

# Idealpos 8 Build 17 - Update History

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## Back Office

### IP-5931 – POS Options – Ability to adjust UI components of File Grids

This function introduces the ability to adjust the User Interface components of File Grids.

The customisation options that are now available include selecting the type of grey that's used to colour the alternating rows (Very Light Grey, Light Grey or Grey) and configuring the Grid Row Height and Grid Font Size.

These options are configurable at the POS Terminal level, meaning that each POS Terminal can have a unique set of options as required at each POS Terminal.

The customisations that are configured will apply wherever the File Grids component is used throughout the entire Idealpos User Interface.

The below is a list of just some windows in Idealpos that will use these customisable settings:

- Locations (File > Stock Control > Locations)
- Stock Items Grid (File > Stock Control > Stock Items)
- Write-Off Categories (File > Stock Control > Write-Off Categories)
- Promotions (File > Sales > Promotions > Promotions)
- Customer Enquiry (Enquiry > Customers)
- Journal History (Enquiry > Journal History)
- Stock Purchases (Transactions > Stock Control > Stock Purchases)

And many more.

To configure this function, go to: Back Office > Setup > POS Terminals > Select the POS Terminal > Modify.

(The POS Terminal that's selected will be POS Terminal that the customisations will be applied to).

Select the POS Settings tab, then within the User-Interface section on the bottom-right corner of the window, configure the following options as required:

Note – When configuring the Grid Font Size/Grid Row Height, setting values that are too large will affect the User Interface as well as the readability of text in the User Interface (e.g. displaying text in a larger font size will prevent the entire Stock Item Descriptions from viewable on each row as they will be too large). Trial and error may be required by setting the desired values, test the change to see if it is suitable and if not, then continue adjusting these settings until the desired appearance has been attained.

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**Grid Font Size** – This is the size of the font used to display each row entry in the grid.

**Grid Row Height** – This is the height of the rows in the grid.

**Alternating Row Colour** – This is the colour of the alternating row (options available are Very Light Grey, Light Grey and Grey).

**Restore Defaults** – This button can be pressed to restore the default settings.

The screenshot shows the 'Pos Terminals' settings window with the following sections:

- POS Screen Tabs:** A list of screen tabs with radio buttons for selection and checkmarks for 'Enabled' status. All tabs are currently selected and enabled.
- Default Tabs for Sessions:** Three dropdown menus, all set to 'Don't Change'.
- User-Defined Options:** A table with columns for 'Description' and 'Setting'. A single row with an asterisk (\*) is visible. A 'Remove All' button is at the bottom right.
- Price Level Mapping:** A list of 12 price levels, each with a dropdown menu. The values are: STANDARD, STAFF, EXTRAS, BOTTLESHOP, Price 5, Price 6, Price 7, Price 8, Price 9, Price 10, Price 11, and OWNERS.
- User-Interface:** Settings for 'POS Screen Resolution' (1024 x 768 (4:3)) and 'POS Screen Colour Theme' (Standard). A yellow box highlights the 'Grid Font Size' (8), 'Grid Row Height' (300), and 'Alternating Row Colour' (Very Light Grey) settings, along with a 'Restore Defaults' button. An orange arrow points from the text above to this box.

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To demonstrate and illustrate this functionality, these options have been customised and example screenshots of the Stock Items grid (File > Stock Control > Stock Items) have been included below to show how the changes affect the User Interface.

## Default Settings:

Grid Font Size

Grid Row Height

Alternating Row Colour

Stock Items ▼ 1627 records					
	Code	Description	Kitchen	Department	Plu Code
Code	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Q "/> >	101001	EGGS ON TOAST	EGGS ON TOAST	BREAKFAST	0
Modify	101002	BACON & EGGS	BACON & EGGS	BREAKFAST	0
Add	101003	EGGS BENEDICT	EGGS BENEDICT	BREAKFAST	0
Discontinue	101004	AVOCADO ON TOAST	AVOCADO ON TOA:	BREAKFAST	0
Enquiry	101005	BAKED BEANS & TOAST	BAKED BEANS & TC	BREAKFAST	0
	101006	PANCAKES	PANCAKES	BREAKFAST	0
	101007	CANADIAN PANCAKES	CANADIAN PANCAK	BREAKFAST	0
	101008	WAFFLES	WAFFLES	BREAKFAST	0
	101009	WAFFLES CHOCOLATE	WAFFLES CHOCOL	BREAKFAST	0

## Alternating Row Colour set to Light Grey:

Grid Font Size

Grid Row Height

Alternating Row Colour

Stock Items ▼ 1627 records					
	Code	Description	Kitchen	Department	Plu Code
Code	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Q "/> >	101001	EGGS ON TOAST	EGGS ON TOAST	BREAKFAST	0
Modify	101002	BACON & EGGS	BACON & EGGS	BREAKFAST	0
Add	101003	EGGS BENEDICT	EGGS BENEDICT	BREAKFAST	0
Discontinue	101004	AVOCADO ON TOAST	AVOCADO ON TOA:	BREAKFAST	0
Enquiry	101005	BAKED BEANS & TOAST	BAKED BEANS & TC	BREAKFAST	0
	101006	PANCAKES	PANCAKES	BREAKFAST	0
	101007	CANADIAN PANCAKES	CANADIAN PANCAK	BREAKFAST	0
	101008	WAFFLES	WAFFLES	BREAKFAST	0
	101009	WAFFLES CHOCOLATE	WAFFLES CHOCOL	BREAKFAST	0

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## Alternating Row Colour set to Grey:

Grid Font Size

Grid Row Height

Alternating Row Colour

Stock Items ▼ 1627 records				
Code	Description	Kitchen	Department	Plu Code
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
101001	EGGS ON TOAST	EGGS ON TOAST	BREAKFAST	0
101002	BACON & EGGS	BACON & EGGS	BREAKFAST	0
101003	EGGS BENEDICT	EGGS BENEDICT	BREAKFAST	0
101004	AVOCADO ON TOAST	AVOCADO ON TOAST	BREAKFAST	0
101005	BAKED BEANS & TOAST	BAKED BEANS & TOAST	BREAKFAST	0
101006	PANCAKES	PANCAKES	BREAKFAST	0
101007	CANADIAN PANCAKES	CANADIAN PANCAKES	BREAKFAST	0
101008	WAFFLES	WAFFLES	BREAKFAST	0
101009	WAFFLES CHOCOLATE	WAFFLES CHOCOLATE	BREAKFAST	0

## Large Grid Font Size and Grid Row Height:

Grid Font Size

Grid Row Height

Alternating Row Colour

Stock Items ▼ 1627 records				
Code	Description	Kitchen	Department	Plu Code
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
101001	EGGS ON TOAST	EGGS ON TOAST	BREAKFAST	0
101002	BACON & EGGS	BACON & EGGS	BREAKFAST	0
101003	EGGS BENEDICT	EGGS BENEDICT	BREAKFAST	0
101004	AVOCADO ON TOAST	AVOCADO ON TOAST	BREAKFAST	0
101005	BAKED BEANS & TOAST	BAKED BEANS & TOAST	BREAKFAST	0
101006	PANCAKES	PANCAKES	BREAKFAST	0

## IP-5993 – Activity Log Search Functionality

This function introduces the ability to search through the Activity Log via a new Search field. This can be used in cases where any instances of a specific record in the Activity Log need to be found. The search function includes the ability to enter a search term into a search field as well as a find next and find previous button to cycle through each record that matches the entered search term.

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

In the Search field, enter the desired Search term and press the on-screen down arrow to find next.

The on-screen down arrow can be pressed repeatedly until the desired record is located.

When Idealpos finds a record that matches the entered search term, the record will be highlighted in blue.

The on-screen up arrow can also be pressed to go to the previously found record.

The Search function can also be used in combination with the options listed in the Selection Criteria.

**Activity Enquiry** [S] [X]

Date	Time	POS	Clerk/User	Action Description
14 Aug 19	09:28:20	1		New Build: 7.1 Build 4 DevR
14 Aug 19	09:28:20	1	Admin	Logged In : Admin
14 Aug 19	09:29:05	1	Admin	Logged Out : Admin
14 Aug 19	09:30:19	1	Admin	Logged In : Admin
27 Sep 21	07:16:24	1		New Build: 8 Build 1 DevRev
27 Sep 21	07:16:24	1	Admin	Logged In : Admin
27 Sep 21	07:17:07	1	Admin	Logged In : Admin
27 Sep 21	07:18:53	1	Admin	Modified Buttons on Layout 1
27 Sep 21	07:24:02	1	Admin	Logged Out : Admin
27 Sep 21	07:28:03	1	Admin	Logged In : Admin
27 Sep 21	07:28:17	1	Admin	Logged Out : Admin
13 Jul 23	11:09:41	1		New Build: 8 Build 14 DevRe
13 Jul 23	11:09:41	1	Admin	Logged In : Admin
13 Jul 23	14:18:54	1	Admin	Logged In : Admin
13 Jul 23	14:44:05	1	Admin	Invalid Registration
13 Jul 23	15:09:11	3	Admin	Exit IPS
13 Jul 23	15:10:34	3		New Build: 8 Build 14 DevRe
13 Jul 23	15:10:46	3	Admin	Logged In : Admin
13 Jul 23	15:22:22	3	Admin	Logged In : Admin
13 Jul 23	15:23:04	3	Admin	POS Options Modify POS 2
13 Jul 23	15:23:11	3	Admin	POS Options Modify POS 3
13 Jul 23	15:27:44	3	Admin	Logged In : Admin
13 Jul 23	15:28:25	3	Admin	POS Options Modify POS 2
13 Jul 23	15:44:43	3	Admin	Logged In : Admin
13 Jul 23	15:44:43	3	Admin	Logged In : Admin
13 Jul 23	15:57:45	3	Admin	Logged In : Admin
13 Jul 23	15:57:45	3	Admin	Logged In : Admin
13 Jul 23	16:01:44	3	Admin	Logged In : Admin
13 Jul 23	16:01:44	3	Admin	Logged In : Admin
13 Jul 23	16:06:40	2		New Build: 8 Build 14 DevRe
13 Jul 23	16:06:41	2	Admin	Logged In : Admin
13 Jul 23	16:06:41	3	Admin	Logged In : Admin
13 Jul 23	17:06:31	2	Admin	Add Network Printer - DUMMY
13 Jul 23	17:06:55	2	Admin	Save All Network Printers
13 Jul 23	17:07:12	3	Admin	Save All Network Printers
13 Jul 23	17:11:43	2	Online	Web Order Received: 1166796872
13 Jul 23	17:12:20	2	Admin	Global Options modified
13 Jul 23	17:13:31	2	Admin	Global Options modified
13 Jul 23	17:14:04	2	Admin	Global Options modified
13 Jul 23	17:14:10	2	Admin	
13 Jul 23	17:14:11	2	Admin	Global Options modified
13 Jul 23	17:14:33	2	Admin	Global Options modified
13 Jul 23	17:16:35	3	Admin	Stock Item Modify 120005 - HAWAII PIZZA
13 Jul 23	17:17:24	2	Online	Web Order Received: 2117503994
13 Jul 23	17:17:24	2	Online	Transaction 000501-2 = 8.99
13 Jul 23	17:19:06	3	Online	Web Order Received: 1616986831
13 Jul 23	17:19:06	3	Online	Transaction 000501-3 = 8.99
13 Jul 23	17:27:25	2	Admin	Cancelled Print Job 1
13 Jul 23	17:27:29	3	Admin	Cancelled Print Job 1
13 Jul 23	17:39:11	2	Admin	Global Options modified

**Selection Criteria**

All Dates [v]

Clerk [v]

Function [v]

POS [v]

Location [v]

Table [v]  Show Only the Selected Type

Top 1000 records  Filter Sales

Search [input] [↓] [↑] [Select]

Transactions	14
Stock Item Modify	1
Customer Modify	1
Log Ins	62
Log Outs	3
Exit IPS	18
Invalid Registration	1

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Enter a search term into the Search field and press the on-screen down arrow.  
The first record that matches the entered search term will be highlighted in the Activity Log.

**Activity Enquiry** S X

Date	Time	POS	Clerk/User	Action Description
13 Jul 23	17:12:20	2	Admin	Global Options modified
13 Jul 23	17:13:31	2	Admin	Global Options modified
13 Jul 23	17:14:04	2	Admin	Global Options modified
13 Jul 23	17:14:10	2	Admin	Global Options modified
13 Jul 23	17:14:11	2	Admin	Global Options modified
13 Jul 23	17:14:33	2	Admin	Global Options modified
13 Jul 23	17:16:35	3	Admin	Stock Item Modify 120005 - HAWAIIAN PIZZA
13 Jul 23	17:17:24	2	Online	Web Order Received: 2117503994
13 Jul 23	17:17:24	2	Online	Transaction 000501-2 = 8.99
13 Jul 23	17:19:06	3	Online	Web Order Received: 1616986831
13 Jul 23	17:19:06	3	Online	Transaction 000501-3 = 8.99
13 Jul 23	17:27:25	2	Admin	Cancelled Print Job 1
13 Jul 23	17:27:29	3	Admin	Cancelled Print Job 1
13 Jul 23	17:39:11	2	Admin	Global Options modified
13 Jul 23	17:39:22	3	Admin	Exit IPS
13 Jul 23	17:39:24	2	Admin	Exit IPS
13 Jul 23	17:39:57	2	Admin	Logged In : Admin
13 Jul 23	17:39:59	3	Admin	Logged In : Admin
13 Jul 23	17:41:17	2	Online	Web Order Received: 2085056965
14 Jul 23	16:09:43	2	Admin	Logged In : Admin
14 Jul 23	16:09:49	3	Admin	Logged In : Admin
14 Jul 23	16:10:19	2	Online	Transaction 000502-2 = 8.99
14 Jul 23	16:12:32	2	Admin	Exit IPS
14 Jul 23	16:12:33	3	Admin	Exit IPS
14 Jul 23	16:13:24	2	Admin	Logged In : Admin
14 Jul 23	16:13:24	3	Admin	Logged In : Admin
14 Jul 23	16:14:44	2	Online	Web Order Received: 925726958
14 Jul 23	16:43:53	2	Admin	Cancelled Print Job 1
14 Jul 23	16:47:27	2	Admin	Global Options modified
14 Jul 23	16:47:29	3	Admin	Global Options modified
14 Jul 23	16:47:31	2	Admin	Exit IPS
14 Jul 23	16:47:33	3	Admin	Exit IPS
14 Jul 23	16:48:05	2	Admin	Logged In : Admin
14 Jul 23	16:48:08	3	Admin	Logged In : Admin
14 Jul 23	16:49:24	2	Online	Web Order Received: 963318596
14 Jul 23	17:11:18	2	Admin	Cancelled Print Job 1
14 Jul 23	17:11:40	2	Admin	Global Options modified
14 Jul 23	17:11:56	3	Admin	Exit IPS
14 Jul 23	17:11:57	2	Admin	Exit IPS
14 Jul 23	17:12:28	2	Admin	Logged In : Admin
14 Jul 23	17:12:31	3	Admin	Logged In : Admin
14 Jul 23	17:13:59	2	Admin	Exit IPS
14 Jul 23	17:14:01	3	Admin	Exit IPS
14 Jul 23	17:14:26	2	Admin	Logged In : Admin
14 Jul 23	17:14:28	3	Admin	Logged In : Admin
14 Jul 23	17:15:26	2	Online	Web Order Received: 2104523024
14 Jul 23	17:15:43	2	Admin	Cancelled Print Job 1
14 Jul 23	17:15:59	2	Online	Transaction 000504-2 = 8.99
14 Jul 23	17:16:30	2	Admin	Global Options modified
14 Jul 23	17:18:08	3	Online	Web Order Received: 109930120

**Selection Criteria**

All Dates

Clerk: [Dropdown]  
Function: [Dropdown]  
POS: [Dropdown]  
Location: [Dropdown]  
Table: [Dropdown]  Show Only the Selected Type  
Top 1000 records  Filter Sales

Search: Global Options [Down Arrow] [Up Arrow] [Select]

Transactions	14
Stock Item Modify	1
Customer Modify	1
Log Ins	62
Log Outs	3
Exit IPS	18
Invalid Registration	1

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The on-screen up/down arrows can be used repeatedly to cycle through the next and previous instances of the search term that have been found.

## Bills/Receipts

### IP-6106 – Bills/Receipts – Option to Group by Sales Category

This function introduces the ability to configure Bills/Receipts so that Stock Items are grouped by their Sales Category. To configure this function, go to: Back Office > Setup > Global Options > Printing.

Within the Print Group Header Format – Receipts/Bills section, enable the “Group by Sales Category” option.

If Group by Sales Category is required on the Bill, ensure that the Bill Format is set to “Order by Print Group” or “Order by Print Group/Seat”.

**Global Options**  
Site 1 (Site 1)

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

**Print Formats**

Kitchen Docket Format

- Standard
- Order by Print Group
- Order by Seat / Print Group
- Order by Print Group / Seat
- Group Instructions by Seat
  - Accumulate Items
  - Show each Instruction on its own line
  - Print Instructions/Seats in small font
  - Print Instructions Red
  - Print Instructions White on Black
  - Use Course Separator instead of Print Groups
  - Use Instruction Separator Line
  - Print Entire Order to triggered Kitchen Printers: All Items

Bill Format

- Standard
- Order by Print Group
- Order by Seat / Print Group
- Order by Print Group / Seat
- Accumulate Items
- Print Discounts White on Black

**QR Codes**

Receipt QR Code Data: [ ] QR Code Size: 1 (2-9)

Print on Coupons  
 Print on Receipt Footer  
 Print on A4 Tax Invoice

Text underneath Code: [ ]

**Kitchen Printer Names**

- KP 1 KITCHEN
- KP 2 BAR
- KP 3 COFFEE
- KP 4 IKM
- KP 5 Kitchen Printer 5
- KP 6 Kitchen Printer 6
- KP 7 Kitchen Printer 7
- KP 8 Kitchen Printer 8
- KP 9 Kitchen Printer 9
- KP 10 Kitchen Printer 10
- KP 11 Kitchen Printer 11
- KP 12 Kitchen Printer 12

**Other Options**

- Use Smallest Line Spacing
- Double Height
- Double Width
- Bold
- Member Photo on IKM Runner Dockets

**Print Group Header Format - Kitchen Printers**

- MAIN [ ] Left-Aligned
- [ ] Centred
- [ ] Double Height
- Double Width Bold

**Print Group Header Format - Receipts/Bills**

- MAIN [ ] Left-Aligned
- [ ] Centred
- [ ] Double Height
- Double Width Bold
- Group by Sales Category

**Show Total Discounts on Receipt**

- This Sale  
Descriptor: TOTAL SAVINGS
- Customer Lifetime  
Descriptor: LIFETIME SAVINGS
- User-Defined Field: Don't Use

Close the Global Options to save the change.



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When the "Group by Sales Category" option is disabled, the Customer Receipt will group by Print Group.

```

      I D E A L P O S

      1/212 Curtin Ave West
      Eagle Farm QLD 4009
      Australia

      TAX INVOICE
      123-456-789-11

      #000626-2 Jeremy 18-Jan-2024 09:36:45

      - - - - E N T R E E - - - -
      PASTA*                $11.00
      BEEF*                 $13.00
      LAMB*                 $12.00
      DUCK*                 $14.00

      - - - - B E V E R A G E - - - -
      CAPPUCCINO*           $3.50
      FLAT WHITE*           $3.50
      SHORT BLACK*          $3.00
      -----
      T O T A L              $60.00
      -----
      GST Amount            $5.45

      C A S H                $ 6 0 . 0 0

      FOOD TOTAL            $50.00
      BEVERAGE TOTAL       $10.00
      Other Categories TOTAL $0.00

      *indicates taxable supply

      Powered by Idealpos

      Idealpos User

```

When the "Group by Sales Category" option is enabled, the Customer Receipt will group by Sales Category.

```

      I D E A L P O S

      1/212 Curtin Ave West
      Eagle Farm QLD 4009
      Australia

      TAX INVOICE
      123-456-789-11

      #000627-2 Jeremy 18-Jan-2024 09:37:32

      - - - - F O O D - - - -
      PASTA*                $11.00
      BEEF*                 $13.00
      LAMB*                 $12.00
      DUCK*                 $14.00

      - - - - B E V E R A G E - - - -
      CAPPUCCINO*           $3.50
      FLAT WHITE*           $3.50
      SHORT BLACK*          $3.00
      -----
      T O T A L              $60.00
      -----
      GST Amount            $5.45

      C A S H                $ 6 0 . 0 0

      FOOD TOTAL            $50.00
      BEVERAGE TOTAL       $10.00
      Other Categories TOTAL $0.00

      *indicates taxable supply

      Powered by Idealpos

      Idealpos User

```

## Customers

### IP-5548 – Customer Enquiry – Filter Customers by Sales on POS/Location

This function introduces the ability to filter Customers by Sales that took place at the POS Terminals and/or Locations that are specified in the Selection Criteria within the Customer Enquiry window.

To use this function, go to: Back Office > Enquiry > Customers.

On the bottom-right corner of the Customer Enquiry window, enter the POS Terminal and/or Locations to filter the Customer Enquiry window. The ">" button within each field can be used to display a list of POS Terminals or Locations to select from a list. When entering values into the POS or Location fields, they can be entered as a comma separated list (e.g. 1, 2, 3) or as a range (e.g. 1-3).

**Customer Enquiry**
S X

Code	Last Name	First Name	Type
1	Harrison	Ben	ACCOUNTS
2	Charlton	Sarah	MEMBERS
3	Townsend	Mick	MASTER ACCOUNTS
4	Winters	Charlotte	SUB ACCOUNTS
5	Andrews	Theresa	LAYBYS
6	Graham	Alan	BAR TABS
7	Account Customer		BRONZE MEMBERS
8	Points Customer		MEMBERS
9	Master Account		GOLD MEMBERS
10	Sub Account		SUB ACCOUNTS
11	Layby Customer		LAYBYS
12	Bar Tab Customer		BAR TABS
13	Me&U		ONLINE
101	Murray	Steve	BRONZE MEMBERS
102	Brown	Talia	SILVER MEMBERS
103	Singh	Jamal	GOLD MEMBERS
104	Brinkle	Rebecca	PLATINUM MEMBERS
105	Smulders	Ashleigh	LIFE MEMBERS
111	Bronze		BRONZE MEMBERS
112	Silver		SILVER MEMBERS
113	Gold		GOLD MEMBERS
114	Platinum		PLATINUM MEMBERS
115	Life		LIFE MEMBERS
5001	Bar Tab 5001		BAR TABS
5002	Bar Tab 5002		BAR TABS
5003	Bar Tab 5003		BAR TABS
5004	Bar Tab 5004		BAR TABS
5005	Bar Tab 5005		BAR TABS
5006	Bar Tab 5006		BAR TABS
5007	Bar Tab 5007		BAR TABS
5008	Bar Tab 5008		BAR TABS
5009	Bar Tab 5009		BAR TABS
5010	Bar Tab 5010		BAR TABS
5011	Bar Tab 5011		BAR TABS
5012	Bar Tab 5012		BAR TABS

**1 - 9874902100196**  
**Dr Ben Harrison**  
**Unit 17**  
**31 Honeysuckle Ave**  
**Groundsborough QLD 34**

Type: ACCOUNTS  
 Credit Limit: 1000.00  
 ABN: 564233185

Phone: 0265486874  
 Mobile: 0499246317  
 Other:  
 Email:

Points:  
 Points Limit:  
 Password:  
 Price Level: 1  
 Dob: 18-Feb-1974 (Age: 49)  
 Birth Date 2:  
 Company: Harry's Meds

Total	Current	1 month	2 months	3 months+
0.00	0.00	0.00	0.00	0.00

Account Journal Modify

Customer Code > to >

Last Name > to >

Birth Date 2 > to >

Customer Type >

Company

Text Field

Yes/No Field

Birth Month

Sales All Dates

Department >

Stock Item >

Discontinued Only  
 Mail-Out Only

Total > to >

Points > to >

POS >

Location >

Apply Filter

Export
Labels
Email
Email to Clipboard

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After entering values into the POS and/or Location fields, press the "Apply Filter" button to filter the list of Customers displayed.

The window will only display Customers that were included in a sale that was performed at either the POS Terminals and/or Locations that were specified.

**Customer Enquiry**

Code	Last Name	First Name	Type
2	Charlton	Sarah	MEMBERS
13	Me&U		ONLINE
123456	Customer 123456		ACCOUNTS

**2 - 9850859357357**  
Miss Sarah Charlton  
42 Wallaby Way  
Hampden

Phone: 0765536455  
Mobile: 0499754163  
Other:  
Email:

Type: MEMBERS  
Credit Limit:  
ABN:

Points: 627  
Points Limit:  
Password:  
Price Level: 1  
Dob: 06-Sep-1987 (Age: 36)  
Birth Date 2: 02-Mar-2015  
Company:

Customer Code > to >  
Last Name > to >  
Birth Date 2 to >  
Customer Type >  
Company  
Text Field >  
Yes/No Field >  Discontinued Only  
Birth Month >  Mail-Out Only  
Sales All Dates >  
Total > to >  
Points > to >  
Location >  
Department >  
Stock Item >

Export Labels Email to Clipboard

# idealpos Update History

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## IP-5852 – Customers – Ability to Set Points Limit

This function introduces the ability to set a Points Limit on each customer.

When a Points Limit has been set for a Customer, they will be unable to earn points beyond the Points Limit that has been set within their customer record.

To configure this function, go to: Back Office > File > Customers > Customers.

Select a Customer from the list > Modify.

In the Points Limit field, enter a limit > Press “Save” on the top-left corner of the window.

Note that if a Points Limit is entered that is less than the Customer’s currently accrued points balance, the Customer will retain their currently accrued points balance and they will not accrue additional points on future purchases.

The screenshot shows the 'Customers Modify 2' window with the following details:

- General:** Code 2, Last Name Charlton, Given Names Sarah, Title Miss, Customer Type MEMBERS, Scan Code 9850859357357, Auto, Other Codes 9955553935198.
- Address Details:** Address 42 Wallaby Way, Suburb Hampden, State [dropdown], Postcode [input].
- Delivery Address:** Delivery Address same as Above, Address [input], Suburb [input], State [dropdown], Postcode [input].
- Contact Details:** Phone 0765536455, Mobile 0499754163, Other [input], Email [input].
- Sales / Accounting:** Auto % Discount 0, Price Level 1, Credit Limit 0.00, Bar Tab [checkbox], Account [checkbox].
- Miscellaneous:** Company [input], ABN [input], Contact No [input], Birth Date 06/09/1987, Birth Date 2 02/03/2015, Occupation [input], Next of Kin [input], Gender F, Marital Status [dropdown], Mail Out [checked], Discontinue [checkbox].
- Points Limit:** 630 (highlighted with a yellow box and arrow).

The Customer’s Points Balance will stop accruing once the Points Limit has been reached.

The screenshot shows the POS interface with the following details:

- Top Bar:** v8 Build 17 DevRev 71 13 Nov 13:19, POS 2 Jeremy STANDARD #608, Sarah Charlton - 630 Points (\$63.00)
- Bottom Bar:** 630 Points (\$63.00), \$0.00

## Import Data

### IP-5579 – Promotions Import – Support for Departments

This function introduces the ability to Import Promotions that include Departments in the Trip Condition Sets when using the Promotions Import function. Prior to this enhancement, only Stock Items could be included in the Trip Condition sets when Promotions were added via a Promotion Import file.

Two examples of this are creating a Promotion via a Promotion Import File that will be tripped:

- When a customer spends \$10.00 on items from Department XYZ, or
- When a customer purchases a specific number of items from Department XYZ.

To use this function, first, create a Promotion Import File.

A Department is specified in the Promotion Import File via a "DPT" header, with the Department Code being placed within the DPT field of the Import File.

E.g. Using the Idealpos Demo Database, create a Promotion that will be tripped when 5 items from the Coffee Department (Department Code 202) are purchased. When tripped, the promotion will trigger a sell price of \$2.00 for each Coffee Item purchased.

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The below is a Promotion File to demonstrate the above example (this can be created as a TXT file). Note that when a Trip Condition Set (TRIP\_GROUP) is not specified, all the items and/or Departments will be added to the Trip Condition Set 1 by default.

```
ZONE,DESCRIPTION,TRIP_QUANTITY,PROMO_PRICE,START_DATE,END_DATE,DPT
1,Coffee Promo,5,2,1-Nov-23,1-Jan-24,202
```

To import the Promotion, go to: Back Office > File > Sales > Promotions > Promotions > press "Import" on the left-hand side > Browse to the folder location that contains the import file > Open. The Promotion will be imported and will appear as follows:

**Promotions** Modify 24

From: 01 Nov 2023 00:00 to: 01 Jan 2024 23:59

Discount Type: Unit Price Each 2.00

**Trip Conditions Set 1**

- Trip by Quantity: Buy 5 of items below
- Trip by Amount

DPT 202 COFFEE

Calculate Unit Prices from these items only

Buttons: Delete, Promotion Link Enquiry, Add Department, Add Stock Item

When 5x Coffee Items are purchased, they will be sold at the Promotion Price of \$2.00 each.

Item	Quantity	Price
CAPPUCCINO	1	3.50
CAPPUCCINO	1	3.50
CAPPUCCINO	1	3.50
CAPPUCCINO	1	3.50
CAPPUCCINO	1	3.50
5x		Discounts -7.50
		<b>\$10.00</b>

# idealpos Update History

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To specify multiple Departments in the Trip Condition Set, simply copy the line in the Promotion Import file and modify the Department Code on the copied line to match the Department that needs to be included in the Trip Condition Set.

ZONE,DESCRIPTION,TRIP\_QUANTITY,PROMO\_PRICE,START\_DATE,END\_DATE,DPT

1,Coffee and Tea Promo,5,2,1-Nov-23,1-Jan-24,201

1,Coffee and Tea Promo,5,2,1-Nov-23,1-Jan-24,202

**Promotions**  
Modify 25

Promotion    Advanced

Description  
Coffee and Tea Promo

Group  
Promo2

POS >

Customer Type >

Multiple Trips  
 Apply Over Trip Level

From 01 Nov 2023 00:00  
to 01 Jan 2024 23:59  
 Continuous  
 During Specific Times

Discount Type  
Unit Price Each 2.00

**Trip Conditions Set 1**  
 Trip by Quantity    Buy 5 of items below  
 Trip by Amount

DPT 202 COFFEE  
DPT 201 TEA

Calculate Unit Prices from these items only

Delete   Promotion Link Enquiry   Add Department   Add Stock Item

**Trip Conditions Set 2**  
 Trip by Quantity    And Buy 0 of items below  
 Trip by Amount

**Trip Conditions Set 3**  
 Trip by Quantity    And Buy 0 of items below  
 Trip by Amount

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It is also possible to create a Promotion that uses all three Trip Condition Sets.  
The below is an example demonstrating this:

ZONE,DESCRIPTION,TRIP\_QUANTITY,PROMO\_PRICE,START\_DATE,END\_DATE,DPT,TRIP\_GROUP  
 1,Tea Coffee and Water Promo,5,2,1-Nov-23,1-Jan-24,201,1  
 1,Tea Coffee and Water Promo,5,2,1-Nov-23,1-Jan-24,202,2  
 1,Tea Coffee and Water Promo,5,2,1-Nov-23,1-Jan-24,204,3

**Promotions**  
Modify 26
Promotion   Advanced
✕

Description  
Tea Coffee and Water Promo

Group  
Promo3

POS >

Customer Type >

Multiple Trips  
 Apply Over Trip Level

From 01 Nov 2023 00:00

to 01 Jan 2024 23:59

Continuous  
 During Specific Times

**Discount Type**

Unit Price Each 2.00

**Trip Conditions Set 1**

Trip by Quantity    Buy 5 of items below  
 Trip by Amount

DPT 201 TEA

Calculate Unit Prices from these items only

Delete   Promotion Link Enquiry   Add Department   Add Stock Item

**Trip Conditions Set 2**

Trip by Quantity    And Buy 5 of items below  
 Trip by Amount

DPT 202 COFFEE

Calculate Unit Prices from these items only

Delete   Promotion Link Enquiry   Add Department   Add Stock Item

**Trip Conditions Set 3**

Trip by Quantity    And Buy 5 of items below  
 Trip by Amount

DPT 204 WATER

Calculate Unit Prices from these items only

Delete   Promotion Link Enquiry   Add Department   Add Stock Item



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Here is one last example showing that it is possible to combine Trip Quantity and Trip Amount in the one Promotion as well as having multiple Departments in each Trip Condition Set.

```

ZONE,DESCRIPTION,TRIP_QUANTITY,TRIP_AMOUNT,PROMO_PRICE,START_DATE,END_DATE,DPT,TRIP_GROUP
1,Mega Promo,3,,5,1-Jan-21,30-Jun-24,101,1
1,Mega Promo,3,,5,1-Jan-21,30-Jun-24,103,1
1,Mega Promo,3,,5,1-Jan-21,30-Jun-24,106,1
1,Mega Promo,,2.50,5,1-Jan-21,30-Jun-24,107,2
1,Mega Promo,,2.50,5,1-Jan-21,30-Jun-24,108,2
1,Mega Promo,,2.50,5,1-Jan-21,30-Jun-24,109,2
1,Mega Promo,3,,5,1-Jan-21,30-Jun-24,111,3
1,Mega Promo,3,,5,1-Jan-21,30-Jun-24,112,3
1,Mega Promo,3,,5,1-Jan-21,30-Jun-24,113,3
    
```

**Promotions**  
Modify 27
Promotion    Advanced
✕

Description  
Mega Promo

Group  
Promo4

POS >

Customer Type >

Multiple Trips  
 Apply Over Trip Level

From 01 Jan 2021 00:00

to 30 Jun 2024 23:59

Continuous  
 During Specific Times

Discount Type

Unit Price Each 5.00

**Trip Conditions Set 1**

Buy 3 of items below

Trip by Quantity  
 Trip by Amount

DPT 101 BREAKFAST  
DPT 106 ENTRÉE  
DPT 103 LUNCH

Calculate Unit Prices from these items only

Delete   Promotion Link Enquiry   Add Department   Add Stock Item

**Trip Conditions Set 2**

And Spend 2.50 on items below

Trip by Quantity  
 Trip by Amount

DPT 109 CHEESE  
DPT 108 DESSERT  
DPT 107 MAIN

Calculate Unit Prices from these items only

Delete   Promotion Link Enquiry   Add Department   Add Stock Item

**Trip Conditions Set 3**

And Buy 3 of items below

Trip by Quantity  
 Trip by Amount

DPT 112 BURGERS  
DPT 111 PIZZAS  
DPT 113 SANDWICHES

Calculate Unit Prices from these items only

Delete   Promotion Link Enquiry   Add Department   Add Stock Item

## Kiosk

### IP-6058 – Kiosk – Option for Order Number Prompt

This function introduces the ability to display an Order Number Prompt on the Kiosk which will prompt the customer to enter an Order Number.

The Kiosk supports an Order Number with a maximum length of 10 digits; after an Order Number is entered, it will display at the top of the Kiosk screen and will be printed on the Kitchen Docket/Customer Receipt.

The Order Number can be something that can be used to identify the Customer that placed the Order (such as the Customer's Mobile Phone Number or any other number that the venue may want to use to identify the customer by).

To configure and use this function, go to: Back Office > Setup > POS Terminals > Select the Kiosk Terminal > Modify. Within the Display/Kiosk tab, enable the "Order Number Prompt" option.

This will trigger the Order Number prompt to appear on the Kiosk when a customer starts placing their order.

If the customer skips the Order Number Prompt by either pressing "OK" or the "X" button on the top-right corner without entering a number, they will be prompted to enter an Order Number again at a later stage when proceeding to make the payment for the order.

The screenshot shows the 'Pos Terminals' configuration window with the 'Display / Kiosk' tab selected. The 'Kiosk' section at the bottom contains the following settings:

- Kiosk Style: Kiosk v2
- Kiosk Clerk: Kiosk
- Home Screen Image: Kiosk2\_Homescreen.jpg
- Home Screen Images Location: >
- Logo Image: >
- Order Finalized Image: Kiosk\_Thankyou.jpg
- Kiosk Closed Image: Kiosk\_Closed.jpg
- Open From: [ ] to [ ]
- Code Scanning: [ ]
- Order Number Prompt:  (highlighted with a red box and arrow)
- Pay at Counter Button:
- Dine-in / Takeaway Prompt:
- Item Screen Font Bold:
- Exit POS Password: [ ]
- Inactivity Timeout: [ ]

The 'Customer Display Screen' section shows a preview of a menu with the following items:

- CHICKEN BURGER: \$13.00
- LARGE CHIPS: \$4.00
- SPRITE 600ML: \$5.00
- LARGE BURGER MEAL: \$18.50
- subtotal: \$18.50

The 'Two-Line Customer Display' section has the following settings:

- Type: None
- Connection: [ ]
- Display Text: [ ]
- Show Subtotal instead of Qty:

The 'Image Options' section has the following settings:

- Skip Images Larger than: 500 KB
- Seconds between images: 9
- Stretch images to fit:

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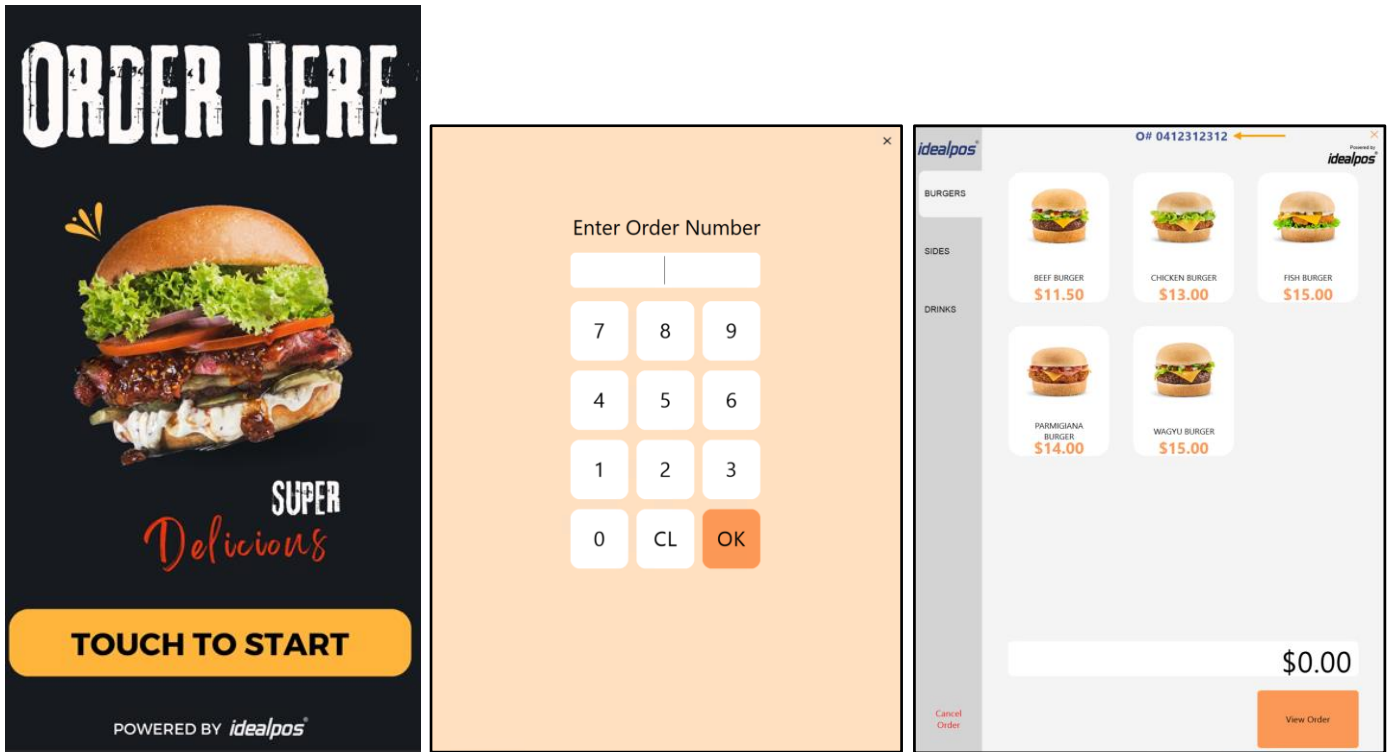
After enabling the "Order Number Prompt" option, close the POS Terminals configuration window, then restart the Kiosk terminal.

After the Kiosk starts, the Kiosk will display the Home Screen Image (an image that welcomes the customer to the Kiosk and typically shows a message "Touch to start" or similar).

After pressing the screen on the Kiosk, the "Enter Order Number" prompt will be displayed.

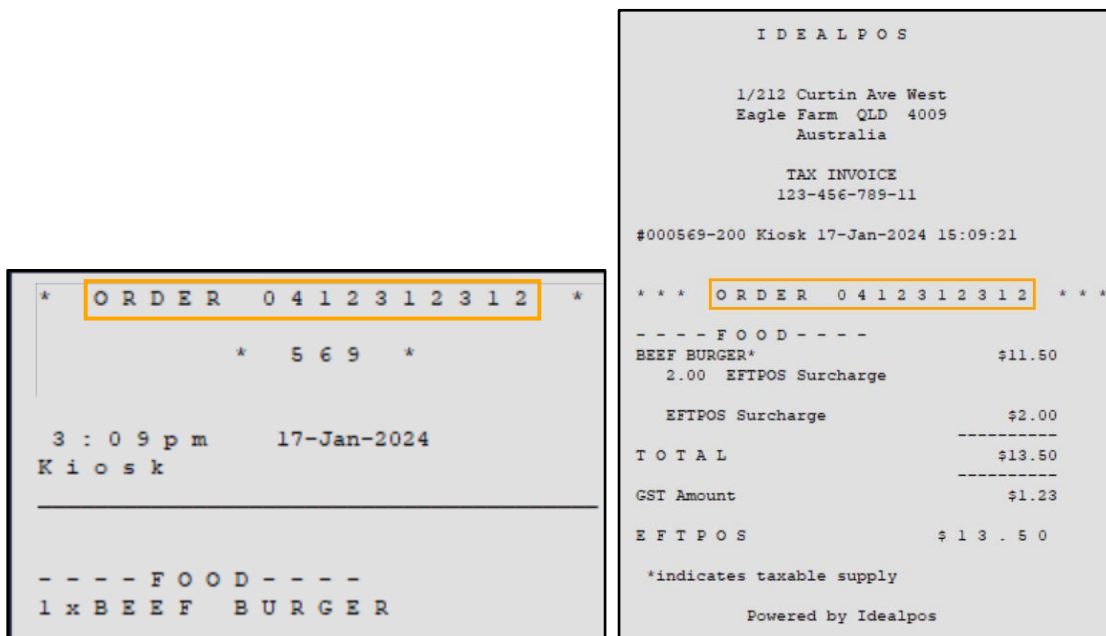
Entering an Order Number and pressing the "OK" button will trigger the entered Order Number to appear at the top of the Kiosk. The Kitchen Docket(s)/Customer Receipt will also show the entered Order Number.

If the Order Number needs to be changed after it has been entered, press the Order Number at the top of the Kiosk screen and it will display the Enter Order Number prompt again; re-enter the correct Order Number and press OK.



After pressing the screen on the Kiosk, the "Enter Order Number" prompt will be displayed.

Entering an Order Number and pressing the "OK" button will trigger the entered Order Number to appear at the top of the Kiosk. The Kitchen Docket/Customer Receipt will also show the entered Order Number.



## POS

### IP-6108 – Default Sale Type Option by POS Terminal

This function enables the ability to set a Default Sale Type for each POS Terminal that will apply for all sales performed at the POS Terminal. When this function is configured, the Default Sale Type can temporarily be disabled for the current sale (if required) or a different Sale Type can be selected via a Sale Type POS Screen button which will override the Default Sale Type for the sale.

When the next sale commences, the Default Sale Type will automatically apply.

To configure and use this function, go to: Back Office > Setup > Global Options > Sales.

Ensure that the required Sale Type Statuses are configured as required.

If required, create additional Sale Type Statuses as required.

Take note of the slot numbers for Sale Types which will be set as Default Sale Types on the POS Terminals, with the first Sale Type slot at the top of the list being "1" and the last Sale Type slot at the bottom of the list being "9".

E.g. In the screenshot below, Takeaway is in slot 1, Delivery is in slot 2, Pickup is in slot 3, Cater is in slot 4, so the corresponding slot number will need to be entered in the next step when configuring the Default Sale Type for each POS Terminal that will have a Default Sale Type configured.

**Global Options**  
Site 1 (Site 1)

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

**Tax Rates**

Default	Description	Rate	Label
Rate 1 <input checked="" type="radio"/>	GST	10.00	GST
Rate 2 <input type="radio"/>	GST-Free	0.000	FRE
Rate 3 <input type="radio"/>	Not Defined	0.000	
Rate 4 <input type="radio"/>	Not Defined	0.000	
Rate 5 <input type="radio"/>	Not Defined	0.000	
Rate 6 <input type="radio"/>	Not Defined	0.000	

**Programmable Barcodes**

Use?  Use Hardwired?

Prefix \_\_\_\_\_ Position \_\_\_\_\_ Length \_\_\_\_\_

Field 1 Stock Code \_\_\_\_\_ 0 \_\_\_\_\_ 0

Field 2 Quantity \_\_\_\_\_ 0 \_\_\_\_\_ 0

Decimal Point \_\_\_\_\_ 0

**Miscellaneous**

Price Level Change Duration  
 Continuous  
 Until End of Sale  
 One Item Only

Price Level Override 0

Non-Turnover Stock Items

Stock Item Profit Based On  
 Average Cost \_\_\_\_\_

**Selling Price Descriptors**

Price 1	STANDARD
Price 2	STAFF
Price 3	EXTRAS
Price 4	BOTTLESHOP
Price 5	Price 5
Price 6	Price 6
Price 7	Price 7
Price 8	Price 8
Price 9	Price 9
Price 10	Price 10
Price 11	Price 11
Price 12	OWNERS

**Refund Reasons**

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

**Sale Type Status**

1	Takeaway
2	Delivery
3	Pickup
4	Cater
5	
6	
7	
8	
9	

**Fast Add Stock Items**

Fast Add Stock Items when not found

Default Department 0 >  Stock Code  Scan Code

**Pending Sales**

- Auto Generate Pending Sale Codes
- Print to Docket Printers
- Print as Bill to Receipt Printer
- Kitchen Print minutes before Expected Time \_\_\_\_\_
- Print to Windows Printer
- Inhibit Amounts on Windows Printer
- When printed from Table Map send to Windows Printer

**Undistributed Links**

Surcharges 10011002 >

Discounts 10011001 >

**Food/Beverage Total Descriptors**

Food FOOD

Beverage BEVERAGE

**Digital Receipts**

Email

SMS

\* Requires Idealpos Online \*

**A4 Pending Sale Messages**

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Go to Back Office > Setup > POS Terminals > Select a POS Terminal > Modify > Miscellaneous Settings.

In the "Default Sale Type" field, enter the Sale Type slot number that corresponds to the Sale Type that will be used as the Default.

For this example, we'll enter 1, which corresponds to the first Sale Type "Takeaway" in the Global Options.

**Pos Terminals** Main Settings POS Settings Receipt Printer Kitchen Printers Display / Kiosk Customer Readers Other Peripherals EFTPOS Settings Import / Export **Miscellaneous Settings** X

**General**

Points per Dollar 1  
Point Redemption Value 0.10  
Delete Points when Customer Inactive for 0 Months  
Lock Price Level to  
Default Table Map 1  
Default User Admin  
Auto Expand Activity  
Customer Codes From  
Stock Item Codes From 0 to  
Show Order to  
Pending Sales From 1 to 999  
Force Order Menu  
Force Receipt Amount  
**Default Sale Type 1**

**Gaming Override Options**

Price Level 0 Remote POS Ticket Threshold 0  
System ID 0 2nd 0

Username  
Password

Enable	Description	Code	Points Per \$	Point Value	Customer Type Discounts
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input checked="" type="checkbox"/>

**POSServer**

POSServer Override IP  
 Automatically Reconnect

**Cash Declaration**

Print to Receipt Printer  Stock Sales  
 Print to Windows Printer  Department Sales  
 Don't Print  Price Levels  
 Waste Mode  
 Promotions

Include Figures for Multiple Terminals  
Current Shift Start 13 Jul 2023

**Dashboard**

Sales in Locations  
 Shortcut Bar Small Font

**Handhelds**

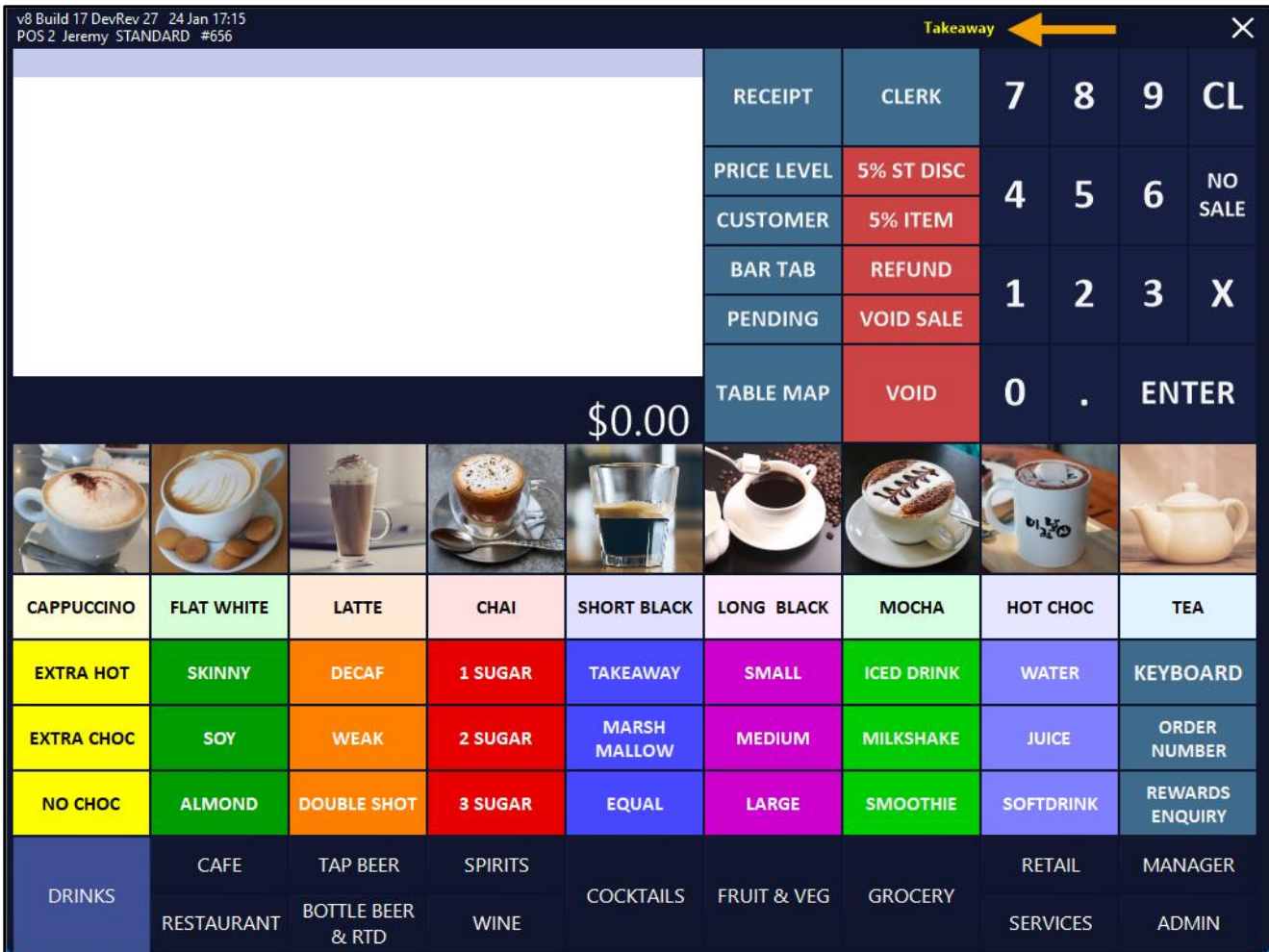
Force Food to Print  
Force Drinks to Print  
Force Bills Printer  
Item Graphic Location https://www.idealpos.com.au/Idealpos/media/Handheld/  
Handheld Background https://www.idealpos.com.au/Idealpos/media/Handheld/TableMap.jpg

After the desired Default Sale Type has been configured for the POS Terminal, close the POS Terminal configuration window and if required, configure any remaining POS Terminals that also require a Default Sale Type.

# idealpos Update History

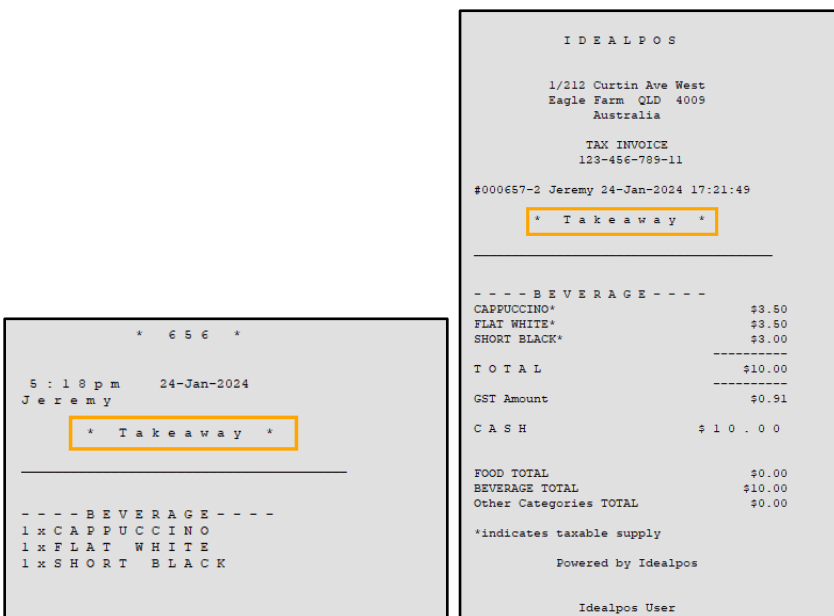
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When the POS Screen is displayed on the POS Terminals that have a Default Sale Type configured, the Default Sale Type will be displayed at the top of the POS Screen, which indicates that the Sale Type will apply to that sale. If the Sale Type is not required, press the Sale Type at the top of the POS Screen to clear it from the current sale.



When a Kitchen Docket is printed, the Sale Type will be displayed (example shown below-left).

If the Sale Type is also required on the Customer's Receipt, this can be enabled via the Yes/No Option "Show Sale Type on Receipt" (go to Back Office > Setup > Yes/No Options > Search "Sale Type" > Enable "Show Sale Type on Receipt"). The Customer Receipt will show the Sale Type as per the below-right example.



## Promotions

### IP-4427 – Points Multiplier – Use Promotions to increase Points Multiplication Factor

This function introduces the ability to use promotions to increase the Points Multiplication Factor (e.g. when a customer trips the Points Multiplication Factor promotion, they will earn points at the Points Multiplication Factor that's set within the Promotion for the entire sale).

To use this functionality, go to: Back Office > File > Sales > Promotions > Promotions.

Create a new Promotion or modify an existing Promotion.

In the Discount Type dropdown box, select "Point Multiplication Factor".

Enter the Point Multiplication Factor to use next to the dropdown box.

Configure the remaining fields required to trip the promotion such as the Description, Date Range and Trip Condition Set(s) as required (add the Items/Departments and select the Trip by Quantity/Trip by Amount and specify the required quantity/amount to trip the promotion).

The screenshot shows the 'Promotions' configuration window. The 'Discount Type' dropdown is highlighted with an orange box and an arrow pointing to it from the 'From' date field. The 'Discount Type' is set to 'Point Multiplication Factor' with a value of '2.00'. The 'Trip Conditions Set 1' is configured with 'Trip by Quantity' selected and a value of '2'.

Trip Conditions Set 1	Trip Conditions Set 2	Trip Conditions Set 3
<input checked="" type="radio"/> Trip by Quantity <input type="radio"/> Trip by Amount	<input checked="" type="radio"/> Trip by Quantity <input type="radio"/> Trip by Amount	<input checked="" type="radio"/> Trip by Quantity <input type="radio"/> Trip by Amount
Buy 2 of items below	And Buy 0 of items below	And Buy 0 of items below
DPT 202 COFFEE		

When a customer is added to a sale and the Promotion is tripped, the customer will earn points using the Point Multiplication Factor that has been set within the promotion.

Note that when the promotion is tripped, the Point Multiplication Factor will be applied to the entire sale.



## Reports

### IP-3918 – Stock Valuation Report – Support for Department/Location Ranges

This function introduces the ability to specify Department and Location Ranges when running the Stock Valuation Report.

Prior to this change, the Department and Location Ranges only allowed values to be selected in the From and To fields, which would include all Departments and/or Locations that were included between the range in the From/To fields.

This change has replaced the individual Department/Location From/To fields with a single field for these options. Having a single field will enable the entry of one or more ranges in each field, enabling specific Departments or Locations to be excluded from the report, as well as the ability to enter a list of specific Departments or Locations as a comma separated list (e.g. 1, 2, 3) or a range (e.g. 1-3), or a mixture of two methods to exclude specific values (e.g. 1-2, 4-5).

To use this function, go to: Back Office > Reports > Stock Control > Stock Valuation.

The Department and Location fields are now a single field instead of separate From/To fields.

Enter a Department range into the Department Field and enter a Location Range into the Location field.

Press the "View" button on the top-left corner to run the Stock Valuation Report.

Stock Valuation Report

View  
Print

Sort Order

Code  
 Description

Group by

Department  
 Sales Category  
 Supplier  
 Location

Options

Cost Price for Valuation  
Average Cost

Negative Stock Levels Only  
 Layby Levels Only  
 Valuation Includes Laybys

Selection Range

Code > to >  
Description > to >  
Supplier > to >  
Department 201-204 >  
Location 1-3 >

Attributes > > +

Show  
 Exclude X

POS 2  
v8 Build 17



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The report will run using the values entered in the Selection Range for the Department and/or Location fields. The specified Selection Range will also be displayed at the top of the Stock Valuation Report.

Code	Description	Stock Level	L/B Level	Avg Cost	Stock Value
204001	MT FRANKLIN 800ML	84.0000	0.0000	2.00	128.00
204002	MT FRANKLIN 1L	21.0000	0.0000	3.00	83.00
204003	FIJI 800ML	20.0000	0.0000	2.75	55.00
204004	FIJI 1L	18.0000	0.0000	4.00	84.00
204005	VOSS 800ML	32.0000	0.0000	3.00	96.00
204006	VOSS 1L	10.0000	0.0000	5.00	50.00
204007	STILL MINERAL WATER	17.0000	0.0000	2.50	42.50
204008	SPARKLING MINERAL WATER	20.0000	0.0000	2.75	55.00
		<b>200.0000</b>	<b>0.0000</b>		<b>553.50</b>

## IP-5763 – Stock Item Sales Report – Option to show Supplier Stock Code

This function introduces the ability to show Supplier Stock Codes on the Stock Item Sales Report.

When enabling the option “Show Supplier Stock Code”, the column in the report that typically displays the Stock Code will instead display the Supplier Stock Code (due to the limited amount of space available on the report).

To use this function, go to: Back Office > Reports > Sales > Stock Item Sales.

Toggle the option “Show Supplier Stock Codes” on or off as required.

As mentioned above, when the option is unchecked, the Stock Item Code will be displayed and when the option is checked, the Supplier Stock Code will be displayed instead.

The screenshot shows the 'Stock Item Sales' configuration window. On the left sidebar, there are buttons for 'View', 'Print', and 'Save Defaults'. The main area is divided into several sections:

- Date Range:** A dropdown menu set to 'Today', with 'From' and 'To' date/time pickers set to 14 Nov 2023 00:00:00 and 14 Nov 2023 23:59:59 respectively.
- Optional Grouping:** A table with columns 'Group Field', 'Show Group Label', 'Totals Only', and 'Totals with Group Label'. The 'Department' row has 'Show Group Label' and 'Totals Only' checked.
- Sort Order:** Radio buttons for 'Code', 'Description', 'Best', and 'Worst'. A 'Quantity' dropdown is also present.
- Checkboxes:** 'Show Stock Items' (checked), 'Consolidate Variants' (unchecked), 'Group by Sell Price' (unchecked), 'Unit Price is Price 1' (unchecked), 'Hide Unit Price/Tax' (unchecked), 'Portrait' (checked), and 'Show Supplier Stock Codes' (checked and highlighted with a yellow box). An orange arrow points to this checkbox.
- Selection Range:** A list of fields with dropdown menus and range indicators (> to >). Fields include Price Level (All Price Levels), Code, Description, Supplier (3 to 3), Department, Location, POS System, Clerk, Customer Type, and Customer Code. There is also an 'Attributes' section with a dropdown and a '+' sign, and a 'Tags' section with a dropdown and an 'X' icon.

At the bottom left of the window, it says 'POS 2 v8 Build 17'.

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The Stock Item Sales Report with the "Show Supplier Stock Codes" disabled/unchecked:

idealpos									
Stock Item Sales Report									
14 Nov 2023 00:00:00 to 14 Nov 2023 23:59:59									
Supp 3 to 3									
Printed 14/11/2023 15:42:56									
Page 1 of 1									
Sales									
	Unit Price inc	Unit Tax	Quantity	Nett ex	Tax	Nett inc	Discounts	Gross inc	
<b>SOFT DRINK</b>									
205001	COKE 250ML BTL	3.50	0.31	1.0000	3.19	0.31	3.50	0.00	3.50
205002	DIET COKE 250ML BTL	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50
205003	COKE ZERO 250ML BTL	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50
205004	SPRITE 250ML BTL	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50
205005	DRY GINGER 250ML BTL	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50
205006	TONIC 250ML BTL	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50
205101	COKE CAN	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50
205102	DIET COKE CAN	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50
205103	COKE ZERO CAN	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50
205104	SPRITE CAN	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50
205105	LIFT CAN	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50
205106	DRY GINGER CAN	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50
205107	FANTA CAN	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50
205108	TONIC CAN	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50
205201	COKE 600ML	5.00	0.45	1.0000	4.55	0.45	5.00	0.00	5.00
205202	DIET COKE 600ML	5.00	0.45	1.0000	4.55	0.45	5.00	0.00	5.00
205203	COKE ZERO 600ML	5.00	0.45	1.0000	4.55	0.45	5.00	0.00	5.00
205204	SPRITE 600ML	5.00	0.45	1.0000	4.55	0.45	5.00	0.00	5.00
205205	LIFT 600ML	5.00	0.45	1.0000	4.55	0.45	5.00	0.00	5.00
205206	DRY GINGER 600ML	5.00	0.45	1.0000	4.55	0.45	5.00	0.00	5.00
205207	FANTA 600ML	5.00	0.45	1.0000	4.55	0.45	5.00	0.00	5.00
205208	TONIC 600ML	5.00	0.45	1.0000	4.55	0.45	5.00	0.00	5.00
205301	COKE 1.25L	2.00	0.18	1.0000	1.82	0.18	2.00	0.00	2.00
205302	DIET COKE 1.25L	2.00	0.18	1.0000	1.82	0.18	2.00	0.00	2.00
205303	COKE ZERO 1.25L	2.00	0.18	1.0000	1.82	0.18	2.00	0.00	2.00
205304	SPRITE 1.25L	2.00	0.18	1.0000	1.82	0.18	2.00	0.00	2.00
205305	LIFT 1.25L	2.00	0.18	1.0000	1.82	0.18	2.00	0.00	2.00
205306	DRY GINGER 1.25L	2.00	0.18	1.0000	1.82	0.18	2.00	0.00	2.00
205307	FANTA 1.25L	2.00	0.18	1.0000	1.82	0.18	2.00	0.00	2.00
205308	TONIC 1.25L	2.00	0.18	1.0000	1.82	0.18	2.00	0.00	2.00
205309	SODA WATER 1.25L	1.00	0.09	1.0000	0.91	0.09	1.00	0.00	1.00
205401	COKE 2L	2.50	0.23	1.0000	2.27	0.23	2.50	0.00	2.50
205402	DIET COKE 2L	2.50	0.23	1.0000	2.27	0.23	2.50	0.00	2.50
205403	COKE ZERO 2L	2.50	0.23	1.0000	2.27	0.23	2.50	0.00	2.50
205404	SPRITE 2L	2.50	0.23	1.0000	2.27	0.23	2.50	0.00	2.50
205405	LIFT 2L	2.50	0.23	1.0000	2.27	0.23	2.50	0.00	2.50
205406	DRY GINGER 2L	2.50	0.23	1.0000	2.27	0.23	2.50	0.00	2.50
205407	FANTA 2L	2.50	0.23	1.0000	2.27	0.23	2.50	0.00	2.50
205408	TONIC 2L	2.50	0.23	1.0000	2.27	0.23	2.50	0.00	2.50
				39.0000	114.55	11.45	126.00	0.00	126.00

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The Stock Item Sales Report with the "Show Supplier Stock Codes" enabled/checked:

		Unit Price inc		Unit Tax	Quantity	Nett ex	Tax	Sales		Gross inc
								Nett inc	Discounts	
<b>SOFT DRINK</b>										
124KSS984	COKE 250ML BTL	3.50	0.31	1.0000	3.19	0.31	3.50	0.00	3.50	3.50
124KSS963	DIET COKE 250ML BTL	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50	3.50
124KSS942	COKE ZERO 250ML BTL	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50	3.50
124KSS921	SPRITE 250ML BTL	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50	3.50
124KSS900	DRY GINGER 250ML BTL	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50	3.50
124KSS879	TONIC 250ML BTL	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50	3.50
124KSS858	COKE CAN	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50	3.50
124KSS837	DIET COKE CAN	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50	3.50
124KSS816	COKE ZERO CAN	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50	3.50
124KSS795	SPRITE CAN	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50	3.50
124KSS774	LIFT CAN	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50	3.50
124KSS753	DRY GINGER CAN	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50	3.50
124KSS732	FANTA CAN	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50	3.50
124KSS711	TONIC CAN	3.50	0.32	1.0000	3.18	0.32	3.50	0.00	3.50	3.50
124KSS690	COKE 600ML	5.00	0.45	1.0000	4.55	0.45	5.00	0.00	5.00	5.00
124KSS669	DIET COKE 600ML	5.00	0.45	1.0000	4.55	0.45	5.00	0.00	5.00	5.00
124KSS648	COKE ZERO 600ML	5.00	0.45	1.0000	4.55	0.45	5.00	0.00	5.00	5.00
124KSS627	SPRITE 600ML	5.00	0.45	1.0000	4.55	0.45	5.00	0.00	5.00	5.00
124KSS606	LIFT 600ML	5.00	0.45	1.0000	4.55	0.45	5.00	0.00	5.00	5.00
124KSS585	DRY GINGER 600ML	5.00	0.45	1.0000	4.55	0.45	5.00	0.00	5.00	5.00
124KSS564	FANTA 600ML	5.00	0.45	1.0000	4.55	0.45	5.00	0.00	5.00	5.00
124KSS543	TONIC 600ML	5.00	0.45	1.0000	4.55	0.45	5.00	0.00	5.00	5.00
124KSS522	COKE 1.25L	2.00	0.18	1.0000	1.82	0.18	2.00	0.00	2.00	2.00
124KSS501	DIET COKE 1.25L	2.00	0.18	1.0000	1.82	0.18	2.00	0.00	2.00	2.00
124KSS480	COKE ZERO 1.25L	2.00	0.18	1.0000	1.82	0.18	2.00	0.00	2.00	2.00
124KSS459	SPRITE 1.25L	2.00	0.18	1.0000	1.82	0.18	2.00	0.00	2.00	2.00
124KSS438	LIFT 1.25L	2.00	0.18	1.0000	1.82	0.18	2.00	0.00	2.00	2.00
124KSS417	DRY GINGER 1.25L	2.00	0.18	1.0000	1.82	0.18	2.00	0.00	2.00	2.00
124KSS396	FANTA 1.25L	2.00	0.18	1.0000	1.82	0.18	2.00	0.00	2.00	2.00
124KSS375	TONIC 1.25L	2.00	0.18	1.0000	1.82	0.18	2.00	0.00	2.00	2.00
124KSS354	SODA WATER 1.25L	1.00	0.09	1.0000	0.91	0.09	1.00	0.00	1.00	1.00
124KSS333	COKE 2L	2.50	0.23	1.0000	2.27	0.23	2.50	0.00	2.50	2.50
124KSS312	DIET COKE 2L	2.50	0.23	1.0000	2.27	0.23	2.50	0.00	2.50	2.50
124KSS291	COKE ZERO 2L	2.50	0.23	1.0000	2.27	0.23	2.50	0.00	2.50	2.50
124KSS270	SPRITE 2L	2.50	0.23	1.0000	2.27	0.23	2.50	0.00	2.50	2.50
124KSS249	LIFT 2L	2.50	0.23	1.0000	2.27	0.23	2.50	0.00	2.50	2.50
124KSS228	DRY GINGER 2L	2.50	0.23	1.0000	2.27	0.23	2.50	0.00	2.50	2.50
124KSS207	FANTA 2L	2.50	0.23	1.0000	2.27	0.23	2.50	0.00	2.50	2.50
124KSS186	TONIC 2L	2.50	0.23	1.0000	2.27	0.23	2.50	0.00	2.50	2.50
					39.0000	114.55	11.45	126.00	0.00	126.00

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## IP-6052 – Shortcut Reports – Ability to Edit/Copy existing Shortcut

This function introduces the ability to Edit/Copy existing Shortcuts that have been created for Reports. This may be useful when the Selection Criteria that was originally used to create a Shortcut needs to be altered so that the Shortcut displays the desired data.

To use this function, go to:

Back Office > Right-click on a report Shortcut on the left-hand side > Select "Edit Shortcut".

The screenshot displays the Idealpos v8 POS interface. The left-hand side features a navigation menu with categories like Functions, Favourite Reports, and Other Reports. A context menu is open over the 'Other Reports' section, with 'Edit Shortcut' highlighted and indicated by a yellow arrow. The main dashboard shows sales data for 'Today', 'Same Time Last Tuesday', and 'Same Time Yesterday', all at \$0. Below this is a horizontal bar chart for 'ELECTRICAL APPLIANCES' and a vertical bar chart for 'Jeremy' (\$1,171) and 'Online' (\$219). A donut chart shows sales categories: BEVERAGE (31.2%, \$433.75), FOOD (28.6%, \$397.82), and RETAIL (40.2%, \$557.92). The bottom left corner has the 'idealpos User Guide' logo.

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The Report window will open where the "S" shortcut button will appear as red on the top-right corner, which indicates that the Shortcut is being modified.

Financial Report Daily

View  
Print

POS 2  
v8 Build 17

Date Range

Today From 28 Nov 2023 00:00:00 To 28 Nov 2023 23:59:59

Group by

POS System  
 Clerk  
 Location

Options

Calculate Sales Categories above 10

Selection Range

Clerk Code > to >  
Clerk Name > to >  
Location >  
POS System >

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Make the required changes to the report (e.g. change the Date Range or any other required Selection Criteria). Once the changes have been made as required, press the red "S" shortcut button on the top-right corner.

**Financial Report Daily** → S X

View  
Print

**Date Range**  
All Dates ▼

**Group by**  
 POS System  
 Clerk  
 Location

**Options**  
 Calculate Sales Categories above 10

**Selection Range**

Clerk Code	>	to	>
Clerk Name	>	to	>
Location			>
POS System			>

POS 2  
v8 Build 17

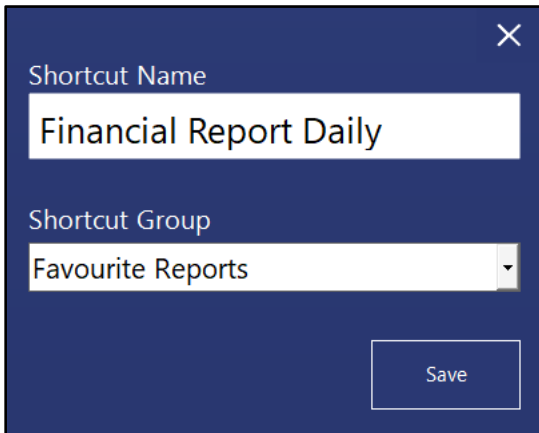
# idealpos Update History

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A window will appear where the Shortcut Name and Shortcut Group fields will be displayed.

By default, the values in these fields will be pre-populated using the details of the Shortcut that is currently being modified. After the "Save" button is pressed, the Shortcut will be updated or copied as per the behaviour outlined below:

- If the same Shortcut Name is used, the Shortcut will be updated with the modified Selection Criteria.
- If a different Shortcut Name is entered, the existing Shortcut will be retained, and a new Shortcut will be created with the current Selection Criteria.



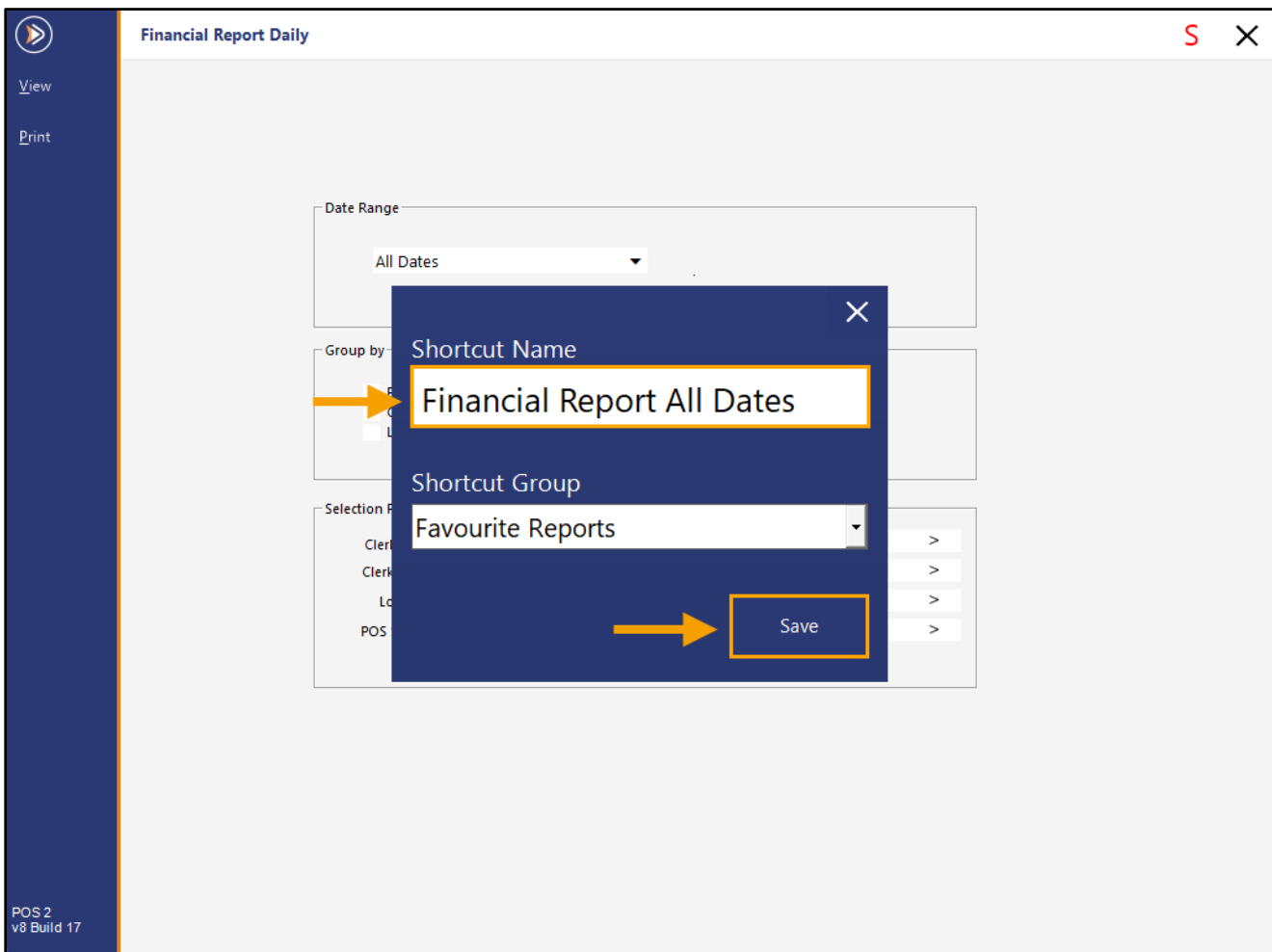
Shortcut Name  
Financial Report Daily

Shortcut Group  
Favourite Reports

Save

In this example, we have modified the Date Range to "All Dates", so we will enter "Financial Report All Dates"; this will create a new Shortcut called "Financial Report All Dates" with the current Selection Criteria, and the "Financial Report Daily" Shortcut will also remain in place.

Press the "Save" button to save the Shortcut.



Financial Report Daily

Date Range  
All Dates

Group by

Shortcut Name  
Financial Report All Dates

Shortcut Group  
Favourite Reports

Save

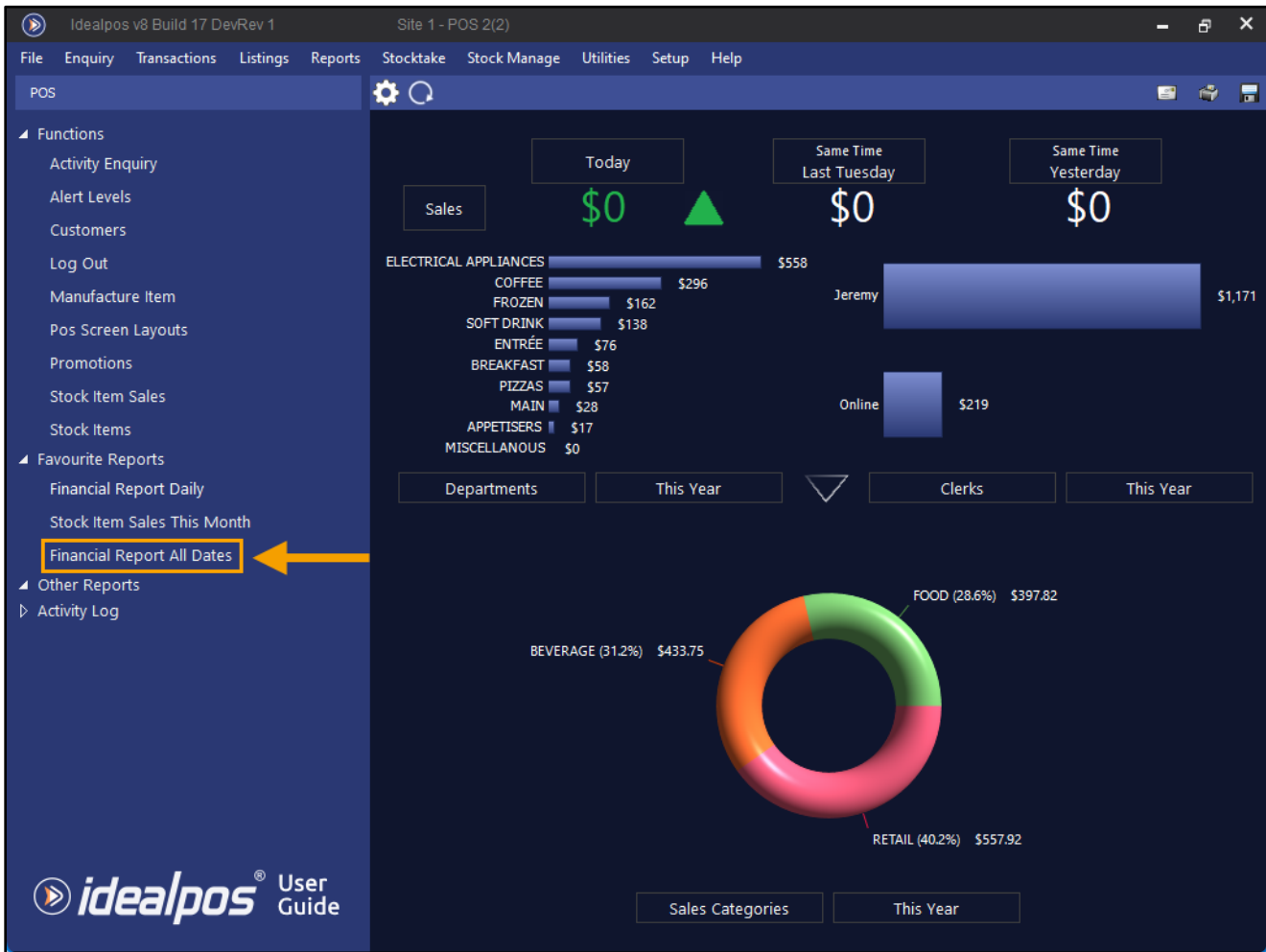
POS 2  
v8 Build 17



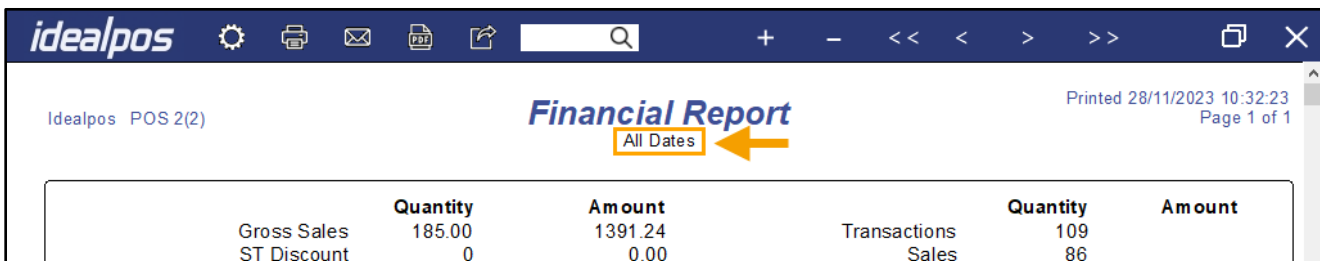
# idealpos Update History

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After pressing the "Save" button, close the Report window to return to the Back Office Dashboard. The newly created report will appear within the Shortcut Group that was selected when the Shortcut was saved.



Running the Report via the newly created Shortcut will use the Selection Criteria that was entered when the Shortcut was modified/saved.



## Suppliers

### IP-3650 – Suppliers – Support for Notes field

This function introduces a new Notes field for each Supplier record that exists in Idealpos.

The Notes field can be used to store information about the Supplier, any specific instructions relating to placing orders with the Supplier or any other notes that are required when interacting or ordering from the Supplier.

To use this function, go to: Back Office > File > Suppliers > Suppliers.

Select a Supplier > Modify or create a new Supplier.

In the Notes field, enter any required notes for the Supplier > Save.

The screenshot shows the 'Suppliers Modify 6' form in the Idealpos system. The form is titled 'Suppliers Modify 6' and has a 'Save' button on the left. The form contains the following fields:

- Supplier Code: 6
- Company Name: Flatters Produce
- Address: (empty)
- Suburb: (empty)
- State: NT (dropdown)
- Postcode: (empty)
- Phone: (empty)
- Other: (empty)
- Mobile: (empty)
- Contact: (empty)
- Email: (empty)
- ABN: 345756853
- Account No: 64
- Credit Limit: 0.00
- Default Tax Rate: No Default (dropdown)
- Default Tax Inclusive:
- Electronic Invoice Format: (None) (dropdown)
- Default Delivery Method: (empty)
- Accounting:
- Payment Due Date: 14 (dropdown)
- Payment Due Date options:  Days,  Day of Month

The Notes field is highlighted with a yellow border and contains the following text:

Notes: Notes for Flatters Produce -  
\* When ordering from this Supplier ensure that the Supplier is paid on the same day to ensure that the order is shipped promptly.  
  
\* Ensure that the delivery date is confirmed when placing an order and ensure that someone is present on the day of delivery to sign and accept the delivery.

At the bottom left of the form, it says 'POS 2 v8 Build 17'.

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The Supplier Notes can be viewed by either:

- Modifying the Supplier via Back Office > File > Suppliers > Suppliers > Select Supplier > Modify.

**Suppliers**  
Modify 6

Supplier Code 6

Company Name Flatters Produce Phone  
Address Other  
Suburb Mobile  
State NT Postcode Contact  
Email

ABN 345756853 Electronic Invoice Format (None)  
Account No 64 Default Delivery Method  
Credit Limit 0.00 Accounting   
Default Tax Rate No Default Payment Due Date 14  Days  Day of Month  
Default Tax Inclusive

**Notes** Notes for Flatters Produce -  
\* When ordering from this Supplier ensure that the Supplier is paid on the same day to ensure that the order is shipped promptly.  
\* Ensure that the delivery date is confirmed when placing an order and ensure that someone is present on the day of delivery to sign and accept the delivery.

POS 2  
v8 Build 17

- Via the Supplier Listing – Go to: Back Office > Listings > Suppliers > Suppliers.

**Supplier Listing** Printed 17:12:58  
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Code	Supplier Name & Address	Credit Limit
1	Aust Liquor Marketers 111 - 137 Magnesium Drive Crestmead QLD Contact: Steve Leggars ABN : 345656098 Account : 684168	0.00
2	Dan Murphy's QLD Contact : Heather ABN : 345676889 Account : 85	0.00
3	Coca Cola QLD Contact : Anthony Tasker ABN : 345696880 Account : 68114	0.00
4	Bidvest NSW Contact : Charmaine ABN : 345716871 Account : 61	0.00
5	Campbells Cash & Carry NT ABN : 345736862 Account : 16	0.00
6	Flatters Produce NT ABN : 345756853 Account : 64 Notes : Notes for Flatters Produce - * When ordering from this Supplier ensure that the Supplier is paid on the same day to ensure that the order is shipped promptly. * Ensure that the delivery date is confirmed when placing an order and ensure that someone is present on the day of delivery to sign and accept the delivery.	0.00
7	KDS Supplies	0.00

## Yes/No Options

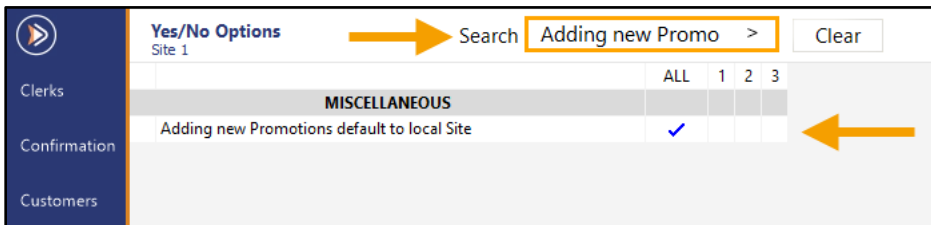
### IP-6044 – Yes/No Option – Adding new Promotions default to local Site

This function introduces the ability to automatically populate the Site field with the local Site when creating new Promotions.

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

Search: Adding new Promo

Enable the Yes/No Option “Adding new Promotions default to local Site”



Close the Yes/No Options.

Go to: Back Office > File > Sales > Promotions > Promotions.

Press the “Add” button on the left-hand side of the window.

The Site field will be automatically populated with the local Site code.

