

Idealpos 9 Build 2 - Update History

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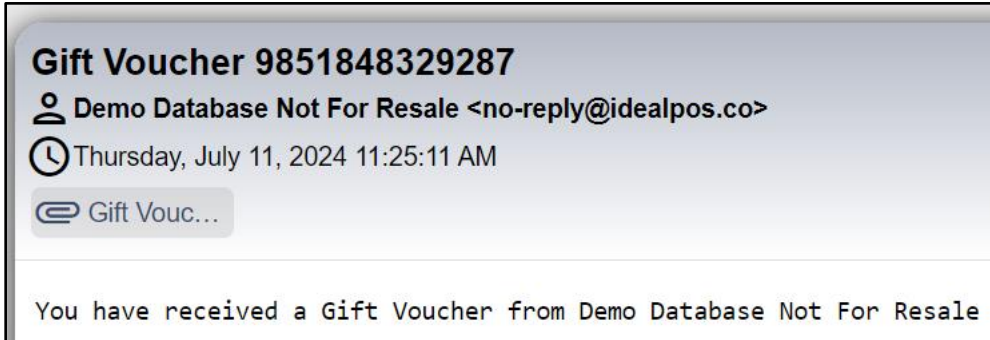
Global Options

IP-6393 – Idealpos Email Service

This function introduces the ability to utilise the Idealpos Email Service to send emails such as Scheduled Reports, Email Alerts and Gift Vouchers.

The Idealpos Email Service enables emails to be sent from your Idealpos system without having to enter complicated settings for an Email Server in Global Options.

Note that when using the Idealpos Email Service as the selected Email Service to send Emails, the Email Recipient of any Emails that are sent from your Idealpos Back Office or POS Terminals will see the email as originating from no-reply@idealpos.co with your venue name also shown as the Sender.



To configure this function, go to: Back Office > Setup > Global Options > Other Options.
 The Email Service dropdown box will contain two options:

- **Idealpos Email** – Select Idealpos Email to use the Idealpos Email Service. Selecting this option does not require any further configuration and Idealpos on your Back Office/POS Terminals will send Emails using the Idealpos Service.
- **Custom** – Select Custom to enter the settings for your own Email Service.

Note – The option that is selected by default will vary depending on how the system was configured prior to upgrading to this build.

If the Email settings were configured before upgrading, then Custom will be selected, and those custom settings will be retained.

If the Email settings were previously not configured before upgrading (e.g. blank values), then the Idealpos Email option will be selected by default.

Global Options S X

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

Home Screen

Home Screen Graphic (pictures folder) >

Last Transaction Timeout 0

Slideshow Start Time 0

Seconds between images 30

Email Settings

Email Service **Idealpos Email**

Default CC Email Address

Default BCC Email Address

Default Subject for Invoices Invoice from [UN] - [INV]

Default Subject for Statements This is the statement from [UN]

Send Test Email

Default Message when sending Reports

Default Message when sending Customer Statements/Invoices

Alerts

Output from POS # 1

Mag Card Printing

Mag Card Format Format 1

Printer Connection

FTP Details

Server Address

Server Port 21

Folder

Username

Password

Special Attribute Types

Stock Item Linking

Remove Tax

Transaction Event

Special Item Subtotal

Attribute Column Headers

1

2

3

4

5

Default Variant Types

Size

Colour

Stock Item Descriptions

Description 2 Kitchen Description

Description 3 Long Description

Email Settings

Email Service **Idealpos Email**

Idealpos Email

Custom

Custom options (as configured in older builds) can be accessed by selecting the “Custom” Email Service option.

Email Settings

Email Service **Custom**

SMTP Outgoing Email Server

Sending Email Address

SMTP Username

SMTP Password

SMTP Port 25

Enable SSL/TLS Protocol

Home Screen

IP-6373 – Home Screen – Functionality adjusted to emulate v8 behaviour

This change adjusts the functionality of the Home Screen to emulate v8 behaviour.

The changes are summarised below; more details to follow below.

- Fast Clerk buttons restored back to the former behaviour, so they are visible at the same time as the numeric keypad (no arrow button to press to toggle between Fast Clerk buttons and numeric keypad).
- Employee Log and Print Last Transaction buttons restored to appear at the top of the Home Screen.
- Show Blackboard will display the Blackboard on the left-hand side of the Home Screen without the need to press the menu button at the top.
- New function to show the Adult ID Date on the Home Screen if Y/N Option "Show Adult ID Date" is enabled.
- Menu button at the top of the Home Screen will toggle the Home Screen between the numeric keypad/Fast Clerk buttons and the POS Terminal details (i.e. Idealpos version/build currently installed, Licensed to user, POS Terminal Number/Description, Site Number/Description, POSServer IP Address, Local IP Address and SQL Server version).

The steps to enable/use the above points have been listed on the following pages in summarised format. For more information, refer to the Home Screen topic in the User Guide.

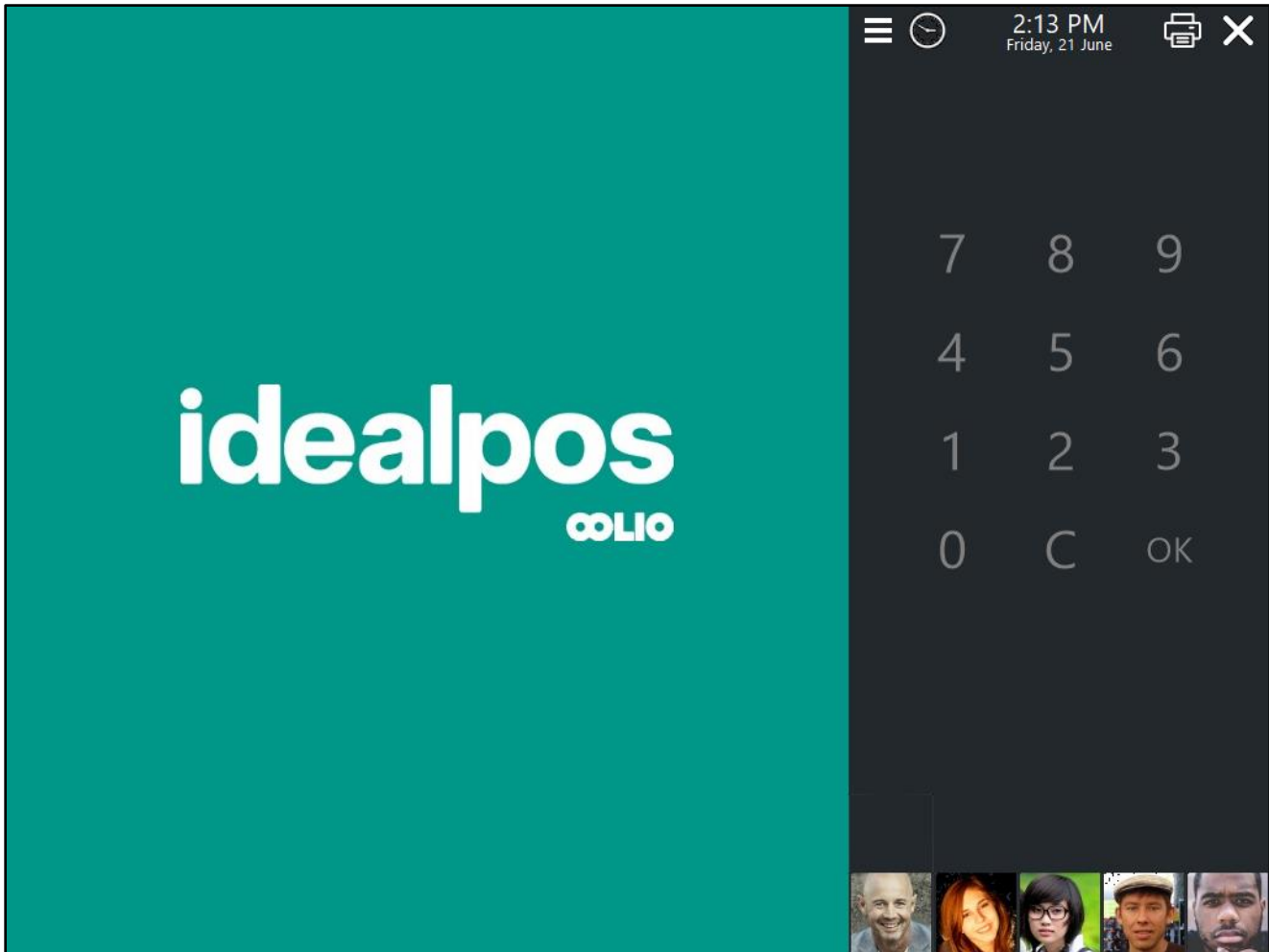
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Fast Clerk Buttons – Back Office > Setup > Yes/No Options > Enable Yes/No Option “Fast Clerk Buttons”.

Fast Clerk Buttons will appear below the numeric keypad.

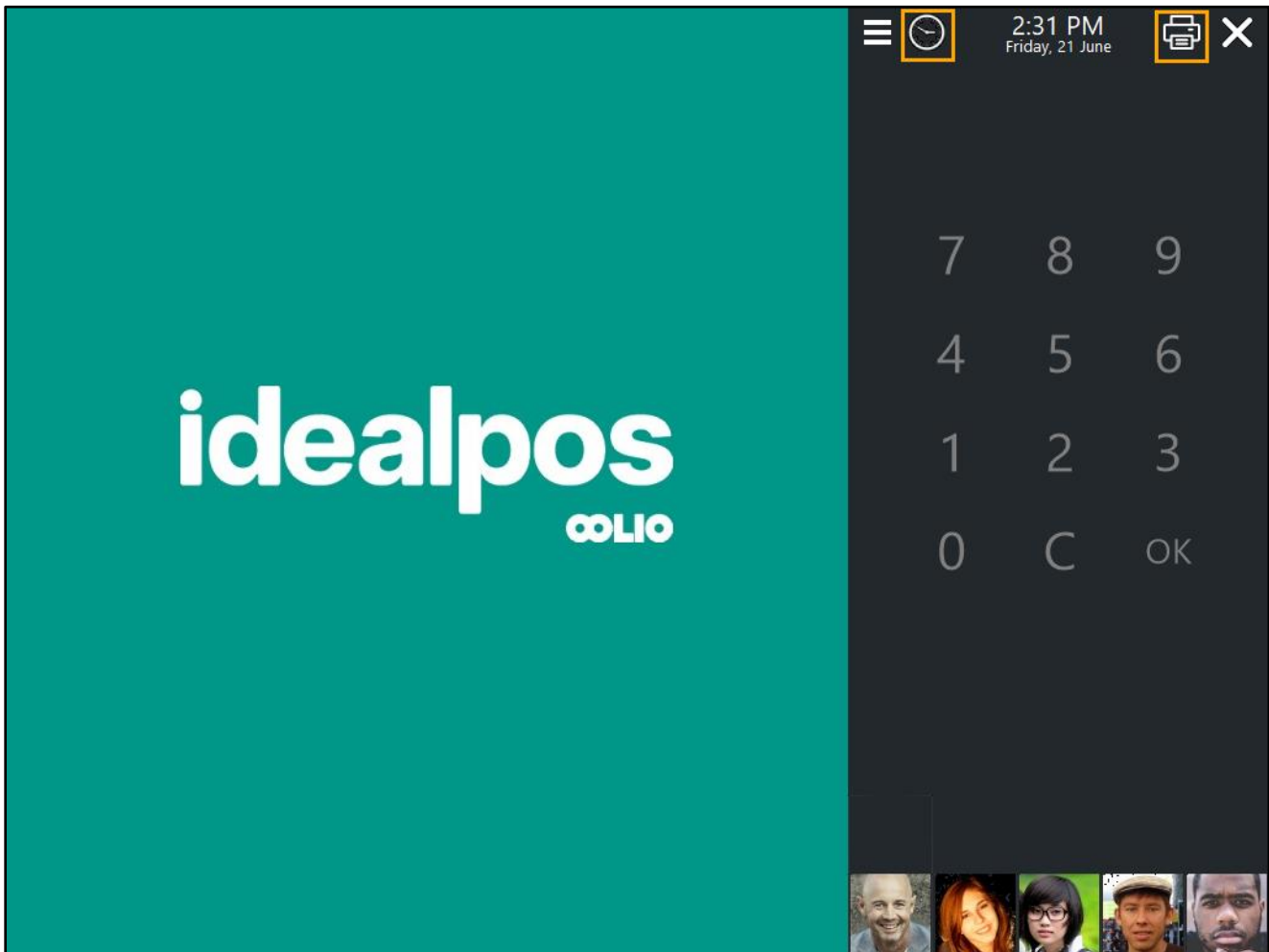
Fast Clerk Buttons are populated from the bottom-left to the bottom-right with a maximum number of 20 Fast Clerk Buttons possible.



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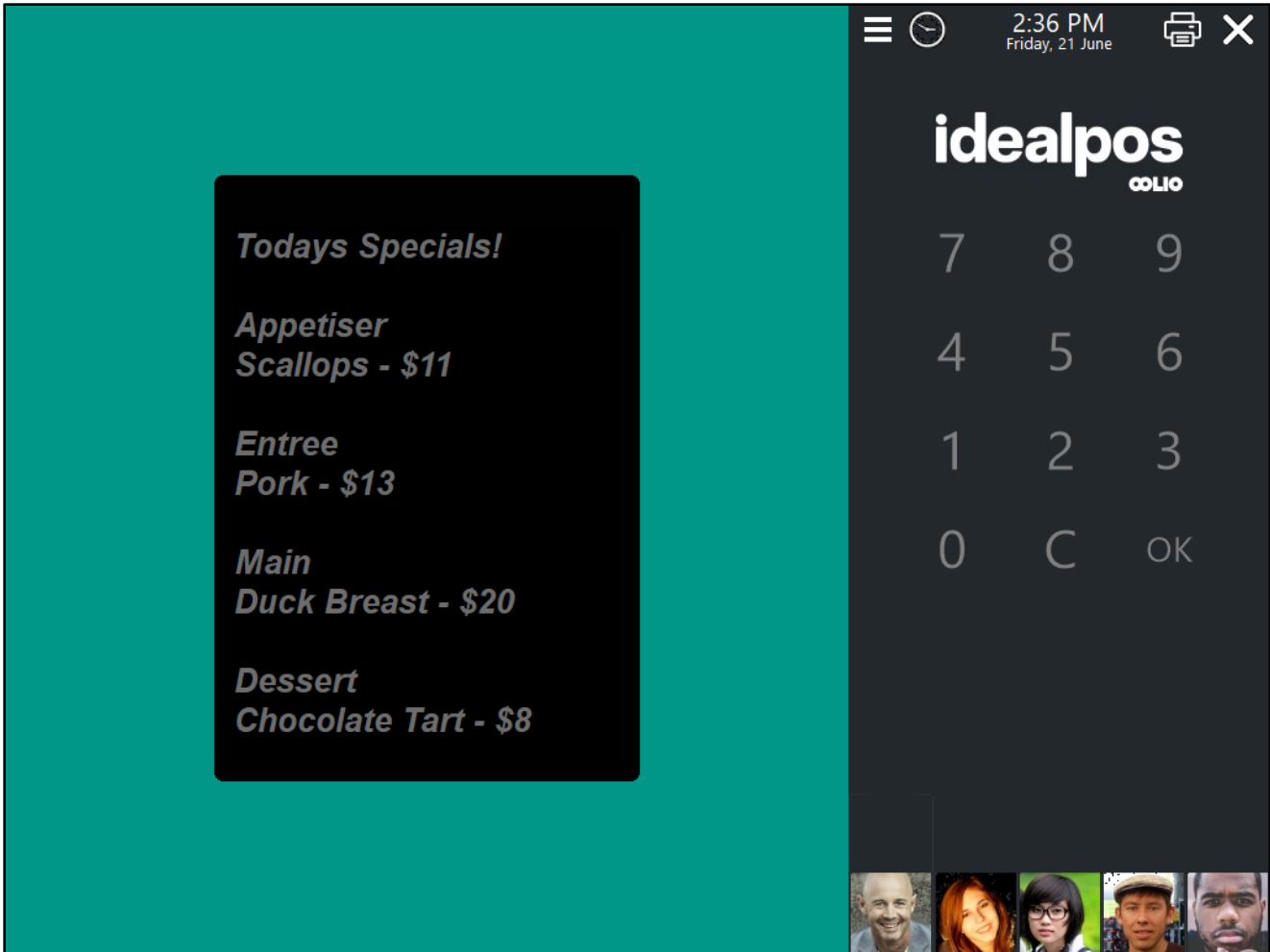
Employee Log and Print Last Transaction appear at the top of the Home Screen.



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The Blackboard now appears on the left-hand side of the Home Screen without having to press the menu button.
Enable Y/N Option "Show Blackboard".



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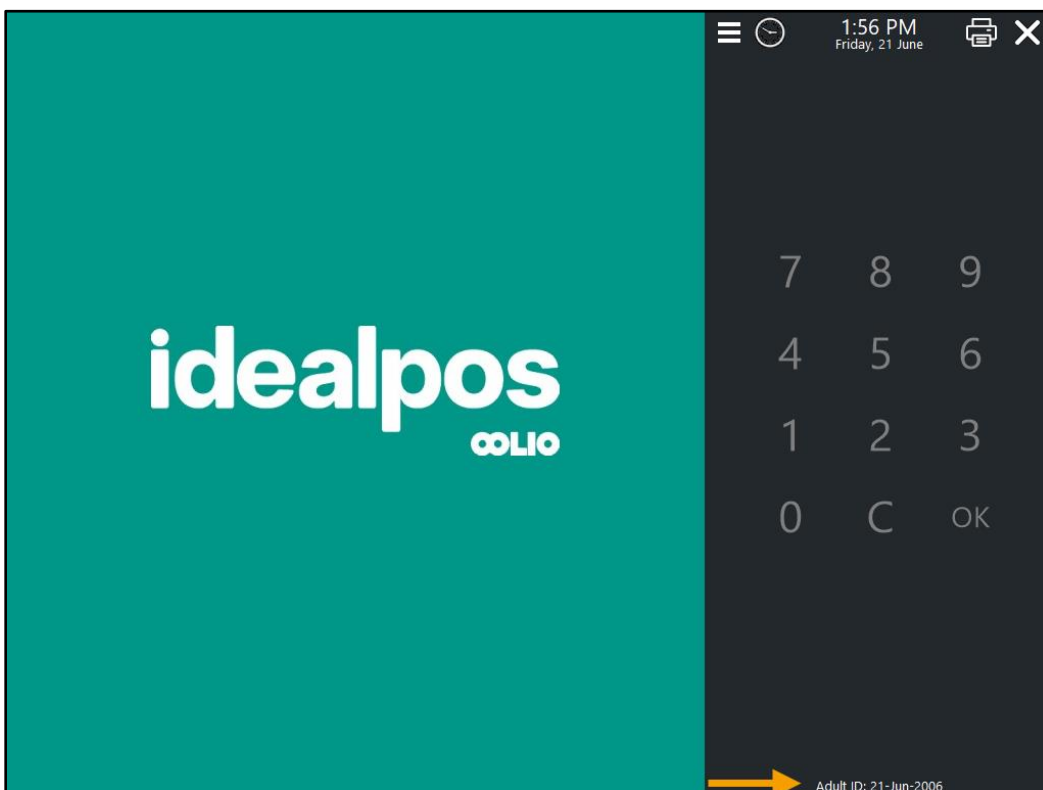
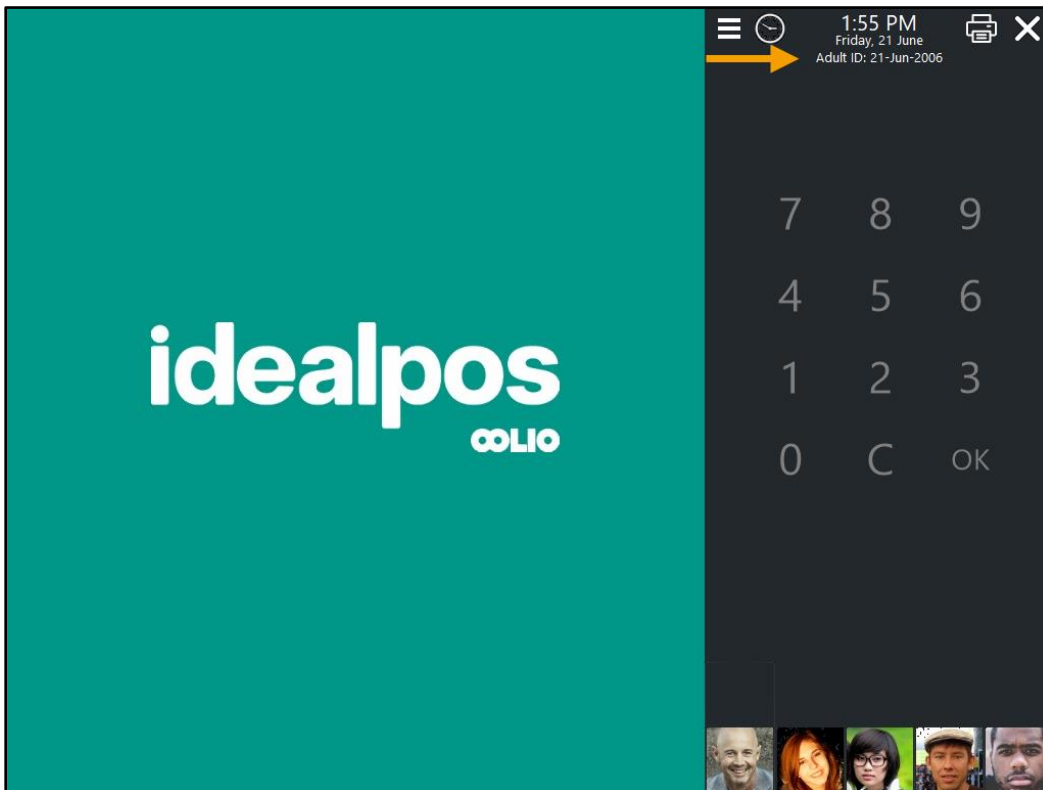
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Show Adult ID Date on Home Screen.

Enable the Yes/No Option "Show Adult ID Date".

The Adult ID Date will appear at the top of the Home Screen if the "Fast Clerk Buttons" are enabled.

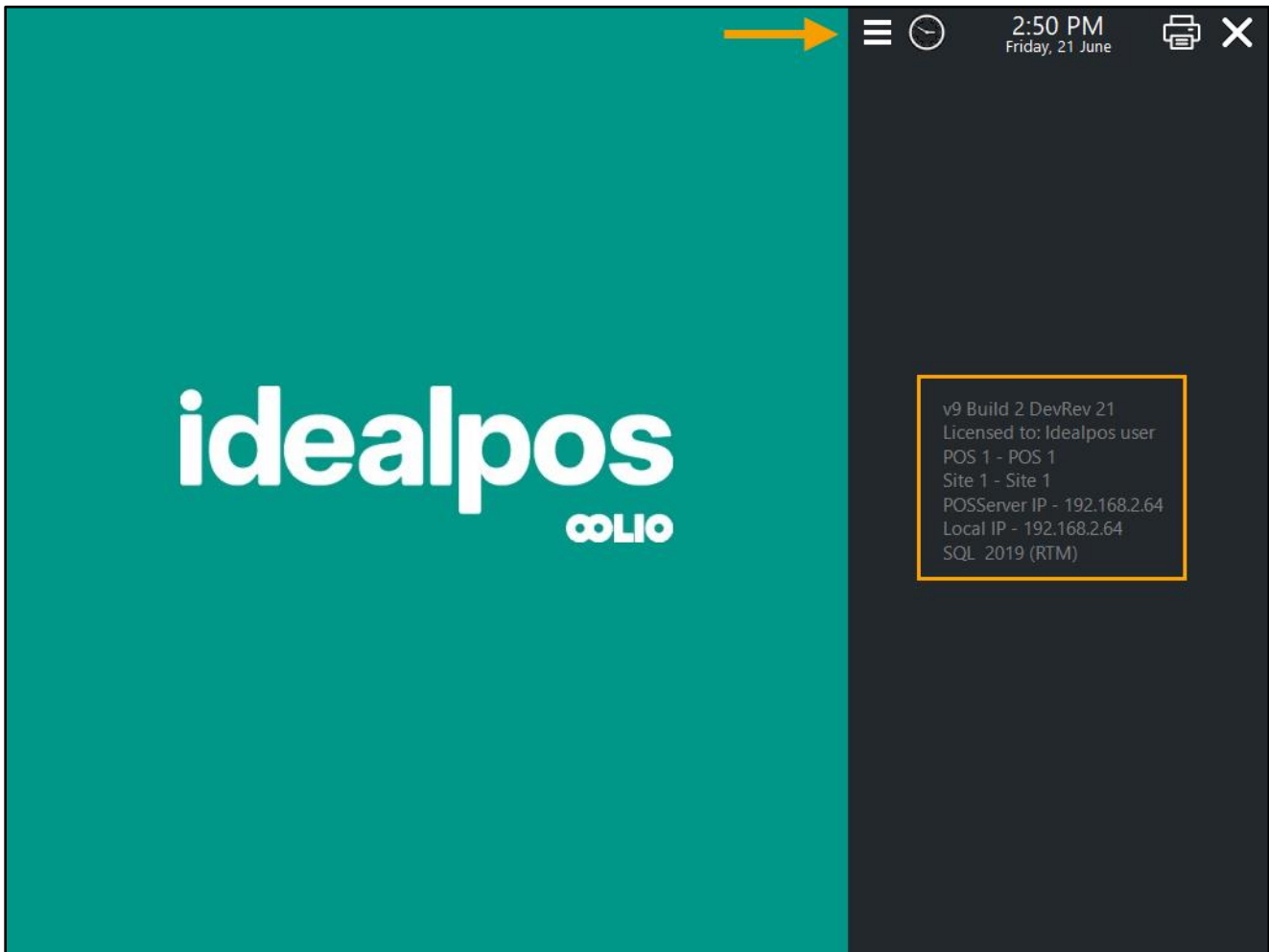
The Adult ID Date will appear at the bottom of the Home Screen if the "Fast Clerk Buttons" are disabled.



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Pressing the Menu button at the top of the Home Screen will display additional details about the POS Terminal.



Kitchen Dockets

IP-6315 – Batch Orders to Kitchen – Option for Web Orders Only

This function introduces the ability to set the Batch Orders to Kitchen Option so that the option only applies to Web Orders. When Web Orders are placed from a table and this option is enabled, any Stock Items that are enabled for Kitchen Printing and saved to a table will only be printed to their respective Kitchen Printer(s) after the entered number of minutes have lapsed. If additional orders are placed to the table before the number of minutes configured lapse, the number of minutes timer will restart for the table. When no additional orders have been saved to the table for the number of minutes configured, all the unprinted Stock Items for the Table will be printed to their respective Kitchen Docket Printer(s). This will enable the Kitchen Staff to prepare all the meals/beverages for the table at the same time, ensuring that all the guests seated at the table receive their order at the same time.

To configure this option, go to: Back Office > Setup > Global Options > Restaurant > Table Map Kitchen Dockets. Ensure that the "Batch Orders to Kitchen after # minutes" is set and that a number of minutes value has been entered. When the "Batch Orders to Kitchen after # minutes" is selected, an option called "Apply to Web Orders Only" will appear. Ensure that this option is enabled to only apply the Batching of Orders to the Kitchen for Web Orders.

The screenshot shows the 'Global Options' window for the 'Restaurant' tab. The 'Table Map Kitchen Dockets' section is highlighted with orange boxes and arrows, indicating the configuration for batch orders to the kitchen. The 'Batch Orders to Kitchen after 5 minutes' option is selected, and the 'Apply to Web Orders Only' checkbox is checked.

Button Caption	Table Caption	Instruction Item to KP
ENTREE AWAY	Entree	1003014 >
MAINS AWAY	Mains	1003015 >
DESSERT AWAY	Desserts	1003016 >
DRINKS AWAY	Drinks	1003017 >
		>
		>

Table Status	Caption
Ready	Ready
Seated	Seated
Unprinted	Unprinted
Sent to Kitchen	Printed
Served	Served
Bill Presented	Bill Print
To Clean	Clean
Reserved	Reserved

Sessions	Name	Start	End
Session 1	Brekky	5:00	10:00
2	Lunch	10:00	15:00
3	Dinner	15:00	23:00
4		:00	:00
5		:00	:00

Reports

IP-6381 – Coupons Redeemed Report – Includes Customer Name where applicable

This function introduces the ability to display the Customer Name in the Coupons Redeemed Report where applicable. When a Serialised Coupon has been redeemed by a Customer, the Coupons Redeemed Report will include the Customer Name that redeemed the Serialised Coupon.

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

Select "Coupons Redeemed" > Select the Redemption Date Range as required > View.

Coupons Report [Close]

View [Print]

Report Type

Outstanding Coupons **Coupons Redeemed**

Redemption Date Range

All Dates

Coupons Expiring

From: 11/07/2024
To: 31/12/2100

Group by

Site

Selection Range

Site [] >

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The Coupons Redeemed Report will be displayed and will include the names of Customers which have redeemed a Serialised Coupon.

Code	Name	Date Printed	Date Redeemed	Transaction Redeemed	Qty
1 Next Day Free Rides					
Next Day Free Rides					
6001		05/10/2016 16:06:39	05/10/2016 16:07:30	133-1	
7001		05/10/2016 16:07:30	05/10/2016 16:09:26	134-1	
					<u>2</u>
					2
3 Customer Spend \$50 Get \$10					
Customer Spend \$50 Get \$10 Off					
39001	Sarah Charlton	11/07/2024 14:58:50	11/07/2024 14:58:50	697-1	
40001	Mick Townsend	11/07/2024 15:16:05	11/07/2024 15:16:05	699-1	
41001	Charlotte Winters	11/07/2024 15:16:38	11/07/2024 15:16:38	701-1	
					<u>3</u>
					3
				Total Coupons:	<u><u>5</u></u>

Yes/No Options

IP-6428 – Yes/No Option – Record Scanned Bar Codes in Transaction Journals

This function introduces the ability to toggle the recording of scanned bar codes in Transaction Journals on or off.

- When this option is **enabled**, any Stock Item that is added to a sale by **scanning the Bar Code** will result in the **Stock Item's Scanned Bar Code** appearing in the Journal History Enquiry.
- When this option is **disabled**, any Stock Item that is added to a sale by **scanning the Bar Code** will result in the **Stock Item's Stock Code** appearing in the Journal History Enquiry.

When adding an item to a sale by pressing a Stock Item button on the POS Screen, the Stock Item Code will be recorded in the Journal History, regardless of whether this option is enabled or disabled.

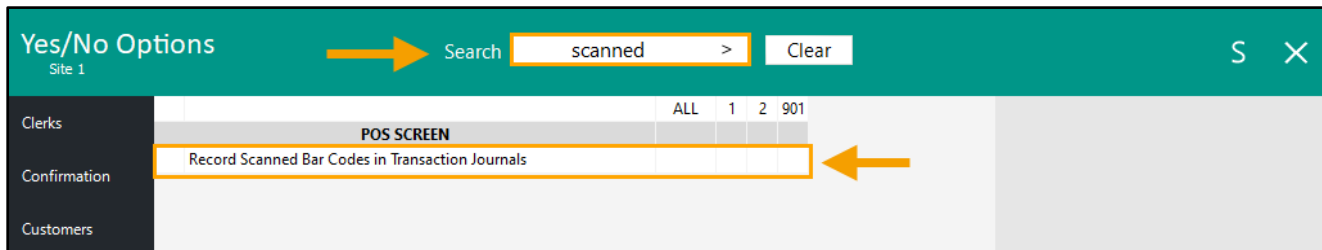
Note that by default, this Yes/No Option is disabled.

Also note that any changes to this option will only affect future sales transactions that are performed after the change is made and will not affect previously completed sales.

E.g. Scanning a Bar Code for a Stock Item in a sale while this option is enabled will result in that Journal displaying the scanned Bar Code. Disabling this option will not affect the previously completed transactions.

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

Toggle the option "Record Scanned Bar Codes in Transaction Journals" as required.



Go to POS Screen and sell items by scanning the Bar Code.

After sales have been completed, go to: Back Office > Enquiry > Journal History.

When selecting a Journal which contains Stock Items that had their Bar Codes scanned, the Bar Code will appear next to the item.

The below screenshot shows an example of Stock Items that were scanned with the Bar Code as well as entered into the sale by the Stock Item Code.

The instances where the item was scanned with the Bar Code will show the longer Scan Code, and the instances where the item was added to the sale by the Stock Item Code will show the Stock Item Code next to the Stock Item Description.

Journal History Enquiry
S X

[View All](#)

[Docket Print](#)

[Email](#)

[Tax Invoice](#)

[Total](#)

[Stock Item Sales](#)

[Favourite](#)

[Add Text](#)

[Keyboard](#)

POS 1
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Today ▼

From 10 Jul 2024 00:00:00 ▼

To 10 Jul 2024 23:59:59 ▼

Top 1000 records

Customer >

Clerk >

POS >

Price Level ▼

Location ▼

Site ▼

Tender Type ▼

Function ▼

Stock Item >

Department >

Sale Total to

Table

Audit

Filter Table/Bar Tabs

Hide Voids

[Select](#)

Audit	POS	Date	Customer		
				10 Jul 2024 12:58:05	Audit 715,1
			9852975708969	COKE CAN	Jeremy 3.50
			205101	COKE CAN	3.50
			9844900827241	DIET COKE CAN	3.50
			205102	DIET COKE CAN	3.50
			9861576846574	COKE 2L	2.50
			205401	COKE 2L	2.50
				GST Subtotal	19.00
				GST Amount	1.73
				CASH	19.00
				Change	0.00

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