

Idealpos 9 Build 14 - Update History

Update Details:

BACK OFFICE DASHBOARD	2
IP-7786 – DASHBOARD KPI – ADDED “SAME DAY LAST YEAR” TOTALS	2
BAR TABS	3
IP-7774 – BAR TAB REPORT – PRINTS FOR LOCAL SITE OR ALL SITES	3
CUSTOMERS	5
IP-7782 – AUTOMATIC IMPORT CUSTOMERS – FILE/FOLDER OPTIONS	5
EFTPOS	8
IP-7711 – OOLIO PAY VERIFONE EFTPOS – SUPPORT FOR UNREFERENCED REFUNDS	8
IP-7743 – OOLIO PAY GLOBAL/AU/NZ/VERIFONE – OPTION TO NOT INCLUDE EFTPOS DATA ON AUTOMATIC RECEIPTS	10
FUEL CONSOLE	13
IP-7544 – ENABLER FUEL INTERFACE – FUEL FUNCTIONS SCREEN	13
FUNCTIONS	21
IP-7710 – ORDER NUMBER FUNCTION – OPTION TO HAVE KEYBOARD ENTRY	21
LMG INTEGRATION	26
IP-7577 – ZEN GIFT VOUCHER INTEGRATION	26
PROMOTIONS	37
IP-7702 – PROMOTIONS – SUPPORT TO TRIGGER BASED ON CUSTOMER POSTCODES	37
IP-7703 – PROMOTIONS – SUPPORT TO TRIGGER BASED ON CUSTOMER GENDER	40
IP-7704 – PROMOTIONS – SUPPORT TO TRIGGER BASED ON USER-DEFINED TEXT FIELDS	43
IP-7705 – PROMOTIONS – SUPPORT TO TRIGGER BASED ON USER-DEFINED YES/NO FIELDS	47
REPORTS	51
IP-7697 – GIFT VOUCHER REPORTS – SUPPORT FOR GIFT VOUCHER NAME FILTER	51
IP-7718 – AUTOMATIC SURCHARGES – SUMMARY AND ITEM REPORTS	53
RESERVATION INTERFACES	58
IP-7724 – NowBookIt – SUPPORT FOR GIFT CARDS	58
IP-7507 – Now Book It Reservations Screen – STATUS FILTERS	62
RESTAURANT & TABLE MAP	64
IP-7715 – TABLE MAP MODIFY – MATCH ALL TABLES FUNCTION	64
IP-7721 – TABLE MAP MODIFY – OPTION TO SET TABLE TO DEFAULT	66
SALES CATEGORIES	67
IP-7737 – SALES CATEGORIES – SUPPORT FOR GL CODE FIELD	67
SELLING PRICE CALCULATOR	68
IP-7755 – SELLING PRICE CALCULATOR – OPTION TO ROUND TO NEAREST 99C	68
STOCK PURCHASES	70
IP-7753 – STOCK PURCHASES – ITEM HISTORY VIEW INCREASED TO 14 PERIODS	70
YES/NO OPTIONS	71
IP-7720 – YES/NO OPTION – STOCK TRANSFERS – PROMPT TO EMAIL REPORT	71

Back Office Dashboard

IP-7786 – Dashboard KPI – Added “Same Day Last Year” totals

This function introduces the ability to display “Total This Day Last Year” and “Same Time This Day Last Year” on the Back Office Dashboard.

There is no additional configuration required to use this functionality.

Note that Total This Day Last Year/Same Time This Day Last Year refers to this same day from last year, not this same date last year.

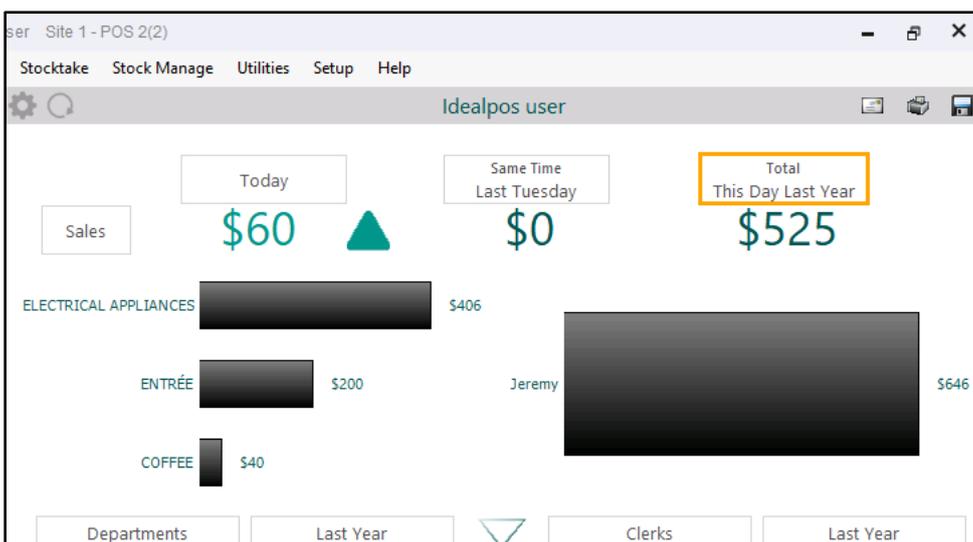
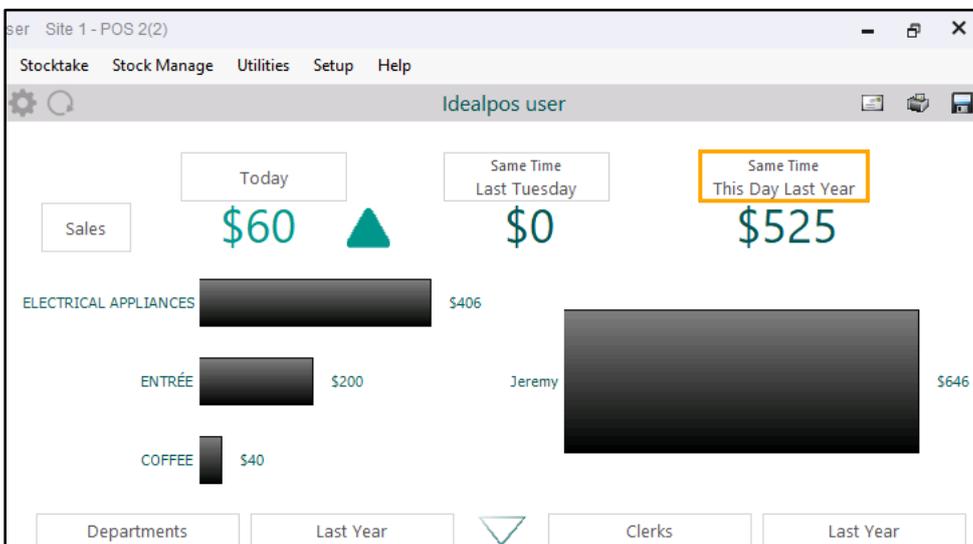
E.g. If today’s date is Wednesday 25th February 2026, the same day last year is Wednesday 26th February 2025; the Total This Day Last Year will display totals from the 26th February 2025.

Go to: Back Office.

The square shown on the top-right corner of the Back Office Dashboard can be used to toggle through the following options; newly added options are listed in bold:

- Same Time Yesterday
- Total Yesterday
- **Same Time This Day Last Year**
- **Total This Day Last Year**

These new options are available for Sales (total \$ of sales), Profit (total Profit \$) and Number (total number of sales).



Bar Tabs

IP-7774 – Bar Tab Report – Prints for Local Site or All Sites

This functionality introduces the ability to print a Bar Tab Report for the Local Site or All Sites. This is achieved by configuring the POS Screen Button for the Print Bar Tab function. When "ALL" is entered in the button's Automatic Text Field, Bar Tabs from All Sites will be included. When the Automatic Text field is blank, only the Bar Tabs from the Local Site will be included.

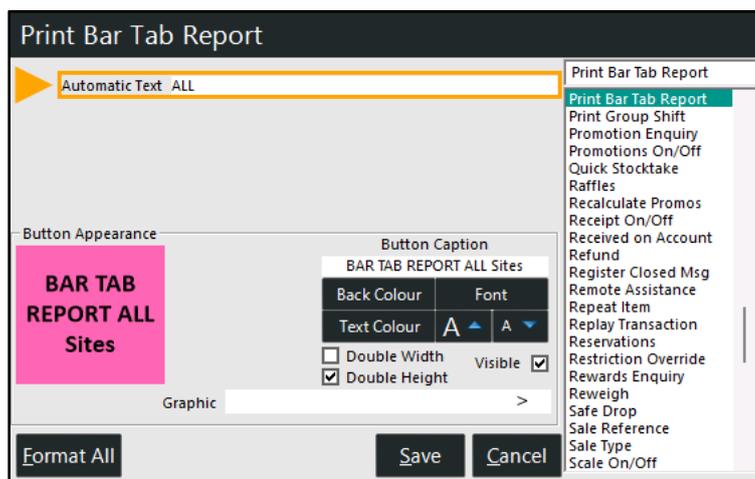
To configure this functionality, go to:

Back Office > Setup > POS Screen > POS Screen Setup > Select a POS Screen Layout > Buttons.

Select a POS Screen Tab to create/modify the button(s).

Locate a blank/unused button and configure as follows; press "Save" after configuring:

- **Function:** Print Bar Tab Report
- **Automatic Text:** ALL
- **Button Caption:** BAR TAB REPORT ALL Sites



If a button is only required for Bar Tabs at the Local Site, perform the above step and exclude the "ALL" text from the Automatic Text field (leave Automatic Text as blank).

If required, the Button Caption can be adjusted accordingly to reflect whether it is for All Sites or Local Site.

In addition, it is possible to have multiple BAR TAB REPORT buttons.

E.g. A venue may want to have two buttons; one for the Local Site and another for All Sites and press the required button.

Close the POS Screen Layout windows once configured.

Go to: POS Screen.

Press the BAR TAB REPORT ALL Sites button and the Bar Tabs from All Sites will be displayed on the report.

```
*****
*
*      B A R   T A B S      *
*
*****

      A L L   S I T E S

5001   Bar Tab 5001          10.00
5002   Bar Tab 5002          50.00

T O T A L                      =====
                               60.00

Printed from POS 1 at 20-Feb-2026 14:02:48
Idealpos user
```

Pressing the BAR TAB REPORT button (without the "ALL" text in the button's Automatic Text field) will display Bar Tabs only for the Local Site.

```
*****
*
*      B A R   T A B S      *
*
*****

      S i t e   1

5001   Bar Tab 5001          10.00

T O T A L                      =====
                               10.00

Printed from POS 1 at 20-Feb-2026 14:03:01
Idealpos user
```

Customers

IP-7782 – Automatic Import Customers – File/Folder options

This function introduces the ability to specify the File/Folder from where Customers are automatically imported from. Previously, customers could only be imported automatically by dropping a cust.txt file into folder location “C:\ProgramData\Idealpos Solutions\Idealpos”

This change enables the ability to specify which folder location/filename the customers will be imported from. Note that if the existing functionality is already in use (cust.txt file is being dropped into the “C:\ProgramData\Idealpos Solutions\Idealpos” folder, there is no additional configuration required and the system will continue to work as it does.

To configure and use this functionality, go to: Back Office > Setup > POS Terminals > Select a POS Terminal > Modify.

In the Import/Export tab > Automatic Import Settings, a new Customer Import Folder\Filename field is available. The field is pre-filled with the original folder location and filename that was previously hard-coded (C:\ProgramData\Idealpos Solutions\Idealpos\cust.txt).

When configuring this option, there are two possible methods that can be used, depending on the requirements.

- **Option A** – Specify a folder path and a filename – Idealpos will only import the specified filename from the specified folder location.
- **Option B** – Specify a folder path without a filename – Idealpos will import any txt file that is placed within the specified folder.

Note that if multiple files are placed into the folder, Idealpos will only import one file at a time using the “Customer Import Frequency” setting or “Automatic Customer Import Daily Time” setting configured in Global Options > Customers. Also note that if any non-Customer txt files are placed in the folder location configured, Idealpos will attempt to import them, and this will trigger problems if the file(s) placed in the folder are not formatted in the expected format.

More information about the format of the customer import file is available in the User Guide by [clicking here](#).

The screenshot shows the 'POS 2' software interface with the 'Automatic Import Settings' tab selected. The interface includes several sections:

- Automatic Export Settings:** Includes fields for 'Export Folder', 'Delete files older than 7 days', 'Export Stock Items' (set to 'All Items'), 'Department Range', 'Filter by Attribute Type', 'Export Daily at' (with 'Or every' and 'minutes' options), 'Filename' (with checkboxes for 'Append Date/Time to filename', 'Append Site Name to filename', 'Append Venue ID to filename', 'Include Discontinued Items', and 'Use Saved Automatic Export Format'), 'Export Sales Format' (set to 'No Daily Export'), 'Sales From' (set to 'All POS Terminals'), and 'Export Daily at' (with 'Or every' and 'minutes' options).
- Automatic Import Settings:** Includes fields for 'Import Folder', 'Delete files older than 7 days', a checked checkbox for 'Delete files after importing', 'Import Stock Items' (with a checked checkbox for 'If imported items exist, update selling prices'), 'Import Promotions', 'Import Gift Vouchers', and a highlighted 'Folder/Filename' field containing 'C:\Import\Customer File\customers.txt'.
- Supplier Invoices:** Includes checkboxes for 'Automatically Import Supplier Invoices', 'Automatically Add/Modify Stock Items during Import' (with sub-options for 'Update Description', 'Update Department', and 'Update Sell Price'), and 'Automatically Process Invoices after Import Complete'. It also has fields for 'Retrieve Location from Filename' (Right of, Left of) and 'Retrieve Supplier from Filename' (Right of, Left of).
- Import Items Only Folder:** A field at the bottom right.
- Metcash Retail Web Services:** Includes fields for 'B2B Account', 'Password', 'Customer ID', 'State Code', 'Automatically Download' (checkbox), 'Daily at' (with 'or every' and 'minutes' options), 'Folder', and 'Temporary Terminal' (checkbox).

Once the folder/file location is configured, close the Modify POS Terminal window.

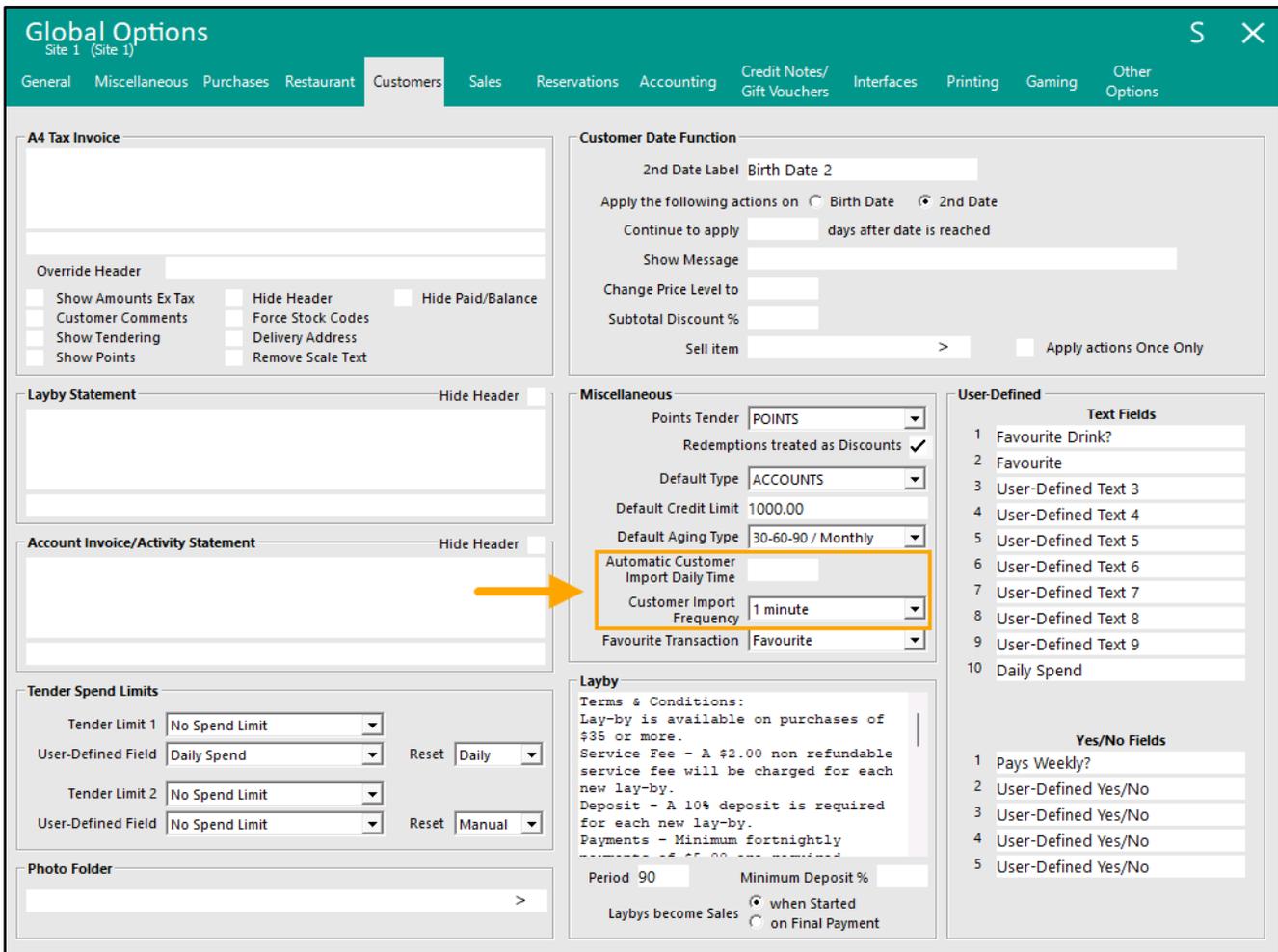
Go to: Back Office > Setup > Global Options > Customers > Miscellaneous.

Configure the "Automatic Customer Import Daily Time" or the "Customer Import Frequency".

If entering an Automatic Customer Import Daily Time, ensure that the time is entered in 24 hour format.

E.g. 08:30 for 8:30AM, 20:30 for 8:30PM, etc.

Customer Import Frequency options that are available are 1 minute, 2 minutes, 5 minutes or 10 minutes.



Close the Global Options window once configured.

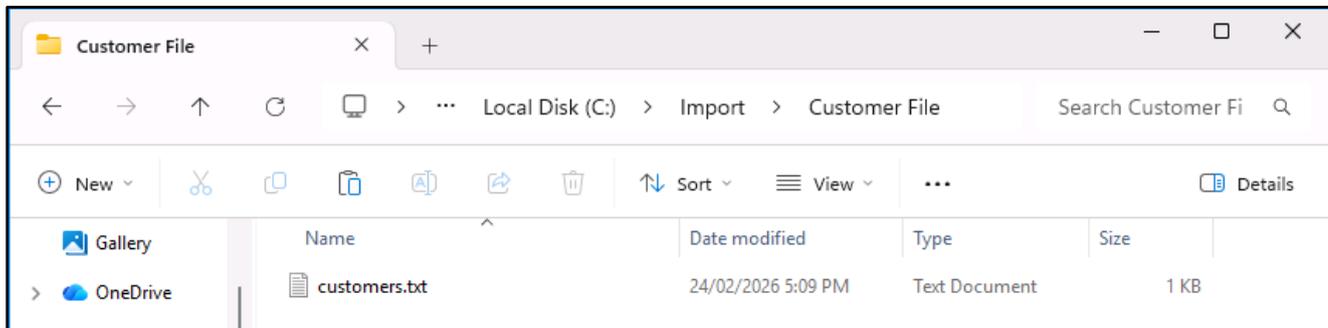
idealpos COLLO Update History

[Return to top](#)

To import a customer file, place a customer txt file into the folder location configured in the POS Terminal settings. Ensure that the filename is the same as-per what was configured in the POS Terminal Settings.

To demonstrate this functionality, the following sample cust.txt file was created:

```
CODE,LASTNAME,FIRSTNAME
12,Smithson,Smith
13,Johnson,John
14,Robertson,Robert
15,Richardson,Richard
```



After placing the file into the configured Customer Import Folder Location, the file will be imported using either the Automatic Customer Import Daily Time, or the interval configured in the Customer Import Frequency.

After the customer file is imported, it is deleted automatically; the new customers will appear in the Customers grid (Back Office > File > Customers > Customers).

Customers				
31 records				
Code <input type="text"/>				
	Code	Last Name	First Name	A
Modify				
	10	Sub Account		
Add	11	Layby Customer		
	12	Smithson	Smith	
	13	Johnson	John	
	14	Robertson	Robert	
Discontinue	15	Richardson	Richard	

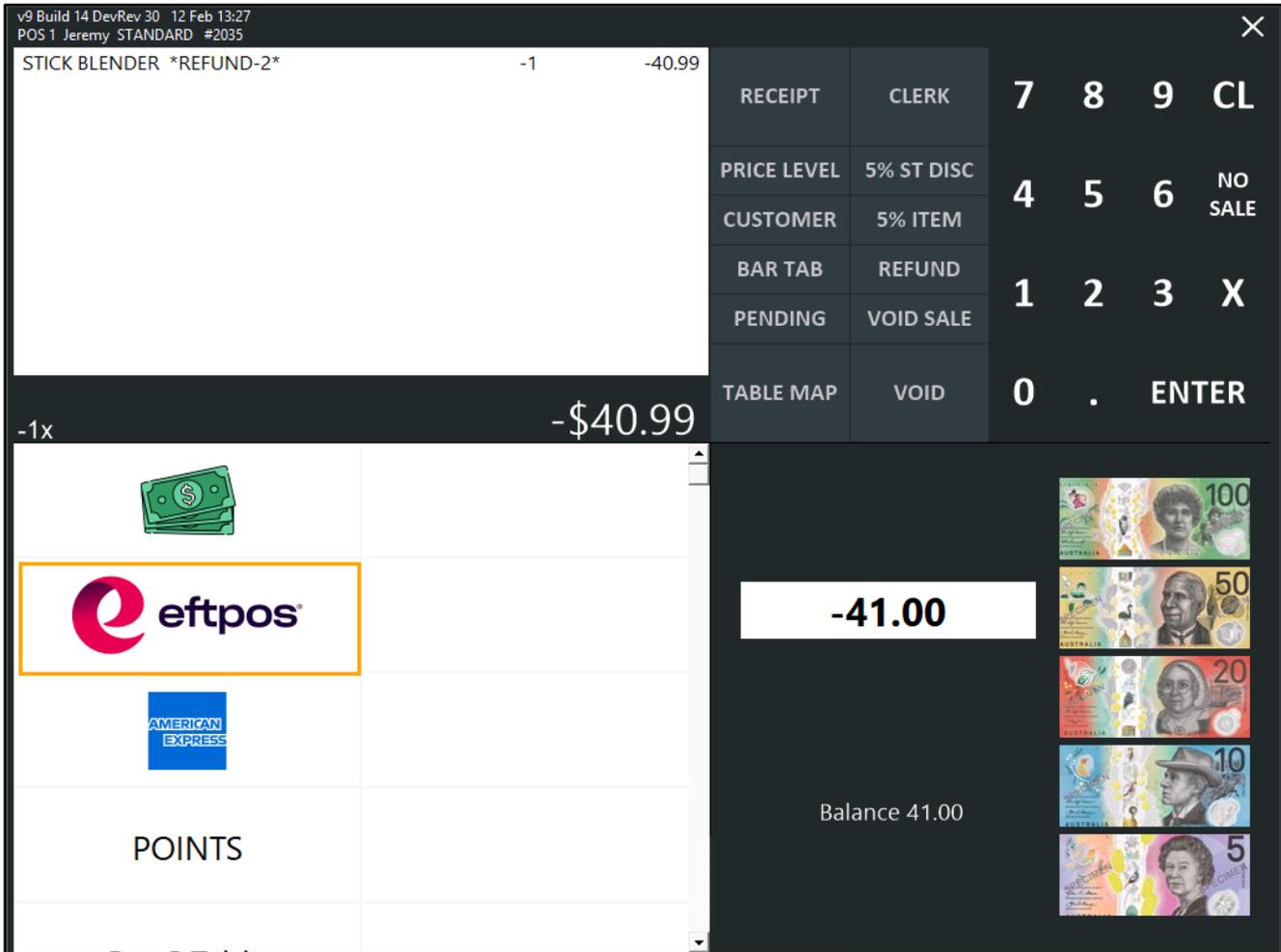
EFTPOS

IP-7711 – Oolio Pay Verifone EFTPOS – Support for Unreferenced Refunds

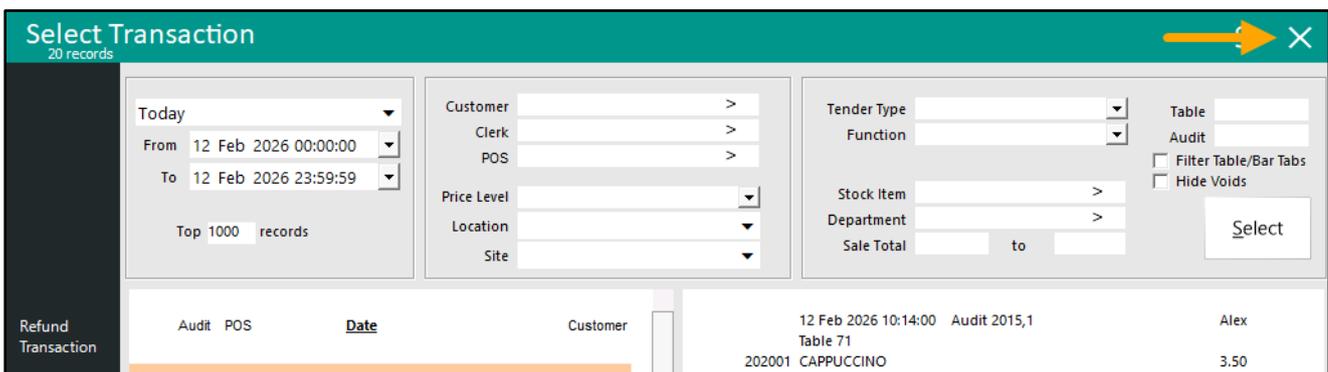
This function introduces the ability to perform unreferenced refunds when using Oolio Pay Verifone EFTPOS integration.

To perform an unreferenced refund, press the Refund button on the POS Screen > add/scan item to refund > Select a Refund Reason.

If refunding multiple items, press the Refund button again and add/scan the next item to refund > Select a Refund Reason. Once all the items being refunded have been added to the sale, press ENTER to go to the Tender Screen > Press the EFTPOS button.



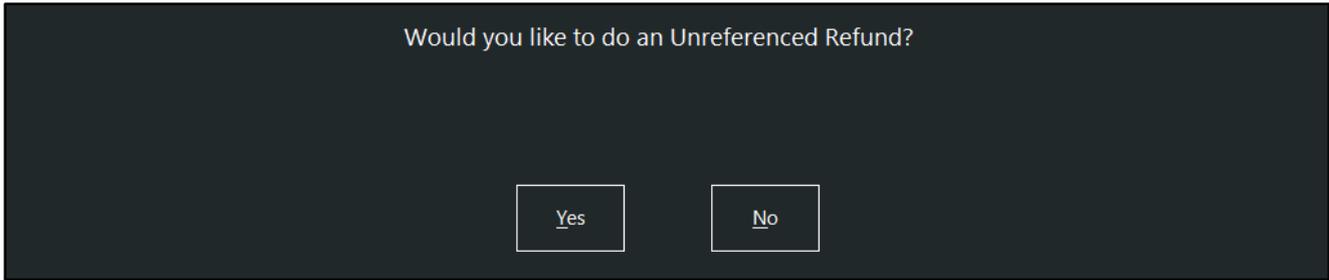
The "Select Transaction" window will open. Close the window by pressing the "X" on the top-right corner.



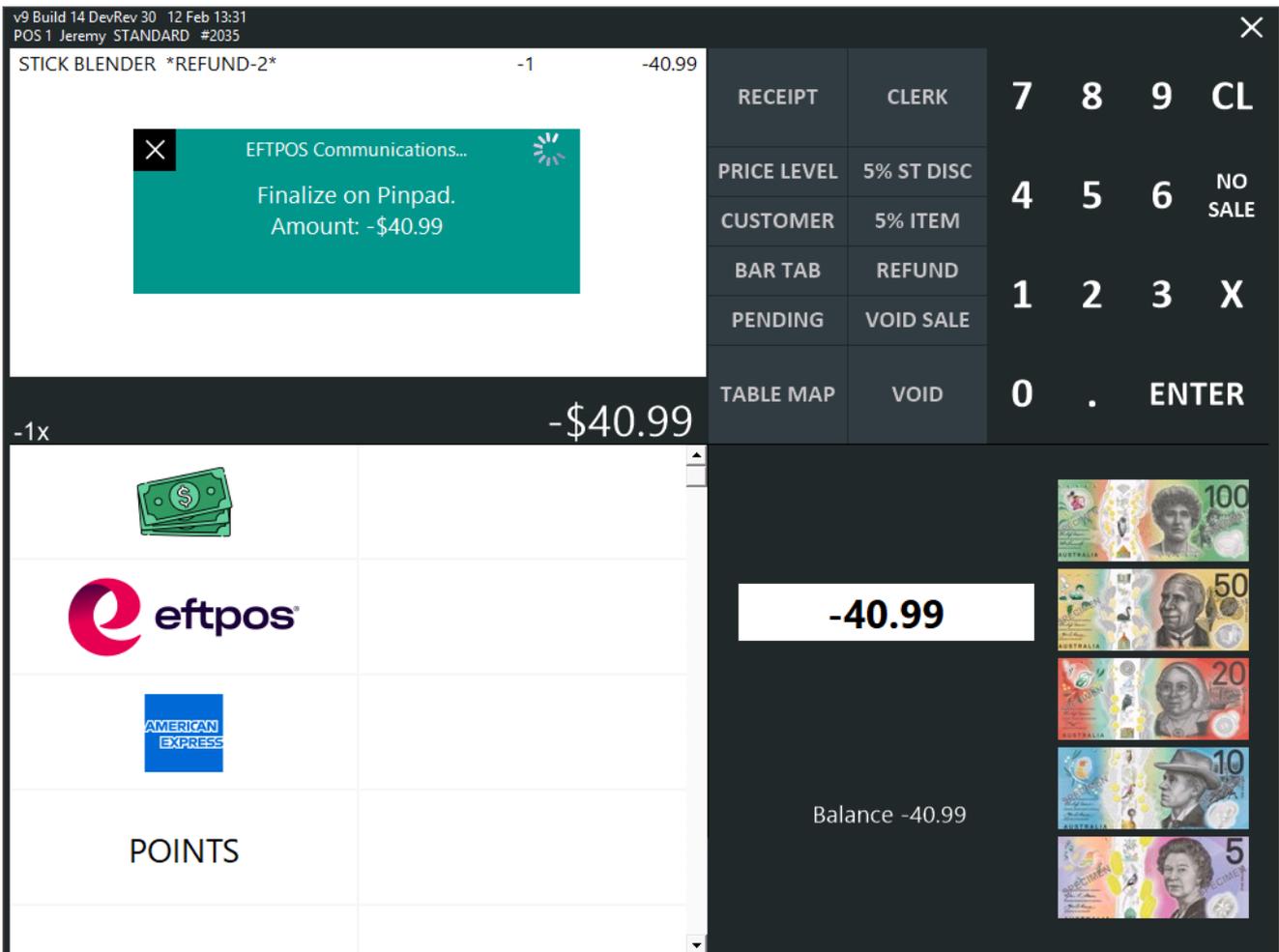
idealpos COLLO Update History

[Return to top](#)

A prompt "Would you like to do an Unreferenced Refund?" will be displayed.
Press "Yes".



The POS Screen will display a prompt like the below:
Follow the prompts on the pinpad to process the refund.



IP-7743 – Oolio Pay Global/AU/NZ/Verifone – Option to not include EFTPOS data on Automatic Receipts

This functionality introduces the ability to disable EFTPOS data from being printed on Automatic Receipts when using the Oolio Pay Global/AU/NZ/Verifone EFTPOS Integration.

Note that this functionality will stop EFTPOS data from being printed on receipts only when the Receipt On/Off function is enabled (receipts turned on).

Also note that receipts will still contain EFTPOS Data when printing a duplicate receipt or manually printing a receipt after the transaction.

To configure this functionality, go to: Back Office > Setup > POS Terminals > Select a POS Terminal > Modify. In the EFTPOS Settings tab, enable the option “Automatic Transaction Receipts Don’t include EFTPOS Data”.

This option is only available for the following EFTPOS Types:

- Oolio Pay Global
- Oolio Pay AUS/NZ Linkly
- Oolio Pay AUS/NZ Verifone

The screenshot shows the 'EFTPOS Settings' window for 'POS 1'. The interface includes a navigation bar with tabs: Main Settings, POS Settings, Receipt Printer, Kitchen Printers, Display / Kiosk, Customer Readers, Other Peripheral, EFTPOS Settings (active), Import / Export, and Miscellaneous Settings. The 'EFTPOS Settings' panel is divided into two sections: 'EFTPOS Settings' and 'EFTPOS'. In the 'EFTPOS Settings' section, the 'Main EFTPOS Type' is set to 'Oolio Pay AUS/NZ Verifone'. There are checkboxes for 'Disable' (unchecked), 'Automatically choose Tender Type based on Card Type' (unchecked), and 'Enable Integrated EFTPOS post-transaction Tips' (unchecked). The 'Overcharging to Tips' dropdown is set to 'TIPS IN'. A yellow arrow points to the checked option 'Automatic Transaction Receipts Don't include EFTPOS Data', which is highlighted with a yellow box. The 'Pinpad Surcharges' dropdown is empty. The 'EFTPOS' section contains a 'Host IP Address' field with the value '192.168.1.150', a 'Connect' button, and a 'Pinpad Home Image' field with a right-pointing arrow.

After configuring the above option, close the Modify POS Terminal window.

idealpos COLLO Update History

[Return to top](#)

Go to: POS Screen > add items to sale > Tender with EFTPOS.
When the receipt is printed, it will exclude the EFTPOS Data.

```

I D E A L P O S

1/212 Curtin Ave West
Eagle Farm QLD 4009
Australia

TAX INVOICE
123-456-789-11

#002075-1 Jeremy 26-Feb-2026 15:02:57

- - - B E V E R A G E - - -
CAPPUCCINO*           $3.50
FLAT WHITE*           $3.50
SHORT BLACK*          $3.00

Eftpos Surcharge*    $0.15
-----
T O T A L              $10.15
-----
GST Amount           $0.92
E F T P O S          $ 1 0 . 1 5

FOOD TOTAL           $0.00
BEVERAGE TOTAL      $10.00
Other Categories TOTAL $0.15

*indicates taxable supply

Powered by Idealpos

Idealpos user
1234567890

```

idealpos COLIC Update History

[Return to top](#)

When the "Automatic Transaction Receipts Don't include EFTPOS Data" option is disabled, the EFTPOS Data will be included on the receipt as shown in the example below.

```

      I D E A L P O S

      1/212 Curtin Ave West
      Eagle Farm QLD 4009
      Australia

      TAX INVOICE
      123-456-789-11

      #002078-1 Jeremy 26-Feb-2026 15:21:51

      - - - - B E V E R A G E - - - -
      CAPPUCINO*           $3.50
      FLAT WHITE*          $3.50
      SHORT BLACK*         $3.00

      Eftpos Surcharge*    $0.15
      -----
      T O T A L             $10.15
      -----
      GST Amount           $0.92

      E F T P O S          $ 1 0 . 1 5

      FOOD TOTAL           $0.00
      BEVERAGE TOTAL      $10.00
      Other Categories TOTAL $0.15

      Verifone NZ

      BLOCK 1
      Rosedale2021
      TID                   HA228701
      MID                   6110006090HA228
      DATE/TIME             26/02/26 15:21
      RRN                   605703000853
      STAN0853              AUTH2710
      CARD...9999           CR(T)
      MASTERCARD
      mc en gbr gbp
      AID                   A000000004101001
      TVR00008001          ATC13
      ARQC                   5200F526C2E446D4
      PURCHASE              NZD.00
      SURCHARGE             NZD15
      TOTAL                 NZD.15
      APPROVED              0000
      CUSTOMER COPY

      *indicates taxable supply

      Powered by Idealpos

      Idealpos user
      1234567890

```

Fuel Console

IP-7544 – Enabler Fuel Interface – Fuel Functions Screen

This functionality introduces a new Fuel Functions Screen which replaces the previous “Fuel Prices” function. If a POS Screen button was previously linked to the “Fuel Prices” Function, it will now link to the “Fuel Functions” function after upgrading to v9 Build 14.

The Fuel Functions screen enables access to the following information and functions:

- Tank – Tank Number.
- Grade – Grade Description.
- Price – Sell Price.
- Capacity – Current Capacity in Litres.
- Level – Current Tank Level.
- Buttons on the left-hand side that provide access to Fuel Delivery, Set Tank Level, Grade Prices, Print Tank Data and Refresh Tank Data. These buttons enable the following functionality:
 - **Fuel Delivery** – Receive a Fuel Delivery into the selected Fuel Tank and enter the amount of Fuel delivered.
 - **Set Tank Level** – Set a new Tank Level for the selected Fuel Tank.
 - **Grade Prices** – Set the Grade Prices (this opens a window to set the Fuel Prices as per the Fuel Prices function that was available).
 - **Print Tank Data** – Prints out a docket with the current Tank Data (list of Tanks, Sell Prices, Capacities and Volumes).
 - **Refresh Tank Data** – This refreshes the data shown on the Fuel Functions screen.

Fuel Functions					
	Tank	Grade	Price	Capacity	Level
Fuel Delivery	1	E10 ULP	2.169	24000	1250
Set Tank Level	2	ULP	2.199	30000	3550
	3	ULP 98	2.299	10000	400
Grade Prices	4	Diesel	1.899	42000	11400
Print Tank Data	5	Diesel	1.899	20000	20000
Refresh Tank Data					

Configuring access to the Fuel Functions screen and using each of the functions is outlined on the following pages.

To configure this functionality:

If a button was already linked to the Fuel Prices function before upgrading to this build, there is no additional configuration required; the Fuel Prices button will open the Fuel Functions function.

If a button wasn't configured, go to:

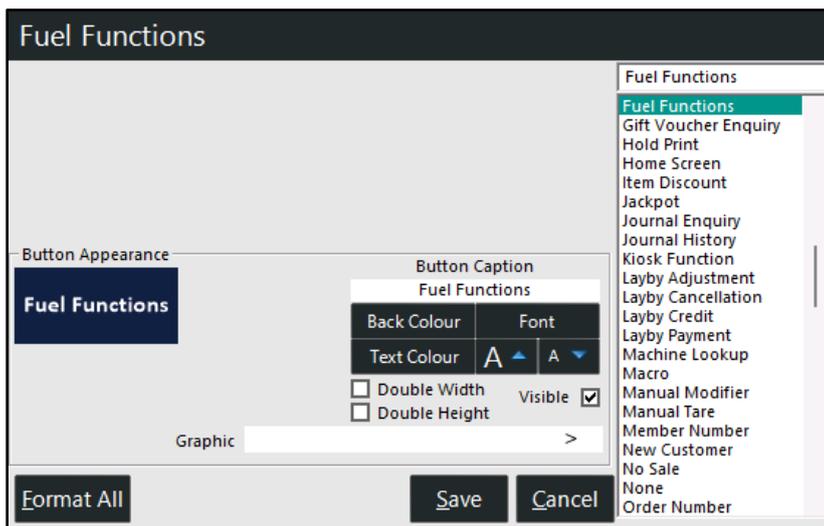
Back Office > Setup > POS Screen > POS Screen Setup.

Select a POS Screen Layout > Buttons.

Select a POS Screen Tab > Select a blank button.

It is strongly recommended that this button only be placed on a POS Screen tab that is restricted to specific Clerks (e.g. an Admin or Manager tab that is restricted to Admin or Manager Clerks) to prevent unauthorised changes to Fuel Levels and Prices.

Link the button to the Fuel Functions Function > Press "Save" to save the button.



Access to POS Screen tabs can be restricted per User or per Clerk.

To restrict for the User, go to: Back Office > Setup > Users > Select a User > Modify > Clerk Permissions > POS > Layers > Disable the checkbox for the POS Screen tab which the button has been placed.

To restrict for the Clerk, go to: Back Office > Setup > Clerks > Select a Clerk from the list > Press the "Permissions" button on the top-left corner of the window.

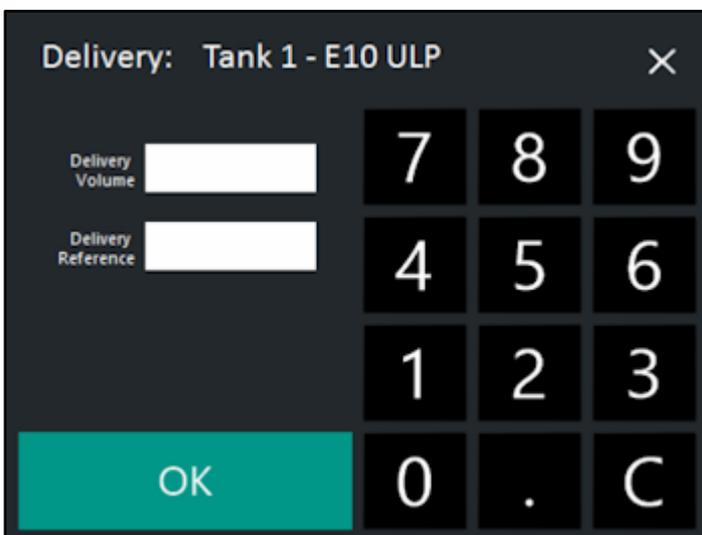
Clerk Permissions > POS > Layers > Disable the checkboxes next to the Layers/Tabs that the Clerk is not permitted to access.

When accessing the Fuel Functions function, the following screen will appear.



	Tank	Grade	Price	Capacity	Level
Fuel Delivery	1	E10 ULP	2.169	24000	1250
Set Tank Level	2	ULP	2.199	30000	3550
	3	ULP 98	2.299	10000	400
Grade Prices	4	Diesel	1.899	42000	11400
Print Tank Data	5	Diesel	1.899	20000	20000
Refresh Tank Data					

To accept a Fuel Delivery, select the Tank, then press the Fuel Delivery button. Enter the Delivery Volume and a Delivery Reference then press OK.



Delivery: Tank 1 - E10 ULP

Delivery Volume:

Delivery Reference:

OK

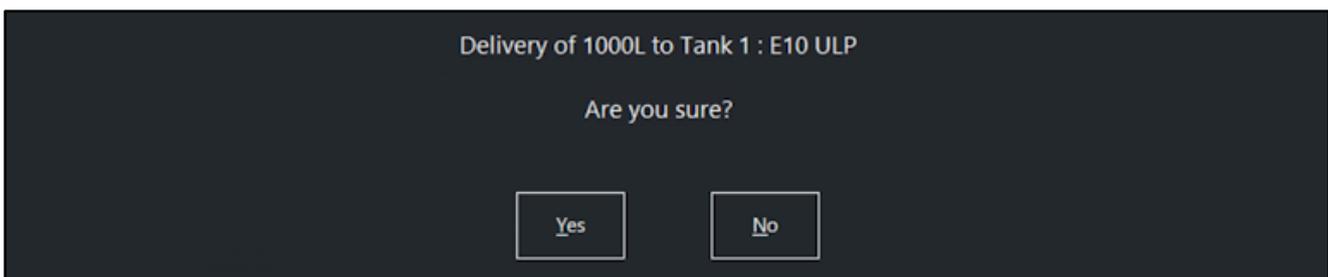
7 8 9

4 5 6

1 2 3

0 . C

Accept the confirmation to proceed:



Delivery of 1000L to Tank 1 : E10 ULP

Are you sure?

Yes No

A docket is printed to the receipt printer.
Note that the docket will be printed regardless of if receipt printing is disabled.

```
*****  
*  
*   F U E L   D E L I V E R Y   *  
*  
*****  
  
CLERK 1 : Jeremy  
POS 200 : POS Terminal 200  
Reference : 20260201  
  
0 4   F e b   2 0 2 6   1 5 : 4 0 : 3 7  
  
Tank 1  
Grade E10 ULP  
  
Previous Volume :    1250.000  
Delivery Volume  :    1000.000  
New Volume      :    2250.000  
  
Signed:  
  
-----
```

idealpos COLLO Update History

[Return to top](#)

The Set Tank Level button can be pressed to update the Tank Level for the selected Tank.
Select a Fuel Tank > Press "Set Tank Level".
Enter the Measured Volume and a Reference > Press "OK"

Set Level: Tank 1 - E10 ULP

Measured Volume

Reference

7 8 9

4 5 6

1 2 3

OK 0 . C

Accept the confirmation to proceed:

Set Level of 2300L to Tank 1 : E10 ULP

Are you sure?

Yes No

A docket is printed to the receipt printer.

As noted previously, the docket will be printed regardless of if receipt printing is disabled.

```
*****
*
*   F U E L   S E T   L E V E L   *
*
*****

      CLERK 1 : Jeremy
      POS 200 : POS Terminal 200
      Reference : 20260202

0 4   F e b   2 0 2 6   1 5 : 5 0 : 0 1

      Tank 1
      Grade E10 ULP

Previous Volume :    2250.000
Measured Volume :    2300.000
      Variance :       50.000

Signed:

-----
```

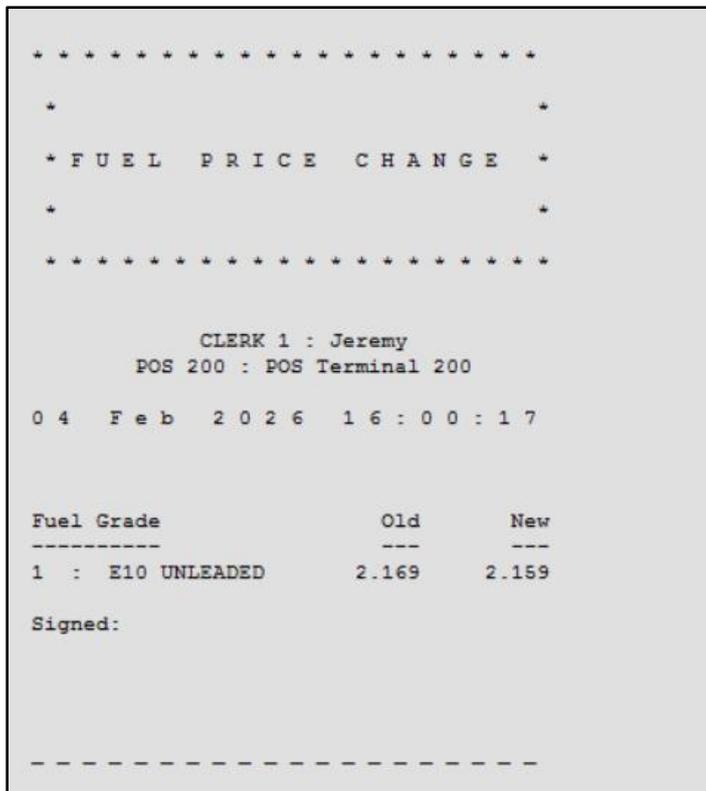
idealpos COLIC Update History

[Return to top](#)

Grade Prices can be changed by pressing the Grade Prices button.

Grade	Price	Type
1	1.639	UNLEADED
2	1.869	PREMIUM UNLEADED
3	1.899	DIESEL
4	1.600	CNG
5	1.049	LPG

When Grade Prices are updated, a docket will be printed to the receipt printer. As noted previously, the docket will be printed regardless of if receipt printing is disabled. The docket will contain a list of Fuel Grades that have had their Prices changed, including the Old Price and New Price.



Pressing the Print Tank Data button will produce a docket containing the current Tank Data.

```
*****
*
*   F U E L   T A N K   D A T A   *
*
*****

      CLERK 1 : Jeremy
      POS 200 : POS Terminal 200

0 4   F e b   2 0 2 6   1 5 : 5 1 : 5 1

Tank      Price  Capacity  Volume
----      -
1 E10 ULP  2.169    24000    2300
2 ULP     2.199    30000    3550
3 ULP 98  2.299    10000     400
4 Diesel  1.899    42000   11400
5 Diesel  1.899    20000    20000
```

Functions

IP-7710 – Order Number Function – Option to have Keyboard Entry

This functionality introduces the ability to trigger an on-screen keyboard to appear when pressing the Order Number button on the POS Screen. The on-screen keyboard can be used to enter alpha-numeric Order Numbers.

Note that the Order Number Keyboard functionality is only supported when the “Order Numbers” option is disabled in the POSServer.

To configure and use this functionality, go to:

Back Office > Setup > Global Options > Miscellaneous > Ensure that the Order Numbers option is disabled.

If the Order Numbers option is enabled, note that disabling it will stop POSServer from centrally issuing Order Numbers to all POS Terminals at the venue.

The screenshot shows the 'Global Options' window for 'Site 1 (Site 1)'. The 'Miscellaneous' tab is active. The 'POSServer' section is expanded, showing the 'Order Numbers' checkbox highlighted with a yellow box and an orange arrow pointing to it from the left. Other options in this section include 'Centralize Points', 'Floating Clerks', 'Centralize Accounts', and 'Unicode'. The 'Transfer' and 'Clear Data' sections are also visible. The 'Promotional Tickets' section includes 'Ticket Printer' and 'Show Graphic Logo'. The 'Magstripe Settings' section has radio buttons for 'Track 1', 'Track 2', and 'Track 3' for both 'Clerks' and 'Customers'. The 'Financial' section includes 'Start of Financial Year', 'Business Tax Descriptor', 'Company Number Descriptor', 'Aging Type', and 'GST Accounting'. The 'Dashboard' section has 'Automatically Refresh' checked and a 'Delete Dashboard Data and Rebuild' button. The 'Packet Processing' section shows 'Number of Packet Commands to process at End of Sale' set to 500 and 'Packet Processing Idle Time' set to 6. The 'Ideal Handheld' section includes 'Enable v7 Features' checked, 'Menus in Code Order', 'Use Price Level from Menu', and a 'Tab Layer Colours' list with 18 tabs. The 'Notes' section is empty.

idealpos COLLO Update History

[Return to top](#)

Therefore, it is recommended that each POS Terminal is configured to issue a unique range of Order Numbers to prevent the same Order Number from being issued by two different POS Terminals.

Go to: Back Office > Setup > POS Terminals > Select a POS Terminal > Modify > Miscellaneous Settings.
In the "Show Order" and "To" fields, enter an Order Number range that is unique to the POS Terminal.
E.g. For POS Terminal 1, a range of 100 – 199.

The screenshot shows the 'Miscellaneous Settings' window for 'POS 1'. The 'General' section contains various configuration options. The 'Show Order' field is highlighted with an orange box and an arrow, showing the range '100 to 199'. The 'Gaming Override Options' section includes a table with columns for 'Enable', 'Description', 'Code', 'Points Per \$', 'Point Value', and 'Customer Type Discounts'. The 'Dashboard' section has a 'Sales in Locations' dropdown and a 'Shortcut Bar Small Font' checkbox. The 'Handhelds' section includes dropdowns for 'Force Food to Print', 'Force Drinks to Print', and 'Force Bills Printer', along with text fields for 'Item Graphic Location' and 'Handheld Background'.

Close the Modify POS Terminal window, then configure the Show Order fields for the remaining POS Terminals.
E.g. Back Office > Setup > POS Terminals > Select POS Terminal 2 > Modify > Miscellaneous Settings > Show Order/to: Enter a range of 200 to 299.
Repeat for the remaining POS Terminals as required.

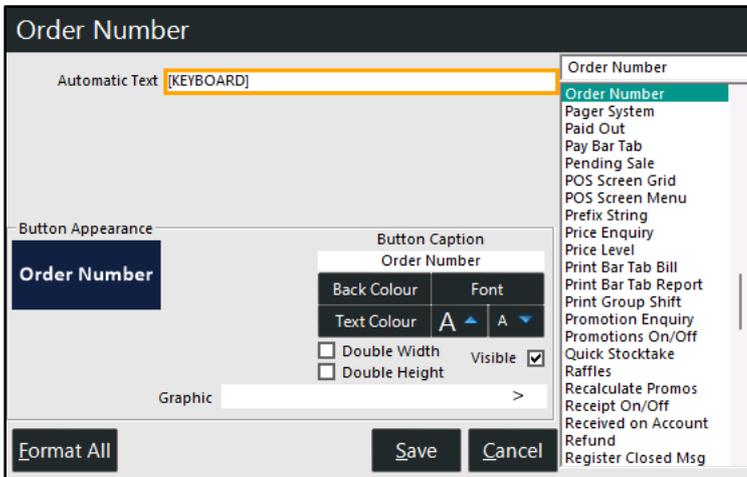
Go to: Back Office > Setup > POS Screen > POS Screen Setup > Select a POS Screen Layout > Buttons.
Select a POS Screen Tab > Locate and click on a blank button > Configure the button as follows:

Function: Order Number

Automatic Text: [KEYBOARD]

Button Appearance/Caption/Colours: Configure as desired.

Press "Save" once configured.



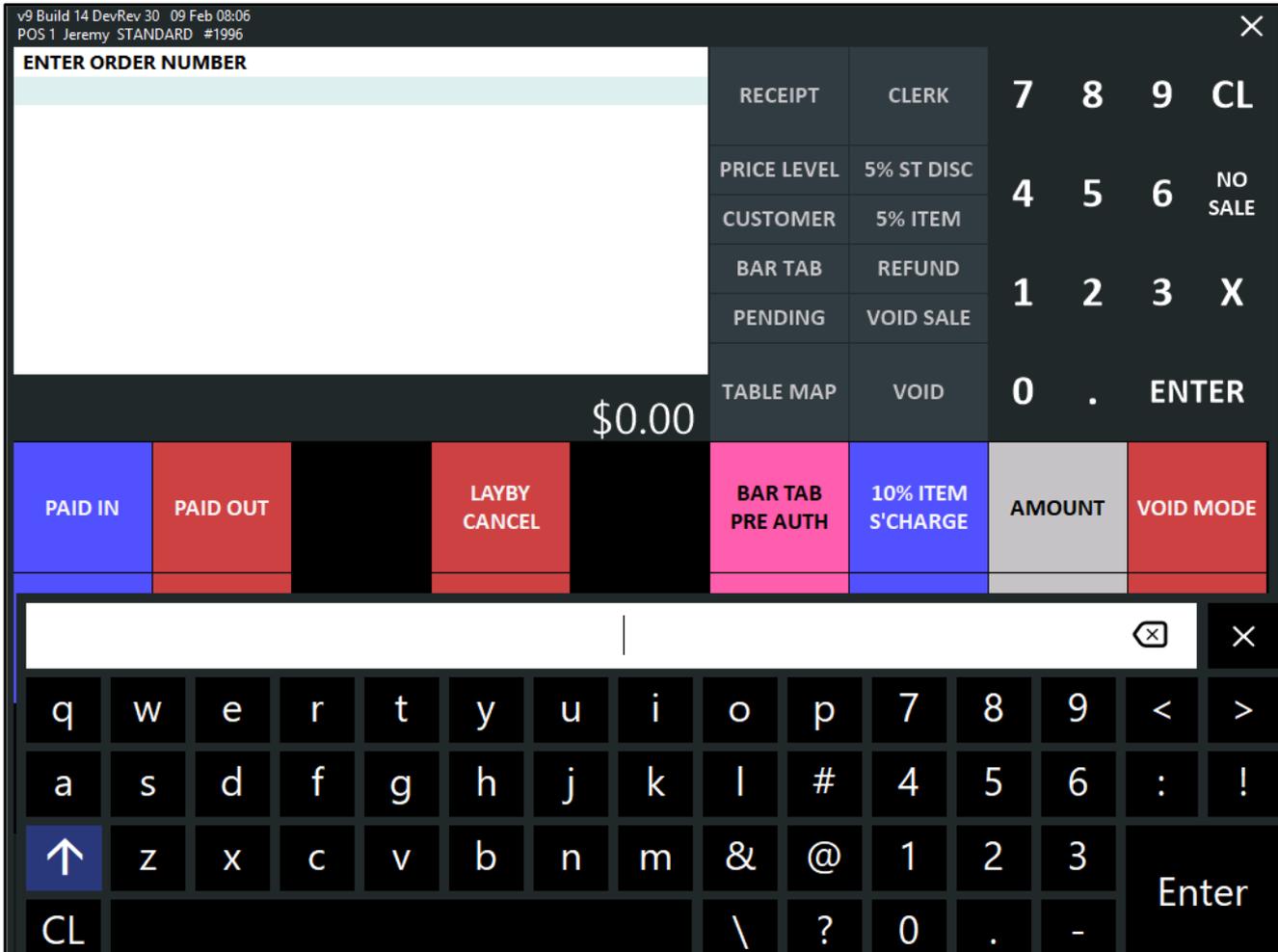
Close the modify POS Screen Layout windows.

idealpos COLLO Update History

[Return to top](#)

Go to:

POS Screen > Press the POS Screen Tab which the above button was created on > Press the Order Number button. The POS Screen will display the ENTER ORDER NUMBER in the sale window area and the on-screen keyboard will be displayed at the bottom of the screen which enables the entry of an alpha-numeric Order Number.



idealpos COLLO Update History

[Return to top](#)

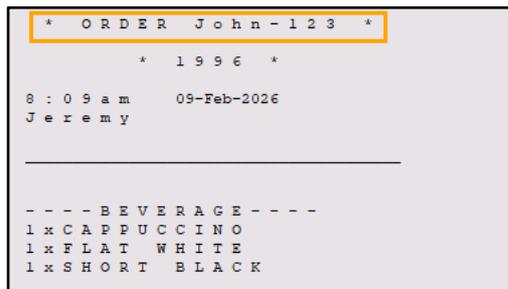
After entering an alpha-numeric Order Number, press the Enter button on the bottom-right corner of the on-screen keyboard.

The Order Number will be displayed at the top of the POS Screen.



Add items to the sale > Press ENTER > Tender the sale.

The Order Number will be printed on the Customer's Receipt as well as the Kitchen Docket Printers.



LMG Integration

IP-7577 – Zen Gift Voucher Integration

This functionality adds the ability to sell and redeem LMG Zen Gift Vouchers with the LMG Zen Loyalty Interface.

Functions supported on Zen Gift Vouchers are:

- Gift Voucher Enquiry
- Gift Voucher Redemption
- Gift Voucher Sale
- Gift Voucher Recharge

Before configuring this integration, note that the LMG Zen Loyalty Interface needs to have been already configured. If setting up a new site that hasn't been configured for the LMG Zen Loyalty Interface, refer to the LMG Zen Loyalty Interface topic in the User Guide for more information about setting up this interface. This includes the requirement of licensing Idealpos for LMG Basic.

To configure this functionality on an existing site that has already been configured for the LMG Zen Loyalty Interface, go to: Back Office > Setup > Tender Types > Select the next available/unused Tender > Modify.

Unused Tender Types are labelled as "Tender #", where # refers to the number of the Tender.

This Tender Type will be used for the redemption of Zen Gift Vouchers.

- **Description:** ONLINE VOUCHERS
- **Show in Banking:** Enabled
- **Open Cash Drawer:** Configure as required.

Toggle/configure any other options as required, then press the "Save" button on the top-left corner.

The screenshot shows the 'Tender Types' configuration interface. The title bar reads 'Tender Types' with a sub-header 'Modify ONLINE VOUCHERS' and a close button. A 'Save' button is located on the left sidebar. The main configuration area includes:

- Function:** TENDER 13
- Description:** ONLINE VOUCHERS
- # of Receipts:** 1, **# of Refund Receipts:** 1
- Exchange Rate:** 0
- Lower Limit:** 0.00
- Upper Limit:** 99999.99
- Scan Code:** (empty field)
- Scan Code Amount:** 0.00
- Surcharge:** 0.00 (with % and \$ icons)
- Waive Surcharge Threshold:** 0.00
- Override Receipt Footer:** (empty text area)
- User-Defined Text:** (empty field)
- Tender Graphic:** (empty field with a right arrow)

On the right side, there is a list of checkboxes for additional 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
- Enable Customer Tipping
- Give Change in Local Currency

At the bottom left of the screen, the version information is displayed: 'POS 1 v9 Build 14 Dev 56'.

Go to: Back Office > Setup > Function Descriptors > Select the next unused Received Account Function > Modify. Unused Received Account functions are labelled as RA #, where # refers to the number of the Received Account Function.

This Received Account Function will be used for the sale and recharge of Zen Gift Vouchers.

- **Description:** ZEN Gift Voucher
- **GIFT VOUCHER:** Enable checkbox.

Press the "Save" button on the top-left corner after the Received Account function has been configured.

The screenshot shows a software window titled "Function Descriptors" with a subtitle "Modify ZEN Gift Voucher". On the left side, there is a dark vertical bar with a "Save" button. The main area contains a form with the following fields:

- Function: RECEIVED ACCOUNT 3
- Description: ZEN Gift Voucher
- GIFT VOUCHER
- Credit Note
- Allow % Tender Surcharges

At the bottom left of the window, the text "POS 1 v9 Build 14 Dev 56" is visible.

Go to: Back Office > Setup > Global Options > Interfaces > LMG.

- **Upload Scan Data:** Enable checkbox [enabling this option is a requirement for Zen Gift Vouchers]
- **Zen Gift Vouchers:** Enable checkbox
- **Gift Voucher Redeem:** Select "ONLINE VOUCHERS" from the dropdown box.
- **All other options such as LMG Site Number, Site Serial, API Key and API Secret should already be configured. If this is a new installation of the LMZ Zen Loyalty Interface, refer to the Idealpos User Guide for complete information about configuring the LMG Zen Loyalty Interface.**

NOTE – It is a requirement that Upload Scan Data is enabled for Zen Gift Vouchers. If Upload Scan Data is unchecked, Gift Vouchers will not work correctly!

Global Options
Site 1 (Site 1)

General Miscellaneous Purchases Restaurant Customers Sales Reservations Accounting Credit Notes/Gift Vouchers **Interfaces** Printing Gaming Other Options

Interfaces

- Allotrac
- BevCon
- Bookings
- Customers
- Doshii
- eCommerce
- ePay
- Fuel Console
- Gunnebo
- LMG** ✓
- Metcash
- Pager
- Pay@Table
- PLBPOS
- Reservations
- Rooms
- Slyp
- Tax Monitoring
- Web Reporting
- VDMS Vending
- Vii Gift Cards

LMG Interface

LMG Site Number: 733
Site Serial: 5mf96zMmcCoV9KWfwp8Y
API Key: *****
API Secret: *****
Reset Credentials

Default Customer Type: MEMBERS
Loyalty Card Prefix: 920

Upload Scan Data
 Zen Gift Vouchers
Gift Voucher Redeem: ONLINE VOUCHERS

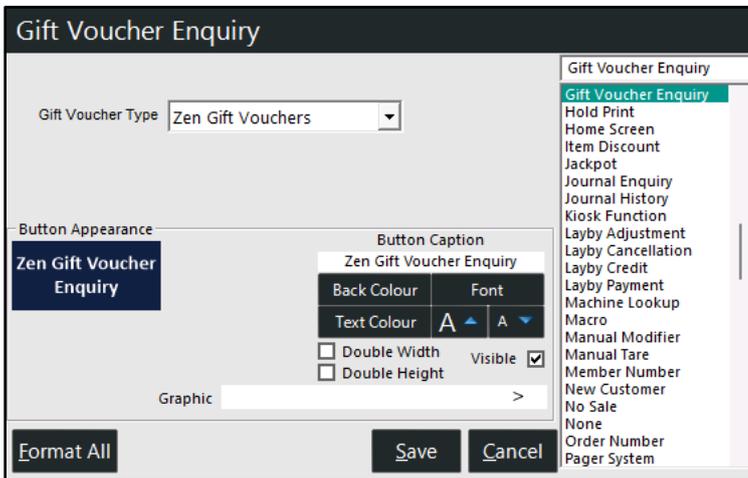
CPI Pricing Import

State: _____
Banner: _____
Pricing Zone: _____

POS Screen buttons will need to be created for the Gift Voucher Enquiry and Gift Voucher Sale/Recharge.
 Go to: Back Office > Setup > POS Screen > POS Screen Setup > Select a POS Screen Layout > Buttons.
 Select a POS Screen tab to place the buttons.

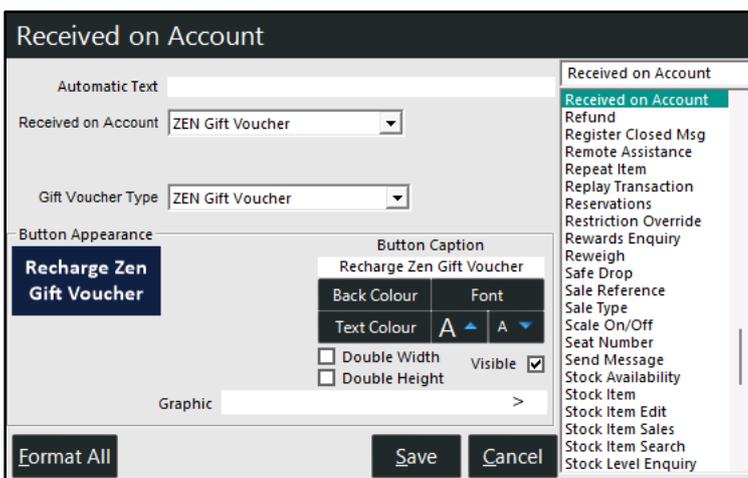
Locate a blank/unused button and configure as follows; press Save after configuring:

- **Function:** Gift Voucher Enquiry
- **Gift Voucher Type:** Zen Gift Vouchers
- **Button Caption:** Zen Gift Voucher Enquiry
- **Button Appearance:** Customise as required



Locate a blank/unused button and configure as follows; press Save after configuring:

- **Function:** Received on Account
- **Received on Account:** ZEN Gift Voucher
- **Gift Voucher Type:** ZEN Gift Voucher
- **Button Caption:** Recharge Zen Gift Voucher
- **Button Appearance:** Customise as required



The ONLINE VOUCHERS Tender Type will need be enabled on the POS Tender Screen.
 Go to: Back Office > Setup > Yes/No Options > Tenders.
 Uncheck ALL next to the "Inhibit ONLINE VOUCHERS" Tender Type.

Yes/No Options		Search	>	Clear
Site 1				
Clerks	42 Inhibit ACCOUNT			
	43 Inhibit ONLINE VOUCHERS			
Confirmation	44 Inhibit TENDER 14			<input checked="" type="checkbox"/>

To finalise changes, it is recommended to perform a Close Suite/Open Suite.

Each of the following functions of the Zen Gift Vouchers are outlined below:

- Gift Voucher Enquiry
- Gift Voucher Sale
- Gift Voucher Redemption
- Gift Voucher Recharge

Gift Voucher Enquiry

To perform a Gift Voucher Enquiry, press the Zen Gift Voucher Enquiry button.

The Zen Gift Voucher Enquiry window will appear.

Enter or Scan the Zen Gift Voucher > Press "Get Balance".

The Gift Voucher Balance will be displayed as well as any other details about the Gift Voucher (Purchased Date, Expiry Date, Status).

Zen Gift Voucher Enquiry

Enter or Scan Gift Card

XXXXXXXXXXXX

>

Gift Voucher Balance \$2.01

Purchased: 18 Feb 2026 14:13:24
 Expires: 18-Feb-2029
 Status: Part Redeemed

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

Gift Voucher Sale

To perform a Zen Gift Voucher Sale, press the Recharge Zen Gift Voucher Button.

Within the Zen Gift Voucher Sale/Recharge window, enter the following details:

- **Scan or Enter Voucher Code:** Scan or Enter an unused Voucher Code. The “Enquiry” button can be pressed. A “Not Found” prompt will indicate that the Gift Voucher has not been used previously. If the card has been previously issued, the card’s details will be displayed on the top-left corner of the window.
- **Amount:** - Enter the amount to load onto the Gift Voucher.
- **Recipient Name:** Enter the name of the recipient.
- **Email Address:** Enter the Recipient’s Email Address. Note that this is only for logging purposes and will not send an email to the recipient.
- **GIFT VOUCHER Type:** ZEN Gift Voucher (Read-Only dropdown box)

Press “OK” once the above details have been entered.

The screenshot shows a window titled "Zen Gift Voucher Sale/Recharge" with a close button (X) in the top right corner. The window contains the following fields and controls:

- Scan or Enter Voucher Code:** A text input field containing a blurred voucher code and an "Enquiry" button to its right.
- Amount:** A text input field containing "100.00".
- Recipient Name:** A text input field containing "John Smith".
- Email Address:** A text input field containing "johnsmith@email.com".
- GIFT VOUCHER Type:** A dropdown menu with "ZEN Gift Voucher" selected.

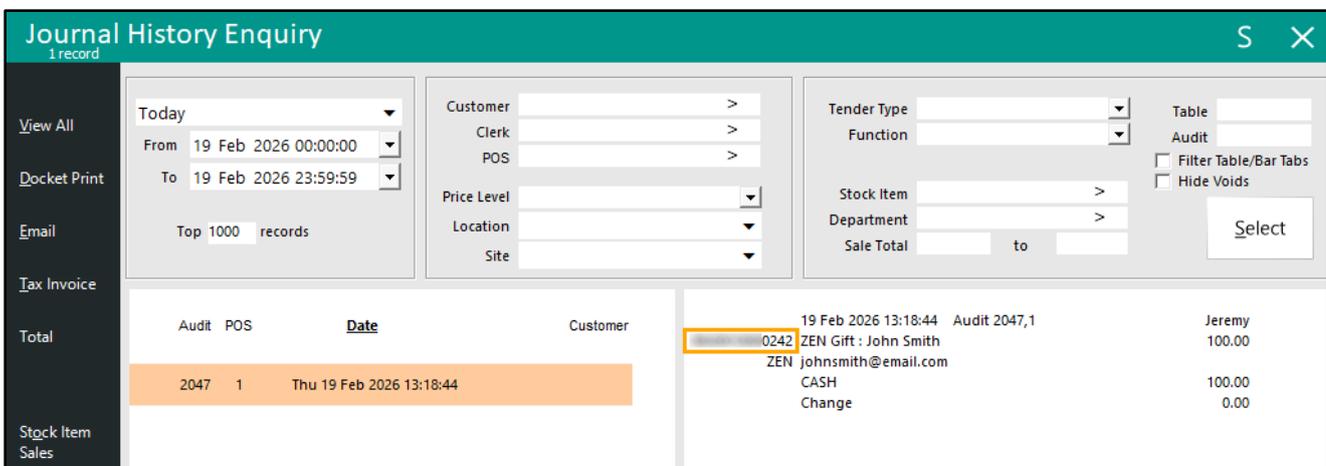
At the bottom of the window, a keyboard overlay is visible with the following keys: q, w, e, r, t, y, u, i, o, p, 7, 8, 9, /, @; a, s, d, f, g, h, j, k, l, #, 4, 5, 6, :, !; ↑, z, x, c, v, b, n, m, &, .com, 1, 2, 3; CL, backspace, \, ?, 0, ., -, OK.

The Gift Voucher is added to the sale window

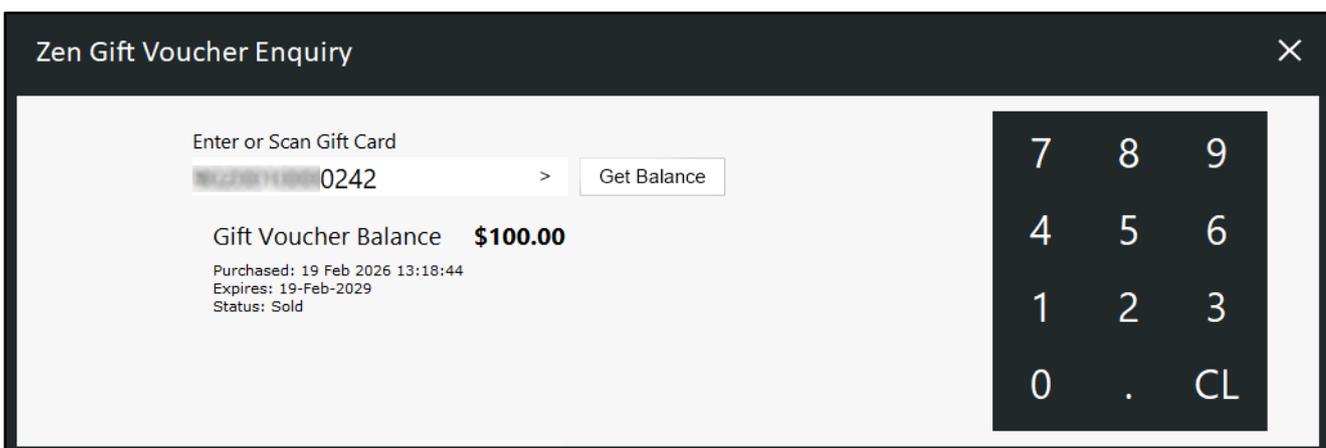


Press the ENTER button to go to the Tender screen and finalise the sale.

The Gift Voucher's Card Number will appear in the Idealpos Journal History Enquiry (Back Office > Enquiry > Journal History).



After the Gift Voucher is sold, the Gift Voucher Enquiry function will show that it has been loaded with the balance.



Gift Voucher Redemption

To perform a Gift Voucher Redemption, add the items to the sale, then press the ENTER button to go to the Tender screen.

From the Tender screen, press the ONLINE VOUCHERS button.

v9 Build 14 DevRev 56 19 Feb 13:31
 POS 1 Jeremy STANDARD #2048

<table style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 80%;">HAHN LIGHT SCH</td><td style="width: 10%; text-align: center;">1</td><td style="width: 10%; text-align: right;">5.50</td></tr> <tr><td>CARLTON MID SCH</td><td style="text-align: center;">1</td><td style="text-align: right;">6.00</td></tr> <tr><td>XXXX GOLD SCH</td><td style="text-align: center;">1</td><td style="text-align: right;">6.00</td></tr> <tr><td>CARLTON DRAUGHT SCH</td><td style="text-align: center;">1</td><td style="text-align: right;">7.00</td></tr> <tr><td>XXXX BITTER SCH</td><td style="text-align: center;">1</td><td style="text-align: right;">7.00</td></tr> <tr><td>TOOHEYS NEW SCH</td><td style="text-align: center;">1</td><td style="text-align: right;">7.00</td></tr> <tr><td>VB SCH</td><td style="text-align: center;">1</td><td style="text-align: right;">7.00</td></tr> <tr><td>HAHN LIGHT SCH</td><td style="text-align: center;">1</td><td style="text-align: right;">5.50</td></tr> </table>	HAHN LIGHT SCH	1	5.50	CARLTON MID SCH	1	6.00	XXXX GOLD SCH	1	6.00	CARLTON DRAUGHT SCH	1	7.00	XXXX BITTER SCH	1	7.00	TOOHEYS NEW SCH	1	7.00	VB SCH	1	7.00	HAHN LIGHT SCH	1	5.50	RECEIPT CLERK PRICE LEVEL 5% ST DISC CUSTOMER 5% ITEM BAR TAB REFUND PENDING VOID SALE TABLE MAP VOID	<table style="width: 100%; text-align: center; border-collapse: collapse;"> <tr><td style="width: 12.5%;">7</td><td style="width: 12.5%;">8</td><td style="width: 12.5%;">9</td><td style="width: 12.5%;">CL</td></tr> <tr><td>4</td><td>5</td><td>6</td><td>NO SALE</td></tr> <tr><td>1</td><td>2</td><td>3</td><td>X</td></tr> <tr><td>0</td><td>.</td><td colspan="2">ENTER</td></tr> </table>	7	8	9	CL	4	5	6	NO SALE	1	2	3	X	0	.	ENTER	
HAHN LIGHT SCH	1	5.50																																								
CARLTON MID SCH	1	6.00																																								
XXXX GOLD SCH	1	6.00																																								
CARLTON DRAUGHT SCH	1	7.00																																								
XXXX BITTER SCH	1	7.00																																								
TOOHEYS NEW SCH	1	7.00																																								
VB SCH	1	7.00																																								
HAHN LIGHT SCH	1	5.50																																								
7	8	9	CL																																							
4	5	6	NO SALE																																							
1	2	3	X																																							
0	.	ENTER																																								

8x
\$51.00

<table style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 50%; padding: 5px;">CASH</td><td style="width: 50%;"></td></tr> <tr><td style="padding: 5px;">EFTPOS</td><td></td></tr> <tr><td style="padding: 5px;">POINTS</td><td></td></tr> <tr><td style="padding: 5px;">LAYBY</td><td></td></tr> <tr><td style="padding: 5px;">GV REDEEM</td><td></td></tr> <tr><td style="padding: 5px;">CREDIT NOTE</td><td></td></tr> <tr><td style="padding: 5px;">CHEQUE</td><td></td></tr> <tr><td style="padding: 5px;">ACCOUNT</td><td></td></tr> <tr style="border: 2px solid orange;"><td style="padding: 5px; font-weight: bold;">ONLINE VOUCHERS</td><td></td></tr> </table>	CASH		EFTPOS		POINTS		LAYBY		GV REDEEM		CREDIT NOTE		CHEQUE		ACCOUNT		ONLINE VOUCHERS		<div style="text-align: center; font-size: 1.5em; font-weight: bold; margin-bottom: 20px;">51.00</div> <div style="text-align: center; font-size: 0.9em;">Balance 51.00</div> <div style="display: flex; align-items: center; justify-content: center;"> </div>
CASH																			
EFTPOS																			
POINTS																			
LAYBY																			
GV REDEEM																			
CREDIT NOTE																			
CHEQUE																			
ACCOUNT																			
ONLINE VOUCHERS																			

The Zen Gift Voucher Redemption window will open.

Enter or Scan Gift Card.

After Entering/Scanning the Card, the "Get Balance" button can be pressed if required to show the available balance on-screen.

The Amount to Redeem field will show the amount being redeemed.

If required, the amount can be adjusted using the on-screen numeric keypad.

Press the "Redeem" button.

Zen Gift Voucher Redemption

Enter or Scan Gift Card

0242 > Get Balance

Amount to Tender 51.00

Gift Voucher Balance \$100.00

Purchased: 19 Feb 2026 13:18:44
Expires: 19-Feb-2029
Status: Sold

Amount to Redeem: 51.00 Redeem

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

After performing a successful redemption, a prompt will appear showing the Available Balance remaining on the Gift Voucher.

Redemption Successful!

Available Balance: \$49.00

OK

Other messages will be displayed depending on the status of the Gift Voucher.

Not Found – The entered Gift Voucher Number was not found.

Request Rejected: Requested reserve exceeds current value – This prompt will appear if the value being redeemed exceeds the balance available on the Gift Voucher.

Gift Voucher Recharge

To perform a Gift Voucher Recharge, select the Recharge Zen Gift Voucher button on the POS Screen. Within the Zen Gift Voucher Sale/Recharge window, Scan or Enter Voucher Code > Press Enquiry. Existing Voucher will appear on the top-left corner and will show the Balance, Expiry and Purchased dates. An existing Gift Voucher can be recharged, even if the amount of the Voucher has not reached \$0.00. When a Gift Voucher is recharged, the Expiry Date on the voucher will be updated. Enter a Recharge Amount into the Recharge Amount field, then press "OK".

This will add the entered amount to the existing balance of the Gift Voucher. The below example shows a Gift Voucher with a Balance of \$49.00 and a Recharge Amount of \$51.00. After the sale is tendered, the Gift Voucher Balance will increase to \$100.00.

Zen Gift Voucher Sale/Recharge
✕

Existing Voucher

Balance: **\$49.00**

Expires: 19-Feb-2029

Purchased: 19 Feb 2026 13:18:44

Scan or Enter Voucher Code

Recharge Amount

Recipient Name

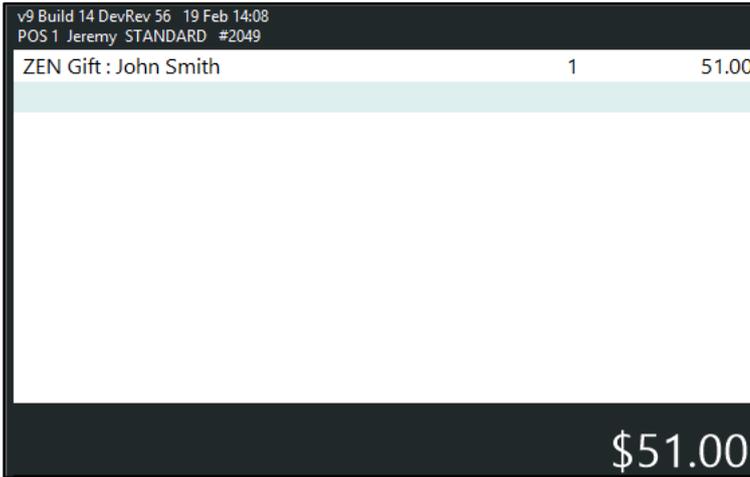
Email Address

GIFT VOUCHER Type

▼

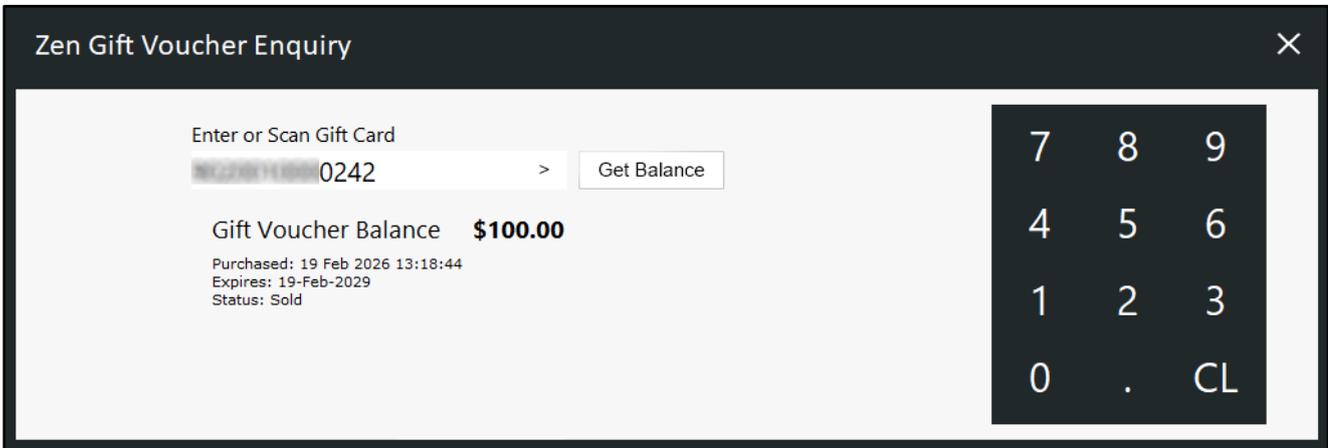
q	w	e	r	t	y	u	i	o	p	7	8	9	/	@
a	s	d	f	g	h	j	k	l	#	4	5	6	:	!
↑	z	x	c	v	b	n	m	&	.com	1	2	3	OK	
CL						backspace	\	?	0	.	-			

The Gift Voucher will appear in the sale window.



Press the ENTER button to go to the Tender screen and finalise the sale.

When enquiring the Recharged Gift Voucher with the Gift Voucher Enquiry function, the new balance will be displayed.



Promotions

IP-7702 – Promotions – Support to trigger based on Customer Postcodes

This functionality introduces the ability to trigger a Promotion based on the Postcode in the Customer’s Address Details.

This will enable Promotions to be restricted to Customers that reside in specific areas based on their Postcode. Postcodes can be specified as a range (e.g. 4000-4100), comma separated list (e.g. 4000,4001,4002) or a combination of both (e.g. 4000,4005-4050,4061).

When a Promotion is configured for this functionality, any Customer that has a Postcode that falls within the entered range will be eligible to receive the Promotion when they purchase the required Stock Items specified in the Promotion.

To configure and use this functionality, go to:

Back Office > File > Customers > Customers > Select a Customer > Modify.

Ensure that a Postcode has been entered within the Address Details field.

Note that the Postcode in the Delivery Address is not used for this functionality.

Save the change.

Repeat the process to update the Address Details/Postcodes of any other Customers as required.

Close the Customer windows.
 Go to: Back Office > File > Sales > Promotions > Promotions.
 Add or Modify a Promotion.
 Select the "Advanced" tab.

In the Advanced Tab of the Promotion, the User-Defined Text Field is used to specify which Postcodes the Promotion will apply to.

Postcodes can be entered as a comma separated list, range, or a combination of both.

See examples below:

Postcodes entered as a comma separated list.

[POSTCODES=4000,4001,4002]

Postcodes entered as a range.

[POSTCODES=4000-4100]

Postcodes entered using a combination of a comma separated list and range.

[POSTCODES=4000,4001,4005-4010,4101]

Enter the required Postcodes into the User-Defined Text Field.

Close the Modify/Add Promotion window and when prompted to "Save Changes?", press Yes.

The above process can be repeated to setup any other Promotions that are required to trigger based on User-Defined Text Fields.

Close the Promotions window, go to: POS Screen.

Add a Customer to the sale that has a Postcode that falls within the same range as set in the Promotion.

Add Stock Items from the Promotion to the sale.

The Promotion is triggered.

v9 Build 14 DevRev 30 11 Feb 15:47 POS 1 Jeremy STANDARD #2015		
Joe Blow - 0 Points		
CHICKEN BURGER	1	13.00
-5.50 BRIS CHICKEN BURGER SPECIAL		
WHITE		
CHICKEN BURGER	1	13.00
-5.50 BRIS CHICKEN BURGER SPECIAL		
WHITE		
BRIS CHICKEN BURGER SPECIAL	1	-11.00
0 Points		Discounts -11.00
2x	\$15.00	

When a Customer that does not have a Postcode that matches the Promotion is added to the sale, the Promotion is not triggered.

The Promotion will also not trigger if a Customer is not added to the sale.

v9 Build 14 DevRev 30 11 Feb 15:49 POS 1 Jeremy STANDARD #2015		
Joanne Blow - 0 Points		
CHICKEN BURGER	1	13.00
WHITE		
CHICKEN BURGER	1	13.00
WHITE		
0 Points		
2x	\$26.00	

IP-7703 – Promotions – Support to trigger based on Customer Gender

This functionality introduces the ability to trigger a Promotion based on the Customer’s Gender. When a Promotion is restricted to a specific Gender, it will only be triggered when a Customer that matches the specified Gender is added to the sale and they purchase the required Stock Items specified in the Promotion.

To configure and use this functionality, go to:

Back Office > File > Customers > Customers > Select a Customer > Modify.

Ensure that the Customer’s Gender has been specified in the Gender dropdown box.

Available Genders are M, F and O.

The Gender is automatically selected based on the customer’s title (e.g. selecting Mr will set the Gender to M, or selecting Mrs/Miss/Ms will set the Gender to F). If required, a Gender of O can be selected.

After setting or updating the Customer’s Gender, press the “Save” button on the top-left corner.

If required, repeat the above to update the Gender for the required customers.

The screenshot shows the 'Customers' modify form with the following details:

- Header:** Customers (Modify 15), General (selected), Advanced
- Buttons:** Save (on the left sidebar)
- Form Fields:**
 - Code: 15
 - Last Name: Blow
 - Given Names: Joe
 - Title: Mr
 - Customer Type: ACCOUNTS
 - Scan Code: Auto
 - Other Codes: (empty)
- Address Details:** Address, Suburb, State, Postcode: 4501
- Sales / Accounting:**
 - Auto % Discount: 0
 - Price Level: 0
 - Bar Tab: (checkbox)
 - Account: (checked)
 - Credit Limit: 1000.00
 - Aging Type: 30-60-90 / Monthly
 - Master Account: >
- Delivery Address:**
 - Delivery Address same as Above: (checked)
 - Address, Suburb, State, Postcode
- Miscellaneous:**
 - Company, ABN, Occupation, Next of Kin, Contact No
 - Birth Date, Birth Date 2, Password
 - Gender: M (highlighted with a yellow box and an orange arrow)
 - Marital Status
 - Mail Out: (checked)
 - Discontinue: (checkbox)
 - Comments, Sales Prompt, Points Limit
- Contact Details:** Phone, Mobile, Other, Email
- Footer:** POS 1 v9 Build 14 Dev 30

Go to: Back Office > File > Sales > Promotions > Promotions.
 Add or Modify a Promotion.
 Select the "Advanced" tab.

In the Advanced Tab of the Promotion, the User-Defined Text Field is used to specify which Gender(s) the Promotion will apply to.

To restrict the Promotion to Male, enter the following into the User-Defined Text Field:
 [GENDER=M]

To restrict the Promotion to Female, enter the following into the User-Defined Field:
 [GENDER=F]

To restrict the Promotion to Other, enter the following into the User-Defined Field:
 [GENDER=O]

To make the Promotion available to multiple Genders, enter the required Genders as a comma separated list.
 [GENDER=M,F]

Close the Modify/Add Promotion window and when prompted to "Save Changes?", press Yes.
 The above process can be repeated to setup any other Promotions that are required to trigger based on the Customer's Gender.

idealpos COLLO Update History

[Return to top](#)

Close the Promotions window, go to: POS Screen.

Add a Customer to the sale that matches the Gender configured in the Promotion.

Add Stock Items from the Promotion to the sale.

The Promotion is triggered.

v9 Build 14 DevRev 30 11 Feb 10:53 POS 1 Jeremy STANDARD #2015		
Joe Blow - 0 Points		
AFTER SHAVE	1	8.00
-5.50 BUY 2X AFTER SHAVE FOR \$5.00		
AFTER SHAVE	1	8.00
-5.50 BUY 2X AFTER SHAVE FOR \$5.00		
BUY 2X AFTER SHAVE FOR \$5.00	1	-11.00
0 Points		Discounts -11.00
2x		\$5.00

When a Customer is added to the sale which does not match the Gender specified in the Promotion, the Promotion is not triggered.

v9 Build 14 DevRev 30 11 Feb 10:54 POS 1 Jeremy STANDARD #2015		
Joanne Blow - 0 Points		
AFTER SHAVE	1	8.00
AFTER SHAVE	1	8.00
0 Points		
2x		\$16.00

IP-7704 – Promotions – Support to trigger based on User-Defined Text Fields

This functionality introduces the ability to trigger a Promotion based on User-Defined Text Fields that are set in the Customer’s record.

This will enable Promotions to be restricted to specific Customers based on the value in the Customer’s User-Defined Text Fields and they purchase the required Stock Items specified in the Promotion.

To configure and use this functionality, go to: Back Office > Setup > Global Options > Customers > User-Defined. In the Text Fields section, there are 10 available fields.

These can be configured to store text details about the customer.

E.g. Favourite Drink, Favourite Cook Type, etc.

Any User-Defined Text Fields that are not currently used will appear as “User-Defined Text #”, where # refers to the number of the User-Defined Text Field.

The screenshot shows the 'Global Options' window for 'Customers'. The 'User-Defined Text Fields' section is highlighted with a yellow border and contains the following list:

- 1 Favourite Drink?
- 2 Favourite
- 3 Favourite Meal
- 4 User-Defined Text 4
- 5 User-Defined Text 5
- 6 User-Defined Text 6
- 7 User-Defined Text 7
- 8 User-Defined Text 8
- 9 User-Defined Text 9
- 10 Daily Spend

Below this list is a 'Yes/No Fields' section with the following items:

- 1 Pays Weekly?
- 2 User-Defined Yes/No
- 3 User-Defined Yes/No
- 4 VIP Customer
- 5 User-Defined Yes/No

Go to: Back Office > File > Customers > Customers > Select a Customer > Modify.

In the Advanced tab, the User-Defined Text Fields are displayed at the top of the Advanced tab.

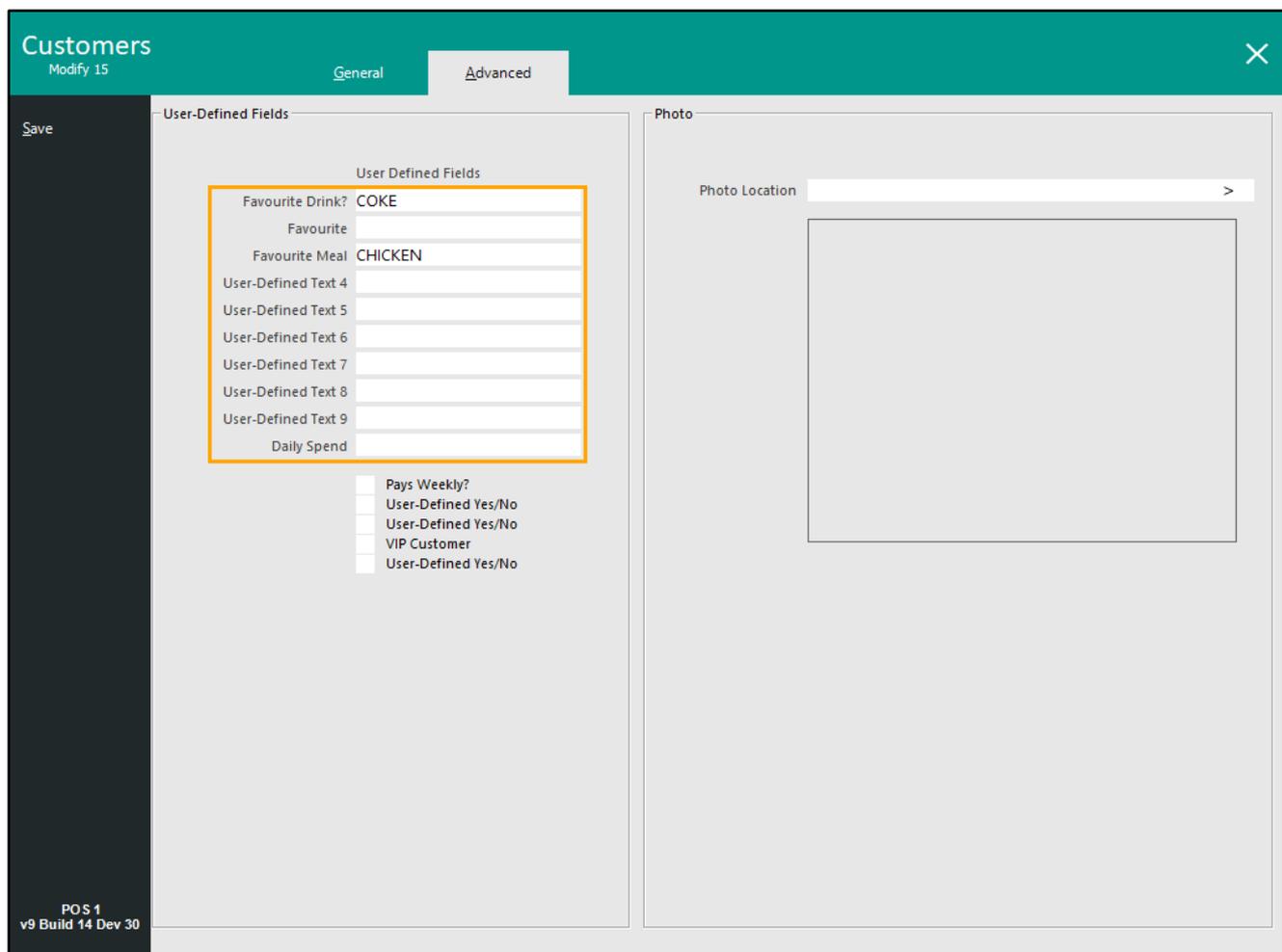
Enter the required values into the User-Defined Text Fields.

E.g. Favourite Drink = COKE, Favourite Meal = CHICKEN

When entering values into the User-Defined Text Fields, take note of the following details as these will be required when setting up the Promotion:

- The Text Fields are numbered based on their row number; the first row is UDT1, the last row is UDT10.
- Promotions can be triggered based on one or more User-Defined Text Fields;
E.g. If entering [UDT1=COKE] [UDT3=CHICKEN] into the User-Defined Text Field of the Promotion, the Customer will need to have Favourite Drink=COKE AND Favourite Meal=CHICKEN in their User-Defined Text Fields.
- The Promotion can be triggered by multiple possible values for each User-Defined Text Field as a comma separated list;
E.g. If entering [UDT1=COKE,SPRITE,FANTA] [UDT3=BEEF,CHICKEN] into the User-Defined Field of the Promotion, the Promotion will trigger for Customers that have a Favourite Drink of COKE, SPRITE or FANTA AND have a Favourite Meal of BEEF or CHICKEN.
- The Promotion can be triggered when a Customer's User-Defined Text Field contains a number value that falls between a specified range;
E.g. If User-Defined Text Field 9 is used to store the age of the member when they joined, the Promotion can be setup to trigger for all members that were between a specific age group when joining.
Entering [UDT9=18-30] into the Promotion's User-Defined Text Field will trigger when the Customer has a value between 18 and 30 in their User-Defined 9 Text Field.

Configure the Customer's User-Defined Text Fields as required:



Go to: Back Office > File > Sales > Promotions > Promotions.
 Add or Modify a Promotion.
 Select the "Advanced" tab.

In the Advanced Tab of the Promotion, the User-Defined Text Field is used to specify which User-Defined Text Fields will be required for the Promotion to trigger.

To demonstrate this functionality using the example from the previous page, the Promotion will be restricted to:
 User-Defined Text 1 (Favourite Drink) = COKE
 User-Defined Text 3 (Favourite Meal) = CHICKEN

To restrict the Promotion to the above User-Defined Text Fields, the User-Defined Text Field in the Promotion Advanced Tab will need to have the following entered:
 [UDT1=COKE] [UDT3=CHICKEN]

Close the Modify/Add Promotion window and when prompted to "Save Changes?", press Yes.
 The above process can be repeated to setup any other Promotions that are required to trigger based on User-Defined Text Fields.

idealpos COLLO Update History

[Return to top](#)

Close the Promotions window, go to: POS Screen.

Add a Customer to the sale that has their User-Defined Text Fields configured the same as the Promotion.

Add Stock Items from the Promotion to the sale.

The Promotion is triggered.

v9 Build 14 DevRev 30 10 Feb 17:05
POS 1 Jeremy STANDARD #2015

Joe Blow - 0 Points

COKE 2L	1	2.50
-1.15 CHICKEN PIZZA & COKE SPECIAL		
CHICKEN PIZZA	1	16.00
-7.35 CHICKEN PIZZA & COKE SPECIAL		
CHICKEN PIZZA & COKE SPECIAL	1	-8.50

0 Points
2x

Discounts -8.50
\$10.00

When a Customer is added to the sale which does not have their User-Defined Yes/No Fields configured to match the Promotion, the Promotion is not triggered.

v9 Build 14 DevRev 30 10 Feb 17:07
POS 1 Jeremy STANDARD #2015

Bob Brown - 0 Points

COKE 2L	1	2.50
CHICKEN PIZZA	1	16.00

0 Points
2x

\$18.50

The Promotion will also not trigger if the Stock Items from the Promotion are added to the sale without a Customer.

IP-7705 – Promotions – Support to trigger based on User-Defined Yes/No Fields

This functionality introduces the ability to trigger a Promotion based on User-Defined Yes/No Fields that are set in the Customer’s record.

This will enable Promotions to be restricted to specific Customers based on the state of the Customer’s User-Defined Yes/No Fields (e.g. Yes/No Fields ticked or unticked).

A Promotion will only trigger when a Customer has been added to the sale which has the required User-Defined Yes/No Fields AND they purchase the required Stock Items specified in the Promotion.

To configure and use this functionality, go to: Back Office > Setup > Global Options > Customers > User-Defined. In the Yes/No Fields section, there are 5 available Yes/No Fields.

These can be configured as required to record specific Yes/No details about the customer.

E.g. Pays Weekly, VIP Customer, Pensioner, etc.

Any User-Defined Yes/No Fields that are not currently used will appear as “User-Defined Yes/No”.

Note that these Yes/No Fields will only store a Yes value (checkbox enabled) or a No value (checkbox unchecked).

For storing User-Defined Text values and triggering Promotions based on those User-Defined Text Fields, a separate enhancement is available; see IP-7704 – Promotions – Support to trigger based on User-Defined Text Fields.

The screenshot shows the 'Global Options' window for 'Customers'. The 'User-Defined' section is expanded, showing two sub-sections: 'Text Fields' and 'Yes/No Fields'. The 'Yes/No Fields' list contains five items, with the first one, 'Pays Weekly?', highlighted by an orange border. Other items include 'User-Defined Yes/No', 'User-Defined Yes/No', 'VIP Customer', and 'User-Defined Yes/No'. The 'Text Fields' list contains ten items, including 'Favourite Drink?', 'Favourite', and various 'User-Defined Text' fields.

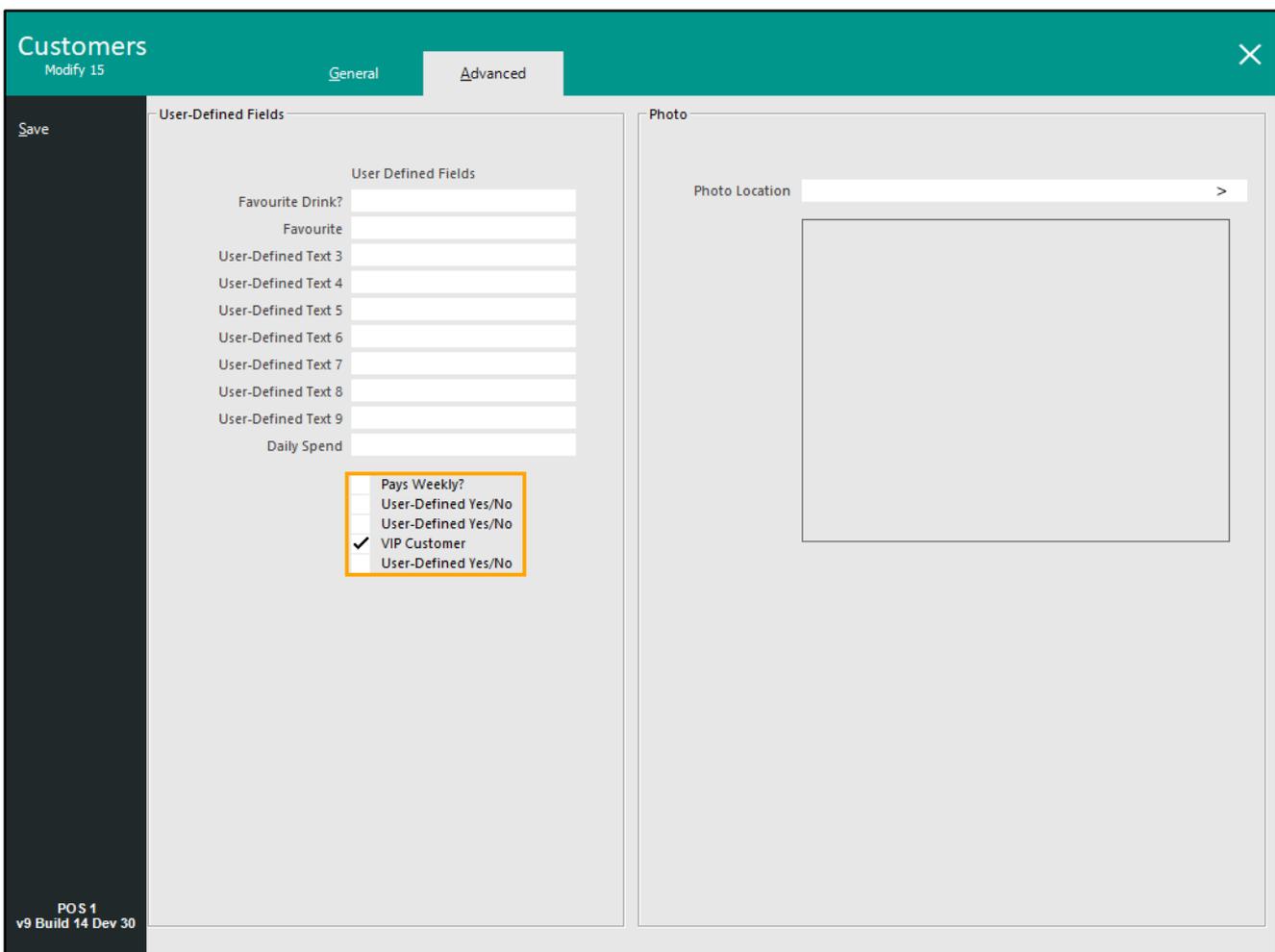
Go to: Back Office > File > Customers > Customers > Select a Customer > Modify.

In the Advanced tab, the User-Defined Yes/No Fields are displayed below the Text Fields.

Toggle the User-Defined Yes/No Fields as required.

When toggling the Yes/No Fields, take note of the following details as these will be required when setting up the Promotion:

- The Yes/No Fields are numbered based on their row number; the first row is UDYN1, the last row is UDYN5.
- Any Y/N Field that is enabled will be referred to as Y and any Y/N Field that is disabled will be referred to as N.
- Examples based on the screenshot below:
- If a Promo is to be restricted to VIP Customers, [UDYN4=Y]
- If a Promo is to be restricted to non-VIP Customers, [UDYN4=N]
- If a Promo is to be restricted to Customers that are Pays Weekly? AND VIP, [UDYN1=Y] [UDYN4=Y]
- Multiple values for each User-Defined Yes/No Field can be specified; e.g. [UDYN4=Y,N]
- Multiple User-Defined Yes/No Fields can be specified; e.g. [UDYN1=Y] [UDYN4=N]



Press the "Save" button on the top-left corner once updated.

Repeat the above process for each Customer that requires the Yes/No Fields to be set.

Go to: Back Office > File > Sales > Promotions > Promotions.
 Add or Modify a Promotion.
 Select the "Advanced" tab.

In the Advanced Tab of the Promotion, the User-Defined Text Field is used to specify which User-Defined Yes/No Fields will be required for the Promotion to trigger.
 To demonstrate this functionality using the example from the previous page, the Promotion will be restricted to the User-Defined Yes/No Field 4 (which is configured as VIP Customer in the Global Options > Customers > Yes/No Fields).

Enter [UDYN4=Y] into the User-Defined Text field:

Close the Modify/Add Promotion window and when prompted to "Save Changes?", press Yes.

Close the Promotions window, go to: POS Screen.

Add a Customer to the sale that has their Yes/No Fields configured the same as the Promotion.

Add Stock Items from the Promotion to the sale.

The Promotion is triggered.

v9 Build 14 DevRev 30 10 Feb 10:55
POS 1 Jeremy STANDARD #2015

Joe Blow - 0 Points

BEEF	1	13.00
-8.00 VIP BEEF PROMO		
BEEF	1	13.00
-8.00 VIP BEEF PROMO		
VIP BEEF PROMO	1	-16.00

0 Points
2x

Discounts -16.00
\$10.00

When a Customer is added to the sale which does not have their User-Defined Yes/No Fields configured to match the Promotion, the Promotion is not triggered.

v9 Build 14 DevRev 30 10 Feb 10:59
POS 1 Jeremy STANDARD #2015

Bob Brown - 0 Points

BEEF	1	13.00
BEEF	1	13.00

0 Points
2x

\$26.00

The Promotion will also not trigger if the Stock Items from the Promotion are added to the sale without a Customer.

Reports

IP-7697 – Gift Voucher Reports – Support for Gift Voucher Name Filter

This functionality introduces the ability to filter the Gift Voucher Report using the “Name Like” field.

A Customer’s Name or any part of their name (First Name and/or Last Name) can be entered into the Name Like field prior to running the Gift Voucher Report.

Depending on the options selected in the report, any Gift Vouchers that were associated with a customer that has a name like the one entered with a Customer Name field will be displayed by the Gift Voucher Report.

E.g. If a customer has a name of “Joe Blow” and part of their name is entered (e.g. Jo, Blo, low, etc.), the report will show the customer and any other customers that have a similar name which matches.

Go to: Back Office > Reports > Sales > Gift Voucher Report > Choose the report options required.

In the “Name Like” field, enter part of the customer’s name > Press “View”.

The screenshot shows the 'GIFT VOUCHER Report' configuration window. On the left is a dark sidebar with 'View' and 'Print' buttons. The main area contains several sections:

- Report Type:** Radio buttons for 'GIFT VOUCHER' (selected) and 'GIFT VOUCHER Redemptions'. A checkbox for 'Group by POS' is also present.
- GIFT VOUCHER Bought:** A dropdown menu currently set to 'All Dates'.
- GIFT VOUCHER Type:** Two dropdown menus labeled 'GIFT VOUCHER Type' and 'to'.
- Name Like:** A text input field containing 'Jo', which is highlighted with a yellow border. A yellow arrow points to this field from the right.
- GIFT VOUCHER Expiring:** Radio buttons for 'Anytime' (selected) and 'Custom Date'.
- Report Options:** Radio buttons for 'All Unredeemed Vouchers' (selected), 'Totally Redeemed', 'Partially Redeemed', 'Expired', and 'All Vouchers'. Checkboxes for 'Exclude Expired', 'Group by Amount', and 'Include drill-down transactions' are also present.

At the bottom left of the sidebar, the text 'POS 4 v9 Build 14 Dev 30' is visible. A close button (X) is in the top right corner of the report window.

When report runs, it will display any customers that have a name like the entered name.

Code	Date Bought	Expires	Name	GVAmount	Redeemed	Balance
Gift Voucher Report						
Idealpos user Idealpos POS 1(1)			All Dates		Printed 12/02/2026 14:37:25 Page 1 of 1	
Type 1 : Gift Voucher						
9824076745242	02/02/2026	02/02/2027	Joanne Blow	10.00	0.00	10.00
9869152832409	22/08/2025	22/08/2026	Joe Blow	10.00	7.00	3.00
				<u>20.00</u>	<u>7.00</u>	<u>13.00</u>
				<u>20.00</u>	<u>7.00</u>	<u>13.00</u>

IP-7718 – Automatic Surcharges – Summary and Item Reports

This functionality adds a new Surcharges Report to the Reports > Sales menu.

The Surcharges Report enables the ability to report on Automatic Surcharges which have been applied to sales within the Date Range selected in the report.

Note – The Surcharges Report will only report on Automatic Surcharges that applied to sales after upgrading to Idealpos v9 Build 14.

Any Automatic Surcharges that were applied to sales that took place prior to upgrading to v9 Build 14 will not be included in the Surcharges Report!

E.g. If a 10% Automatic Surcharge applied to all sales that took place on the day before upgrading to v9 Build 14, the Surcharges Summary or Surcharge Details by Item will not return any data for that Automatic Surcharge.

When running the Surcharges Report, there are two Report Types:

- **Surcharges Summary** – This will show a Summary of all Surcharges which were triggered within the selected Date Range. The Summary will display the Surcharge Code, Surcharge Description, Quantity (the Quantity shows the total number of sales which had a Surcharge, not the number of items) and the total Surcharge value.
- **Surcharge Details by Item** – This will show a detailed report which contains a listing of all the Surcharged Stock Items that were sold per Journal. This includes the Journal Number, Stock Item Description, Date of sale, Unit Price, Quantity, Pre-Surcharge Amount, Surcharge, Surcharged Amount, Cost.

The following options are available in the Report:

- Date Range – Select a Date to show Automatic Surcharges that were applied on the selected date.
- Group By – POS Terminal, Location or Site.
- Report Type: Surcharges Summary or Surcharge Details by Item as outlined above.
- Selection Range:
 - Site
 - POS System
 - Supplier (Supplier is only available when selecting Surcharge Details by Item)

To utilise this functionality, ensure that sales have been performed with an Automatic Surcharge after upgrading to v9 Build 14.

An Automatic Surcharge can be created by going to:

Back Office > File > Sales > Surcharges > Add > Create a new Surcharge.

Surcharges

Add New

Save

Code

Description

From to

Repeat Every Year

Continuous
 During Specific Times

Surcharge %
 \$

If Total < then Surcharge %
 \$

If Total > then Surcharge %
 \$

Apply Surcharge To:

POS System

User-Defined Text

POS 1
v9 Build 14 Dev 30

idealpos COLLO Update History

[Return to top](#)

After saving the Surcharge, go to: POS Screen > Perform a sale > Tender the sale.

v9 Build 14 DevRev 30 06 Feb 14:24
 POS 1 Jeremy STANDARD #1995

CAPPUCCINO <small>0.35 10% Friday 10% Surcharge</small>	1	3.50			
FLAT WHITE <small>0.35 10% Friday 10% Surcharge</small>	1	3.50		RECEIPT	CLERK
SHORT BLACK <small>0.30 10% Friday 10% Surcharge</small>	1	3.00		PRICE LEVEL	5% ST DISC
PASTA <small>1.10 10% Friday 10% Surcharge</small>	1	11.00		CUSTOMER	5% ITEM
BEEF <small>1.30 10% Friday 10% Surcharge</small>	1	13.00		BAR TAB	REFUND
LAMB <small>1.20 10% Friday 10% Surcharge</small>	1	12.00		PENDING	VOID SALE
DUCK <small>1.40 10% Friday 10% Surcharge</small>	1	14.00		TABLE MAP	VOID
Surcharges 6.00					
\$66.00					

7x

\$66.00

   POINTS	<div style="border: 1px solid black; padding: 5px; font-size: 1.5em; font-weight: bold; margin-bottom: 10px;">66.00</div> Balance 66.00
--	---

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

    
--

Close the POS Screen > Go to: Back Office > Reports > Sales > Surcharges.
 Select Surcharges Summary to display a summary:

Surcharges Report
✕

[View](#)
[Print](#)

Date Range

Today ▾

From

06 Feb 2026 00:00:00 ▾

To

06 Feb 2026 23:59:59 ▾

Group by

POS Terminal

Location

Site

Report Type

Surcharges Summary

Surcharge Details by Item

Selection Range

Site

>

POS System

>

POS 1
 v9 Build 14 Dev 30

The Report will show a Summary.
 The Surcharges Summary contains a listing of Surcharge Codes, Surcharge Descriptions, Quantity (Quantity of sales that had a Surcharge applied), and the Surcharge Amount.

Idealpos user
 Idealpos POS 1(1)

Surcharges Report

06 Feb 2026 00:00:00 to 06 Feb 2026 23:59:59

Printed 06/02/2026 2:30PM
 Page 1 of 1

Code	Description	Quantity	Amount
2	10% Friday 10% Surcharge	1	6.00
		1	6.00
		1	6.00
		1	6.00

To display a detailed Surcharges Report, select the "Surcharge Details by Item" option:

Surcharges Report
✕

View
Print

Date Range

Today From 06 Feb 2026 00:00:00
To 06 Feb 2026 23:59:59

Group by

POS Terminal
 Location
 Site

Report Type

Surcharges Summary
 Surcharge Details by Item

Selection Range

Site
 POS System
 Supplier

POS 1
 v9 Build 14 Dev 30

When running the Surcharges Report with the "Surcharge Details by Item" selected, a detailed listing will be displayed which includes the Journal Number, Stock Item Descriptions, Date, Unit Price, Quantity, Pre-Surcharge Amount, Surcharge, Surcharged Amount and Cost.

If required, the Group by/Selection Range options can be used to perform further grouping/filtering.

	Item Description	Date	Unit Price	Quantity	Pre-Surcharge Amount	Surcharge	Surcharged Amount	Cost
Friday 10% Surcharge								
1995-1	CAPPUCCINO	06/02/2026 14:25:48	3.50	1.0000	3.50	0.35	3.85	0.29
1995-1	FLAT WHITE	06/02/2026 14:25:48	3.50	1.0000	3.50	0.35	3.85	0.29
1995-1	SHORT BLACK	06/02/2026 14:25:48	3.00	1.0000	3.00	0.30	3.30	0.20
1995-1	PASTA	06/02/2026 14:25:48	11.00	1.0000	11.00	1.10	12.10	2.50
1995-1	BEEF	06/02/2026 14:25:48	13.00	1.0000	13.00	1.30	14.30	6.25
1995-1	LAMB	06/02/2026 14:25:48	12.00	1.0000	12.00	1.20	13.20	5.80
1995-1	DUCK	06/02/2026 14:25:48	14.00	1.0000	14.00	1.40	15.40	7.60
				7.0000	60.00	6.00	66.00	22.94
Grand Total				7.0000	60.00	6.00	66.00	22.94

Reservation Interfaces

IP-7724 – NowBookIt – Support for Gift Cards

This functionality adds support for NowBookIt Gift Card redemptions to the NowBookIt Reservation interface.

To configure and use this functionality, go to: Back Office > Setup > Tender Types.

Select the next unused Tender Type (unused Tender Types are labelled as "TENDER #", where # refers to the number of the Tender Type) and press Modify > configure as required > Press "Save" on the top-left corner.

Tender Types
✕

Modify NowBookIt Gift Card

Function:

Description:

of Receipts: # of Refund Receipts:

Exchange Rate:

Lower Limit:

Upper Limit:

Scan Code:

Scan Code Amount:

Surcharge: %

Waive Surcharge Threshold:

- 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
- Enable Customer Tipping
- Give Change in Local Currency

Override Receipt Footer:

User-Defined Text:

Tender Graphic:

Save

POS 1
v9 Build 14 Dev 52

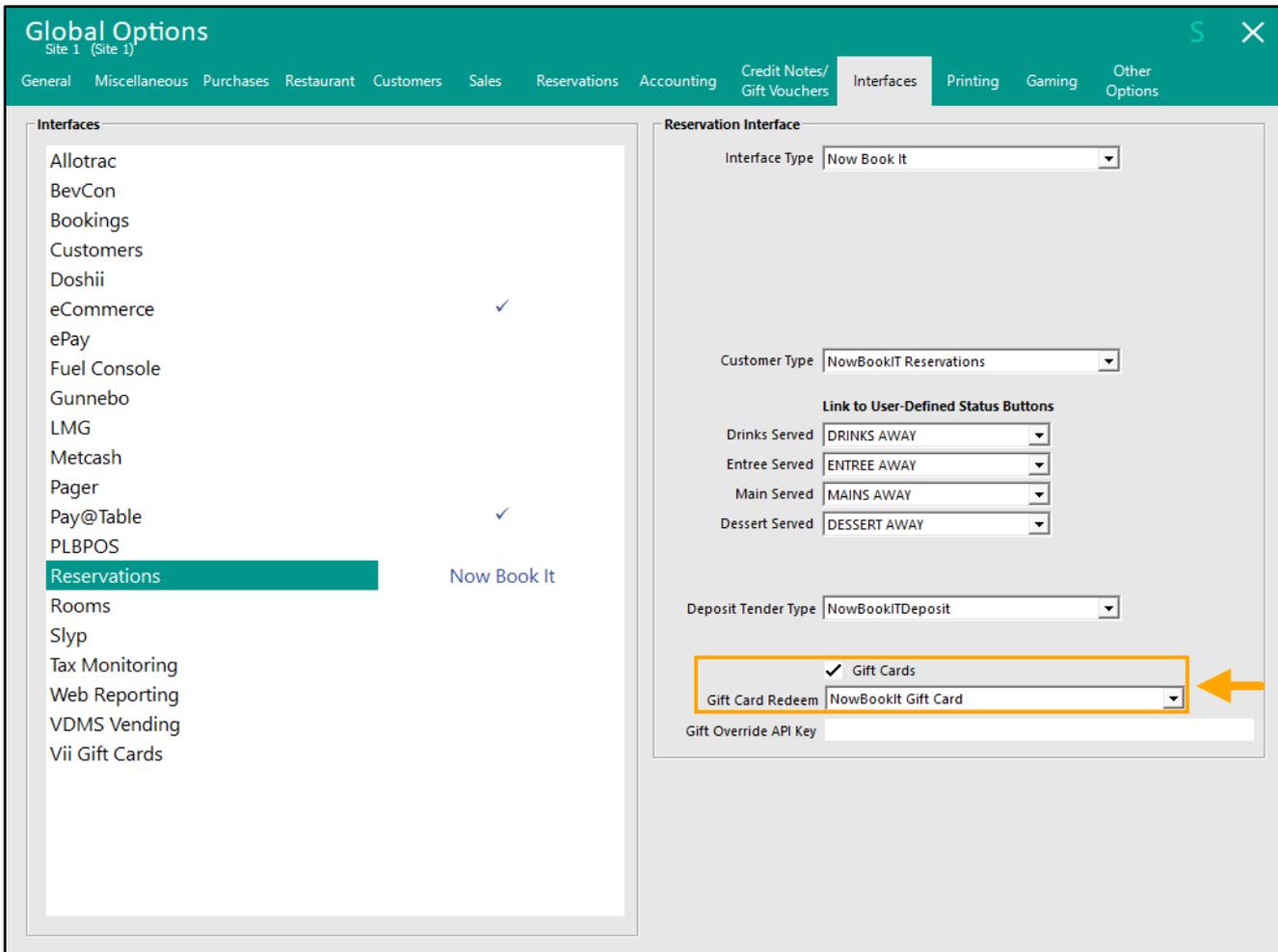
idealpos COLLIG Update History

[Return to top](#)

Go to: Back Office > Setup > Global Options > Interfaces > Reservations.

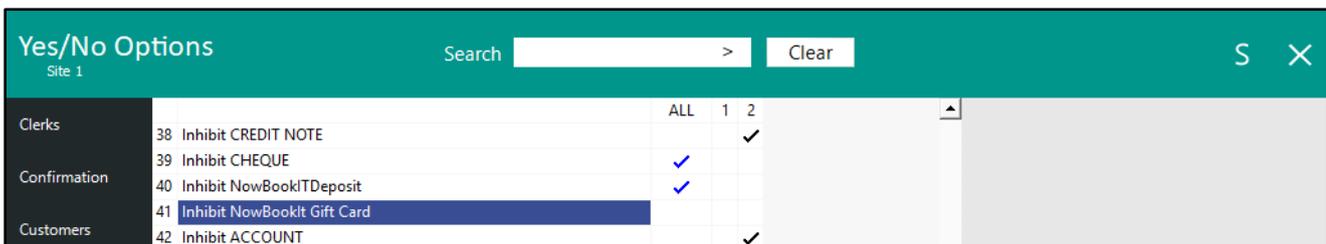
Enable the "Gift Cards" checkbox and select the Tender Type that was configured above.

If required, the ability to enter a Gift Override API Key is available if the restaurant wants to use a separate API Key for Gift Cards.



Close the Global Options window.

Go to: Back Office > Setup > Yes/No Options > Tenders > Untick the "Inhibit NowBookIt Gift Card" Tender Type.



To finalise the configuration of Now Book It Gift Cards, perform a Close Suite/Open Suite.

Go to: Start > Apps/All Apps > Idealpos > IPSUtils > Close > Confirm.

Idealpos can be started by going to Start > Idealpos > Idealpos or press the Idealpos icon on the Windows desktop. Alternatively, a complete restart of the POS Terminals can be done to apply the change.

The Now Book It Gift Card Redemption window will appear.

Enter or Scan the Gift Card Number.

To enter a Gift Card Number, press the ">" button within the Gift Card Number field to display an on-screen keyboard. When entering a Now Book It Gift Card, either the entire Gift Card Number can be entered, or the last four characters of the Gift Card can be entered.

The Amount to Redeem can be left as the default amount or adjusted by selecting the Amount to Redeem field > enter a new amount using the on-screen numeric keypad.

Press the "Redeem" button to proceed with the redemption.

Now Book It Gift Card Redemption

Enter or Scan Gift Card
1ABC >

Amount to Tender
10.00

Amount to Redeem: 10.00 Redeem

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

A "Redemption Successful!" prompt will appear with the amount redeemed.

Redemption Successful!

Amount Redeemed: \$10.00

OK

Press OK.

The sale is finalised.

If the Gift Card has already been redeemed, a prompt of "Card already redeemed" will be displayed.

If attempting to redeem a value that is greater than what is available on the Gift Card, an "Invalid request" prompt will appear.

IP-7507 – Now Book It Reservations Screen – Status Filters

This functionality introduces the ability to filter the Reservations window by the Table Status.

Status filters available are: All, None, Billed, Cancelled, Confirmed, Dessert, Drinks, Entrée, Finished, Main, No Show, Ordered, Paid, Seated, Unconfirmed.

The list shown in the Status Filters may vary based on configuration in Now Book It.

To use this functionality, go to: POS Screen > Table Map > Reservations.

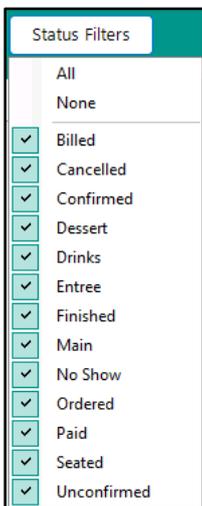
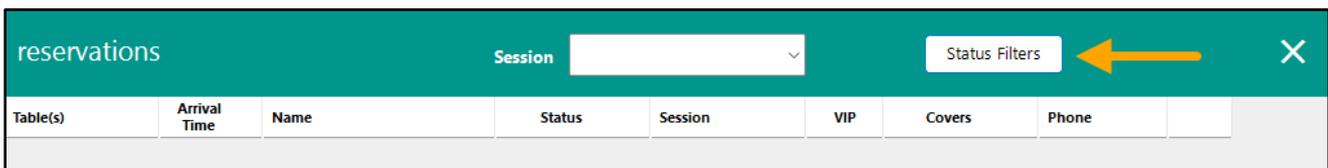
A new "Status Filters" button will appear on the top-right corner of the window.

Pressing the button will display a list of Status Filters which can be selected to filter the Reservations window by the selected filters.

Selecting the "All" option will toggle all the statuses as enabled so that they all appear in the Reservations window.

Selecting the "None" option will toggle all the statuses as disabled so that they don't appear in the Reservations window.

None can be used if you need to quickly unselect all statuses, then you can enable the required statuses from the list.



idealpos COLLO Update History

[Return to top](#)

E.g. When all the status filters are enabled, all Status Types will be shown in the Reservations window.

Table(s)	Arrival Time	Name	Status	Session	VIP	Covers	Phone
1.	11:00 AM	Joe Blow	Unconfirmed	All Day	<input checked="" type="checkbox"/>	2	
2.	11:00 AM	John Smith	Confirmed	All Day	<input checked="" type="checkbox"/>	2	
3.	10:43 AM	Joanne Smith	Seated	All Day	<input type="checkbox"/>	2	+61412312312

When filtering by specific Status(es), only reservations that match the selected Status Type(s) will be shown.

Table(s)	Arrival Time	Name	Status	Session	VIP	Covers	Phone
2.	11:00 AM	John Smith	Confirmed	All Day	<input checked="" type="checkbox"/>	2	
3.	10:43 AM	Joanne Smith	Seated	All Day	<input type="checkbox"/>	2	+61412312312

Pressing the "All" option will enable all statuses or pressing "None" will clear all the statuses:

Status Filters

All

None

- Billed
- Cancelled
- Confirmed
- Dessert
- Drinks
- Entree
- Finished
- Main
- No Show
- Ordered
- Paid
- Seated
- Unconfirmed

Status Filters

All

None

- Billed
- Cancelled
- Confirmed
- Dessert
- Drinks
- Entree
- Finished
- Main
- No Show
- Ordered
- Paid
- Seated
- Unconfirmed

Restaurant & Table Map

IP-7715 – Table Map Modify – Match All Tables Function

This functionality adds the ability to match all Tables on the Table Map to the Table Size/Shape and Font of a specific Table.

E.g. A Table Map contains tables which are all square in shape and have a small font size.

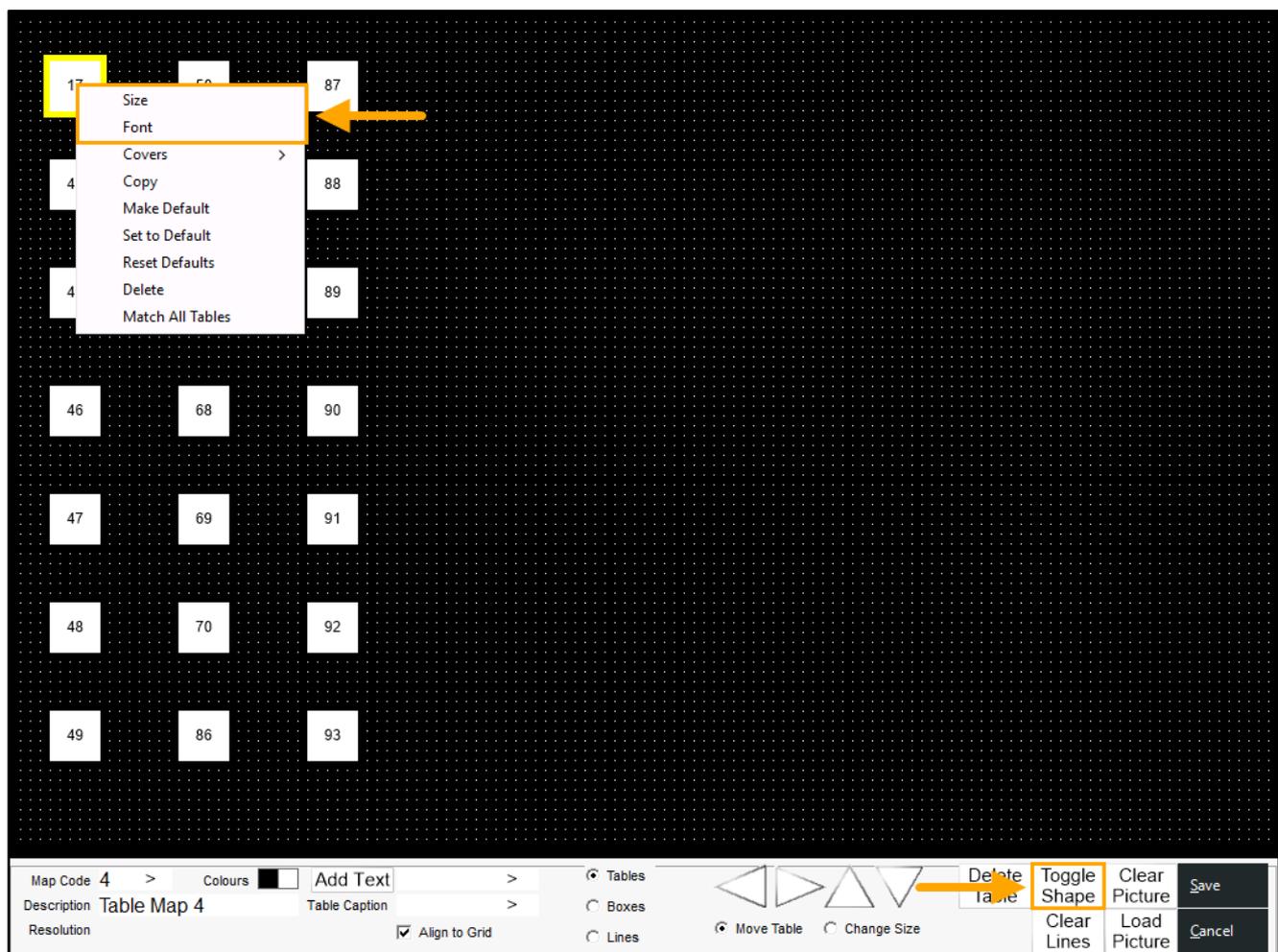
To change the shape of all tables to a circle and increase the font size shown on the tables, the process can be achieved quickly using this functionality by setting up a single table to appear as desired, then right-clicking on it and selecting "Match All Tables". All the Tables on the current Table Map will be changed to match the configured table, saving time when configuring Table Maps.

To use this functionality, go to:

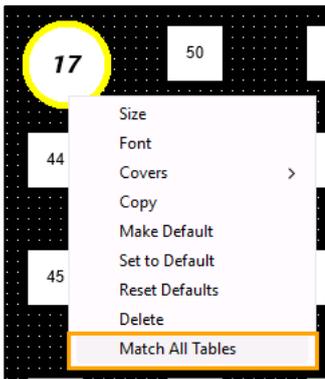
Back Office > Setup > Restaurant > Table Maps > Select a Table Map > Modify.

Right-click on a Table and use the Size/Font options to customise the appearance of the Table.

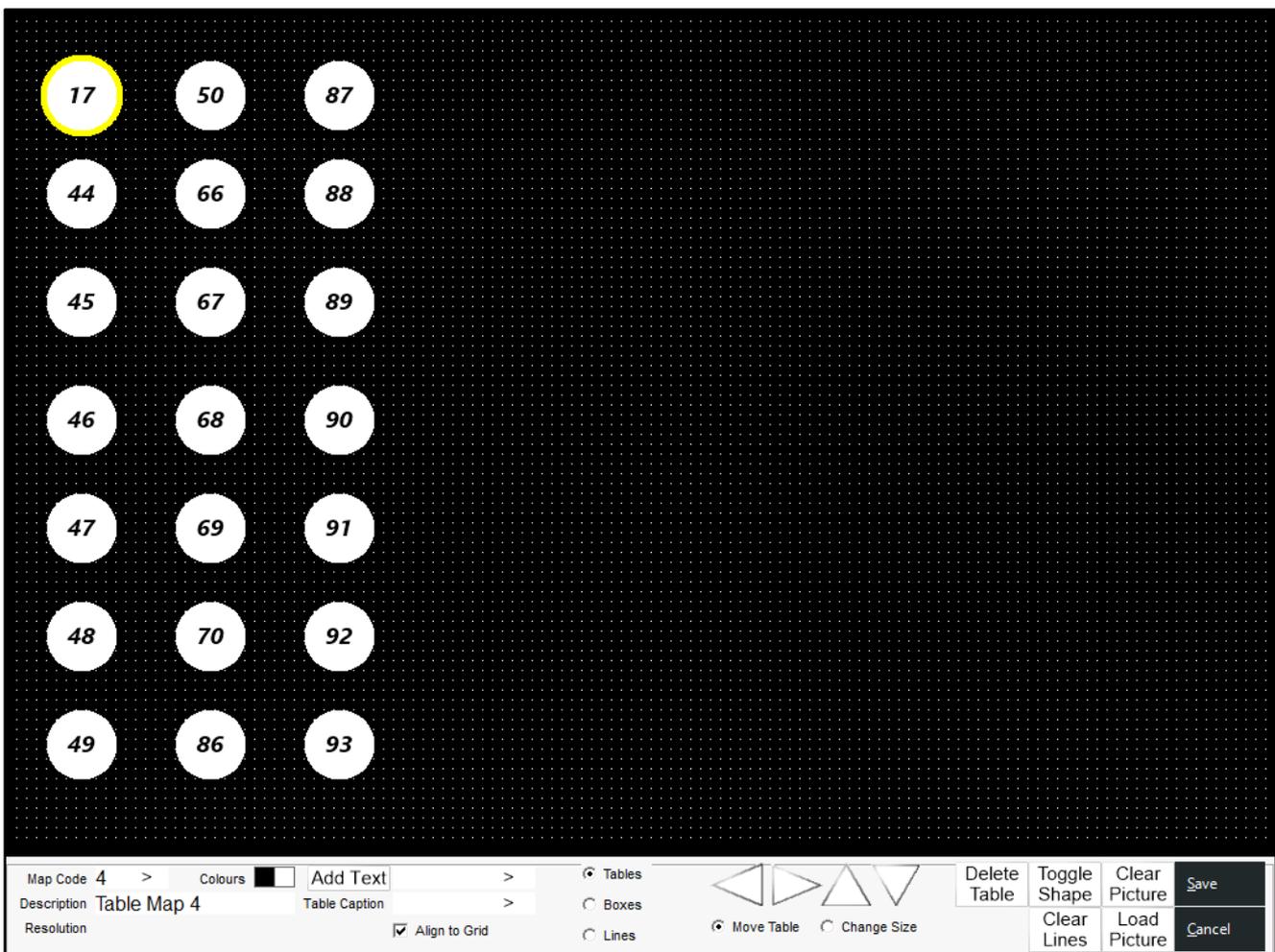
The Toggle Shape button can also be used on the bottom-right corner of the window to toggle through various shapes.



After the table has been customised as required, right-click on it and select "Match All Tables".



All the Tables on the current Table Map will have their Table Size, Shape and Font matched to the customised table.

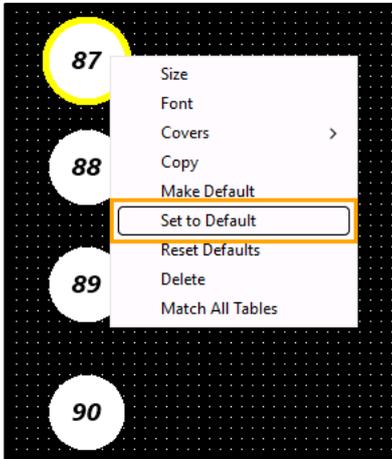


Press the "Save" button on the bottom-right corner of the Map Modify window to save the changes. The above process can be repeated for each Table Map that requires customisation.

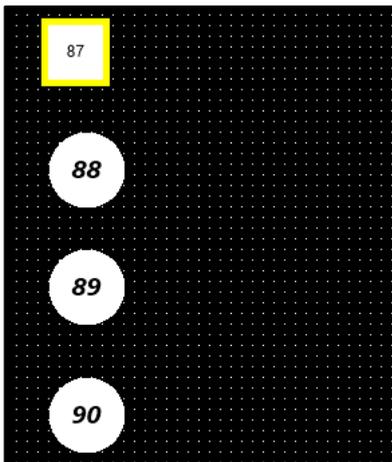
IP-7721 – Table Map Modify – Option to Set Table to Default

This functionality adds the ability to restore the formatting (Table Size, Table Shape, Font Style/Size, Number of Covers) of the currently right-clicked table to the default format in the Table Map Modify.

To use this functionality, go to: Back Office > Setup > Restaurant > Table Maps > Select a Table Map > Modify. Right-click on a Table and select the “Set to Default” option.



The Table’s formatting (Table Size, Table Shape, Font Style/Size and Number of Covers) will be set to the Default Format.



If the Default Format does not appear as desired or required, a new Default Format can be set.

Customise the formatting of a Table (Table Size, Table Shape, Font Style/Size and Number of Covers), then right-click the Table and select “Make Default”.

Alternatively, the Idealpos Default options can be restored by right-clicking on a Table and selecting “Reset Defaults”. Note that Reset Defaults does not alter the formatting of any existing tables.

Reset Defaults will restore the default Idealpos formatting so that when any new tables are added, they will use the Idealpos Default Formatting. The Reset Defaults option will also restore the Idealpos Formatting that is saved against the “Set to Default” option. When the “Set to Default” option is pressed, the Idealpos Default formatting will be used instead of any options that were previously set as default.

Sales Categories

IP-7737 – Sales Categories – Support for GL Code field

This functionality adds support for a GL Code field in the Modify Sales Categories window. Each Sales Category can have its own GL Code (General Ledger Code) entered and used with Accounting Functions. This functionality was previously configured via the following User-Defined Option:

SCxxxGLCODE = yyyy

Where xxx was the Sales Category Number and yyyy was the GL Code.

After upgrading to v9 Build 14, it is recommended that any GL Codes which were linked to a Sales Category via the above User-Defined Option GL Codes be updated via the Modify Sales Category window.

User-Defined Options will appear in:

Back Office > Setup > POS Terminals > Modify > POS Settings > User-Defined Options.

Take note of any User-Defined Options that exist which link a GL Code to a Sales Category. Then go to: Back Office > File > Sales > Sales Categories > Select a Sales Category > Modify. Enter the GL Code into the GL Code Field, then press "Save" on the top-left corner.

The screenshot shows the 'Sales Categories' window in a 'Modify' state. The window has a teal header with the title 'Sales Categories' and a close button (X) in the top right corner. Below the header, there is a dark sidebar on the left with a 'Save' button. The main content area is light gray and contains a form with the following fields: 'Code' with the value '4', 'Description' with the value 'GROCERIES', and 'GL Code' which is highlighted with a yellow box and an orange arrow pointing to it. Below the 'GL Code' field are two checkboxes: 'Add to FOOD Total' and 'Add to BEVERAGE Total'. In the bottom left corner, there is a footer that reads 'POS 1 v9 Build 14 Dev 30'.

Repeat the above process for each Sales Category until the GL Codes for all required Sales Categories have been updated.

After completing the above process, the SCxxxGLCODE=yyyy User-Defined Options can be removed.

Selling Price Calculator

IP-7755 – Selling Price Calculator – Option to Round to Nearest 99c

This functionality introduces a new Nearest 99c Rounding option to the Selling Price Calculator.

The Nearest 99c option can be used to Round Up or Round Down and can be used together with the Dollar Adjustment, Percent Adjustment or Profit Margin options.

Note that the Selling Price Calculator will affect Sell Prices and therefore, a backup is strongly recommended before using this functionality!

To use this functionality, go to: Back Office > Utilities > Selling Price Calculator.

Populate the Selection Range (Code/Description/Department/Supplier) to restrict the Selling Price Calculation changes to specific range.

Leaving the Selection Range fields as blank will trigger the Selling Price Calculator to run on ALL Stock Items.

- **Modify Selling Price** – Specify the Price Level to Modify. The Prices in the selected Price Level will be modified.
- **Base Calculation on** – Specify the Price Level which will be used to base the calculation on.
- **Calculation Methods:**
- **Dollar Adjustment** – This will adjust the Sell Price by the dollar amount entered in the blank field.
- **Percent Adjustment** – This will adjust the Sell Price by the Percentage value entered in the blank field.
- **Profit Margin** – This will adjust the Sell Price by the Profit Margin percent entered in the blank field.
- **Rounding – Up/Down** – Select up or down depending on the type of rounding required. Round up or down must be selected to utilise the Nearest 99c option.
- **Amount to round** - Select Nearest 99c to round to the Nearest 99c.

Selling Price Calculator
✕

[Proceed](#)

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

Modify Selling Price

STANDARD ▾

Base Calculation on

STANDARD ▾

Calculation Method

Dollar Adjustment

Percent Adjustment 0.50

Profit Margin

Rounding

None

Up

Down

Nearest 5
 Nearest 10
 Nearest 50
 Nearest 99

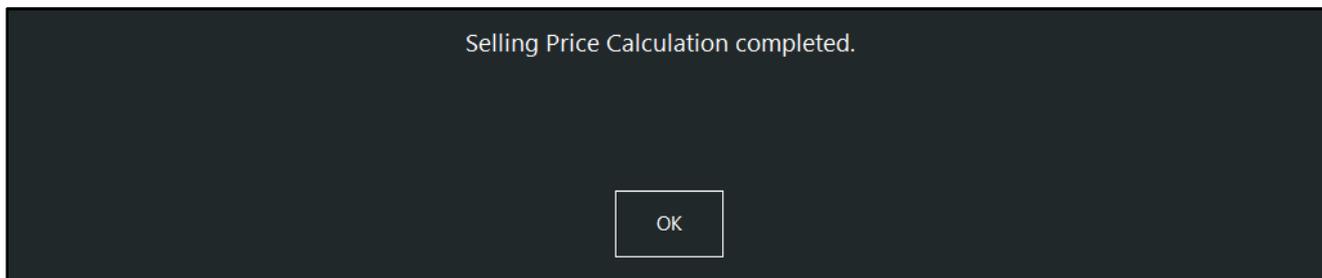
Example

Stock Item 1 - TEST STOCK ITEM (Cost = 1.00)			
	Before Calculation	After Calculation	
STANDARD	2.00	2.99	

POS 1
v9 Build 14 Dev 56

Once the options have been set in the Selling Price Calculator, press the "Proceed" button on the top-left corner.
As stated above, the Selling Price Calculator will affect Sell Prices, therefore, a backup is strongly recommended before using this functionality. Any incorrect selections/changes to Selling Prices cannot be undone!

After the Selling Price Calculator finishes processing, the following prompt will appear.
 Press "OK".



The Sell Prices are updated as-per the options specified in the Selling Price Calculator.
 Go to: Back Office > File > Stock Control > Stock Items > Select a Stock Item that was within the Selection Range updated by the Selling Price Calculator > Modify.
 The Sell Price has been rounded up to 99c as per the options set in the Selling Price Calculator.

Stock Items

General
Advanced
Indirect Item
Variants

James SQ Gngr Beer 4x6x330ml C
>>> X

Stock Code

Description (15)

Kitchen Description (15)

Long Description (15)

Department > GROCERIES

Scan Code

Created 19 Aug 2025 10:15:50
 Last Modified 20 Feb 2026 11:19:25

Selling Prices (inc Tax)

	Price	Profit %	Profit \$
STANDARD	2.99	66.56	1.99
STAFF	0.00		
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 > BEVERAGE

Default Supplier > Campbells Cash & Carry

Default Supplier Stock Code

Other Options

Stock Control

Has Variants

Indirect Item

Non-Accumulating

Can't Buy with GIFT VOUCHER

Scale

Instruction

Print Red

Web Store

Inhibit Discounts

Inhibit Voids

Manufactured Item

Tags

Cost Prices (ex Tax)

Standard Cost

Last Cost

Average Cost

Recalculate Sell Prices

Don't Recalculate Sell Prices

Based on Profit %

Based on Profit \$

Tax Settings (Selling)

GST

GST-Free

Not Defined

Not Defined

Not Defined

Not Defined

Attributes

POS 1 v9 Build 14 Dev 56

Idealpos 9 Build 14 - Update History

Page 69 of 73

Stock Purchases

IP-7753 – Stock Purchases – Item History View increased to 14 periods

This functionality increases the number of periods to 14 in the Item History View of a Stock Purchase. Previously, a total of 12 periods were shown.

To use this functionality, go to: Back Office > Transactions > Stock Control > Stock Purchases > Add/Modify. Select a Stock Item in the Purchase Order/Stock Receive. The bottom-left corner of the window will now display a total of 14 periods:

Stock Code	Supplier Code	Description	Quantity Ordered	Unit Cost	Disc %	Tax 1	Total	Last Cost	Department	Sell Price (STANDARD)	Profit Margin %
205106	124KSS753	DRY GINGER CAN	0	0.94	0.00	GST	0.00		205	3.50	73.1
205107	124KSS732	FANTA CAN	0	0.94	0.00	GST	0.00		205	3.50	73.1
205108	124KSS711	TONIC CAN	0	0.94	0.00	GST	0.00		205	3.50	73.1
205201	124KSS690	COKE 600ML	0	1.13	0.00	GST	0.00		205	5.00	77.4
205202	124KSS669	DIET COKE 600ML	0	1.13	0.00	GST	0.00		205	5.00	77.4
205203	124KSS648	COKE ZERO 600ML	0	1.13	0.00	GST	0.00		205	5.00	77.4
205204	124KSS627	SPRITE 600ML	0	1.13	0.00	GST	0.00		205	5.00	77.4
205205	124KSS606	LIFT 600ML	0	1.13	0.00	GST	0.00		205	5.00	77.4
205206	124KSS585	DRY GINGER 600ML	0	1.13	0.00	GST	0.00		205	5.00	77.4
205207	124KSS564	FANTA 600ML	0	1.13	0.00	GST	0.00		205	5.00	77.4
205208	124KSS543	TONIC 600ML	0	1.13	0.00	GST	0.00		205	5.00	77.4
205301	124KSS522	COKE 1.25L	0	0.75	0.00	GST	0.00		205	2.00	62.5
205302	124KSS501	DIET COKE 1.25L	0	0.75	0.00	GST	0.00		205	2.00	62.5
205303	124KSS480	COKE ZERO 1.25L	0	0.75	0.00	GST	0.00		205	2.00	62.5
205304	124KSS459	SPRITE 1.25L	0	0.75	0.00	GST	0.00		205	2.00	62.5
205305	124KSS438	LIFT 1.25L	0	0.75	0.00	GST	0.00		205	2.00	62.5
205306	124KSS417	DRY GINGER 1.25L	0	0.75	0.00	GST	0.00		205	2.00	62.5
205307	124KSS396	FANTA 1.25L	0	0.75	0.00	GST	0.00		205	2.00	62.5
205308	124KSS375	TONIC 1.25L	0	0.75	0.00	GST	0.00		205	2.00	62.5
205309	124KSS354	SODA WATER 1.25L	0	0.63	0.00	GST	0.00		205	1.00	37.1
205401	124KSS333	COKE 2L	1	0.81	0.00	GST	0.81		205	2.50	67.6
205402	124KSS312	DIET COKE 2L	0	0.81	0.00	GST	0.00		205	2.50	67.6
205403	124KSS291	COKE ZERO 2L	0	0.81	0.00	GST	0.00		205	2.50	67.6
205404	124KSS270	SPRITE 2L	0	0.81	0.00	GST	0.00		205	2.50	67.6

1x COKE 2L (205401)
 @ \$0.81 each
 Department: SOFT DRINK

Subtotal: 0.74
 Freight: 0.00
 Admin Fee: 0.00
 Tax: 0.07
Invoice Total: 0.81

Periods: Aug 25 (80), Sep 25 (90), Oct 25 (100), Nov 25 (110), Dec 25 (120), Jan 26 (10), Feb 26 (20), Jan 25 (10), Feb 25 (20), Mar 25 (30), Apr 25 (40), May 25 (50), Jun 25 (60), Jul 25 (70)

The Transaction Type (Sales Quantity, Write-Offs, Transfers, Purchases, Returns, Variances) and History Type (Day, Week, Month) can be selected from the two dropdown boxes at the bottom to control which data is shown in these 14 period fields:

1x COKE 2L (205401)
 @ \$0.81 each
 Department: SOFT DRINK

Transaction Type: Purchases
 History Type: Month

Periods: Oct 25 (100), Nov 25 (110), Dec 25 (120), Jan 26 (10), Feb 26 (20), Jan 25 (10), Feb 25 (20), Mar 25 (30), Apr 25 (40), May 25 (50), Jun 25 (60), Jul 25 (70)

1x COKE 2L (205401)
 @ \$0.81 each
 Department: SOFT DRINK

Transaction Type: Purchases
 History Type: Day

Periods: Aug 25 (80), Sep 25 (90), Oct 25 (100), Nov 25 (110), Dec 25 (120), Jan 26 (10), Feb 26 (20), Jan 25 (10), Feb 25 (20), Mar 25 (30), Apr 25 (40), May 25 (50), Jun 25 (60), Jul 25 (70)

Yes/No Options

IP-7720 – Yes/No Option – Stock Transfers – Prompt to Email Report

This functionality introduces the ability to enable a Prompt to Email a Stock Transfers Report after a Stock Transfer is processed.

When processing a Stock Transfer from the Back Office, this option will prompt to Email the Stock Transfer Report. The prompt can be toggled on/off via a new Yes/No Option “Stock Transfers – Prompt to Email Report”.

Prior to configuring this functionality, ensure that the Email settings are configured correctly in Idealpos.

These can be configured by going to: Back Office > Setup > Global Options > Other Options > Email Settings.

There are two options available:

- Idealpos Email – This will utilise the Idealpos Email Service to send emails.
- Custom – This will utilise your own Email Service. When using Custom, you will need to enter additional settings:
 - SMTP Outgoing Email Server
 - Sending Email Address
 - SMTP Username
 - SMTP Password
 - SMTP Port
 - Enable SSL/TLS Protocol

The above details can be obtained from your Email Service provider.

To enable this functionality, go to: Back Office > Setup > Yes/No Options > Search “Stock Transfer”.

Enable the Yes/No Option “Stock Transfers – Prompt to Email Report”.

The screenshot shows the 'Yes/No Options' configuration interface. At the top, there is a search bar with 'Stock Transfer' entered and a 'Clear' button. Below the search bar is a table with columns for 'ALL', '1', '2', '901', '902', '903', '963', and '967'. The table is divided into sections: 'CONFIRMATION' and 'STOCK CONTROL'. The 'STOCK CONTROL' section contains three rows: 'Allow Stock Transfers between different Sites', 'Allow Stock Transfers between items', and 'Stock Transfers - Prompt to Email Report'. The 'Stock Transfers - Prompt to Email Report' row is highlighted in blue and has a checkmark in the '1' column. An orange arrow points to this row.

	ALL	1	2	901	902	903	963	967
CONFIRMATION								
Confirm you want to Automatically Print Stock Transfer								
Confirm you want to Process Stock Transfer								
STOCK CONTROL								
Allow Stock Transfers between different Sites		✓						
Allow Stock Transfers between items		✓						
Stock Transfers - Prompt to Email Report		✓						

After the option has been enabled, go to:

Back Office > Transactions > Stock Control > Stock Transfers.

Select a Date and enter a Reference/Details for the Stock Transfer.

Add Stock Items to the Stock Transfer via the Add button > Select a Stock Item, Source/Destination Location, Quantity.

Press the "Process" button on the bottom-right corner.

Stock Code	Description	Source Location	Dest Location	Quantity	Dest Stock Code	Dest Description	Dest Quantity
205401	COKE 2L	1	2	5.0000	205401	COKE 2L	5.0000
205402	DIET COKE 2L	1	2	6.0000	205402	DIET COKE 2L	6.0000

The "Would you like to Email this Stock Transfer?" prompt will be displayed.

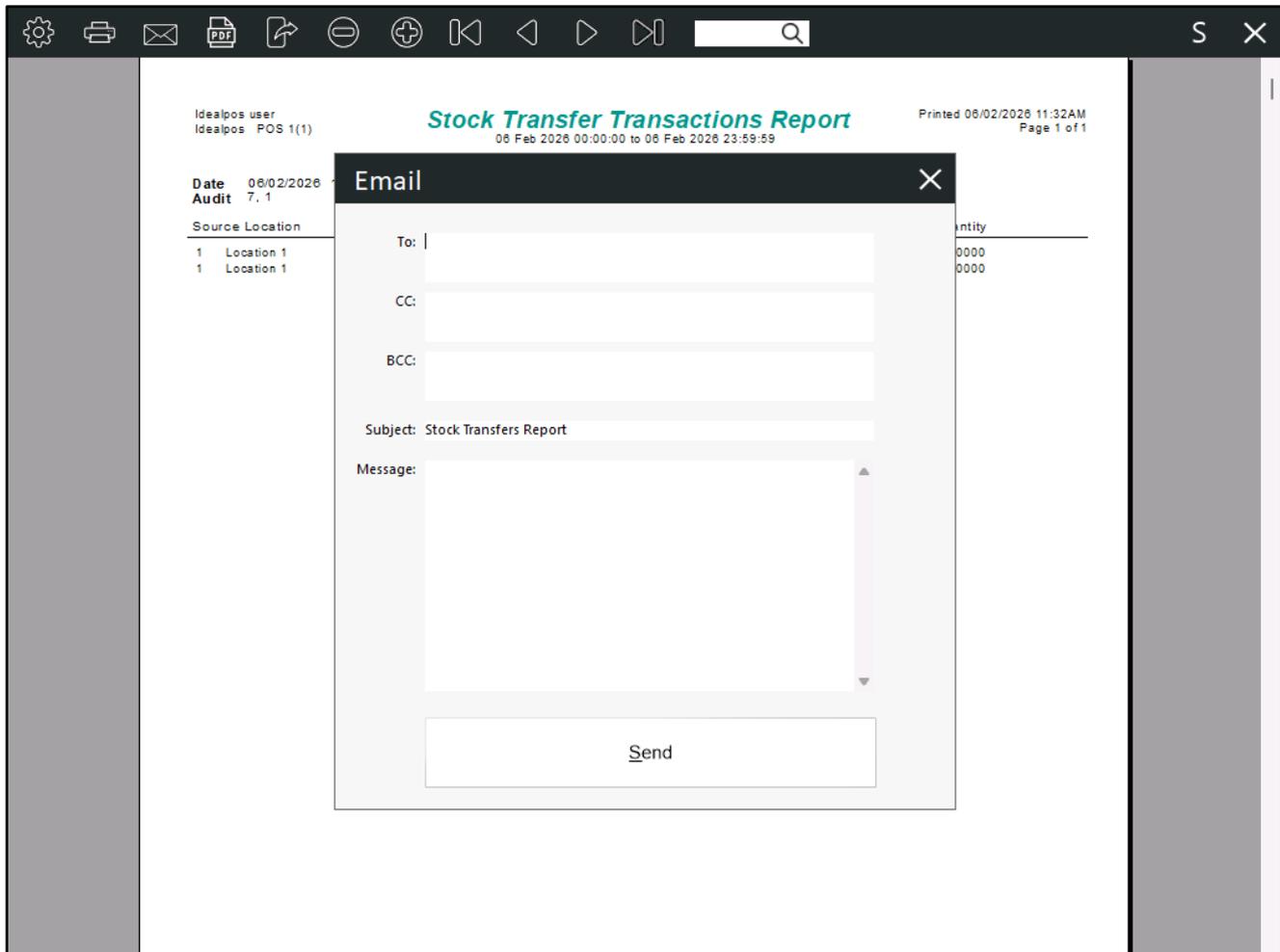
Press "Yes" to email the Stock Transfer.

Would you like to Email this Stock Transfer?

Yes No

The Stock Transfer Transactions Report will open.

The Email window will appear on top of the Report, enabling the entry of the Email Addresses to send the Report to. Enter the required Email Addresses in the To/CC/BCC Fields, and if required, add/modify the details in the Subject/Message fields > Press "Send".



The Stock Transfers Report will be sent to the entered Email Addresses, with the report being attached as a PDF file.

