup > Global Options > General > General > Adult ID Age: Set to legal drinking age (Displays at the top-left of the POS screen) > Adult Restriction Question Age: Set it to the age operators should think customers look before needing to produce ID.

Adult ID Age	18
Adult Restriction Question Age	25

02 Nov 11:45 POS 1 Adult ID: 02/11/99
Jeremy STANDARD

idealpos7 Update History

Using Age Restriction: Over Age Requirement

Open POS and start a sale by selling an item from a restricted Department. As soon as you press the stock item, a new window will display asking if the customer is over the specified age. No more items can be entered until the question has been answered.

02 Nov 12:43 POS 1 Adult ID: 02/11/99
Jeremy STANDARD

customer looks over 25 ?




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

							POT
							SCHOONER
							PINT
							JUG
							Back

DRINKS	CAFE	TAP BEER	SPIRITS	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL	MANAGER
	RESTAURANT	BOTTLE BEER & RTD	WINE			HIRE	SERVICES	ADMIN

If the operator believes the customer is over 25, they just press the "OVER 25" button and the sale will continue as normal. The customer is free to purchase anything they choose.

02 Nov 11:51 POS 1 Adult ID: 02/11/99
Jeremy STANDARD

HOLGATE TEMPRESS PINT	1	9.00
Over 25		

idealpos7 Update History

Using Age Restriction: Under Age Requirement

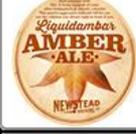
Open POS and start a sale by selling an item from a restricted Department. As soon as you press the stock item, a new window will display asking if the customer is over the specified age.

02 Nov 12:43 POS 1 Adult ID: 02/11/99
Jeremy STANDARD

customer looks over 25 ?




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

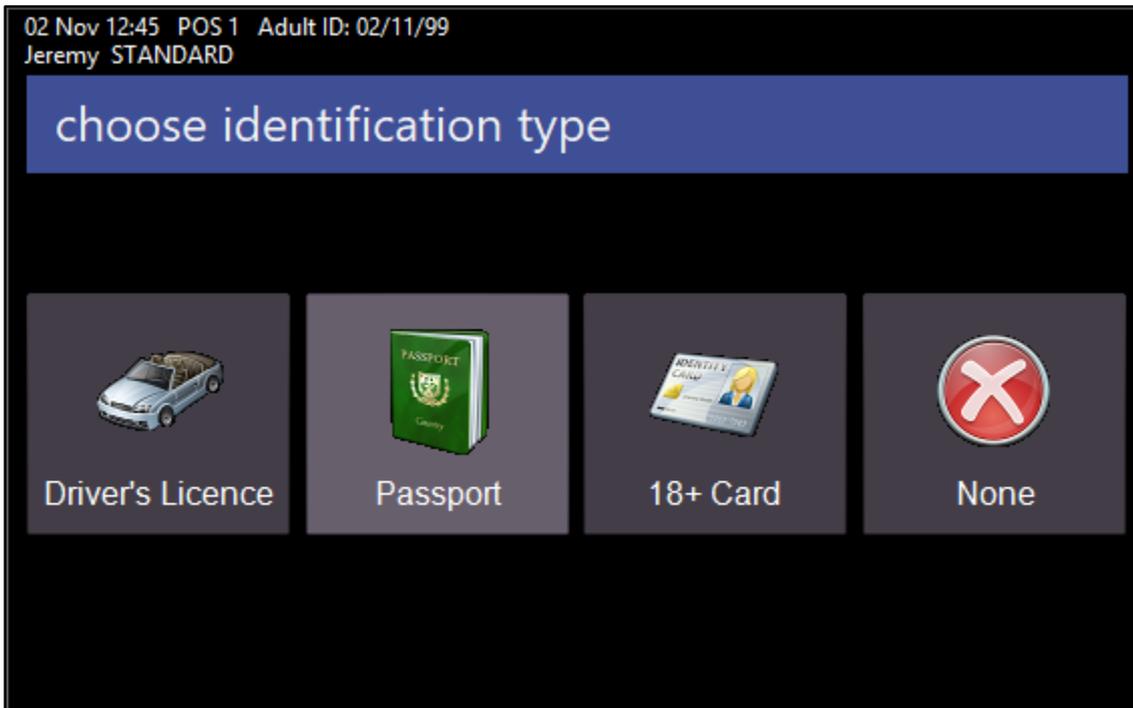
						
						
						

POT
SCHOONER
PINT
JUG
Back

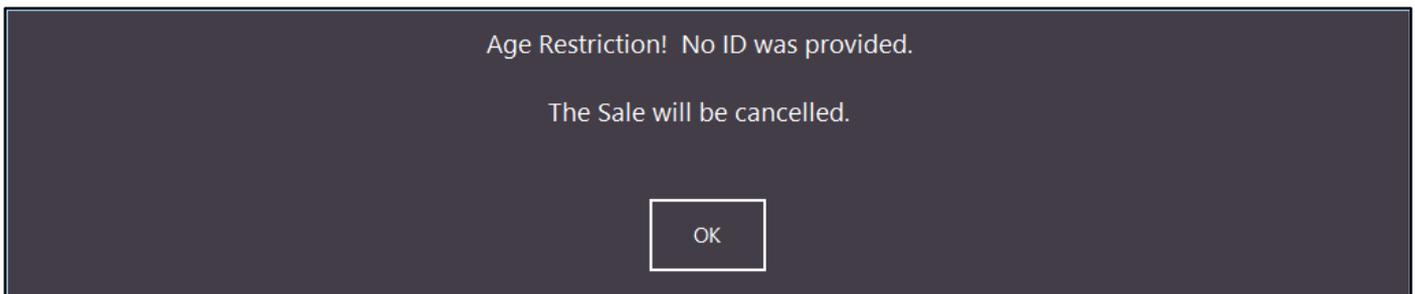
DRINKS	CAFE	<u>TAP BEER</u>	SPIRITS	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL	MANAGER
	RESTAURANT	BOTTLE BEER & RTD	WINE			HIRE	SERVICES	ADMIN

idealpos7 Update History

If the operator believes the customer is under 25, they just press the "UNDER 25" button. A new window will display to select the ID type to select that the customer must provide to prove they are of age.



If the operator presses None, due to no ID being present, the sale will be cancelled.



idealpos7 Update History

The operator can select any other card type that is accepted as a form of ID.

choose identification type

 Driver's Licence	 Passport	 18+ Card	 None
---	---	---	---

Enter the date of birth from the ID into the window.

enter date of birth

1 0 / m m / y y y y

Jan	Feb	Mar	Apr	May	Jun
Jul	Aug	Sep	Oct	Nov	Dec

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

This will be recorded against the transaction.

02 Nov 12:01 POS 1 Adult ID: 02/11/99 Jeremy STANDARD		
HOLGATE TEMPTRESS PINT	1	9.00
Under 25, 18+ Card=10/09/1999		

idealpos7 Update History

If the date is voided from the sale, the ID request screen will display again. If the date entered is less than the Adult ID Date, a screen will display a message telling the operator the sale is cancelled and the reason why.

Age Restriction! This customer is 16 years old.

The Sale will be cancelled.

OK

All sales will be recorded in the Journal, successful or not.

Date 02/11/2017 12:49:18	Audit 552,1	Jeremy
211032 HOLGATE TEMPTRESS PINT		9.00
Under 25, 18+ Card=10/04/1999		
GST Subtotal		9.00
GST Amount		0.82
CASH		9.00
Change		0.00

Date 02/11/2017 12:48:06	Audit 551,1	Jeremy
VOID ENTIRE SALE		9.00
211032 HOLGATE TEMPTRESS PINT (VOID)		9.00
AGE Under 25, 18+ Card=03/11/1999 (VOID)		0.00
Change		0.00

Date 02/11/2017 12:44:38	Audit 548,1	Jeremy
211032 HOLGATE TEMPTRESS PINT		9.00
Over 25		
GST Subtotal		9.00
GST Amount		0.82
CASH		9.00
Change		0.00

idealpos7 Update History

Customers

Customer Type Triggers Prompt in POS

This functionality allows for the Customer Type to be prompted to display on the POS Screen for all customers who are linked to the Customer Type's selected.

Go to File > Customers > Customer Types > Modify > Prompt in POS > Save.

customer types

Code 8

Description SILVER MEMBERS

Use Points System

Point Multiplication Factor 1

Auto % Discount 6

Auto Discount POS Range >

Price Level

Gaming Rating Grade

Auto Populate Tender Spend Limit Credit (1)

Auto Populate Tender Spend Limit Credit (2)

Macro

New Customers Default to Bar Tab

Print at Kitchen

Prompt in POS

Fast Customers

Back Colour

Text Colour

Idealpos Customer

Save

Talia Brown - 0 Points

Customer Type: SILVER MEMBERS

idealpos7 Update History

Customer Type can be Printed on Kitchen Printer Docket

This option allows for the Customer Type to be printed to the kitchen, where the chef may be able to make the call to push those meal requirements through faster to give this level of customer's higher service. The Customer Type will be printed at the top of the docket.

Go to File > Customers > Customer Types > Modify > Tick: Print at Kitchen > Save.

customer types ✕

Code

Description

Use Points System

Point Multiplication Factor

Auto % Discount

Auto Discount POS Range

Price Level

Gaming Rating Grade

Auto Populate Tender Spend Limit Credit (1)

Auto Populate Tender Spend Limit Credit (2)

Macro

New Customers Default to Bar Tab

Print at Kitchen

Prompt in POS

Fast Customers

Back Colour

Text Colour

Idealpos Customer

Save

1:48pm 02/11/17
Jeremy
* SILVER MEMBERS *
Cust 102
Talia Brown
Ph:0765536455

-----BEVERAGE-----
1x FLAT WHITE
1x LATTE

idealpos7 Update History

Database

Warning about nearing the 10GB SQL database limit

This feature displays a warning message once the database reaches 9GB in size.

Your SQL (Express) Database has a 10GB limit. It is now over 9GB.

Data loss will occur once the database reaches the 10GB limit.
It is highly recommended that you either Clear Data or upgrade to SQL Standard Edition.

OK

Export Data

Automatic Stock Items Export – Filter by Attribute Type

You now have the ability to Filter by Attribute Type when configuring Automatic Export Settings.

When you select an Attribute Type in the “Filter by Attribute Type” setting, only Stock Items which match that Attribute Type will be included in the Stock Item Export.

Go to Setup > POS Terminals > select a POS terminal > Modify > Import/Export > Filter by Attribute Type

pos terminals	Main Settings	POS Settings	Receipt Printer	Kitchen Printers	Customer Display	Customer Readers	Other Peripherals	EFTPOS Settings	Import / Export	Miscellaneous Settings	X
<div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <h4>Automatic Export Settings</h4> <p>Export Folder: C:\Export\ ></p> <p><input type="checkbox"/> Delete files older than 7 days</p> <p>Export Stock Items: All Items</p> <p>Department Range: _____</p> <p>Filter by Attribute Type: Wine Varietals</p> <p>Export Daily at: _____ Or every 10 minutes</p> <p>Filename: StkItemExport.txt</p> <p><input type="checkbox"/> Append Date/Time to filename</p> <p><input type="checkbox"/> Append Site Name to filename</p> <p><input type="checkbox"/> Append Venue ID to filename</p> <p><input type="checkbox"/> Include Discontinued Items</p> <p><input type="checkbox"/> Use Saved Automatic Export Format</p> <p>Export Sales Format: No Daily Export</p> <p>Sales From: All POS Terminals</p> <p>Daily Export Time: _____</p> </div> <div style="width: 48%;"> <h4>Automatic Import Settings</h4> <p>Import Folder: _____ ></p> <p><input type="checkbox"/> Delete files older than 7 days</p> <p>Import Stock Items</p> <p>Filename: _____</p> <p><input checked="" type="checkbox"/> If imported items exist, update selling prices</p> <p><input checked="" type="checkbox"/> Delete file after importing</p> </div> </div> <div style="margin-top: 10px;"> <h4>Supplier Invoices</h4> <p><input type="checkbox"/> Automatically Import Supplier Invoices</p> <p>Retrieve Location from Filename: Right of _____ Left of _____</p> <p>Retrieve Supplier from Filename: Right of _____ Left of _____</p> <p><input type="checkbox"/> Automatically Add/Modify Stock Items during Import</p> <ul style="list-style-type: none"> <input type="checkbox"/> Update Description <input type="checkbox"/> Update Department <input type="checkbox"/> Update Sell Price <p><input type="checkbox"/> Automatically Process Invoices after Import Complete</p> <p>Import Items Only Folder: _____ ></p> </div>											
Keyboard											

idealpos7 Update History

Manual Export of Sales Data in Generic Format

This option allows data to be manually exported using the Generic format.

Go to Utilities > Export Data > Stock Item Sales > Select Generic as the Output File Format.

Select the Date Range that you wish to export and press OK, then choose a file name and location to save the file and press Save.

export stock item sales ✕

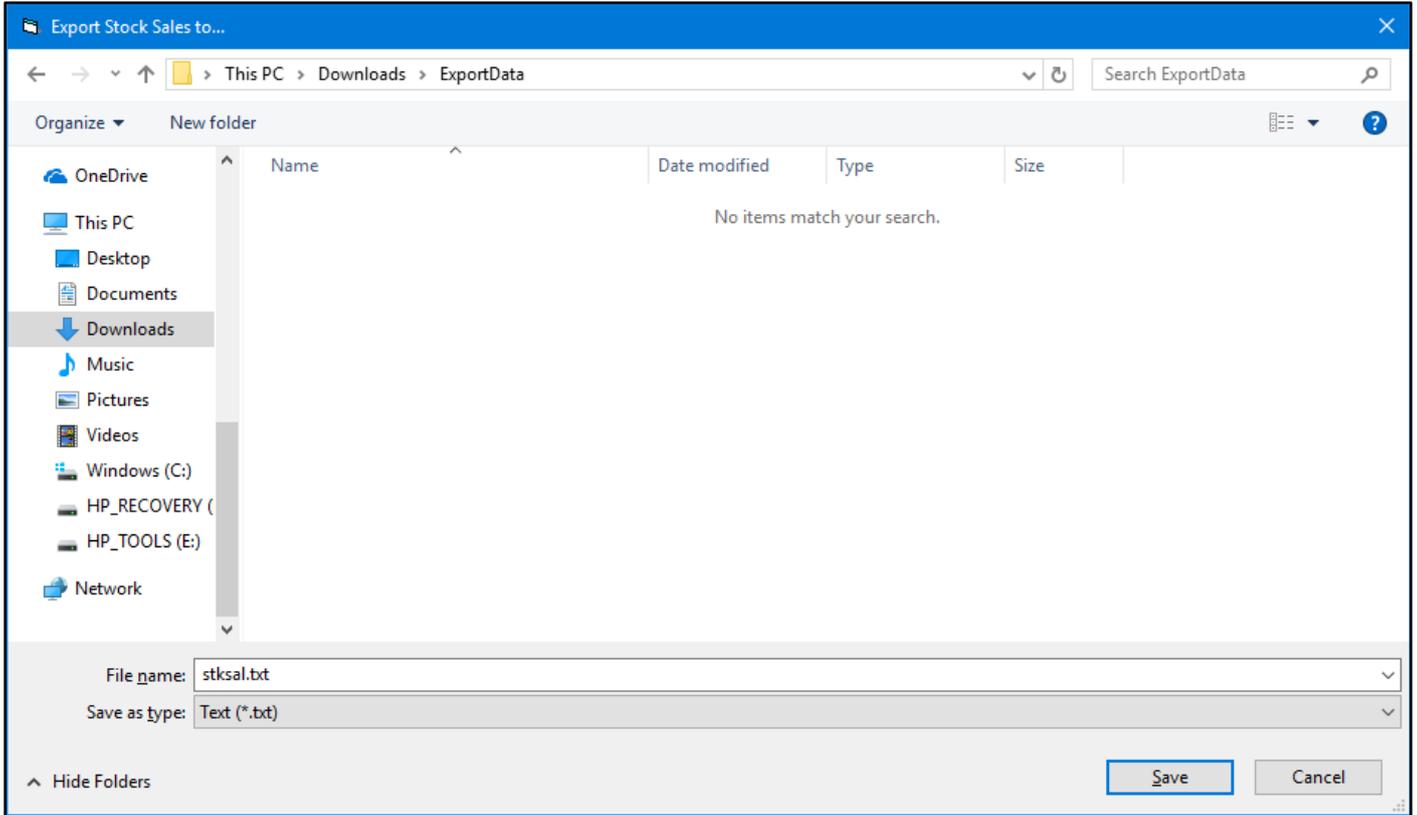
This option will export stock item sales in a comma delimited text format.

Output File Format

Date Range

From
To

idealpos7 Update History



idealpos7 Update History

Export Stock Items – Ability to save a specific Automatic Export Format

This function adds the ability to customise the Automatic Export Format.

Instead of using the default Automatic Export Format which exports Stock Items using a hard-coded selection of fields, you can now select up to 24 specific fields which will be exported when an Automatic Export takes place.

To configure the Automatic Export Format, go to Utilities > Export Data > Stock Items > Export: Automatic Export Format.

Select the specific fields that you want to include in the Automatic Export Format from each of the dropdown boxes. If you want the first row of the Automatic Export Format to include the headers of the fields that are being exported, tick the "Include Headers" checkbox.

Note that you don't have to fill out all available 24 dropdown boxes.

Once you've selected the fields to be included in the Automatic Export Format, press the "Save Format" button.

export stock items

Export **Automatic Export Format**

Export Specific Fields by Range

1	CODE	2	DESCRIPTION	3	DPT	4	DPT DESCRIPTION
5	SCAN CODE	6	PRICE 1	7	PRICE 2	8	PRICE 3
9	ATTRIBUTE 1 CODE	10	ATTRIBUTE 1 DESC	11	ATTRIBUTE 2 CODE	12	ATTRIBUTE 2 DESC
13		14		15		16	
17		18		19		20	
21		22		23		24	

Include Headers

Save Format

idealpos7 Update History

In order to use the Saved Automatic Export Format, it needs to be enabled.

To enable the Saved Automatic Export Format, go to

Setup > POS Terminals > Select the POS Terminal which you configured the Automatic Export Format > Modify > Import/Export > Use Saved Automatic Export Format.

pos terminals	Main Settings	POS Settings	Receipt Printer	Kitchen Printers	Customer Display	Customer Readers	Other Peripherals	EFTPOS Settings	Import / Export	Miscellaneous Settings	X
Automatic Export Settings											
Export Folder: C:\Export\ >											
<input type="checkbox"/> Delete files older than 7 days											
Export Stock Items: All Items											
Department Range: _____											
Filter by Attribute Type: _____											
Export Daily at: _____ Or every 10 minutes											
Filename: StkitemExport.txt											
<input type="checkbox"/> Append Date/Time to filename											
<input type="checkbox"/> Append Site Name to filename											
<input type="checkbox"/> Append Venue ID to filename											
<input type="checkbox"/> Include Discontinued Items											
<input checked="" type="checkbox"/> Use Saved Automatic Export Format											
Export Sales Format: No Daily Export											
Sales From: All POS Terminals											
Daily Export Time: _____											
Automatic Import Settings											
Import Folder: _____ >											
<input type="checkbox"/> Delete files older than 7 days											
Import Stock Items											
Filename: _____											
<input checked="" type="checkbox"/> If imported items exist, update selling prices											
<input checked="" type="checkbox"/> Delete file after importing											
Supplier Invoices											
<input type="checkbox"/> Automatically Import Supplier Invoices											
Retrieve Location from Filename: Right of _____											
Left of _____											
Retrieve Supplier from Filename: Right of _____											
Left of _____											
<input type="checkbox"/> Automatically Add/Modify Stock Items during Import											
<input type="checkbox"/> Update Description											
<input type="checkbox"/> Update Department											
<input type="checkbox"/> Update Sell Price											
<input type="checkbox"/> Automatically Process Invoices after Import Complete											
Import Items Only Folder: _____ >											

Keyboard

idealpos7 Update History

Export Stock Items – Attribute Codes and Description Fields added

This function includes the ability to export Attribute Codes 1 through to 5 as well as Attribute Descriptions 1 through to 5 in the Export Stock Items – Automatic Export Format. To include these fields in the Automatic Export Format, go to Utilities > Export Data > Stock Items > Export: Automatic Export Format.

Select from any of the Attribute Codes 1 through to 5 or Attribute Descriptions 1 through to 5 that you want to include in the Automatic Export Format.

The screenshot shows a software window titled "export stock items" with a close button (X) in the top right corner. At the top, there is a dropdown menu labeled "Export" with "Automatic Export Format" selected. Below this is a section titled "Export Specific Fields by Range" containing a grid of 24 dropdown menus arranged in four columns and six rows. The first three rows have labels: "ATTRIBUTE 1 CODE", "ATTRIBUTE 1 DESC", "ATTRIBUTE 2 CODE", "ATTRIBUTE 2 DESC" for the first row; "ATTRIBUTE 3 CODE", "ATTRIBUTE 3 DESC", "ATTRIBUTE 3 CODE", "ATTRIBUTE 3 DESC" for the second row; and "ATTRIBUTE 4 CODE", "ATTRIBUTE 4 DESC", "ATTRIBUTE 5 CODE", "ATTRIBUTE 5 DESC" for the third row. The fourth row contains empty dropdown menus. A list box on the left side of the grid is open, showing a scrollable list of field names: "ATTRIBUTE 1 CODE", "ATTRIBUTE 2 CODE", "ATTRIBUTE 3 CODE", "ATTRIBUTE 4 CODE" (highlighted in blue), "ATTRIBUTE 5 CODE", "ATTRIBUTE 1 DESC", "ATTRIBUTE 2 DESC", and "ATTRIBUTE 3 DESC". At the bottom right of the grid, there is a checked checkbox labeled "Include Headers". In the bottom right corner of the window, there is a "Save Format" button.

idealpos7 Update History

If needed, you can identify the Stock Item Attributes in your system that correspond to Attribute Codes 1 – 5.

Go to File > Sales > Stock Item Attributes

The Attribute Types are listed in the left-hand side column and the Attribute Codes are listed in the right-hand side column.

You may have to click on several Attribute Types in the left-hand side column in order to locate Attribute Codes 1 – 5 in the right-hand side column. Only Attribute Codes between 1 to 5 can be included in the Automatic Export Format.

stock item attributes S X

Type Code	Attribute Types
1	Container Type

Code	Attributes (9)
4	1.25L Bottle
8	1L Btl
7	250ml Bottle
5	2L Bottle
3	600ml Bottle
9	Bladder
1	Can
6	Keg
2	Stubby

Add New Attribute Type Delete Modify Add New Container Type Delete Modify

idealpos7 Update History

Export Stock Items – Unit field added

This function includes the ability to export the Scale Unit field in the Export Stock Items – Automatic Export Format.

To include this field in the Automatic Export Format, go to

Utilities > Export Data > Stock Items > Export: Automatic Export Format

export stock items ✕

Export Automatic Export Format

Export Specific Fields by Range

1	CODE	2	DESCRIPTION	3	SCALE UNIT	4	
5		6		7	TAX3	8	
9		10		11	TAX4	12	
13		14		15	TAX5	16	
17		18		19	TAX6	20	
21		22		23	INDIRECT	24	
					INSTRUCTION		
					STOCK CONTROL		
					SCALE UNIT		

Include Headers

Save Format

idealpos7 Update History

When the Scale Unit field is included in an Automatic Export Format, it will export whatever value is in the Scale Unit field in the Stock Item. In the following screenshot, "kg" has been entered in the Scale Unit field.

stock items
General Advanced Indirect Item
✕

Stock Code

Description (9)

Description 2 (9)

Department > MEAT & FISH

Scan Code Auto

Selling Prices (inc Tax)

	Price	Profit%
STANDARD	16.99	41.75
STAFF	11.50	13.88
EXTRAS	0.00	
BOTTLESHOP	0.00	
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	
OWNERS	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 > FOOD

Default Supplier > Master's Meat Supplies

Default Supplier Stock Code

Other Options

- Stock Control
- Indirect Item
- Non-Accumulating
- Scale Tare
- 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
- GST-Free
- Not Defined
- Not Defined
- Not Defined
- Not Defined

Attributes

Keyboard
Save

Here is how the Stock Item will appear in a Stock Item Export.

CODE,DESC,UNIT

" 121013","BEEF RIBS","kg"

idealpos7 Update History

Global Options

Ability to Override Attribute Column Headers

This function allows you to override the Attribute Column Headers which are displayed in the Stock Items grid.

Go to Setup > Global Options > Other Options > Attribute Column Headers

Attribute Column Headers

1	Container Type
2	Country of Origin
3	Dietary
4	Spirit Varietal
5	Wine Varietals

You may also need to enable the Attribute Column Headers in Stock Items.

Go to Setup > Users > Modify > Enable Attribute1Desc – Attribute5Desc

users

User Name

Password
Confirm

Override Permissions from Other User

- KP 2
- KP 3
- KP 4
- KP 5
- KP 6
- KP 7
- KP 8
- KP 9
- KP 10
- KP 11
- KP 12
- Tax1
- Tax2
- Tax3
- Tax4
- Tax5
- Tax6
- LinkTable
- Scale
- Instruction
- MenuCode
- PromotionTable
- PrintRed
- StockLevel
- Webstore
- Attribute1Desc
- Attribute2Desc
- Attribute3Desc
- Attribute4Desc
- Attribute5Desc
- DateModified
- InhibitDiscounts
- Manufactured
- Notes

Search

The Stock Items Grid (File > Stock Control > Stock Items) will now show the updated Attribute Column Headers

Container Type	Country of Origin	Dietary	Spirit Varietal	Wine Varietals
<input type="text"/>				

idealpos7 Update History

Support for Tiering on Maxetag Gaming Interface

The Maxetag interface has been updated to support tiering.

Using the Member Rating Guide within Max Gaming will adjust the Customer Type that is recorded in Idealpos.

If the Update Customer Type from Member Rating Grade checkbox is enabled, the Customer will be added to the relevant Rating Customer Type, not the default selected Customer Type.

This function can be enabled as follows

Go to Setup > Global Options > Gaming > Update Customer Type from Member Rating Grade

The screenshot shows the 'Global Options' window for 'site 1 (ADMISSION)' with the 'Gaming' tab selected. The 'Gaming Interface' section is expanded, showing various configuration options. The checkbox 'Update Customer Type from Member Rating Grade' is checked and highlighted with a blue bar. Other options include 'Add Members to POS', 'Use Price Level Schedule', and 'Redemptions treated as Discounts'. The 'StarrSvr Interface' section is also visible, with options for 'Use StarrSvr', 'IP Address', 'Redeem Tender', 'Redeem Tender 2', 'Interface Type', 'Customer Timeout', 'Rating Points per Dollar', and 'Add Members to POS'. The 'Tickets' section has radio buttons for 'None', 'One Only', 'Multiple by Threshold', and 'Multiple by Points'. The 'Customer Type' is set to '1' and 'Length' is '0'.

Section	Option	Value / Status
Gaming Interface	Interface Type	Maxetag
	Redeem Tender	No Pay by Points
	Username	
	Password	
	IP Address/Host	
	Add Members to POS	<input checked="" type="checkbox"/>
	Code Length	
	Customer Type	1
	Update Customer Type from Member Rating Grade	<input checked="" type="checkbox"/>
	Use Price Level Schedule	<input type="checkbox"/>
Redemptions treated as Discounts	<input checked="" type="checkbox"/>	
StarrSvr Interface	Use StarrSvr	<input type="checkbox"/>
	IP Address	
	Redeem Tender	EFTPOS
	Redeem Tender 2	EFTPOS
	Interface Type	IRC
	Customer Timeout	0
	Rating Points per Dollar	
	Add Members to POS	<input type="checkbox"/>
	Update Customer Type from Member Price Level	<input type="checkbox"/>
	Update Customer Type from Member Rating Grade	<input checked="" type="checkbox"/>
Tickets	None	<input checked="" type="radio"/>
	One Only	<input type="radio"/>
	Multiple by Threshold	<input type="radio"/>
	Multiple by Points	<input type="radio"/>
Other Options	Use Price Level Schedule	<input type="checkbox"/>
	Copies on Detailed Statement	<input type="checkbox"/>
	Maximum PO Amount	0
	Scan Code	<input type="checkbox"/>
Membership ID	Membership ID	<input type="checkbox"/>
	Customer Type	
	Length	0
	Redemptions treated as Discounts	<input type="checkbox"/>

Import Data

Ability to Import Stock Item Attributes by Code or Description

This function allows you to specify which Attributes a Stock Item will be linked to when importing new Stock Items or updating existing Stock Items using Utilities > Import Data > Stock Items.

When using this function, you have the option of either specifying Attributes by Code or by Description.

Attribute Codes and Attribute Descriptions can be displayed by running the Stock Item Attributes Listing which is explained in this document under Listings – Stock Item Attributes Listing.

If you want to specify the Attribute Codes with your Stock Item import data, include the required attribute headers with your Stock Item data and list the appropriate attribute codes for each field:

```
ATTRIBUTE1,ATTRIBUTE2,ATTRIBUTE3,ATTRIBUTE4,ATTRIBUTE5
```

An example of Stock Item import data using Attribute Codes is:

```
CODE,DESCRIPTION,DEPARTMENT,ATTRIBUTE1,ATTRIBUTE2,ATTRIBUTE3,ATTRIBUTE4,ATTRIBUTE5  
1,Test Stock Item,402,4,18,29,41,34
```

If you want to specify the Attribute Descriptions with your Stock Item import data, include the required attribute headers with your Stock Item data and list the appropriate attribute descriptions for each field:

```
ATTRIBUTE1DESC,ATTRIBUTE2DESC,ATTRIBUTE3DESC,ATTRIBUTE4DESC,ATTRIBUTE5DESC
```

An example of Stock Import data using Attribute Descriptions is:

```
CODE,DESCRIPTION,DEPARTMENT,ATTRIBUTE1DESC,ATTRIBUTE2DESC,ATTRIBUTE3DESC,ATTRIBUTE4DESC,ATTRIBUTE  
5DESC  
2,Test Stock Item Two,402,1.25L Bottle,Bourbons,Cab Merlot,Australia,Contains Egg
```

The Stock Import Data can be saved as a txt file and used in the Import Stock Items screen.

idealpos7 Update History

To import Stock Items, go to Utilities > Import Data > Stock Items

import stock items ✕

This option will import stock items from a comma delimited text file.
The text file must include a header row containing the field names.

C:\ProgramData\Idealpos Solutions\Idealpos\stk.txt 

Starting Stock Code |

Preview OK

Press the small magnifying glass icon  next to the path to browse to the file that contains the Stock Items you want to import or update. Once you have selected your file, press OK to import the Stock Items. The Stock Items will be imported using the Attributes that were included in the data.

idealpos7 Update History

Labels

New Stock Item Label 3x8 format with larger price

There is now a third format available for the 3x8 Landscape label. This format will have a larger price displayed than the other formats.

Go to Utilities > Labels > Dimensions: 24 labels (3 x 8) Landscape > Design: Format 3

Data Type	Stock Items	
Output To	Idealpos A4 Labels	
A4 Printer	SHARP MX-2600N PCL6	
Dimensions	24 labels (3 x 8) Landscape	
Design	Format 3	
Top Margin	0	Price Level 1
Left Margin	0	
Start Position	1	



idealpos7 Update History

Listings

Location Listing to include Stock Location and Site descriptors

A change has been made to the Location Listing to show the locations where stock will be drawn from. Stock may be recorded as being in one location, but when it is sold, it is drawn from a different location.

Go to Listings > Stock Control > Locations

Idealpos user (pos1)		Locations Listing			Printed 12/10/2017 12:40PM
					Page 1 of 1
<u>Code</u>	<u>Description</u>	<u>Auto Enable Stock Items</u>	<u>Stock Location</u>	<u>Site</u>	
1	Location 1	Yes	Location 1	Site 1	
2	Location 2	Yes	Location 1	Site 1	
3	Location 3	Yes	Location 3	Site 1	
4	Location 4	Yes	Location 4	Site 1	
5	Location 5	Yes	Location 5	Site 1	
20	Location 20	Yes	Location 20	Site 2	

idealpos7 Update History

Stock Item Attributes Listing

This function will produce a list of all Stock Item Attributes that exist in the system.

Go to Listings > Sales > Stock Item Attributes

idealpos user (pos1)		Stock Item Attributes Listing		Printed 29/11/2017 10:22:43
				Page 1 of 1
Code	Description			
Type 1 - Container Type				
4	1.25L Bottle			
8	1L Btl			
7	250ml Bottle			
5	2L Bottle			
3	600ml Bottle			
9	Bladder			
1	Can			
6	Keg			
2	Stubby			
Type 2 - Stock Item Type				
10	Manufactured			
Type 3 - Spint Varietal				
17	Bourbons			
16	Brandy			
12	Gin			
14	Ouzo			
15	Rum			
13	Tequila			
11	Vodka			
18	Whiskies			

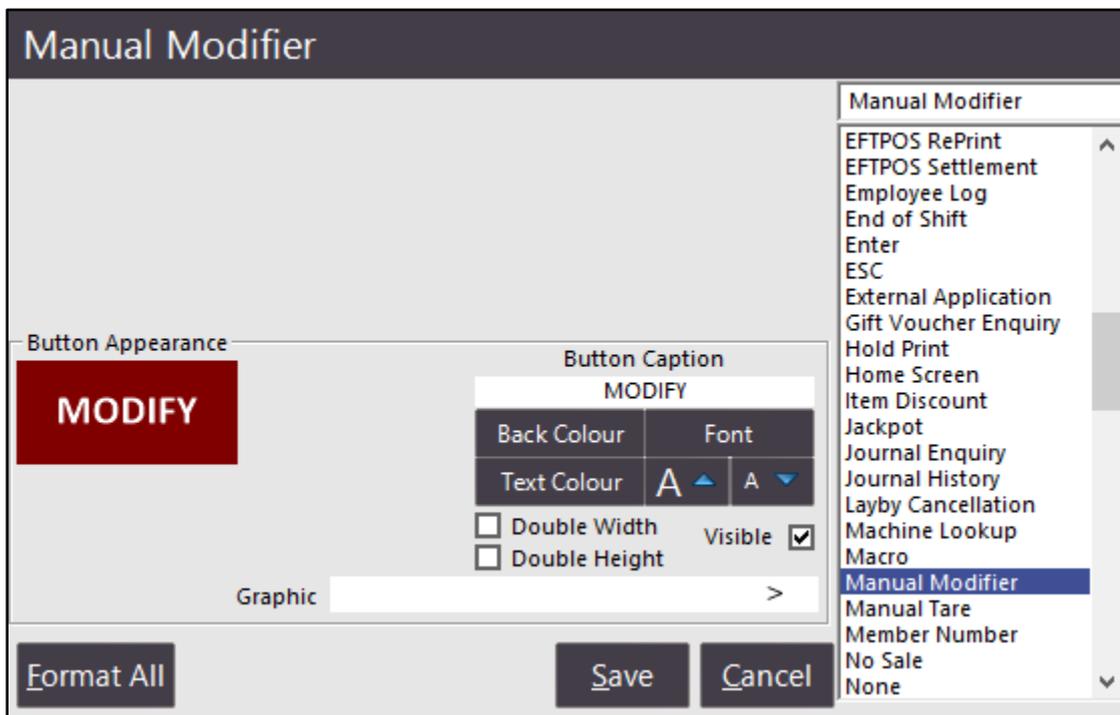
idealpos7 Update History

POS Screen Setup

Manual Modifier Grid functionality by Stock Item

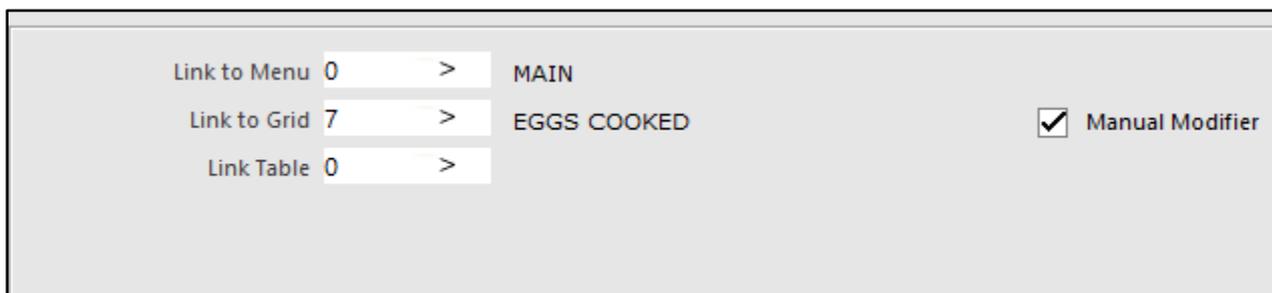
This function allows you to have a single button on the POS Screen called Modify (or whatever you choose), which links items to a specific grid only when required, instead of being forced to step the operator through various grids, or have multiple grids required to be on screen for many different items.

Go to Setup > POS Screen > POS Screen Setup > Layouts > Buttons > Function: Manual Modifier.



Whenever eggs are ordered for breakfast, they are fried by default (except for Scrambled Eggs, Eggs Benedict) unless specified. This allows the chef to know that when the order is received, he can just fry them unless otherwise instructed. It can save unnecessary printing of instructions when the default is set.

Go to File > Stock Control > Stock Items > Stock Item: Eggs on Toast > Advanced tab > Link to Grid: Eggs Cooked > Tick: Manual Modifier.



idealpos7 Update History

Now, instead of the grid for Eggs Cooked opening automatically and a selection having to be made, if the customer wants Eggs on Toast, the chef cooks them fried. If the customer wants them poached, the operator can press the "Modify" button and select a cook type. If you try to modify an item that is not linked to the Modify function, it will prompt with a message that the item is not linked, so either cannot be modified, or has to be in a different manner.

02 Nov 14:16 POS 1 Adult ID: 02/11/99
Jeremy STANDARD

BIG BREAKFAST	1	15.00	RECEIPT	CLERK	7	8	9	CL
			PRICE LEVEL	5% ST DISC	4	5	6	NO SALE
			CUSTOMER	5% ITEM				
			BAR TAB	Employee Log	1	2	3	X
			PENDING	VOID SALE				

Highlighted Item does not have Manual Modifier Functionality.

OK

TOAST	WAFFLES CHOCOLATE	CARROT CAKE SLICE	FOCCACIA	CHICKEN BURGER	PIZZA	COUS COUS	ORDER NUMBER
JAM & TOAST	BIG BREAKFAST	BLACK FORREST CAKE SLICE	LAMB TURKISH	TOFU BURGER	ISLANDER PIZZA	CHILLI SEAFOOD	WITH
BAKED BEANS & TOAST	MODIFY	MANUFACTURED ITEMS	ROAST SANDWICH	DESIGNER BURGER	CHICKEN PIZZA	SMALL CHIPS	WITHOUT
AVOCADO ON TOAST			DESIGNER SANDWICH	DESIGNER BURGER	DESIGNER PIZZA	LARGE CHIPS	MANAGER
DRINKS	CAFE	TAP BEER	SPIRITS	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL
	RESTAURANT	BOTTLE BEER & RTD	WINE			HIRE	SERVICES

idealpos7 Update History

Promotions

Promotion Group Customer Limit - ability to limit by Amount

This functionality allows for a Promotion Group to be used for a dollar value on Promotions within a set time frame on Promotions, Coupons and Customer Rewards. If you don't configure Customer Types to only be able to use these promotions, the limits won't apply to customers without an account.

Go to File > Sales > Promotions > Promotion Groups > Customer Limit: Amount.

promotion groups ✕

Code

Description

Customer Limit

idealpos7 Update History

Go to File > Sales > Promotions > Add.

promotions
✕

Promotion
Advanced

Description
Amount Promotion

Group
Promotions Amount

POS >

Customer Type >

Multiple Trips

From: 01/10/2017 00:00

to: 01/11/2017 00:00

Continuous
 During Specific Times

Discount Type
\$ Discount off Items 5.00

Trip Conditions Set 1

Trip by Quantity Buy 1 of items below

Trip by Amount

101011 BIG BREAKFAST

Trip Conditions Set 2

Trip by Quantity And Buy 0 of items below

Trip by Amount

Trip Conditions Set 3

Trip by Quantity And Buy 0 of items below

Trip by Amount

Delete
Promotion Link Enquiry
Add Department
Add Stock Item

In our example, only 10x the discount will be allocated, even though 11x of the item has sold.

31 Oct 14:37 POS 1 Adult ID: 31/10/99			>>>
Jeremy STANDARD			
Promotions Customer - 0 Points			
BIG BREAKFAST	11	165.00	
-50.00 Amount Promotion			
Amount Promotion	10	-50.00	
0 Points		Discounts (+/-) -50.00	
11x		\$115.00	

Reports

Stock Levels by Location Report – option to Hide Cost Prices

This function allows you to hide the Cost Prices on the Stock Levels by Location Report.

Go to Reports > Stock Control > Stock Levels by Location > Hide Cost Prices > View

stock levels by location
✕

Sort Order

Code

Description

Group by

Department

Supplier

Options

Location 1

Location 2

Location 3

Location 4

Location 5

Location 20

Show Value for Each Location
 NOT show zero qty items
 Hide Cost Prices

Selection Range

Code > to

Description > to

Department > to

Supplier > to

Attributes > +

Show

Exclude

Print
View

The Stock Levels by Location Report will omit the Cost and Total Value columns in the report.

Idealpos Demo **NOT-FOR-RESALE** (pos1)		Stock Levels by Location Report						Printed 01/12/2017 16:15:13 Page 1 of 19	
Code	Description	Supplier's Stock Code	Location 1	Location 2	Location 3	Location 4	Location 5	Location 20	Total
1	Test Stock Item								0.0000
2	Test Stock Item Two								0.0000
115006	BISCOTTI								0.0000
117001	APPLES	SK123456	32.2000						32.2000
117002	APRICOT	SK123457	21.9000						21.9000
117003	AVOCADO	SK123458	24.7000						24.7000
117004	BANANA	SK123459	31.6250						31.6250
117005	BLACKBERRIES	SK123460	5.8000						5.8000

idealpos7 Update History

Schedules

Ability to Send Messages to other Terminals

You are now able to configure messages to be sent to other terminals through Schedules menu. This allows for them to be configured for the future, and repeat as often as required.

Go to Setup > Schedules > Type: Send Message > POS: POS Terminal codes that will receive the message. If you want to send a message to all terminals, leave this field blank. Any terminal that creates a message to be sent to all terminals, will not receive those messages, i.e. terminals cannot send messages to itself.

schedules

Description Start Closing Shop

Type Send Message

Run next at 02 Nov 2017 15:03

Repeat Every 1 Days

From 00:00 to 23:59

Mon Tue Wed Thu
 Fri Sat Sun

Message Options

POS 1

Message Please start closing the shop down

idealpos7 Update History

When the message is sent it will display on the screen.

02 Nov 15:50 POS 1 Adult ID: 02/11/99
Jeremy STANDARD
✕

	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	Employee Log				
	PENDING	VOID SALE				
			0	.	ENTER	

POS 2

Start closing shop

								
CAPPUCCINO	FLAT WHITE					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	Safe Drop
DRINKS	CAFE	TAP BEER	SPIRITS	COCKTAILS	FRUIT & VEG	GROCERY	RETAIL	MANAGER
	RESTAURANT	BOTTLE BEER & RTD	WINE			HIRE	SERVICES	ADMIN

Stock Item Attributes

Attributes Setup – Attribute / Attribute Type Codes displayed

This function displays the Attribute Code and Attribute Type Codes in the Stock Item Attributes screen. Codes for Attribute Types and Attributes are displayed on the left-hand side of the Attribute Type/Attribute. This functionality facilitates the function for Importing Stock Item Attributes by Code or Description.

Go to File > Sales > Stock Item Attributes

stock item attributes S X

Type Code	Attribute Types	Available in Columns
1	Container Type	ALL
2	Stock Item Type	ALL
3	Spirit Varietal	ALL
4	Wine Varietals	ALL
5	Country of Origin	ALL
6	Dietary	ALL
7	Hire	5

Code	Attributes (9)
10	1.25L Bottle
11	1L Btl
12	250ml Bottle
13	2L Bottle
14	600ml Bottle
15	Bladder
16	Can
17	Keg
18	Stubby

[Add New Attribute Type](#) [Delete](#) [Modify](#) [Add New Container Type](#) [Delete](#) [Modify](#)

idealpos7 Update History

Attribute Types – Ability to Lock Type to specific Stock Item Columns

This function allows you to lock Stock Item Attributes to specific Stock Item Columns.

Go to File > Sales > Stock Item Attributes

Type Code	Attribute Types	Available in Columns
1	Container Type	1
2	Stock Item Type	
3	Spirit Varietal	4
4	Wine Varietals	5
5	Country of Origin	2
6	Dietary	3

Code	Attributes (9)
4	1.25L Bottle
8	1L Btl
7	250ml Bottle
5	2L Bottle
3	600ml Bottle
9	Bladder
1	Can
6	Keg
2	Stubby

Buttons: Add New Attribute Type, Delete, Modify, Add New Container Type, Delete, Modify

Then select an Attribute Type from the left-hand side column and press the Modify button on the left-hand side.

Enable the tickboxes for the columns that you want the Attribute Type to be available in, then press Save.

Repeat this process for each Attribute Type that you want to lock to specific Stock Item Columns.

Modify Attribute Type: Container Type

Available in Columns: All 1 2 3 4 5

idealpos7 Update History

When you open a Stock Item and click on the Attribute Type dropdown box that corresponds to the column, you will now only see Attribute Types that have been locked to that column.

The following are examples for the dropdown box in each column showing that a single Attribute Type has been locked to each column.

Attributes

Container Type		+
Container Type		

Attributes

Country of Origin		+
Country of Origin		

Attributes

Dietary		+
Dietary		

Attributes

Spirit Varietal		+
Spirit Varietal		

Attributes

Wine Varietals		+
Wine Varietals		

idealpos7 Update History

Kitchen Print Item Priority Order

When a large group of items are ordered together, not only do they print within their print groups, but all of the different steaks print together, all of the different fish dishes print together etc. It basically allows the items that need the most cooking time to be grouped together. Items with no priority will appear at the bottom of the group of items.

Go to File > Sales > Stock Item Attributes > Add New Attribute Type: Priority > Add New Priority: Enter a range of numbers used to order items > Save.

The screenshot shows the 'stock item attributes' window. The window title is 'stock item attributes' with a search icon 'S' and a close icon 'X'. The window is divided into two main sections. The left section is titled 'Attribute Types' and contains a list of attribute types: Container Type, Stock Item Type, Spirit Varietal, Wine Varietals, Country of Origin, Dietary, HIRE, and Priority. The 'Priority' attribute type is selected and highlighted in blue. The right section is titled 'Attributes (9)' and contains a list of attributes: 10, 20, 30, 40, 50, 60, 70, 80, and 90. The '10' attribute is selected and highlighted in blue. At the bottom of the window, there is an 'Add Priority' button and a text input field. The 'Save' button is located in the bottom right corner of the window.

idealpos7 Update History

Using Kitchen Print Priorities

Enter Stock Items into the sale in any order. In our example, the priority is displayed in the Stock Item Description.

ITEM 1 - 10	1	5.25
ITEM 3 - 20	1	5.75
ITEM 2 - 10	1	5.50
ITEM 9 - 50	1	7.25
ITEM 6 - 30	1	6.50
ITEM 7 - 40	1	6.75

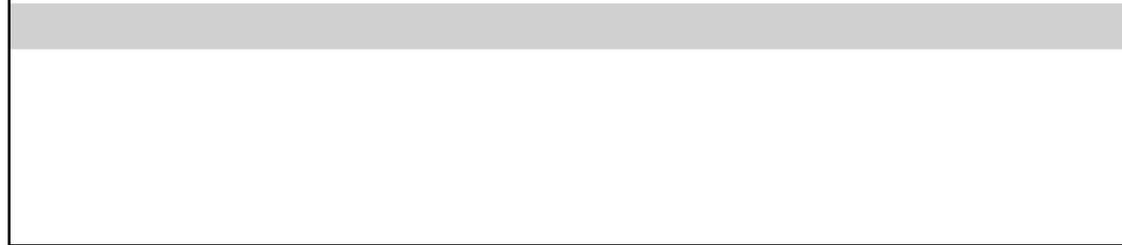
The items will be rearranged to print in the order of priority previously chosen. Items of the same priority will be printed in the order they were added to the sale.

TABLE 42 4 covers		
2:27pm 15/11/17		
Jeremy		
<hr/>		
1x	ITEM 1 - 10	
1x	ITEM 2 - 10	
1x	ITEM 3 - 20	
1x	ITEM 6 - 30	
1x	ITEM 7 - 40	
1x	ITEM 9 - 50	

idealpos7 Update History

Items within Print Groups will behave the same way.

ITEM 27 - 0 PG4	1	11.75
ITEM 26 - 50 PG3	1	11.50
ITEM 25 - 10 PG3	1	11.25
ITEM 21 - 10 PG1	1	10.25
ITEM 22 - 10 PG1	1	10.50
ITEM 22 - 10 PG1	1	10.50



The items will be arranged into their Print Groups first, and then ordered in their priority. Items with no priority.

TABLE 41 4 covers	
2:40pm	15/11/17
Jeremy	
-----ENTREE-----	
1x	ITEM 21 - 10 PG1
2x	ITEM 22 - 10 PG1
-----DESSERT-----	
1x	ITEM 25 - 10 PG3
1x	ITEM 26 - 50 PG3
-----FOOD-----	
1x	ITEM 27 - 0 PG4

idealpos7 Update History

Instruction items will respect the item they were entered with and print in the correct order.

ITEM 27 - 0 PG4	1	11.75
ADD BACON		
ITEM 28 - 30 PG4	1	12.00
MEDIUM		
ITEM 28 - 30 PG4	1	12.00
MED-RARE		
ITEM 24 - 20 PG2	1	11.00
ADD BACON		
ADD BEETROOT		
ITEM 23 - 10 PG2	1	10.75

Items in the kitchen will print with all instructions located correctly.

TABLE 40 4 covers	
3:20pm	15/11/17
Jeremy	
-----MAIN-----	
1x	ITEM 23 - 10 PG2
1x	ITEM 24 - 20 PG2
->	1x ADD BACON
->	1x ADD BEETROOT
-----FOOD-----	
2x	ITEM 28 - 30 PG4
->	1x MEDIUM
->	1x MED-RARE
1x	ITEM 27 - 0 PG4
->	1x ADD BACON

Stocktake

Enter Stocktake can filter by Department Range

You used to only be able to enter a single Department to filter the results, but you are now able to enter a Department range, enabling you to view more data. A Stocktake must be started to be able to view this screen.

Go to Stocktake > Enter Stocktake > Filter Criteria > Department > Enter range; 210,204-205.

enter stocktake
S X

Stock Code	Description	Stock Level	Stocktake
204001	MT FRANKLIN 600ML	67	
204002	MT FRANKLIN 1L	21	
204003	FIJI 600ML	19	
204004	FIJI 1L	16	
204005	VOSS 600ML	33	
204006	VOSS 1L	10	
204007	STILL MINERAL WATER	18	
204008	SPARKLING MINERAL WATER	20	
219001	SMIRNOFF 700	9.9	
219002	666 VODKA 700	2,3284	
219003	666 BUTTER VODKA 700	3,2855	
219004	RUSSIAN STANDARD 700	5,3142	
219005	HENDRICKS 700	1,7571	
219006	BOMBAY SAPPHIRE 700	3.8	
219007	WEST WINDS 700	1,8142	
219008	4 PILLARS 700	2,1714	
219009	JOSE CUERVO SILVER 700	4.4	
219010	JOSE CUERVO REP 700	1,6428	
219011	PATRON SILVER 700	4.1	
219012	PATRON XO 700	1.2	
219013	OUZO 700	2,0571	
219014	BACARDI 700	4,3714	
219015	HAVANA ANEJO 700	1,3071	
219016	BACARDI 151 750	2,3799	
219017	BUNDABERG 700	1.8	
219018	RON ZACAPA 700	3.8	
219019	THE KRAKEN 700	1,9638	
219020	DIPLOMATICO RESERVA 700	2.4	
219021	HENNESSY VSOP 700	1,5786	
219022	HENNESSY XO 700	1,7571	
219023	HENNESSY VS 700	2.2	
219024	CHATELLE NAPOLEON 700	1.3	
219025	JACK DANIELS NO.7 700	1.4	
219026	WILD TURKEY 700	1,7284	
219027	JIM BEAM 700	3,0142	
219028	MAKERS MARK 700	1,0284	
219029	WOODFORD RESERVE 700	1,1573	
219030	CANADIAN CLUB 700	2,7571	
219031	FAMOUS GROUSE 700	1.5	
219032	JOHNNIE WALKER RED 700	2,3571	
219033	JOHNNIE WALKER BLACK 700	1.8	
219034	BRUICHLADDICH 700	3.8	
219035	GLEN MORAY PORT CASK 700	1.5	
219036	WRITERS TEARS 700	2.4	
219037	JAMESON 700	1,4571	
219038	HELLYERS ROAD 700	1.8	
219039	STARWARD 700	2,1142	

Filter Criteria

Location

Department

Sort Order:

- Stock Code
- Description
- Department/Stock Code
- Department/Description
- Supplier/Stock Code

Show Counted Items Only

Direct Stock Item Entry

Search Code >

Quantity

Automatically Add One to Stocktake with each Scan

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

Set Uncounted Items to Zero
 Set Uncounted Items to Stock Level

idealpos7 Update History

Quick Stocktake Function

This function allows you to perform a quick stocktake from the POS screen on a small number of items. It is generally used for Service Stations who perform a stocktake when they read the volume of fuel in the tanks. You can configure multiple buttons by using a Department Range on each button, so only select Departments are available when that particular button is selected.

Go to Setup > POS Screen > POS Screen Setup > Layouts > Buttons > Select Button > Function: Quick Stocktake.

Quick Stocktake

Department Range

Print Stocktake on Receipt Printer

Button Appearance

Quick Stocktake

Button Caption

Quick Stocktake

Back Colour Font

Text Colour A A

Double Width Visible

Double Height

Graphic

Format All Save Cancel

Quick Stocktake

- Quick Stocktake
- Raffles
- 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 Location
- Stock Notes

Department Range: Enter the Departments you want this button to be responsible for.

Print Stocktake on Receipt Printer: Check to print out the variance reports on the receipt printer.

Quick Stocktake

Department Range 201-202

Print Stocktake on Receipt Printer

Button Appearance

Hot Drinks Stocktake

Button Caption

Hot Drinks Stocktake

Back Colour Font

Text Colour A A

Double Width Visible

Double Height

Graphic

Format All Save Cancel

Quick Stocktake

- Quick Stocktake
- Raffles
- 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 Location
- Stock Notes

idealpos7 Update History

You are able to control which Users have access to this function so not all staff can access it.

Go to Setup > Users > Select User > Clerk Permissions > POS > Quick Stocktake.

The screenshot shows the 'users' configuration window for a user named 'MANAGER'. The window is divided into several sections:

- User Information:** User Name: MANAGER. There are fields for Password and Confirm, and a 'Change Password' button.
- Permissions:** A tree view of permissions with checkboxes. The 'Quick Stocktake' checkbox is highlighted. Other checked items include External Application, Gift Vouchers, Jackpot Functions, Live Button Programming, Modify/Reverse Transaction, Promotion Enquiry, Raffles, Safe Drop, Scale On/Off, Shortcuts, Stock Item Edit, Stock Item Sales Report, Table Summary Report, Transfer Mode, and Unallocated Adjustments. Other categories like Table Map, Cust Types, File, Enquiry, Transactions, Accounting, Listings, Reports, Financial, and Financial Trend also have sub-items with checkboxes.
- Override Permissions:** A dropdown menu set to 'Own Permissions'.
- Search:** A search bar on the right side.
- Footer:** Buttons for 'Collapse All', 'Print', and 'Save'.

idealpos7 Update History

Using Quick Stocktake

From the POS Screen select the Quick Stocktake button you created.

**Drinks
Stocktake**

A new window will open where you can enter the quantity of items into the stocktake field. Use the keypad to enter the quantity of items and the arrow buttons to the line above or below. You can also directly press the stock item to select it.

The screenshot displays the 'quick stocktake' interface. It features a table with columns for Stock Code, Description, Stock Level, and Stocktake. The 'Stocktake' column is highlighted in yellow. To the right of the table is a 'Filter Criteria' panel with a Location dropdown set to '1 - Location 1' and a Department field set to '204-205'. Below the filter panel is a 'Direct Stock Item Entry' section with search and quantity input fields, an 'Add to Stocktake' button, and a numeric keypad with an 'Automatically Add One to Stocktake with each Scan' checkbox. At the bottom of the interface are three buttons: 'Set Uncounted Items to Zero', 'Set Uncounted Items to Stock Level', and 'Update Stock Levels'.

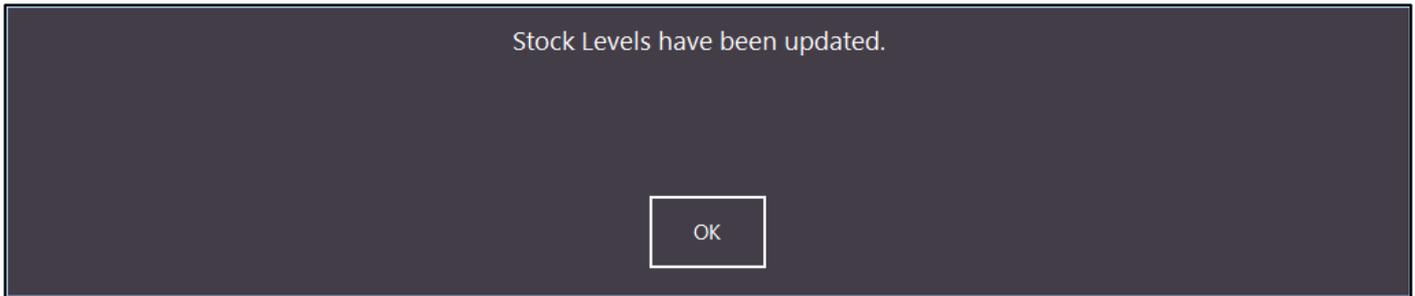
Stock Code	Description	Stock Level	Stocktake
204001	MT FRANKLIN 600ML	64	67
204002	MT FRANKLIN 1L	21	21
204003	FIJI 600ML	20	19
204004	FIJI 1L	16	16
204005	VOSS 600ML	32	33
204006	VOSS 1L	10	10
204007	STILL MINERAL WATER	17	18
204008	SPARKLING MINERAL WATER	20	20
205001	COKE 250ML BTL	35	35
205002	DIET COKE 250ML BTL	62	62
205003	COKE ZERO 250ML BTL	32	56
205004	SPRITE 250ML BTL	41	
205005	DRY GINGER 250ML BTL	24	
205006	TONIC 250ML BTL	29	
205101	COKE CAN	61	
205102	DIET COKE CAN	18	
205103	COKE ZERO CAN	45	
205104	SPRITE CAN	58	
205105	LIFT CAN	86	
205106	DRY GINGER CAN	32	
205107	FANTA CAN	41	
205108	TONIC CAN	24	
205201	COKE 600ML	61	
205202	DIET COKE 600ML	42	
205203	COKE ZERO 600ML	21	

When you are ready to save the details, or need to use the POS screen, press Update Stock Levels.

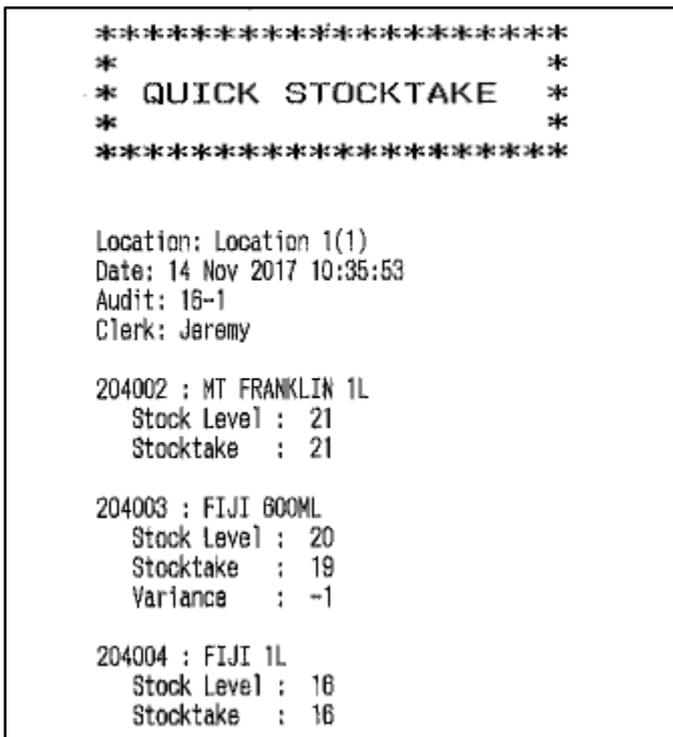
Update Stock Levels

idealpos7 Update History

A confirmation message will display on screen.



If a receipt is set to print, the details will be included on there.



idealpos7 Update History

All Quick Stocktake variances will be recorded in the Archived Stocktakes Reports.

Go to Reports > Stock Control > Archived Stocktakes > Select > View.

Idealpos user (pos1)		Archived Stocktake Report					Printed 14/11/2017 11:05:09 Page 1 of 1		
		Stocktake Processed: 14/11/2017 10:35:53 :							
Code	Description	Stock Level	Stocktake	Avg Cost	Valuation	Variance			
						Quantity	%	Value	
Location 1 Location 1									
DPT 204 - WATER									
204001	MT FRANKLIN 600ML	64.0000	67.0000	\$2.00	\$134.00	3.0000	4.69	\$6.00	
204002	MT FRANKLIN 1L	21.0000	21.0000	\$3.00	\$63.00	0.0000	0.00	\$0.00	
204003	FIJI 600ML	20.0000	19.0000	\$2.75	\$52.25	-1.0000	-5.00	-\$2.75	
204004	FIJI 1L	16.0000	16.0000	\$4.00	\$64.00	0.0000	0.00	\$0.00	
204005	VOSS 600ML	32.0000	33.0000	\$3.00	\$99.00	1.0000	3.13	\$3.00	
204006	VOSS 1L	10.0000	10.0000	\$5.00	\$50.00	0.0000	0.00	\$0.00	
204007	STILL MINERAL WATER	17.0000	18.0000	\$2.50	\$45.00	1.0000	5.88	\$2.50	
204008	SPARKLING MINERAL W	20.0000	20.0000	\$2.75	\$55.00	0.0000	0.00	\$0.00	
					\$562.25			\$8.75	
DPT 205 - SOFT DRINK									
205001	COKE 250ML BTL	35.0000	35.0000	\$0.94	\$32.90	0.0000	0.00	\$0.00	
205002	DIET COKE 250ML BTL	62.0000	62.0000	\$0.94	\$58.28	0.0000	0.00	\$0.00	
205003	COKE ZERO 250ML BTL	32.0000	56.0000	\$0.94	\$52.64	24.0000	75.00	\$22.56	
					\$143.82			\$22.56	
					\$706.07			\$31.31	
					\$706.07			\$31.31	

idealpos7 Update History

Yes/No Options

Yes/No Option to Inhibit Back button on Grids

This option will hide the Back button on POS screen Grids. It means staff are required to have to enter an item from the grid before they can continue with the sale.

Go to Setup > Yes/No Options > POS Screen > Inhibit Back Button on Grids.

Inhibit Back Button on Grids

The button will appear a cream colour and not function. You can program a double size button to display over this button if required.

TALL GLASS	
NO STRAWS	Back

idealpos7 Update History

Yes/No Option – Automatically send Gift Voucher Email if email address is present

This option will automatically send a Gift Voucher email to the customer when the customer purchases a Gift Voucher and there is an email address present for the customer.

Go to Setup > Yes/No Options > Customers > Automatically send Gift Voucher Email if email address is present

Automatically send Gift Voucher Email if email address is present

idealpos7 Update History

Yes/No Option - Inhibit Zero Priced Items on Bill Prints

This option will allow or inhibit zero-priced items from displaying on the bill print and will be ticked by default.

Go to Setup > Yes/No Options > Receipt/Kitchen > Inhibit Zero Priced Items on Bills.

Inhibit Zero Priced Items on Bills

idealpos7 Update History

Zebra Wristband Printing

Wristband printing on Zebra HC100 supports DATE and DATE+ tag

Idealpos will now also support the DATE and DATE+ tags, allowing for more information to be displayed.

For information on using this feature, please visit [this](#) link.

