Update History

Idealpos 10 Build 4 - Update History

Update Details:

AUTOMATIC EXPORT SETTINGS – POS TERMINALS 3

IP-8315 – DEPUTY EXPORT – SUPPORT FOR TABLE ORDERS FORMAT 3
IP-8395 – IGT EZ INSIGHTS EXPORT FILE FUNCTIONALITY 5
IP-8340 – EBEV DAILY INVENTORY EXPORT 9

BACK OFFICE 12

IP-8371 – BACKOFFICE SHORTCUTS – OPTION TO ADJUST FONT SIZE 12

ECOMMERCE 14

IP-8378 – ECOMMERCE ORDERS – ABILITY TO MODIFY SURCHARGE DESCRIPTOR 14
IP-8379 – ECOMMERCE – OPTION TO INHIBIT CREATING CUSTOMER FOR WEB ORDERS 15

EFTPOS 16

IP-8178 – OOLIO PAY – RECONCILIATION FUNCTIONALITY (BETA) 16

END OF SHIFT 21

IP-8295 – CASH DECLARATION – ABILITY TO DO MID-SHIFT XREPORT WITH COUNTED CASH 21

FLEXISCHOOLS INTERFACE 24

IP-8308 – FLEXISCHOOLS – SUPPORT FOR V4 API 24

GAMING 25

IP-8046 – ARISTOCRAT GAMING – SUPPORT FOR MEMBER PHOTOS 25

IMPACT DATA 27

IP-8341 – IDEALPOS ENGAGE COUPONS FUNCTIONALITY 27

IPSCLIENT 34

IP-8377 – USER-DEFINED OPTION TO CHECK IPSCLIENT CONNECTIVITY 34

LABELS 37

IP-8364 – STOCK ITEM LABELS – SAVED FORMATS INCLUDE 'QUANTITIES MATCH STOCK LEVELS' 37

POCKET PAD 41

IP-8317 – POCKET PAD SUPPORT FOR GAMING LOYALTY 41

POS SCREEN 49

IP-8354 – POS SCREEN RETAIL FORMAT – ABILITY TO INCREASE FONT & LINE SIZES 49
IP-8374 – POS SCREEN GRIDS – SUPPORT FOR THE EXTERNAL APPLICATION FUNCTION 52

REPORT HUB 54

IP-8200 – REPORT HUB – TREND REPORT FUNCTIONALITY 54
IP-8381 – REPORT HUB – OPTION TO INCLUDE CHARTS 56

TAX MONITORING 58

IP-8014 – TAX INVOICE MONITORING SYSTEM – SUPPORT FOR V3 58

TENDER TYPES 59

IP-8349 – TENDER TYPES – "NO SPECIAL POINTS IF FULLY PAID BY THIS TENDER" OPTION 59

USERS 64

IP-8301 – EXTENDED PERMISSIONS FOR CUSTOMER MODIFICATION FIELDS 64

YES/NO OPTIONS 66

Return to top

IP-8350 – YES/NO OPTION – PENDING SALES/WEB ORDERS – USE LOCATION WHERE FINALIZED 66
IP-8380 – YES/NO OPTION – DUPLICATE RECEIPTS INCLUDE EFTPOS RECEIPT DATA 67
IP-8391 – YES/NO OPTION – CASH DECLARATIONS – FORCE AMOUNTS IN ALL TENDERS 68

Automatic Export Settings – POS Terminals

IP-8315 – Deputy Export – Support for Table Orders Format

This functionality introduces the ability to export Table Add data to Deputy (i.e. when items are saved to Tables on the Restaurant Table Map).
Note that the format of the exported data is the same as the "Deputy" Export Sales Format.
The difference between "Deputy" and "Deputy Table Orders" is listed below:

- **Deputy** – This format will export data for sales that have been completed (i.e. add items to a sale > tender the sale > data is included in the export).
- **Deputy Table Orders** – This format will export data for Table Orders (i.e. add items to a sale > Press Table Map > save the sale to a table, or select a Table from the Table Map > Press POS > Add Items > Press Table Map > data is included in the export).

The below is an example of the Deputy Table Orders Export Format:

Date/Time,Employee Name,Department Name,Unique Sales Reference,Sales Quantity,Sales Amount
2026-10-21 10:03,Jeremy,Location 1,3853-1,3,10.00
2026-10-21 10:03,Jeremy,Location 1,3854-1,3,10.00

To configure the Deputy Table Orders format, complete the steps outlined on the following page.

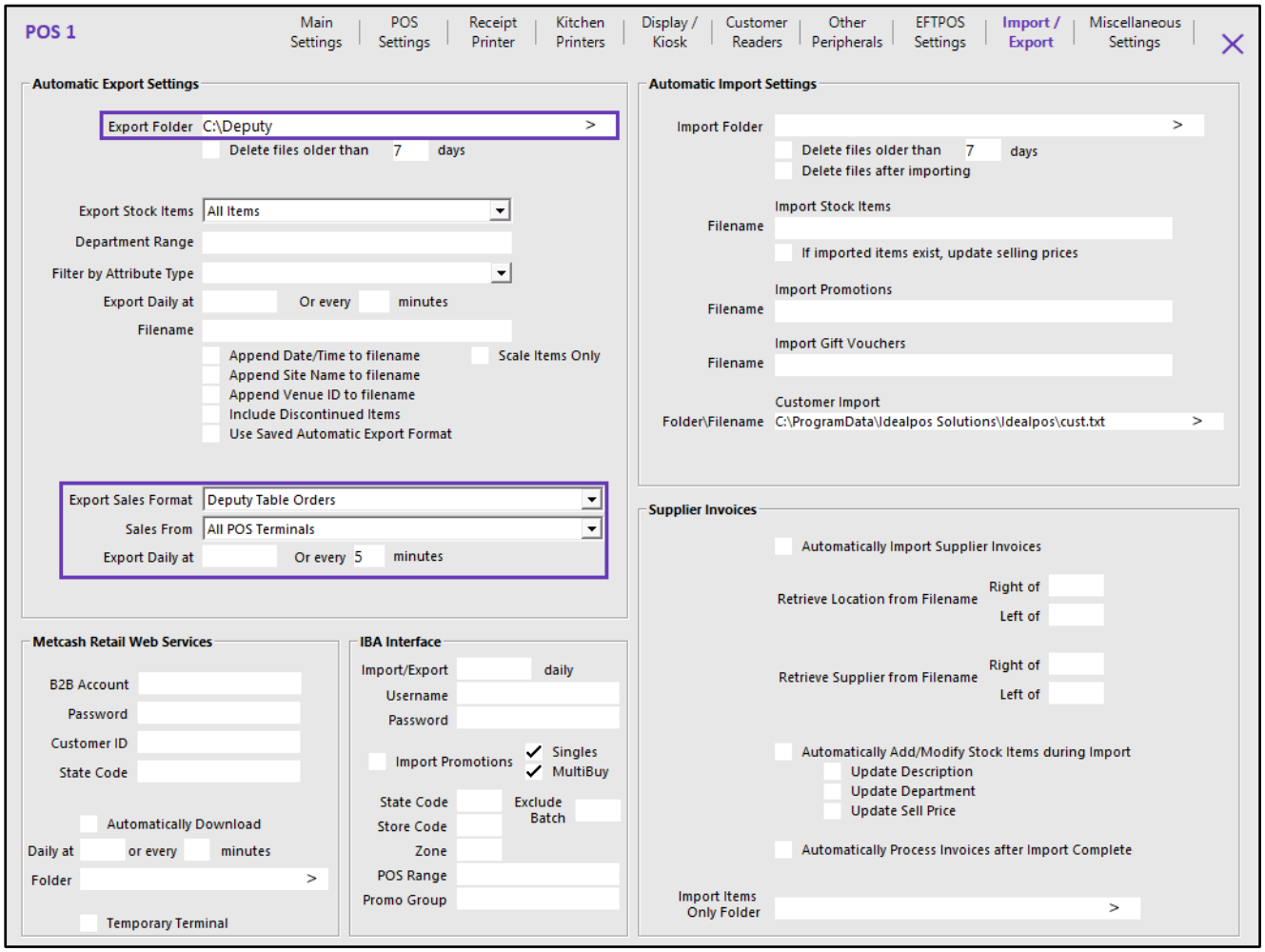
Return to top

Configuring Automatic Export Settings

Go to: Back Office > Setup > POS Terminals > Select a POS Terminal > Modify.
In the Import/Export tab, configure as follows:

Automatic Export Settings

- **Export Folder:** Select the folder location where the data will be exported to.
- **Export Sales Format:** Deputy Table Orders
- **Sales From:** Select the required option (All POS Terminals, This POS Only or This Site Only).
- **Export Daily at/or every # minutes:** Enter a daily export time in 24-hour format or enter a value into the every minutes field.



The Automatic Export will be triggered as per the Export Daily at time/or every # minutes.
An export file will be produced as per the example shown on the previous page.

Return to top

IP-8395 – IGT EZ Insights Export File functionality

This functionality introduces the ability to export IGT EZ Insights data.
IGT EZ Insights is the successor to the old iKnow format.
This functionality will export the following files when it runs:

- IGTItemExtractYYYYMMDD
- IGTTenderExtractYYYYMMDD
- IGTTransactionExtractYYYYMMDD

YYYY = Year
MM = Month
DD = Day of Month

The headers included in the above files are listed as follows:

IGTItemExtract
TransactionNumber|CheckNumber|ItemNumber|ItemName|ItemCategory|ItemType|MerchandiseValue|Quantity

IGTTenderExtract
TransactionNumber|CheckNumber|SettlementMethod|MerchandiseValue|MemberDiscountAmount

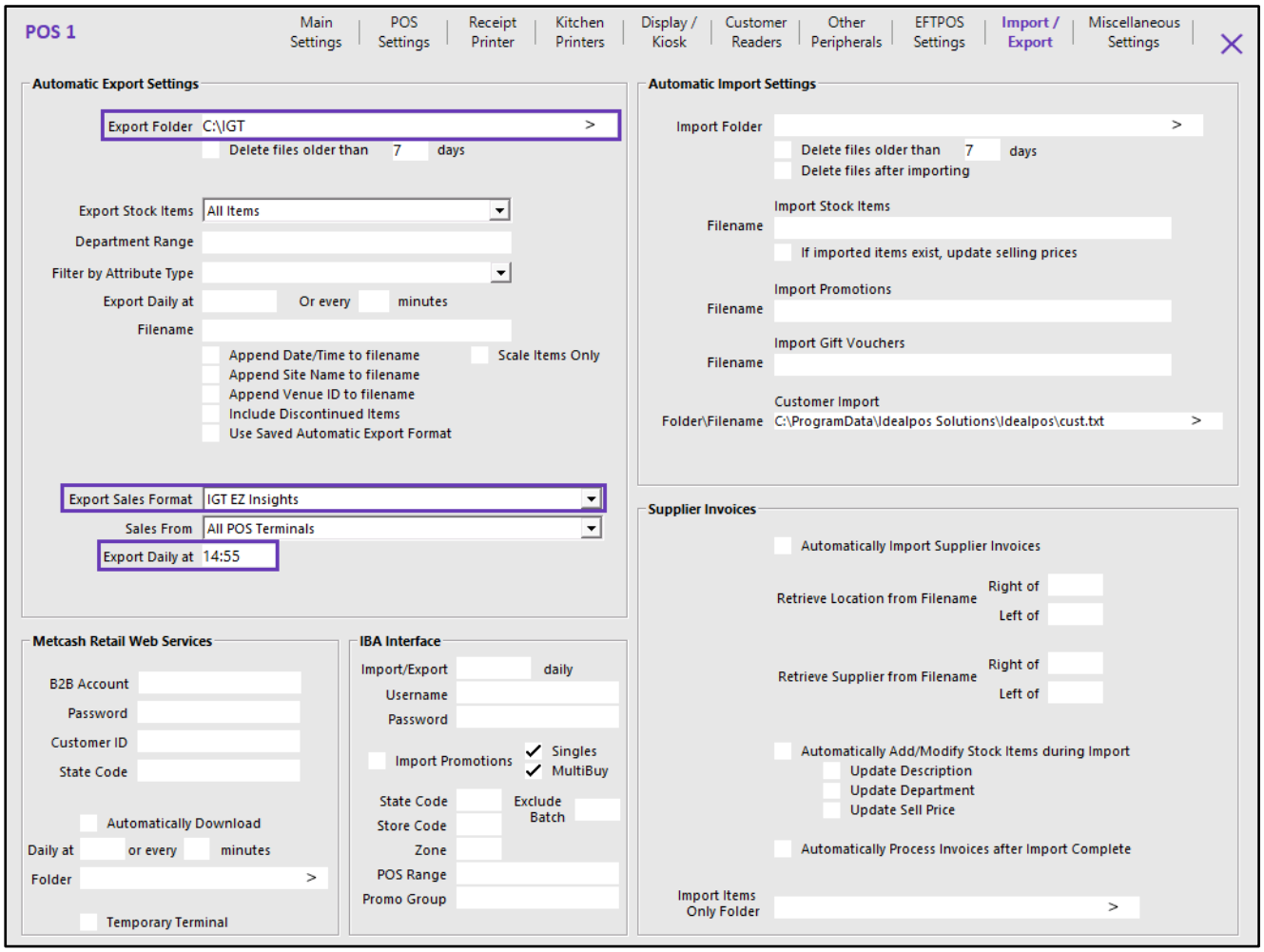
IGTTransactionExtract
TransactionNumber|CheckNumber|MemberIdentifier|CashierNumber|CashierName|CostCentreName|WorkstationID|MerchandiseValue|MemberDiscountAmount|PointsRedeemedValue|PointsAccruedValue|TransactionDate|TransactionTime

Return to top

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

Automatic Export Settings

- **Export Folder:** Select a folder to export the data
- **Export Sales Format:** IGT EZ Insights
- **Sales From:** All POS Terminals, This POS Only or This Site Only (select the required option)
- **Export Daily at:** Enter time in 24-hour format.



The export will run automatically at the Export Daily at time and the export files will be exported to the Export Folder.

Notes regarding Customer Data and Points:

Member Data

So that Member Data is included in the export files, **Add Members to POS must be enabled** in Global Options > Gaming.

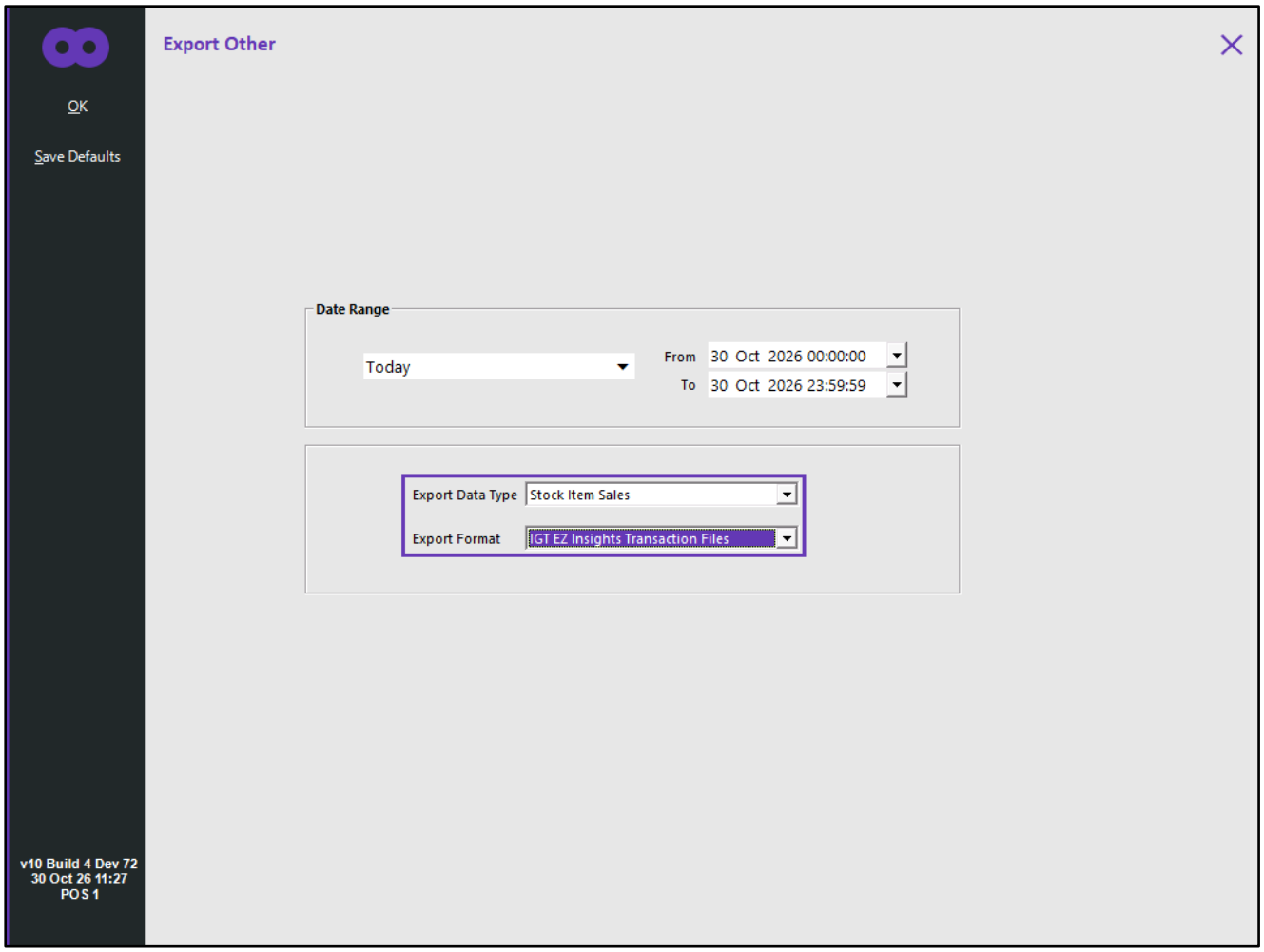
Points Accrual data

So that points accrual data is exported correctly, ensure that Global Options > Gaming > Customer Type is linked to a Customer Type which has "Use Points System" enabled!
E.g. Go to: Back Office > File > Customers > Customer Types > Select a Customer Type > Modify > Enable: Use Points System.

Return to top

The data can also be exported manually via Back Office > Utilities > Export Data > Other Data.

- **Export Data Type:** Stock Item Sales
- **Export Format:** IGT EZ Insights Transaction Files



An example of exported data is shown on the following page.

Return to top

IGTItemExtract

TransactionNumber|CheckNumber|ItemNumber|ItemName|ItemCategory|ItemType|MerchandiseValue|Quantity
501|1|106007|PASTA|ENTRÉE|FOOD|11.00|1
501|1|106002|BEEF|ENTRÉE|FOOD|13.00|1
501|1|106003|LAMB|ENTRÉE|FOOD|12.00|1
501|1|106001|DUCK|ENTRÉE|FOOD|14.00|1
502|1|106007|PASTA|ENTRÉE|FOOD|11.00|1
502|1|106002|BEEF|ENTRÉE|FOOD|13.00|1
502|1|106003|LAMB|ENTRÉE|FOOD|12.00|1
502|1|106001|DUCK|ENTRÉE|FOOD|14.00|1

IGTTenderExtract

TransactionNumber|CheckNumber|SettlementMethod|MerchandiseValue|MemberDiscountAmount
501|1|EFTPOS|50.00|0
502|1|EFTPOS|50.00|0

IGTTransactionExtract

TransactionNumber|CheckNumber|MemberIdentifier|CashierNumber|CashierName|CostCentreName|WorkstationID|MerchandiseValue|MemberDiscountAmount|PointsRedeemedValue|PointsAccruedValue|TransactionDate|TransactionTime
501|1|0120802600|1|Jeremy|Location 1|1|50.00|0.00|0.00|0.00|2026-10-30 10:23:50|2026-10-30 10:23:50
502|1|01208406299|1|Jeremy|Location 1|1|50.00|0.00|0.00|0.00|2026-10-30 10:24:01|2026-10-30 10:24:01

Return to top

IP-8340 – eBev Daily Inventory Export

This functionality introduces the ability to configure Idealpos to Automatically Export Stock Items using the eBev Inventory format which is suitable for importing into eBev.
For more information about eBev, visit: https://www.ebev.com

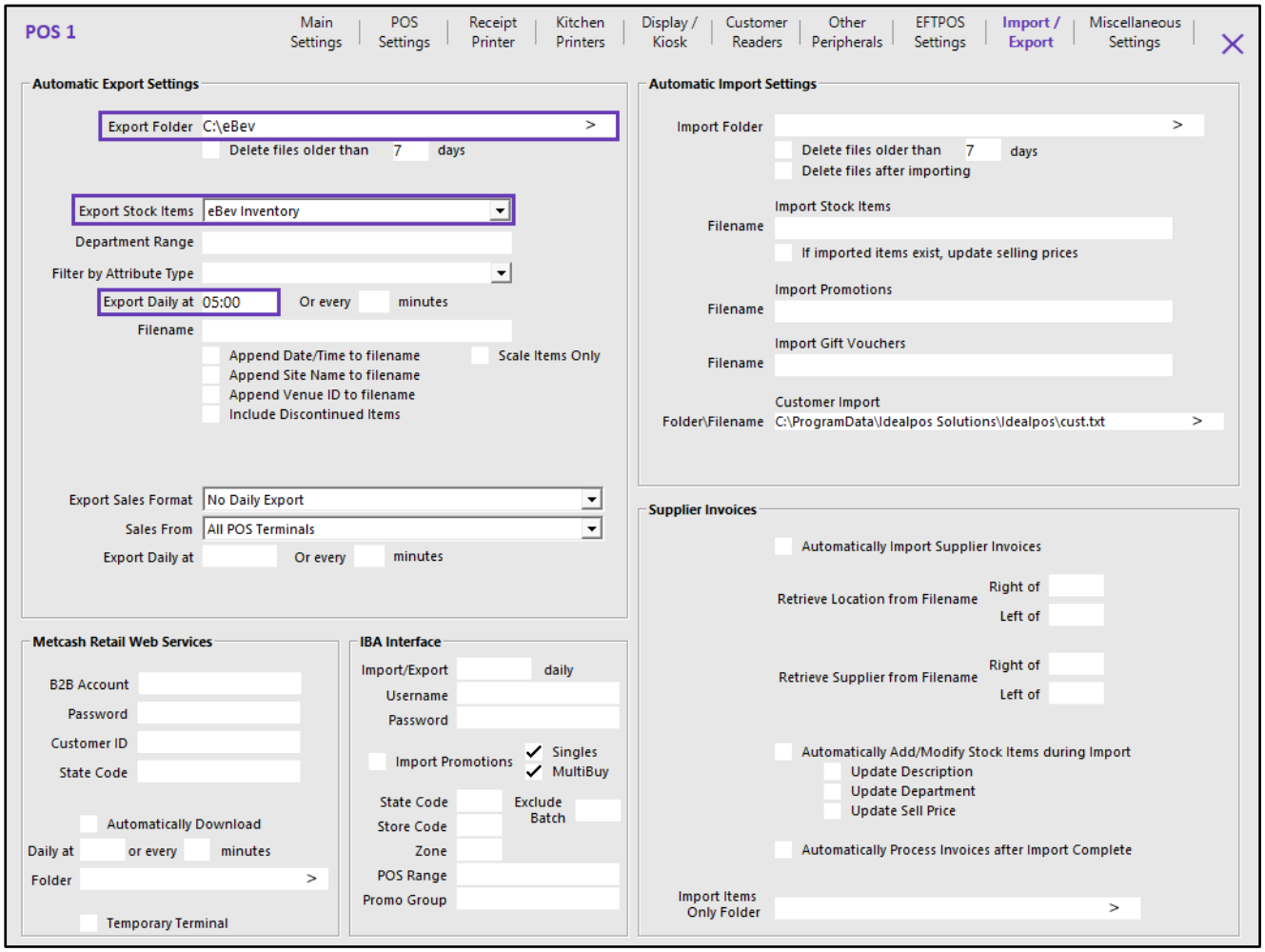
To configure the eBev Inventory format, complete the steps outlined below.

Configuring Automatic Export Settings

Go to: Back Office > Setup > POS Terminals > Select a POS Terminal > Modify.
In the Import/Export tab, configure as follows:

Automatic Export Settings

- **Export Folder:** Select the folder location where the data will be exported to.
- **Export Stock Items:** eBev Inventory
- **Export Daily at:** Enter the time (using 24-hour format) to export the data.



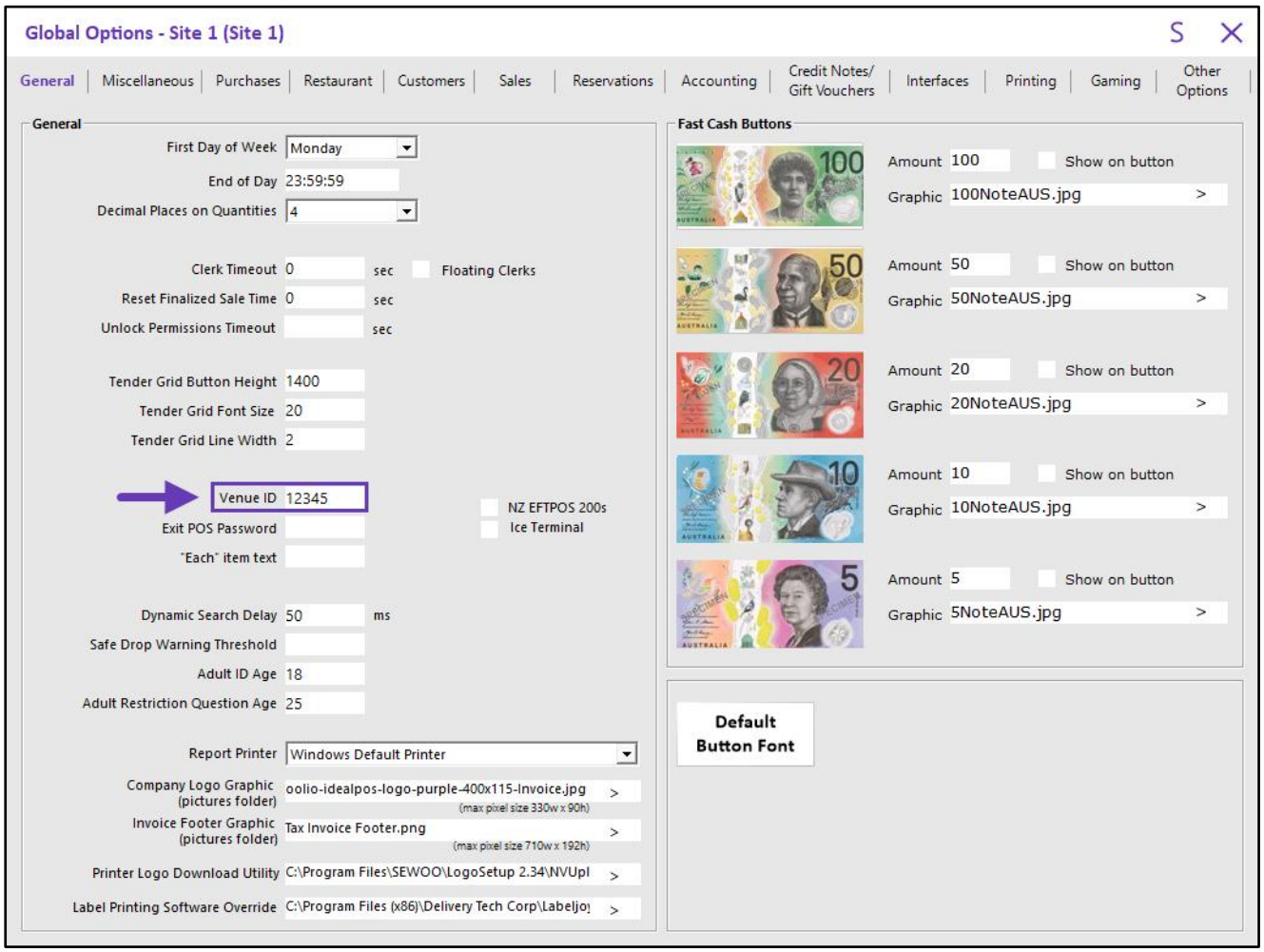
Return to top

Configure NetSuite ID

The NetSuite ID for the customer will need to be entered.
Idealpos will provide the ID when setting up a site for eBev.

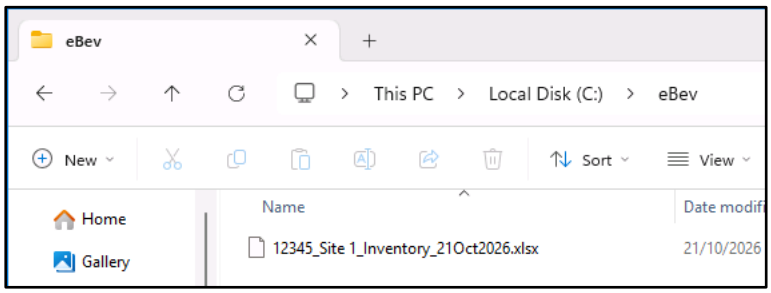
Go to: Back Office > Setup > Global Options > General.

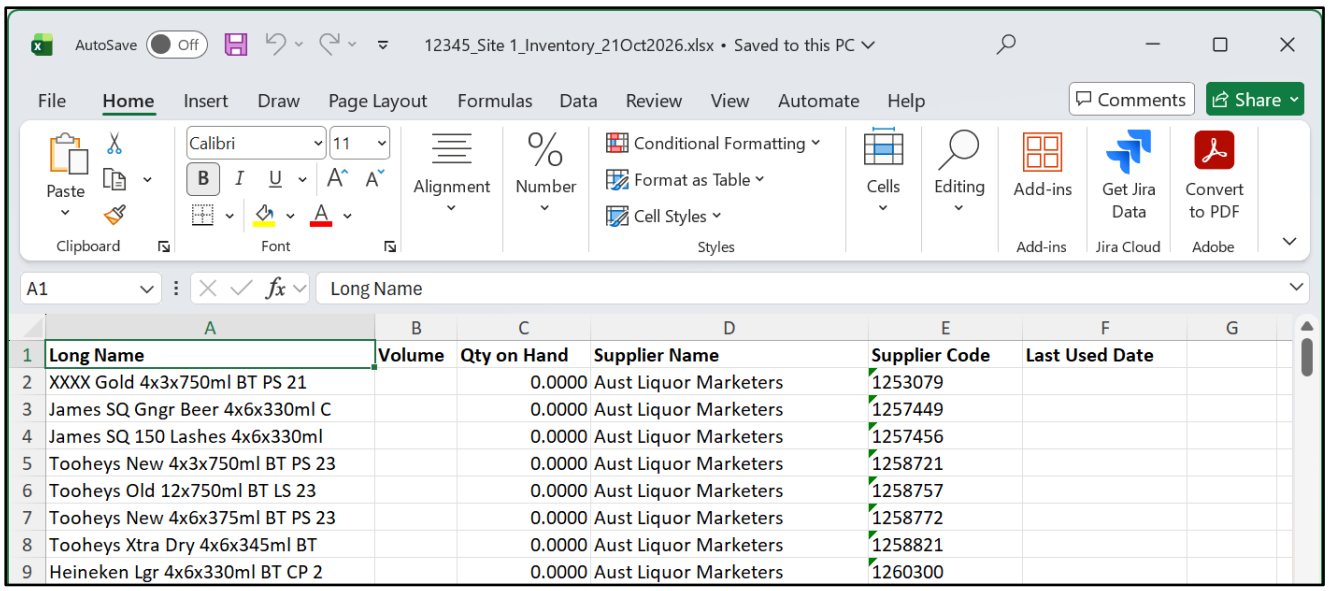
- **Venue ID:** Enter the NetSuite ID provided by Idealpos into this field.



Return to top

Data Exported to Export Folder at chosen time
The data will be exported to the Export Folder at the chosen time.



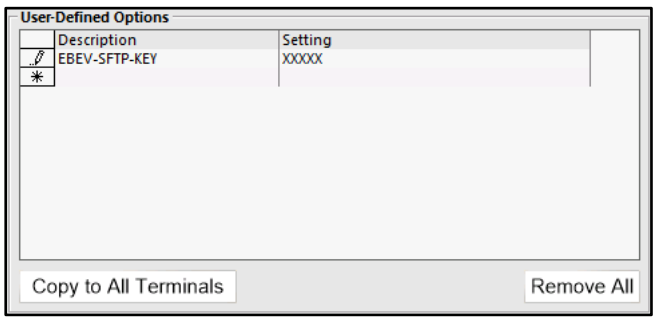


	A	B	C	D	E	F	G
1	**Long Name**	**Volume**	**Qty on Hand**	**Supplier Name**	**Supplier Code**	**Last Used Date**	
2	XXXX Gold 4x3x750ml BT PS 21		0.0000	Aust Liquor Marketers	1253079		
3	James SQ Gngr Beer 4x6x330ml C		0.0000	Aust Liquor Marketers	1257449		
4	James SQ 150 Lashes 4x6x330ml		0.0000	Aust Liquor Marketers	1257456		
5	Tooheys New 4x3x750ml BT PS 23		0.0000	Aust Liquor Marketers	1258721		
6	Tooheys Old 12x750ml BT LS 23		0.0000	Aust Liquor Marketers	1258757		
7	Tooheys New 4x6x375ml BT PS 23		0.0000	Aust Liquor Marketers	1258772		
8	Tooheys Xtra Dry 4x6x345ml BT		0.0000	Aust Liquor Marketers	1258821		
9	Heineken Lgr 4x6x330ml BT CP 2		0.0000	Aust Liquor Marketers	1260300		

Automatically send file to eBev SFTP Site (Optional Functionality)
The eBev Inventory file can be sent automatically to eBev when an EBEV-SFTP-KEY User-Defined Option exists.

Go to: Back Office > Setup > POS Terminals > Select a POS Terminal > Modify > POS Settings.
In User-Defined Options, create the following User-Defined Option.
The key value will be provided when a site goes live.

- **Description:** EBEV-SFTP-KEY
- **Setting:** XXXXX

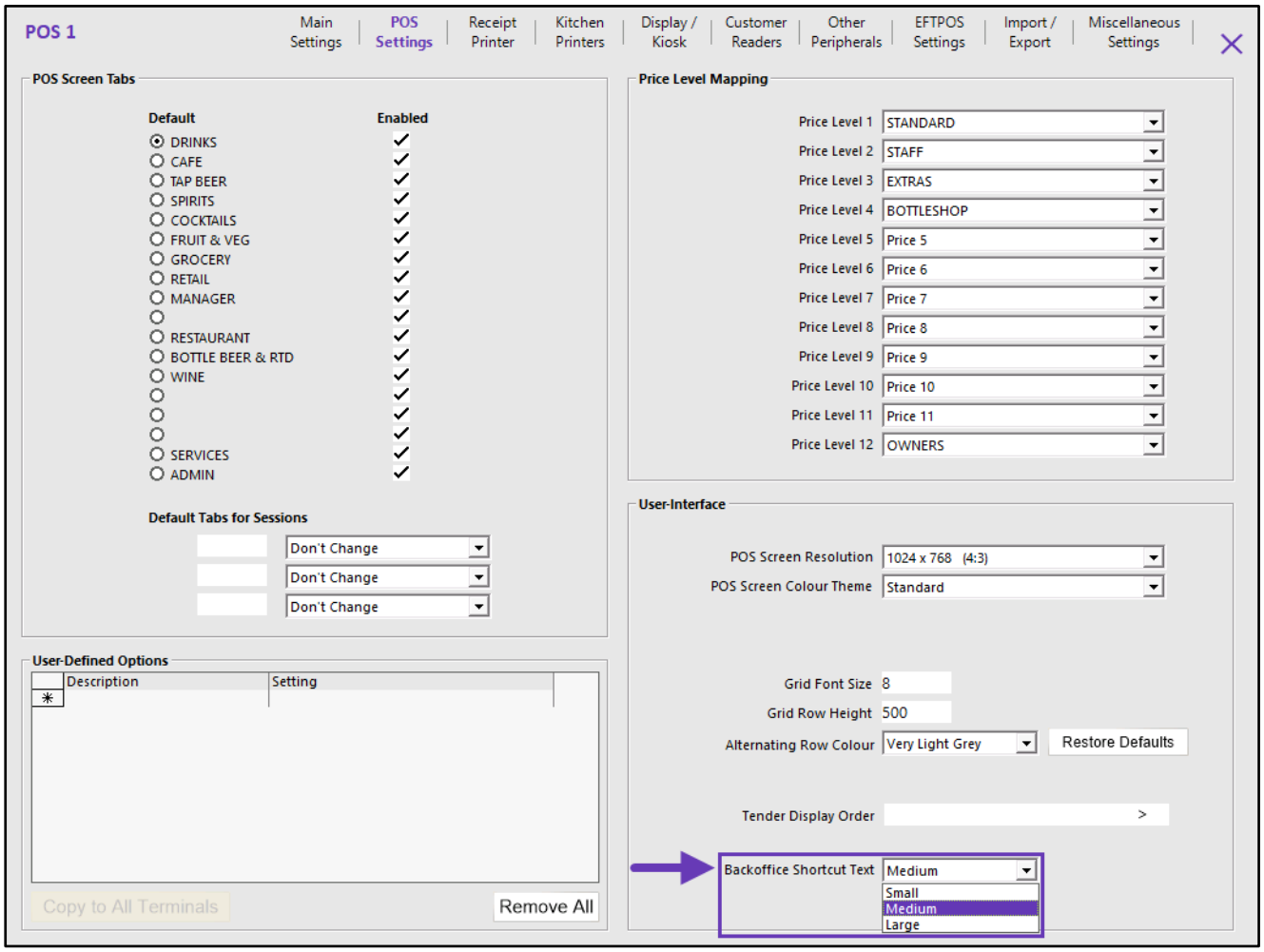


Back Office

IP-8371 – Backoffice Shortcuts – Option to adjust Font Size

This functionality introduces the ability to adjust the Font Size used for Backoffice Dashboard Shortcuts.
Sizes available are Small, Medium (Default) or Large.
This functionality replaces the option "Shortcut Bar Small Font" that previously appeared in the Miscellaneous Settings tab of the Modify POS Terminal window.

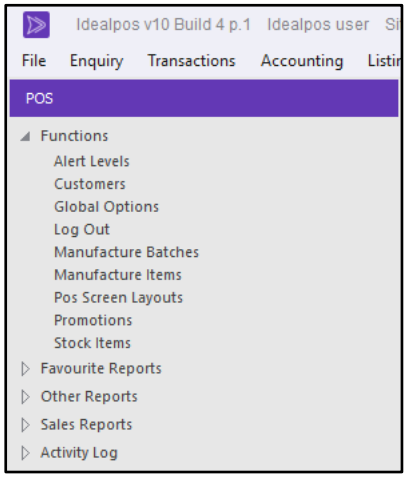
To configure and use this functionality, go to:
Back Office > Setup > POS Terminals > Select a POS Terminal > Modify > POS Settings tab.
Backoffice Shortcut Text: Small, Medium or Large



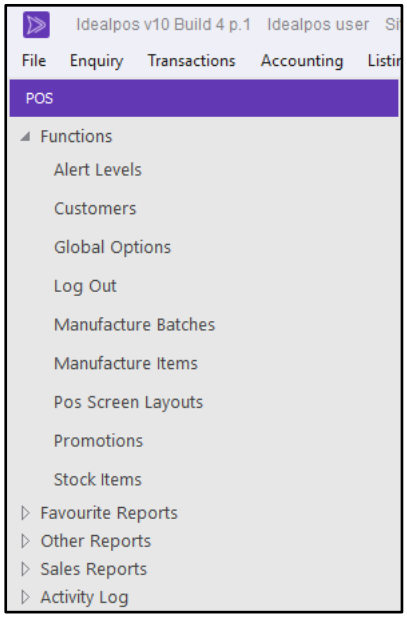
Once the required option has been selected, close the Modify POS Terminal window.
An example of each Backoffice Shortcut Text size is shown on the following page.

Return to top

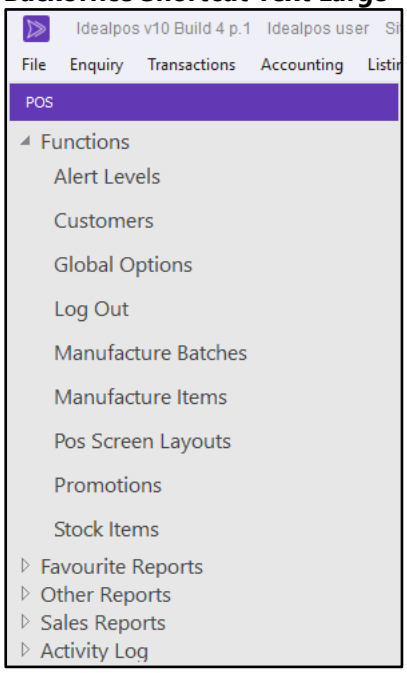
Backoffice Shortcut Text Small



Backoffice Shortcut Text Medium (Default)



Backoffice Shortcut Text Large

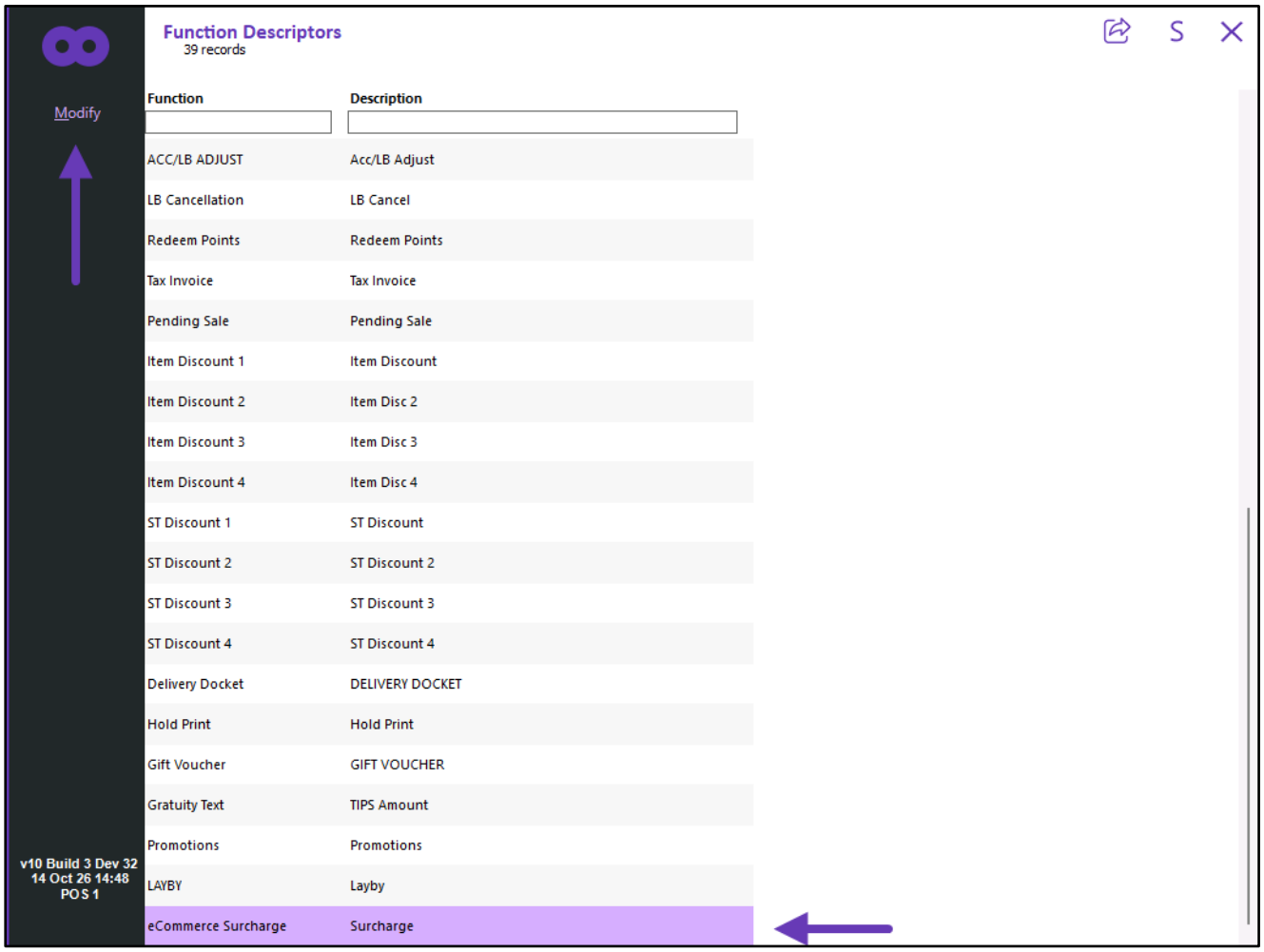


eCommerce

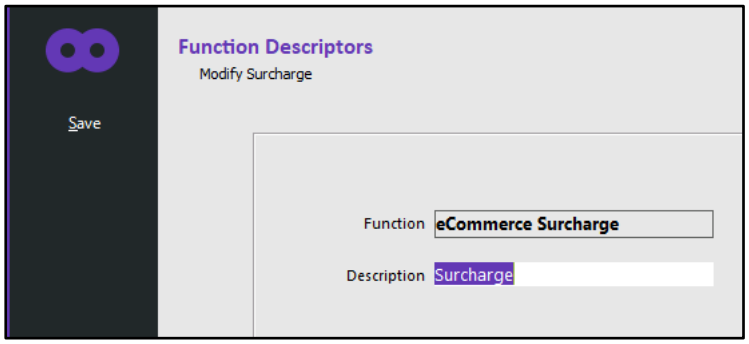
IP-8378 – eCommerce Orders – Ability to Modify Surcharge Descriptor

This functionality introduces the ability to modify the Surcharge Descriptor for eCommerce Order Surcharges.
When an eCommerce Order has a Surcharge that applies, the Description for the Surcharge in the Journal was previously hard-coded as "Surcharge".
This option now enables the ability to modify the description for eCommerce Surcharges; the eCommerce Surcharge description will be displayed in the Journal when an eCommerce Surcharge applies to an eCommerce Order.

To configure this functionality, go to:
Back Office > Setup > Function Descriptors > Select "eCommerce Surcharge" (from the bottom of the list) > Modify.



Enter the desired Description for the eCommerce Surcharge > Press "Save".



Return to top

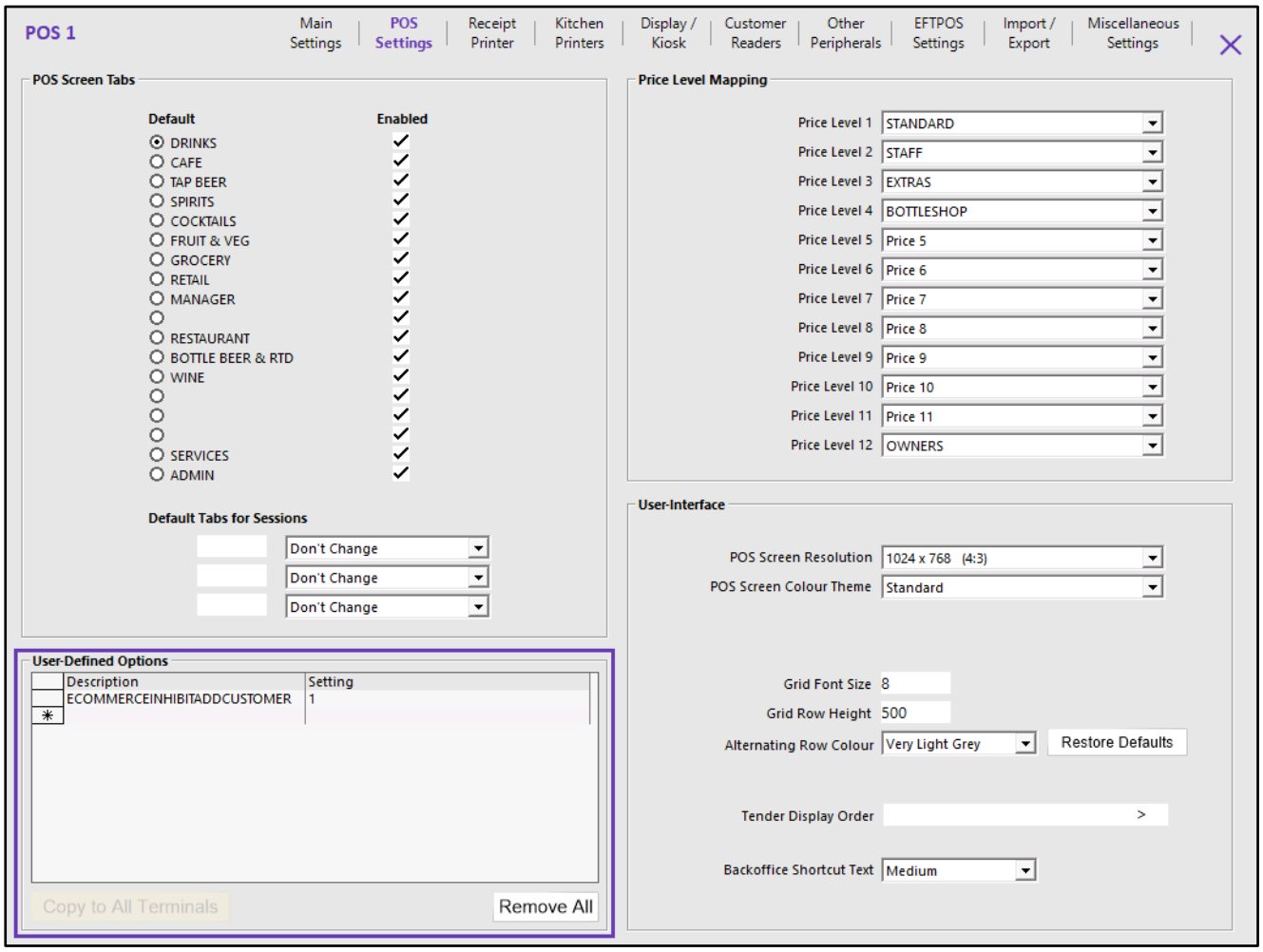
IP-8379 – eCommerce – Option to inhibit creating Customer for Web Orders

This functionality introduces the ability to inhibit the creation of Customers for Web Orders.
By default, Idealpos will automatically create new customers from Web Orders when the orders arrive.
A User-Defined Option can be created to stop this behaviour and prevent the auto-creation of customers from Web Orders.

To configure this functionality, go to:
Back Office > Setup > Select a POS Terminal > Modify > POS Settings > User-Defined Options.

Create the following User-Defined Option:

- **Description**: ECOMMERCEINHIBITADDCUSTOMER
- **Setting**: 1



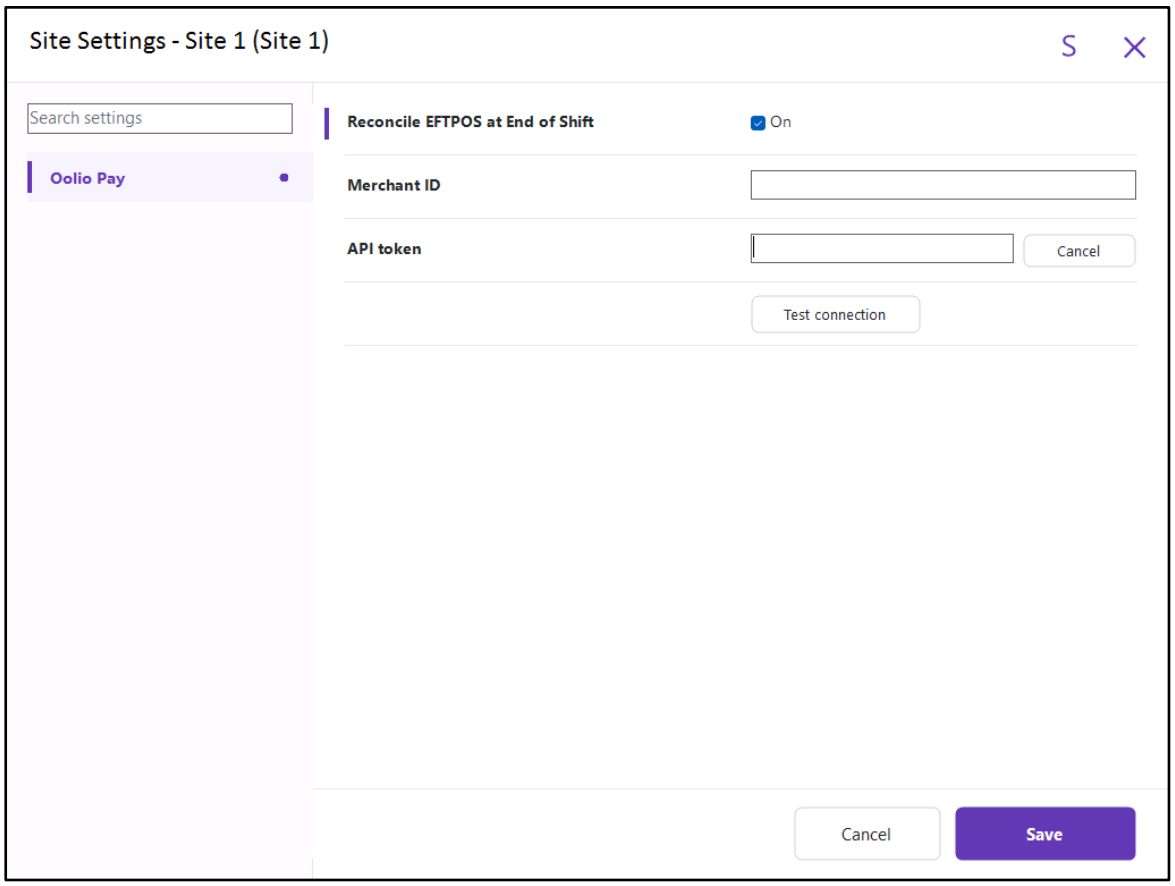
EFTPOS

IP-8178 – Oolio Pay – Reconciliation Functionality (beta)

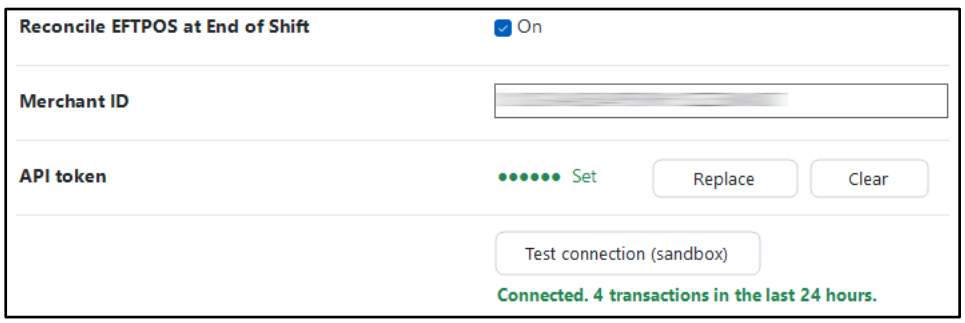
This functionality introduces the ability to perform EFTPOS reconciliations for Oolio Pay (currently Oolio Pay Global). When doing a Cash Declaration at the End of Shift, the EFTPOS figure will be posted automatically into the correct Tender.
Any variance will be shown with the ability to drill down to find where the variance came from.
As this is beta functionality, it is subject to change pending feedback.

To configure and use this functionality, go to: Back Office > Setup > Site Settings.

- **Reconcile EFTPOS at End of Shift** – On
- **Merchant ID** – Enter the supplied Merchant ID
- **API Token** – Press "Enter" > populate the API Token



After entering the details > press "Test connection" > A successful result should be displayed.

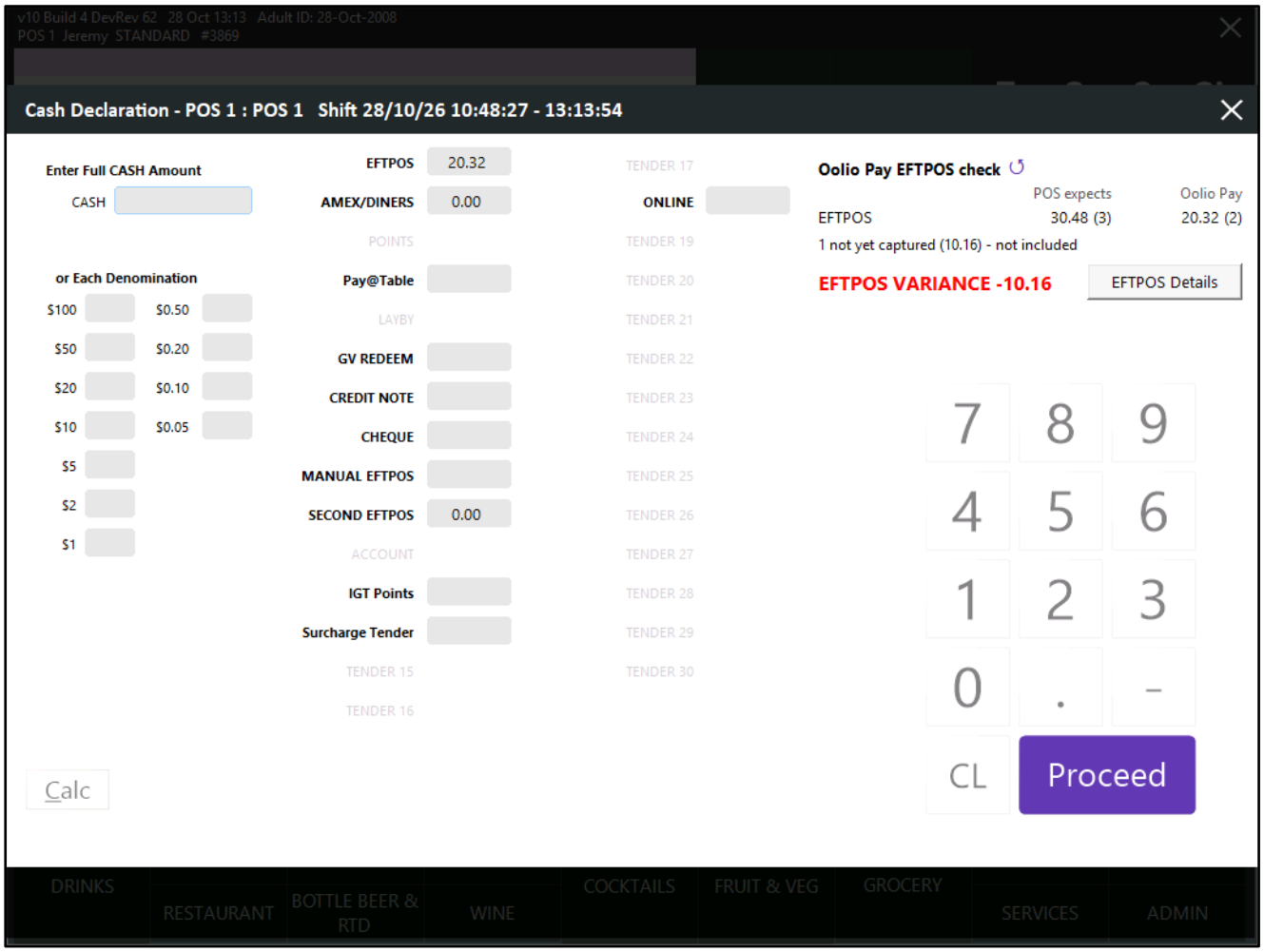


Press "Save" to save the changes and close the Site Settings window.

Return to top

Go to: POS Screen > Press End of Shift.
Note – It is recommended to wait until 40 seconds after the last EFTPOS transaction before pressing the "End of Shift" button/function.

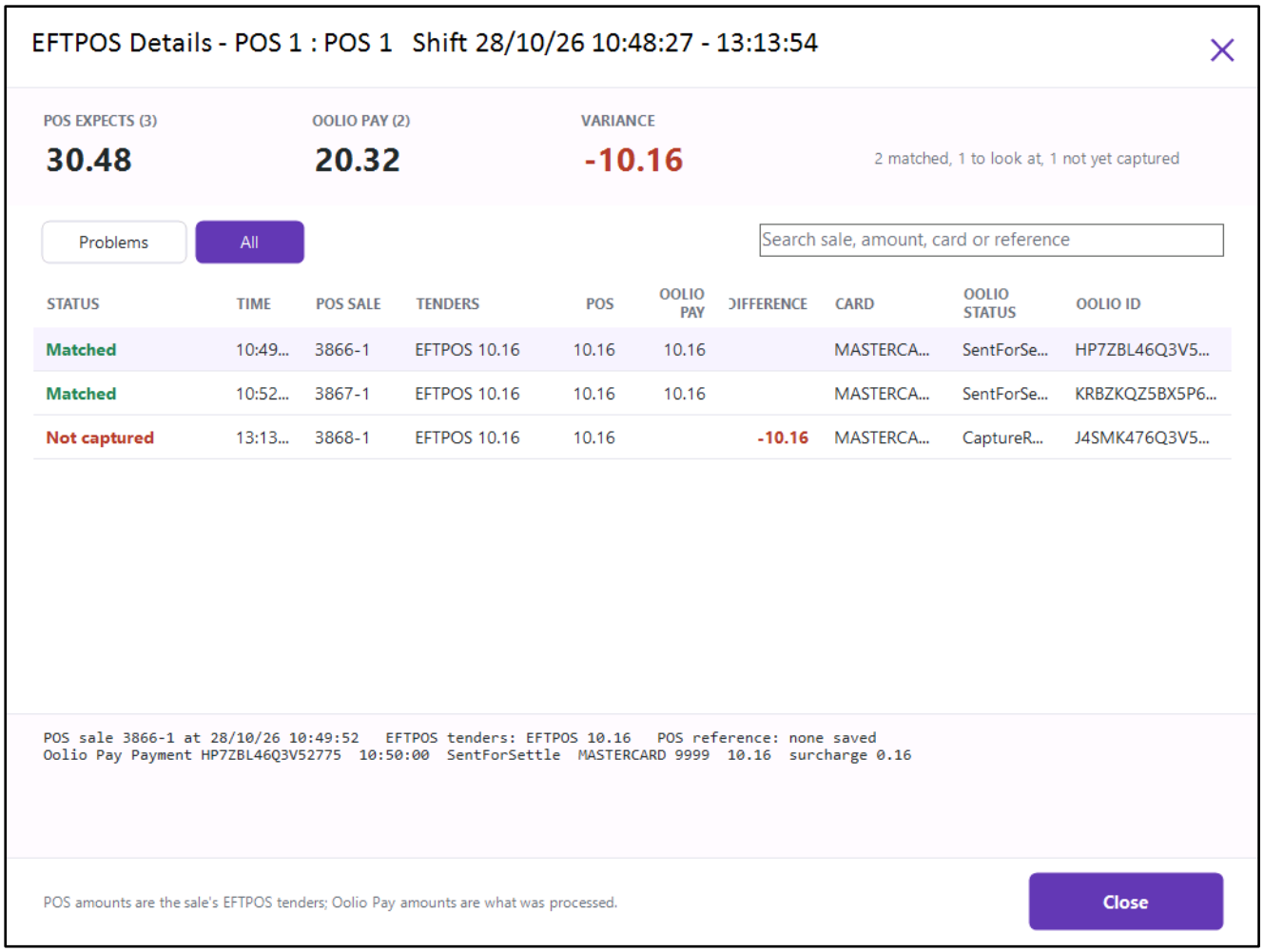
Cash Declaration when Variances exist
The EFTPOS amount in the Cash Declaration screen will show the captured amount.
If there is a variance, the Cash Declaration screen will show EFTPOS VARIANCE with the amount.



Return to top

EFTPOS Details screen when Variances exist

Press the EFTPOS Details button (top-right corner) to show the details of the EFTPOS transactions.
The EFTPOS Details Problems can be filtered by All or Problems.



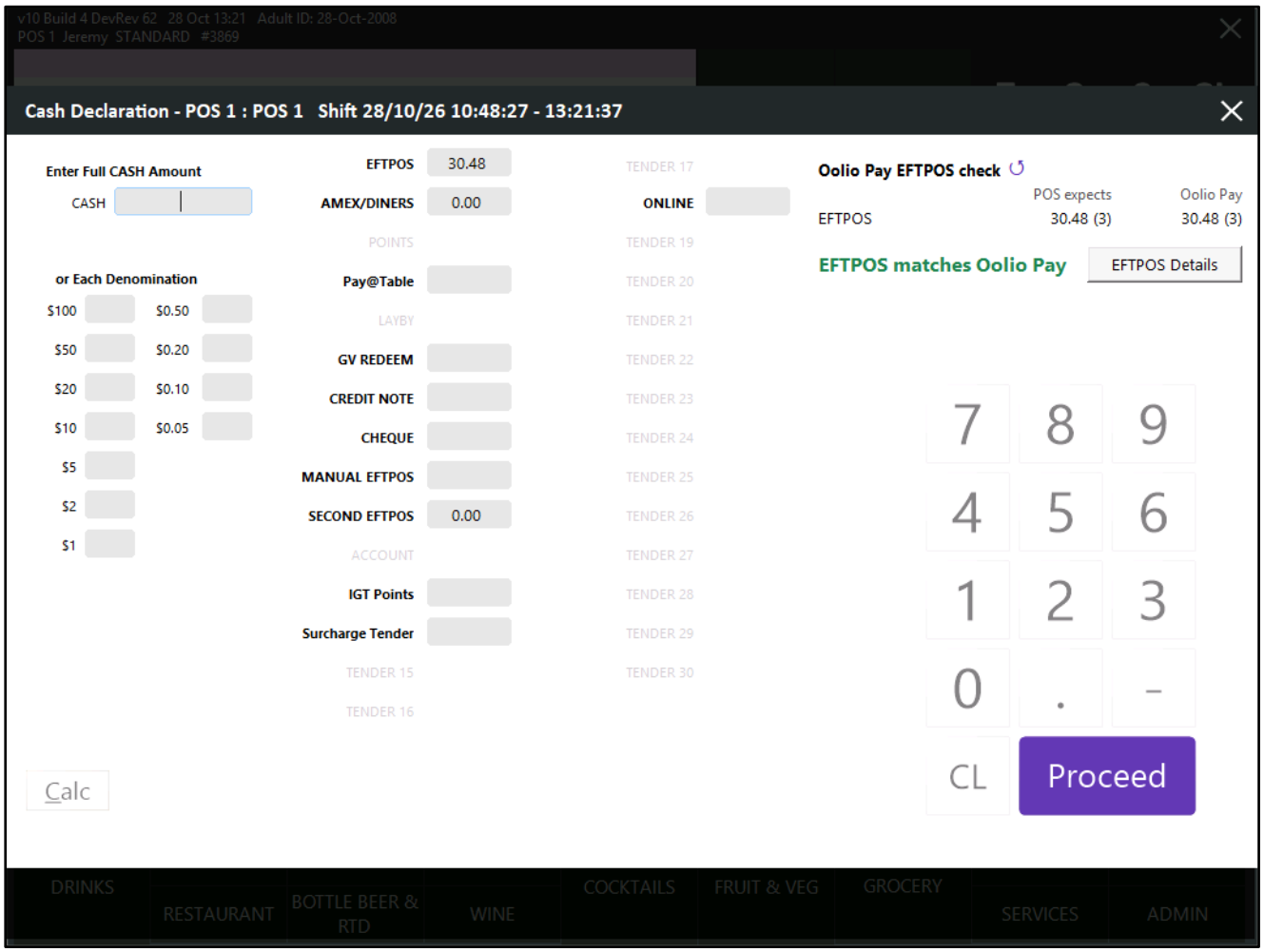
Return to top

Oolio Pay EFTPOS Check - Refresh

To refresh the Cash Declaration, press the "Refresh" arrow > the Cash Declaration will be updated with previously uncaptured EFTPOS Transactions.



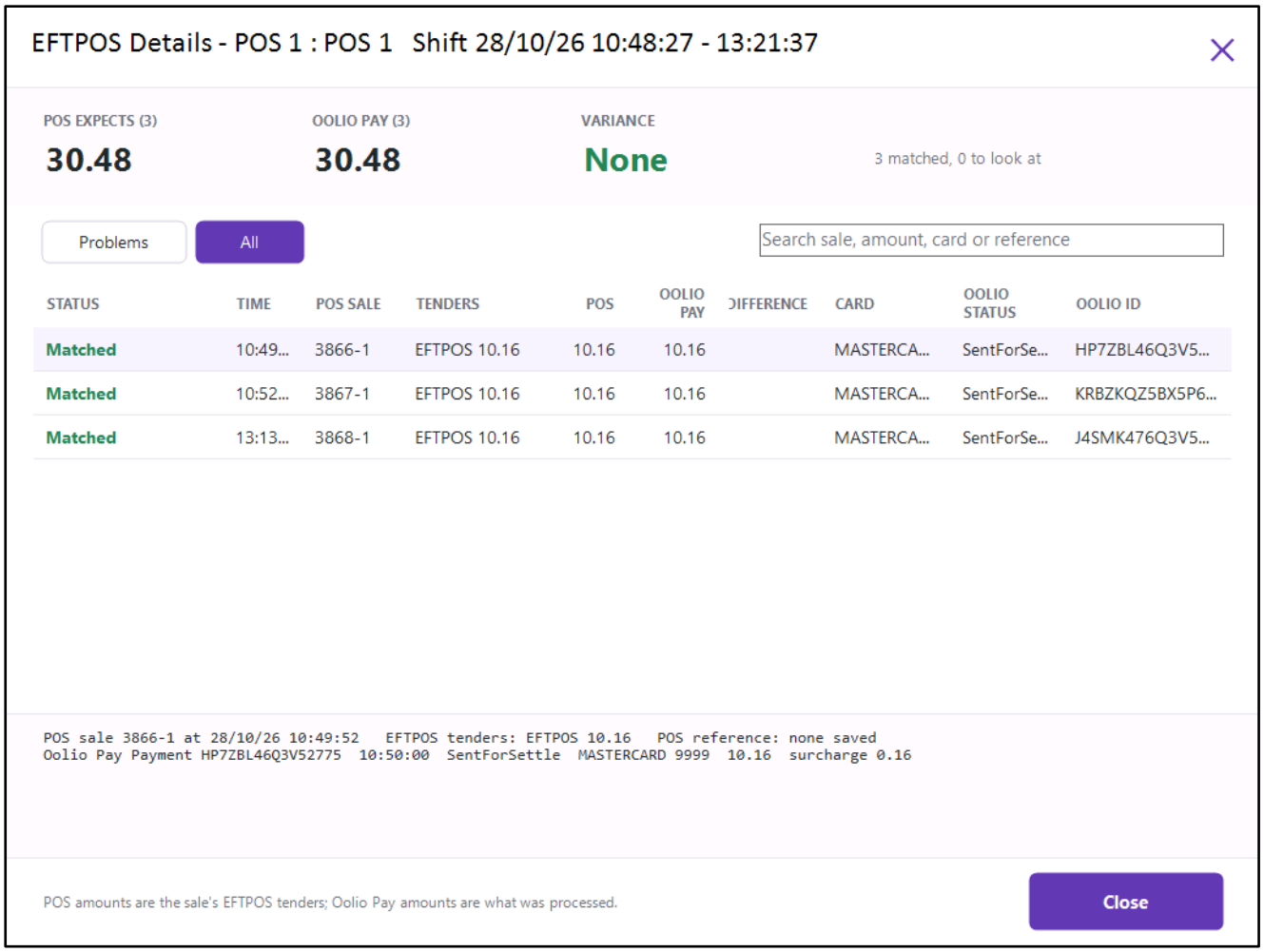
Cash Declaration when EFTPOS matches Oolio Pay (No Variance)



Return to top

EFTPOS Details screen when EFTPOS matches Oolio Pay (No Variances)

When the "EFTPOS Details" button is pressed while there are no variances, the EFTPOS Details screen will show all transactions as Matched.



End of Shift

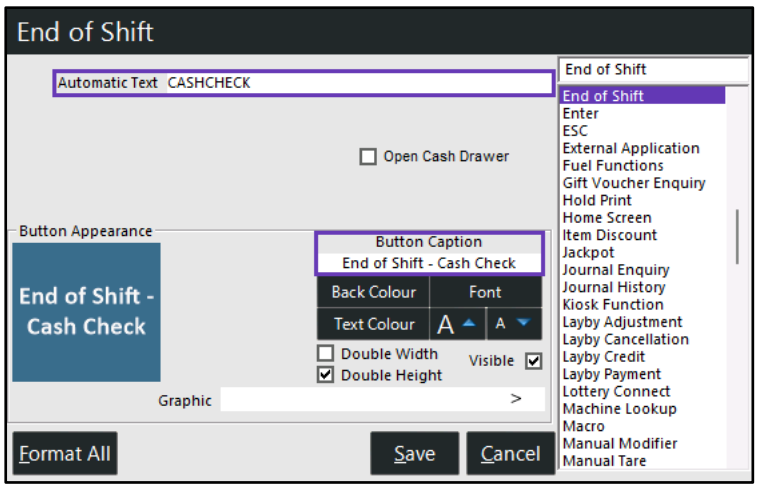
IP-8295 – Cash Declaration – Ability to do Mid-shift XReport with Counted Cash

This functionality introduces the ability to do a Mid-shift XReport with Counted Cash.
This enables a Clerk to count the cash in the cash drawer and enter the values into the Cash Check screen (same appearance as the Cash Declaration screen) which will then print out a CASH CHECK report to the receipt printer.
The details printed on the CASH CHECK receipt are the same as the details that are printed on an End of Shift Sales Report (e.g. Expected, Actual, Variance).
Note that the CASH CHECK function ***will not perform an End of Shift***.
This function is simply a way of counting the cash drawer and seeing the Expected, Actual and Variance amounts ***without performing an End of Shift***.
An End of Shift will still need to be completed, and the cash drawer counted at the End of Shift.

To configure and use this functionality, go to:
Back Office > Setup > POS Screen > POS Screen Setup > Select a POS Screen Layout > Buttons.
Select a POS Screen tab > select a blank/unused button and configure as follows:

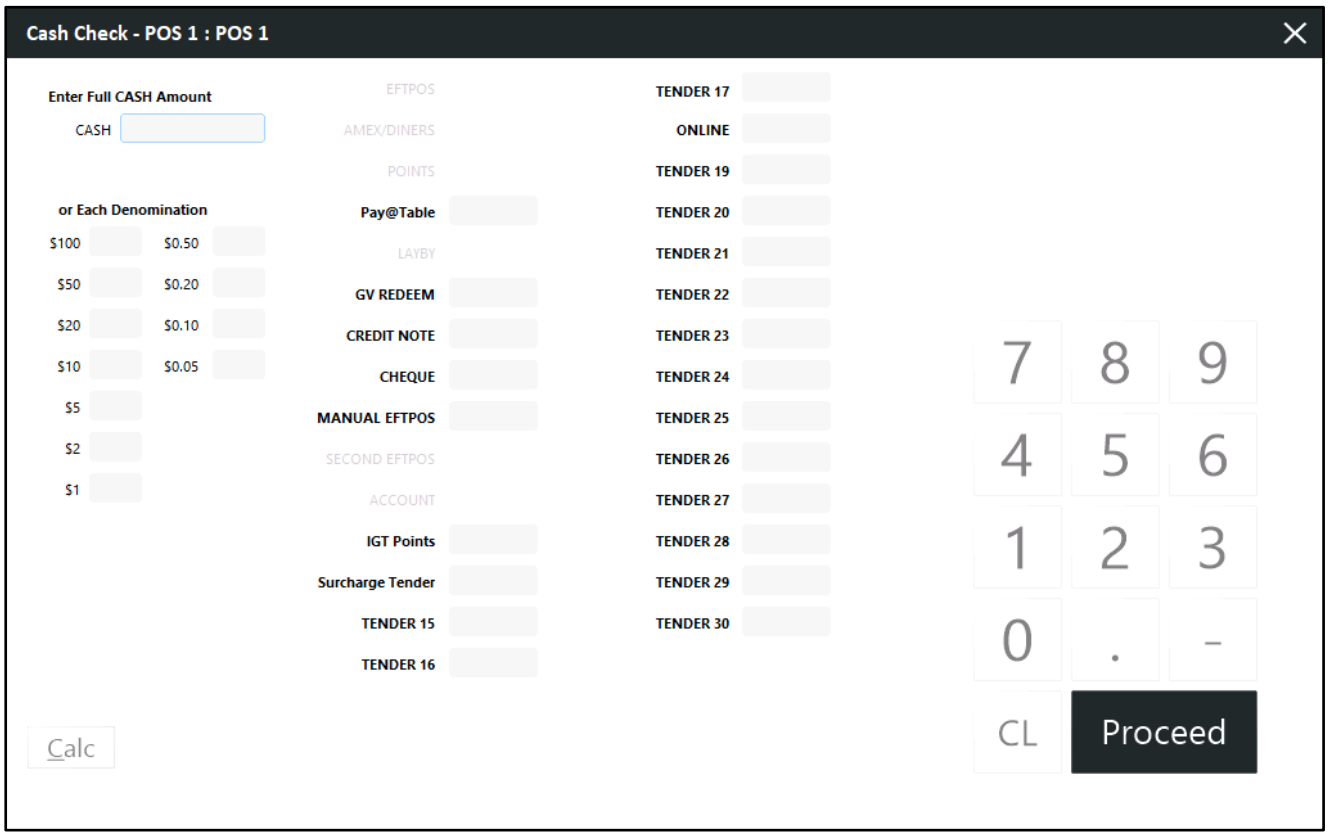
- **Function:** End of Shift
- **Automatic Text:** CASHCHECK

- **Button Appearance:** Customise as required.
- **Button Caption:** End of Shift – Cash Check



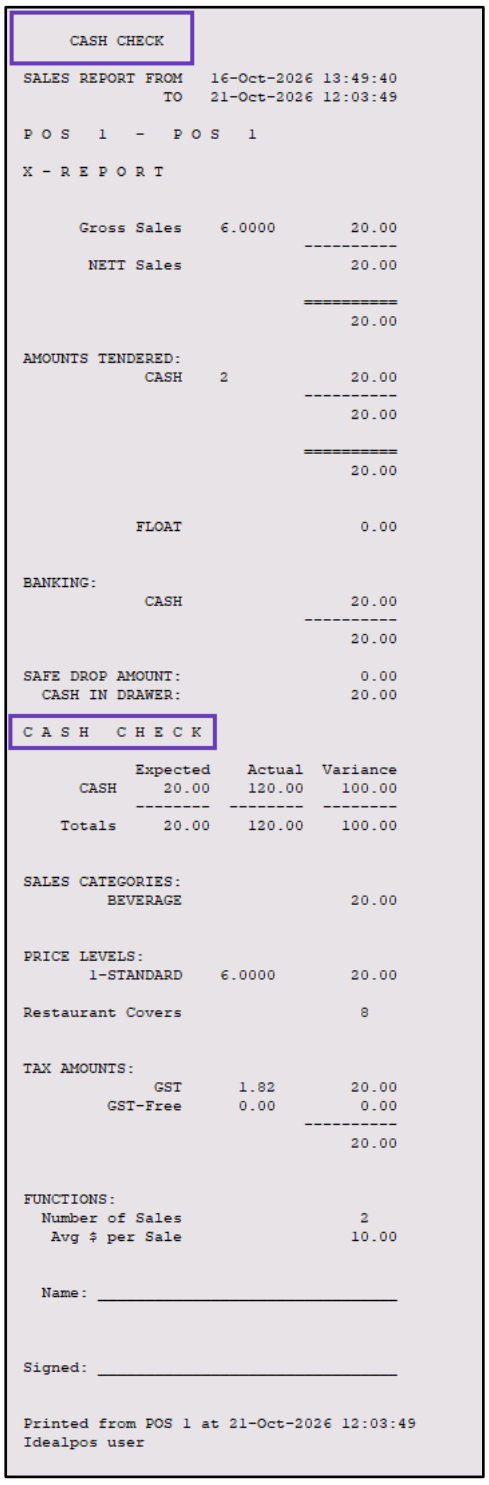
Return to top

Go to: POS Screen > Select POS Screen Tab that contains the button > Press the CASH CHECK button.
The Cash Check screen opens > Count the Cash amounts/denominations and enter the values > Press "Proceed".



Return to top

The receipt printer will produce a CASH CHECK report showing the Expected, Actual and Variance amounts.
CASH CHECK will be displayed on the printed report to distinguish it from an End of Shift Sales Report.



```
      CASH CHECK
SALES REPORT FROM   16-Oct-2026 13:49:40
              TO    21-Oct-2026 12:03:49

P O S   1   -   P O S   1

X - R E P O R T


      Gross Sales    6.0000         20.00
                                  ----------
       NETT Sales                    20.00

                                  ==========
                                    20.00

AMOUNTS TENDERED:
             CASH    2              20.00
                                  ----------
                                    20.00

                                  ==========
                                    20.00


            FLOAT                    0.00


BANKING:
             CASH                   20.00
                                  ----------
                                    20.00

SAFE DROP AMOUNT:                    0.00
  CASH IN DRAWER:                   20.00

C A S H   C H E C K

           Expected    Actual  Variance
      CASH    20.00    120.00    100.00
           --------  --------  --------
    Totals    20.00    120.00    100.00


SALES CATEGORIES:
         BEVERAGE                   20.00


PRICE LEVELS:
       1-STANDARD    6.0000         20.00

Restaurant Covers                    8


TAX AMOUNTS:
             GST      1.82          20.00
         GST-Free     0.00           0.00
                                  ----------
                                    20.00


FUNCTIONS:
  Number of Sales                    2
   Avg $ per Sale                   10.00


  Name: _____________________________

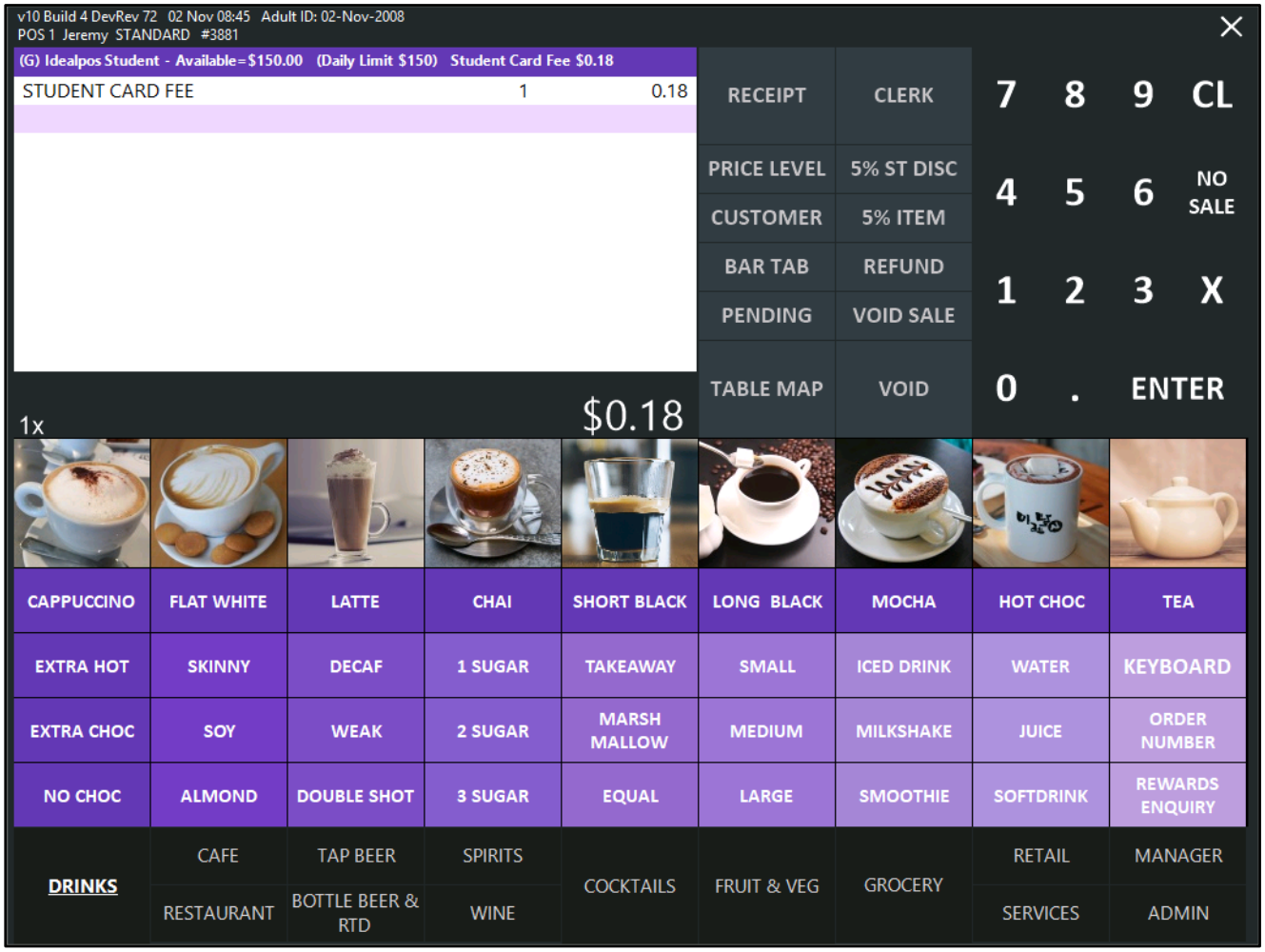

Signed: _____________________________

Printed from POS 1 at 21-Oct-2026 12:03:49
Idealpos user
```

Flexischools Interface

IP-8308 – Flexischools – Support for v4 API

This functionality introduces support for the Flexischools V4 API.
The process for configuring and using the Flexischools Integration is outlined in the User Guide.
For more information, go to:
https://userguide.idealpos.com.au/#Flexischools%20Interface/Flexischools%20Interface.htm

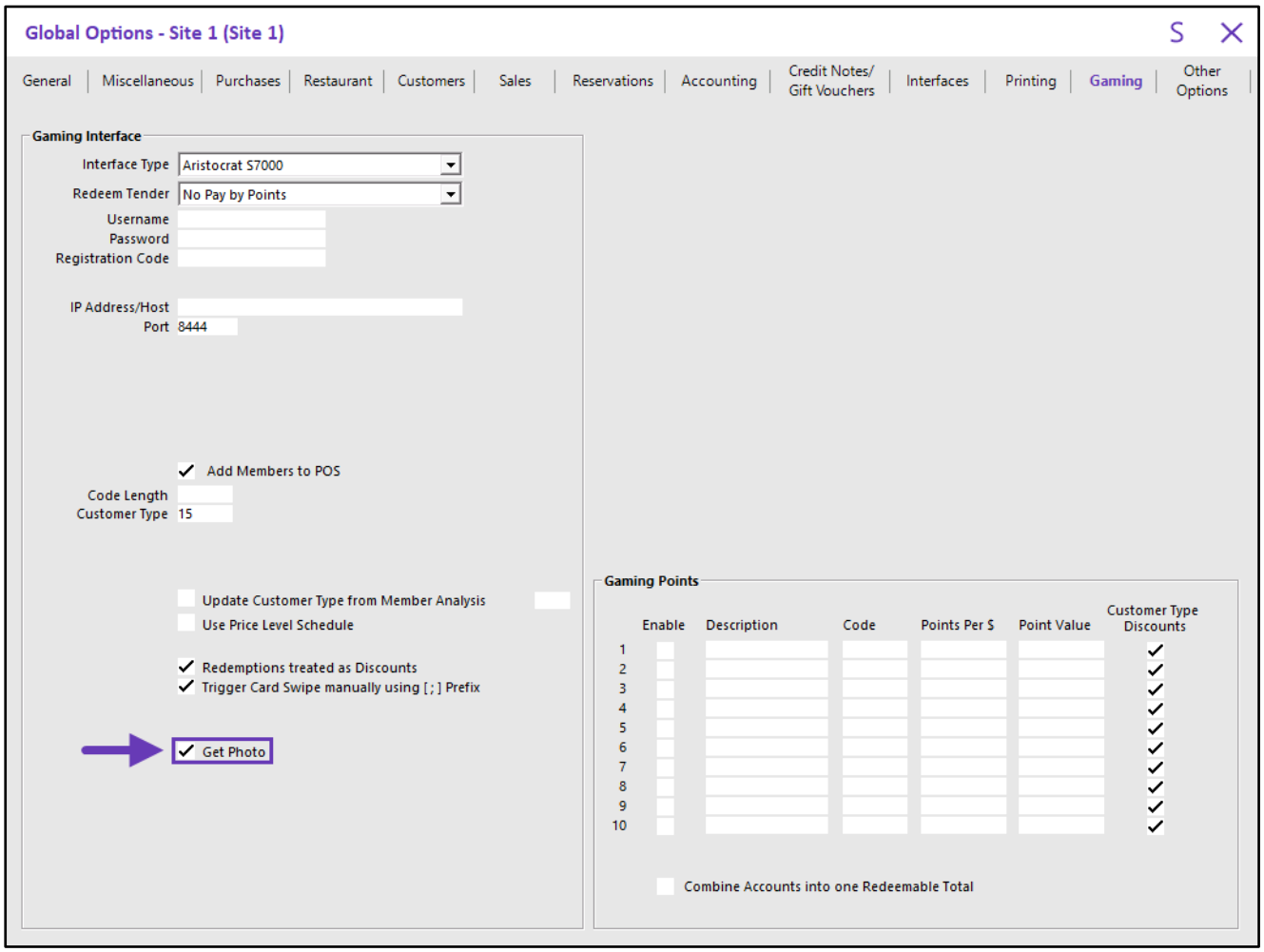


Gaming

IP-8046 – Aristocrat Gaming – Support for Member Photos

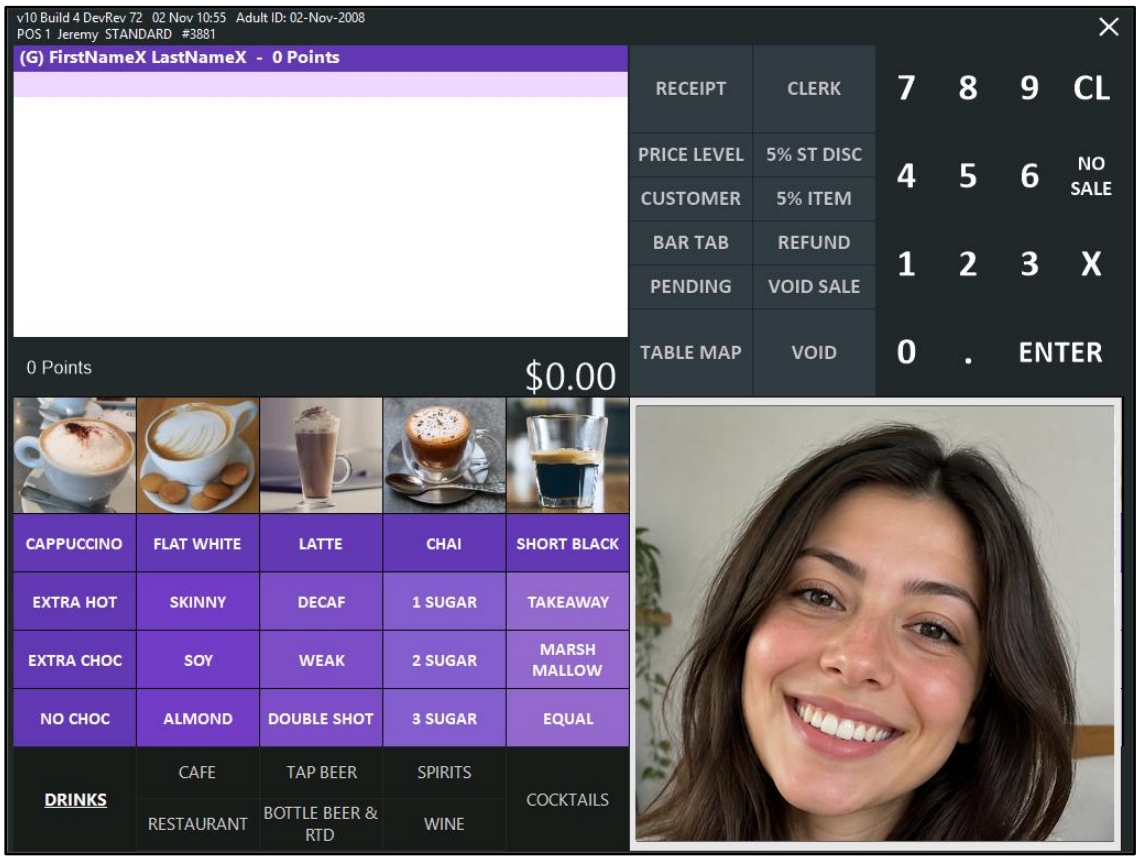
This functionality introduces the ability to display Aristocrat Gaming Member Photos when the Gaming Member is added to the sale.

To enable this functionality, go to: Back Office > Setup > Global Options > Gaming.
Enable "Get Photo"

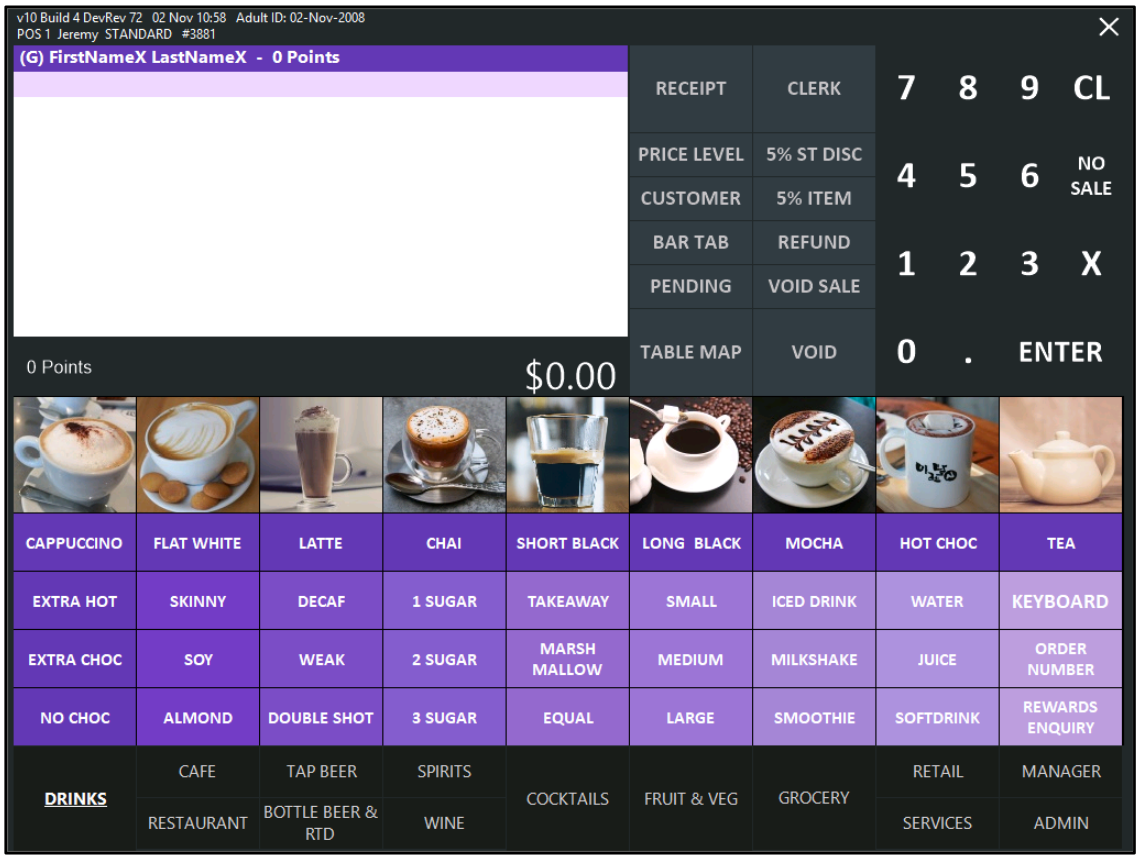


Perform a Close Suite/Open Suite to apply the setting.

Go to POS Screen > Add a member to the sale.
The Gaming Member's Photo will be displayed.



Press the photo to close the image.



Impact Data

IP-8341 – Idealpos Engage Coupons Functionality

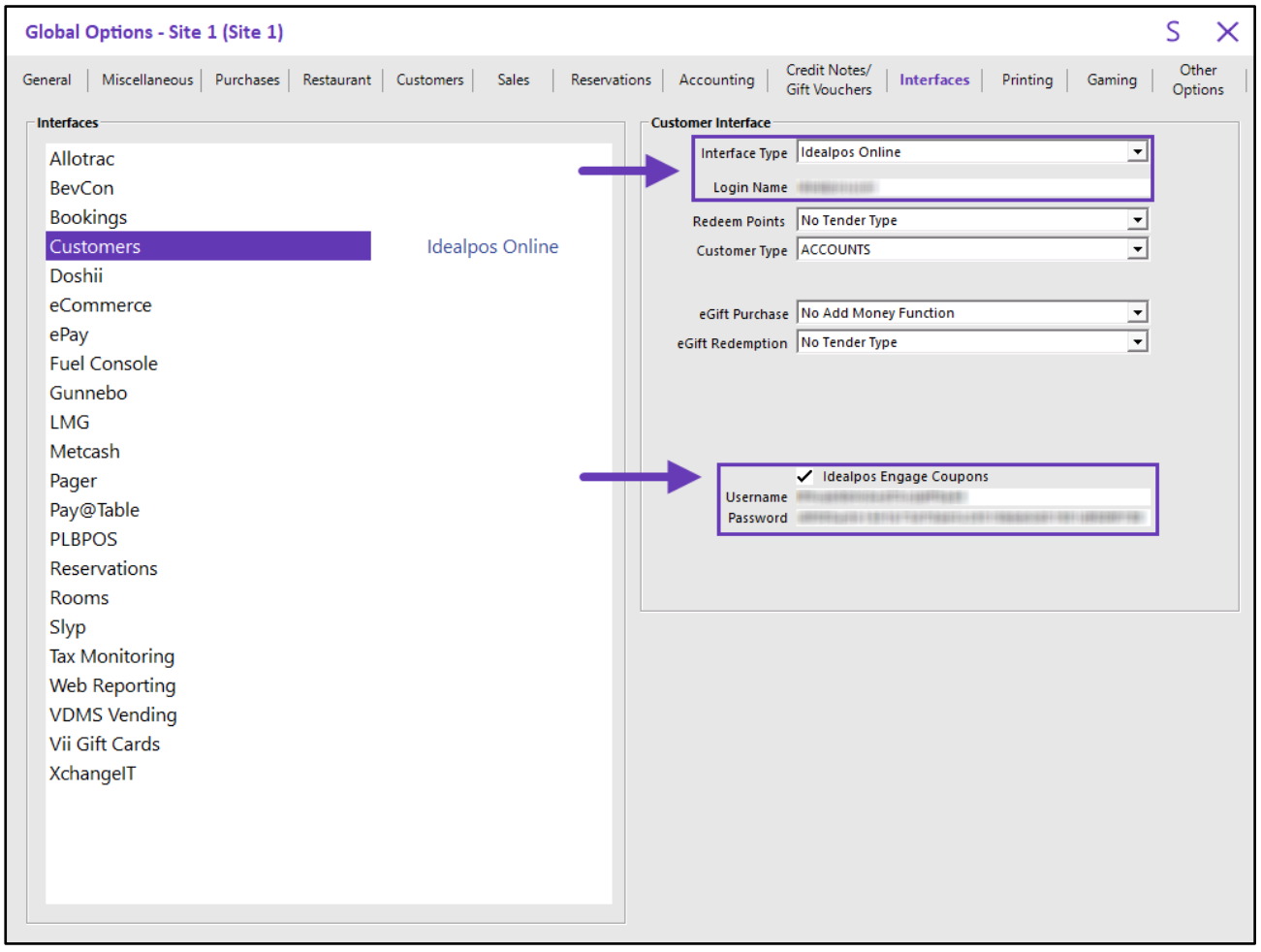
This functionality introduces the ability to redeem Idealpos Engage Coupons on the POS Screen via the Customer Coupon button.
This functionality works as follows:
The Idealpos Engage Customer is added to the sale by scanning their loyalty barcode from the digital wallet app.
The clerk presses the "Customer Coupons" button on the POS Screen to show a list of Idealpos Engage Coupons available to the customer.
The clerk selects the coupon and presses the "Use Coupon" button > the coupon applies to the sale.
Idealpos will apply the Coupon Promotion which has a Description that matches the Talkbox Coupon Description.
If the Idealpos Coupon Promotion Description does not match the Talkbox Coupon Description, the "External Description" in the Coupon Promotion will be used to match to the Talkbox Coupon.

Note that parts of some steps outlined below may have already been configured as part of the Engage onboarding process.

To configure and use this functionality, go to:
Back Office > Setup > Global Options > Interfaces > Customers.

- **Interface Type**: Idealpos Online
- **Login Name**: This should be pre-filled with the Login Name used for the Online Licence (i.e. shown in Back Office > Setup > Licence Gateway > Username).

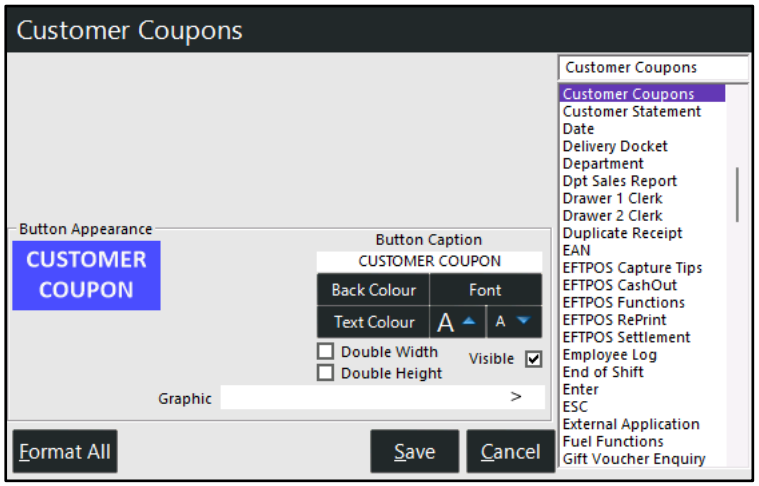
- **Idealpos Engage Coupons**: Enable checkbox
- **Username**: Enter the Username supplied for Idealpos Engage Coupons
- **Password**: Enter the Password supplied for Idealpos Engage Coupons



Return to top

To view/select Idealpos Engage Coupon(s) to trigger during a sale, a Customer Coupons button will need to exist on the POS Screen.
If the button does not exist, create the button by going to:
Back Office > Setup > POS Screen > POS Screen Setup > Select a POS Screen Layout > Buttons.
Select a blank/unused button and configure as follows:

- **Function**: Customer Coupons
- **Button Appearance/Caption**: Customise as required.



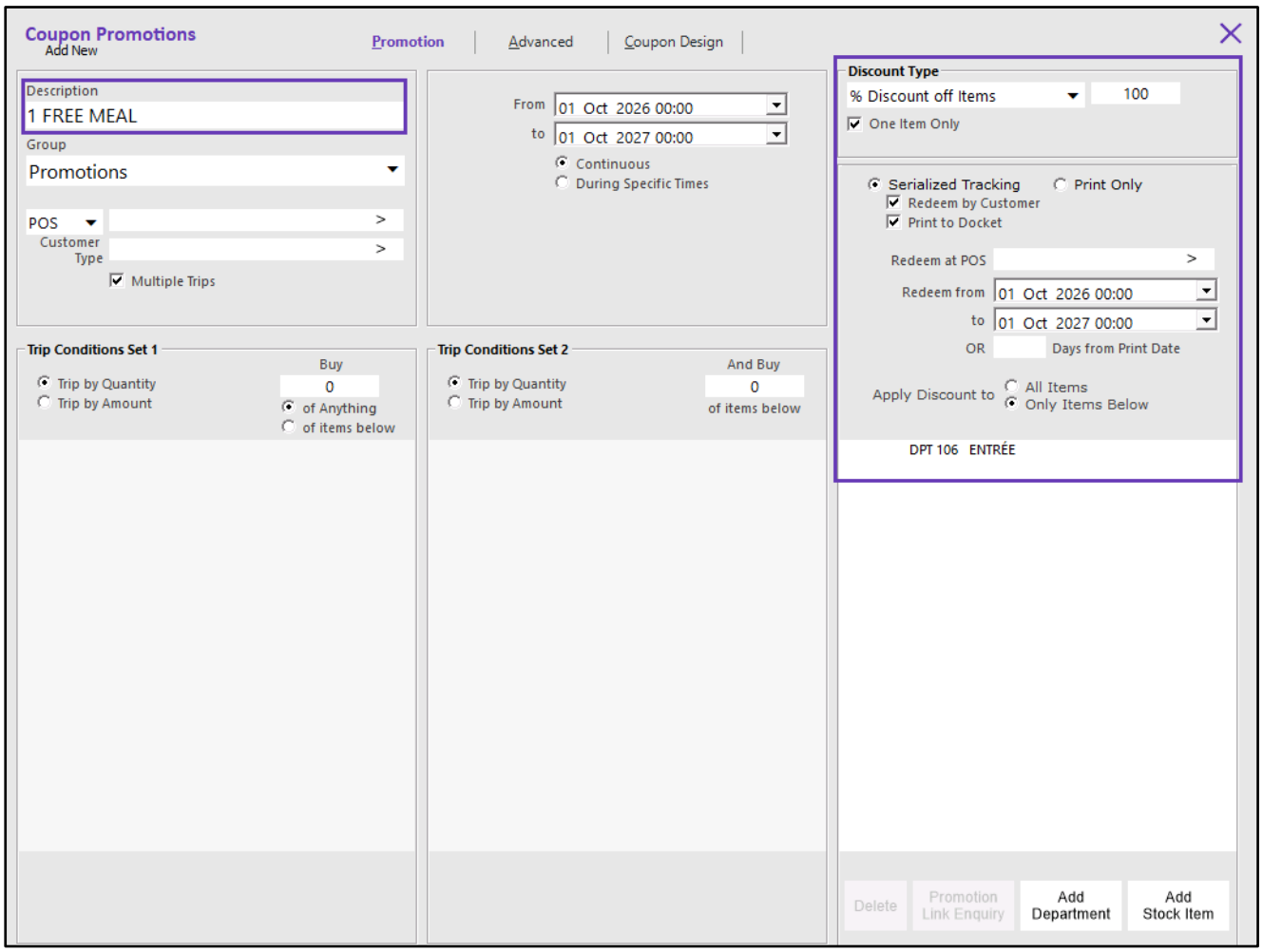
Create the Coupon Promotions.
Go to: Back Office > File > Sales > Promotions > Coupon Promotions > Add.

Promotion Tab

There are two options when naming the Coupon Promotions:

- Enter a Description that matches the Talkbox Coupon
- Enter a different Description that does not match the Talkbox Coupon and instead, use the External Description field (in the Advanced tab outlined below) to enter the Description of the Coupon as it appears in Talkbox.

Configure the Discount settings in the Coupon Promotion as required.



Return to top

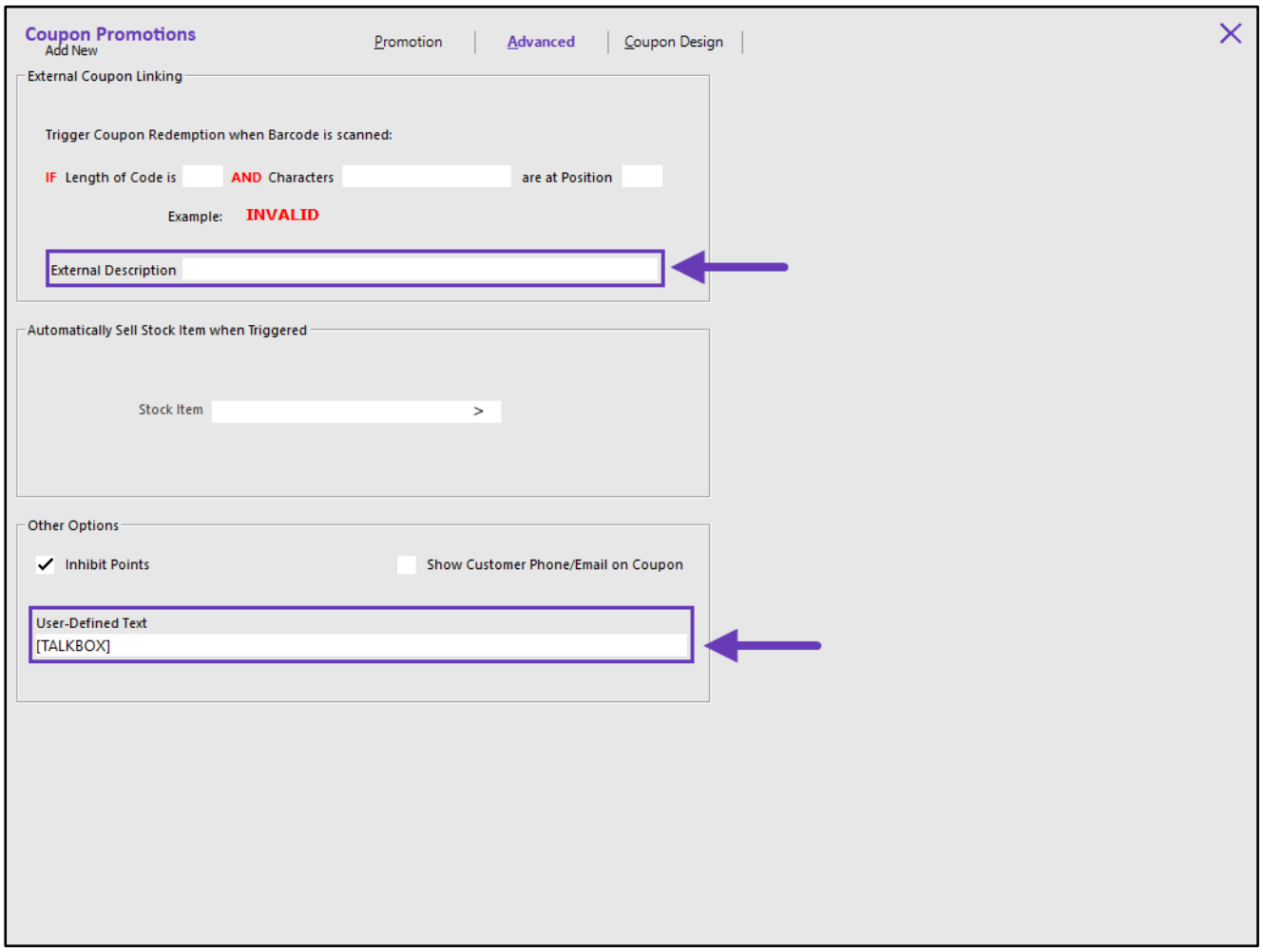
Advanced Tab

External Coupon Linking

- **External Description**: If the Description entered in the Promotion tab does not match the Talkbox Coupon, enter the Talkbox Coupon Description in this field.

Other Options

- **User-Defined Text**: [TALKBOX]



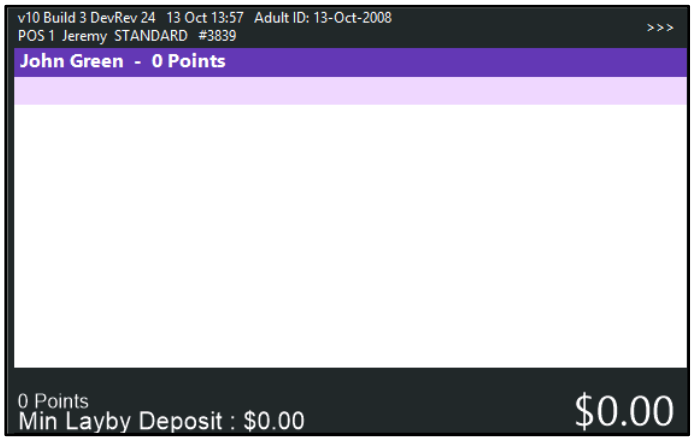
Close the Add New Coupon Promotion window and save the change when prompted.

Repeat the above process to create an Idealpos Coupon Promotion for each Talkbox Coupon.

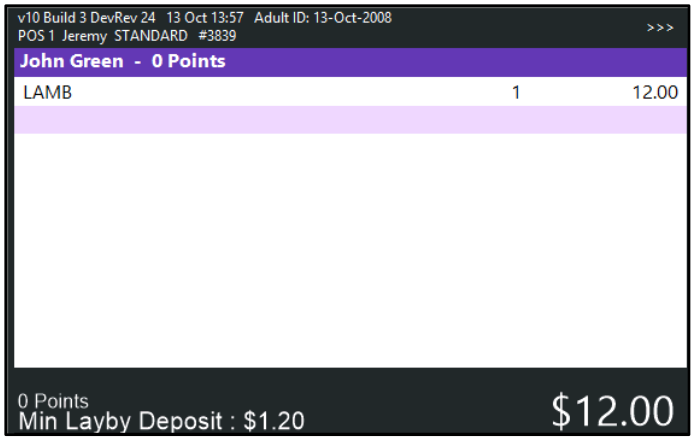
Return to top

The steps for redeeming Idealpos Engage Coupons are outlined below:

The Customer scans their barcode from the digital wallet app.
The POS Screen shows the Customer Name.

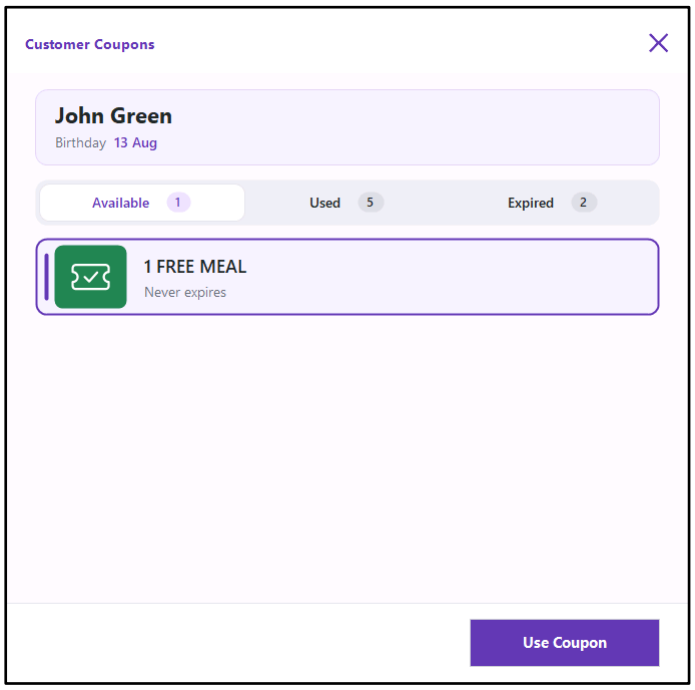


The Clerk adds the required items to the sale.

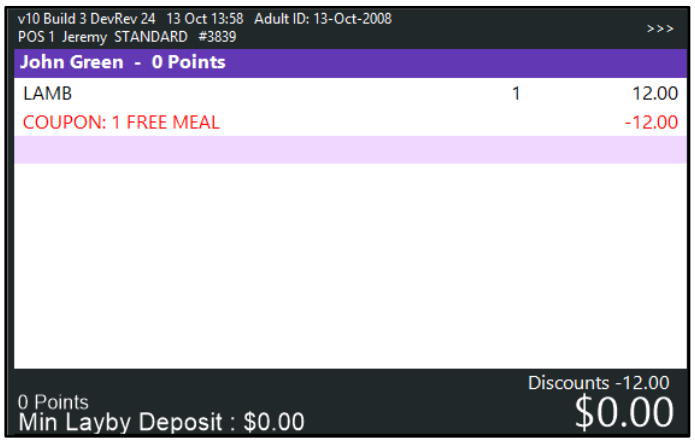


Return to top

The Clerk presses the "Customer Coupons" button which will display a list of Idealpos Engage Coupons available to the customer > Select the required Coupon > Use Coupon.



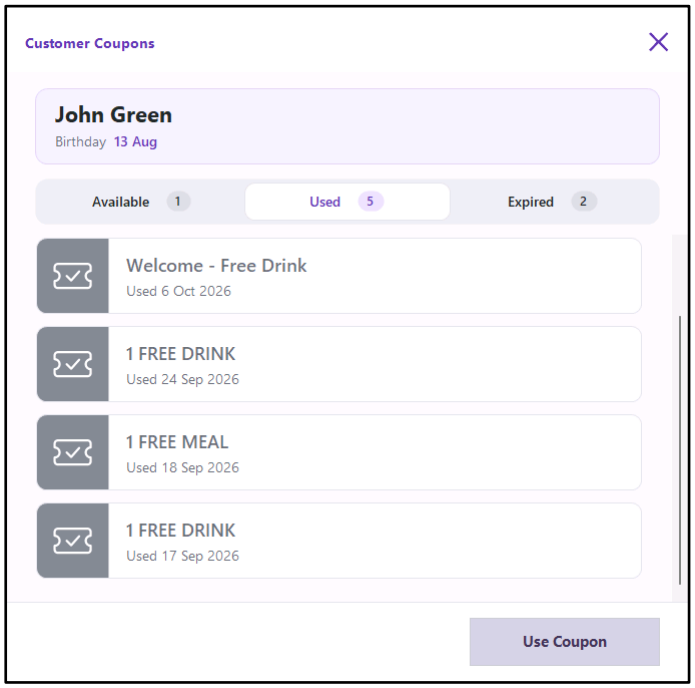
The Idealpos Engage Coupon is applied to the sale using the discount from the corresponding Idealpos Coupon Promotion.



Tender and finalise the sale.

Return to top

After the Coupon is redeemed by the customer, it will be moved from the Available tab to the Used tab, preventing that customer from redeeming it again.
The next time the customer is added to the sale, and the clerk presses the Customer Coupons button, the Coupon will appear in the Used tab.



IPSClient

IP-8377 – User-Defined Option to Check IPSClient Connectivity

This functionality introduces the ability to check IPSClient Connectivity via a User-Defined Option and send Email Notifications when terminals are offline.
Idealpos tests the status of the other terminals connectivity every 5 minutes.
By default, if a POS Terminal has been offline for over 30 minutes, an email alert will be triggered.
If a POS Terminal is online for less time than the gap between the 5-minute checks and then goes offline again, it will be treated as the same outage and won't email again.
The 30-minute threshold can be adjusted via a User-Defined Option.

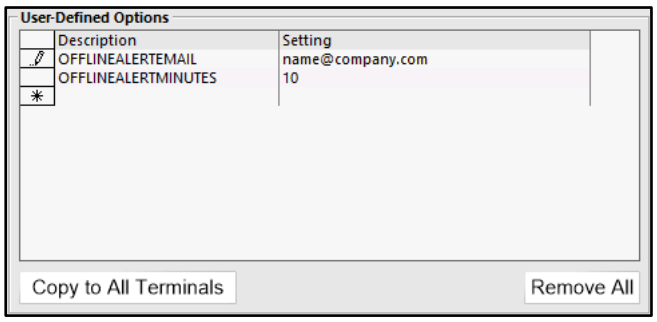
To configure this functionality, go to:
Back Office > Setup > POS Terminals > Select a POS Terminal > Modify > POS Settings > User-Defined Options.
Create the following User-Defined Option(s).

OFFLINEALERTEMAIL User-Defined Option to enable functionality
This User-Defined Option is the trigger to enable this functionality; it also specifies the email address to notify.
If required, multiple email addresses can be entered as a comma separated list (e.g. john.smith@email.com, joanne.smith@email.com)

- **Description:** OFFLINEALERTEMAIL
- **Setting:** Enter the Email Address(es) to notify

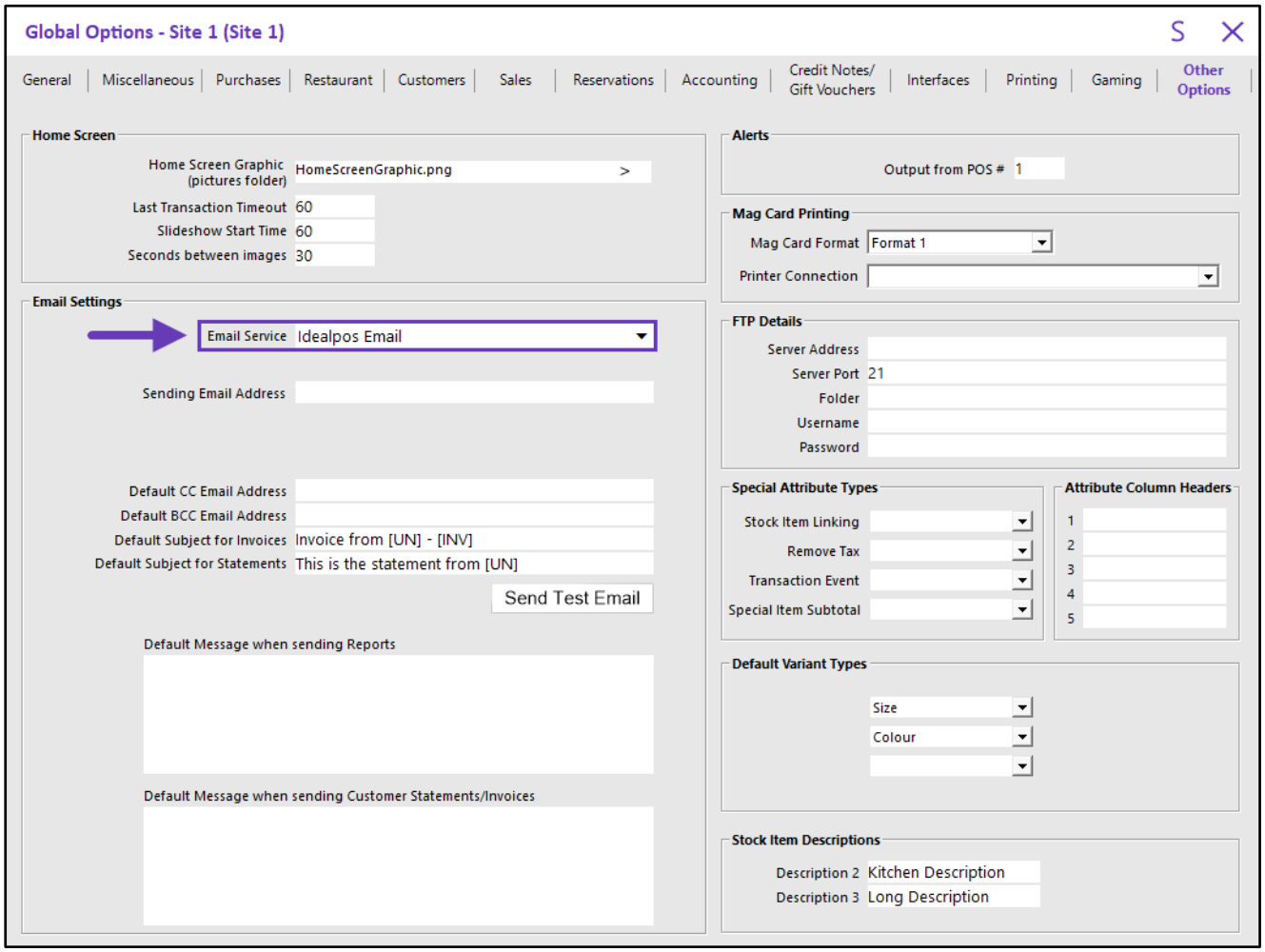
OFFLINEALERTMINUTES User-Defined Option to adjust alert minutes (Optional)
This User-Defined Option is optional and is used to specify how many minutes Idealpos will wait before sending an email notification that a POS Terminal is offline.
If this User-Defined Option does not exist, a default value of 30 minutes will be used.

- **Description:** OFFLINEALERTMINUTES
- **Setting:** Enter the number of minutes (e.g. 10)

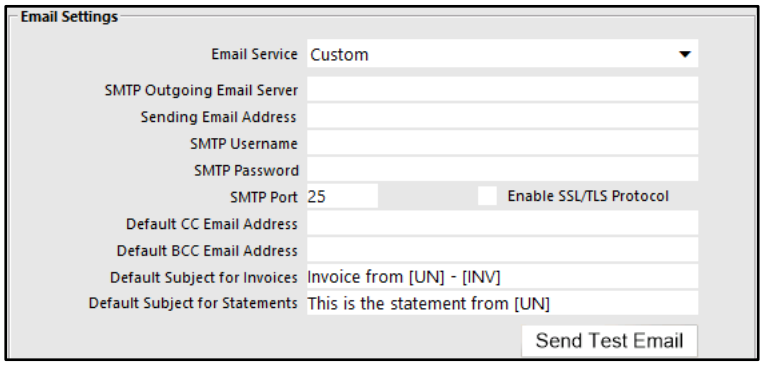


Return to top

After configuring the User-Defined Option(s), ensure that the Email Settings have been configured.
Go to: Back Office > Setup > Global Options > Other Options > Email Settings > Email Service.
Select Idealpos Email to use Idealpos' built-in Email Service.
Select Custom to specify custom Email Settings (SMTP Outgoing Email Server, SMTP Username/Password, etc.).



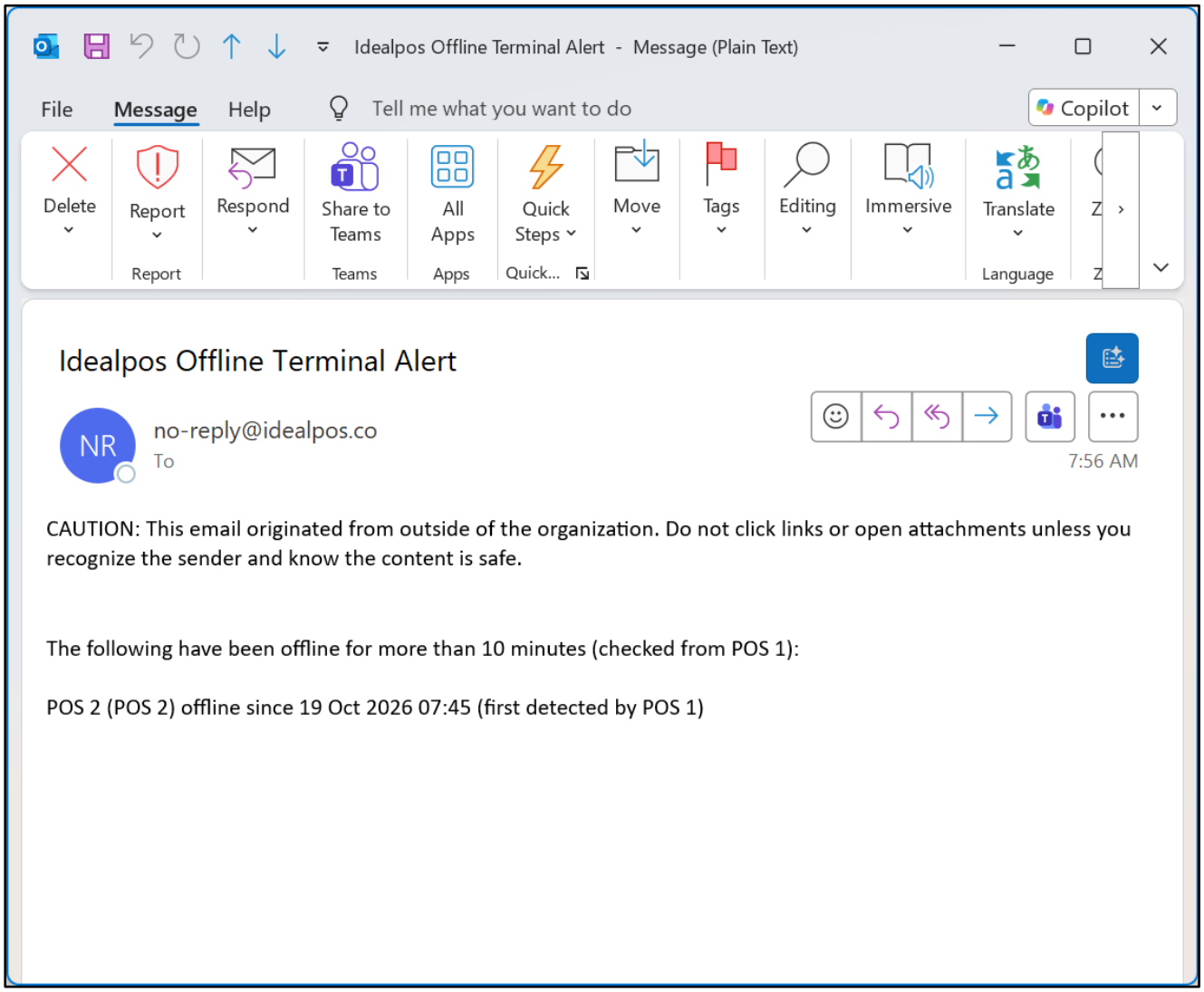
If using Custom, populate the additional fields as required.
These details can be sourced from the email provider.



The "Send Test Email" button can be used to send an email to confirm that the email options are configured correctly.

Return to top

When a POS Terminal is offline for more than the OFFLINEALERTMINUTES (or offline for more than 30 minutes if the OFFLINEALERTMINUTES User-Defined Option does not exist), an email alert will be sent to email address(es) configured.
The below is a sample of the email that is sent.



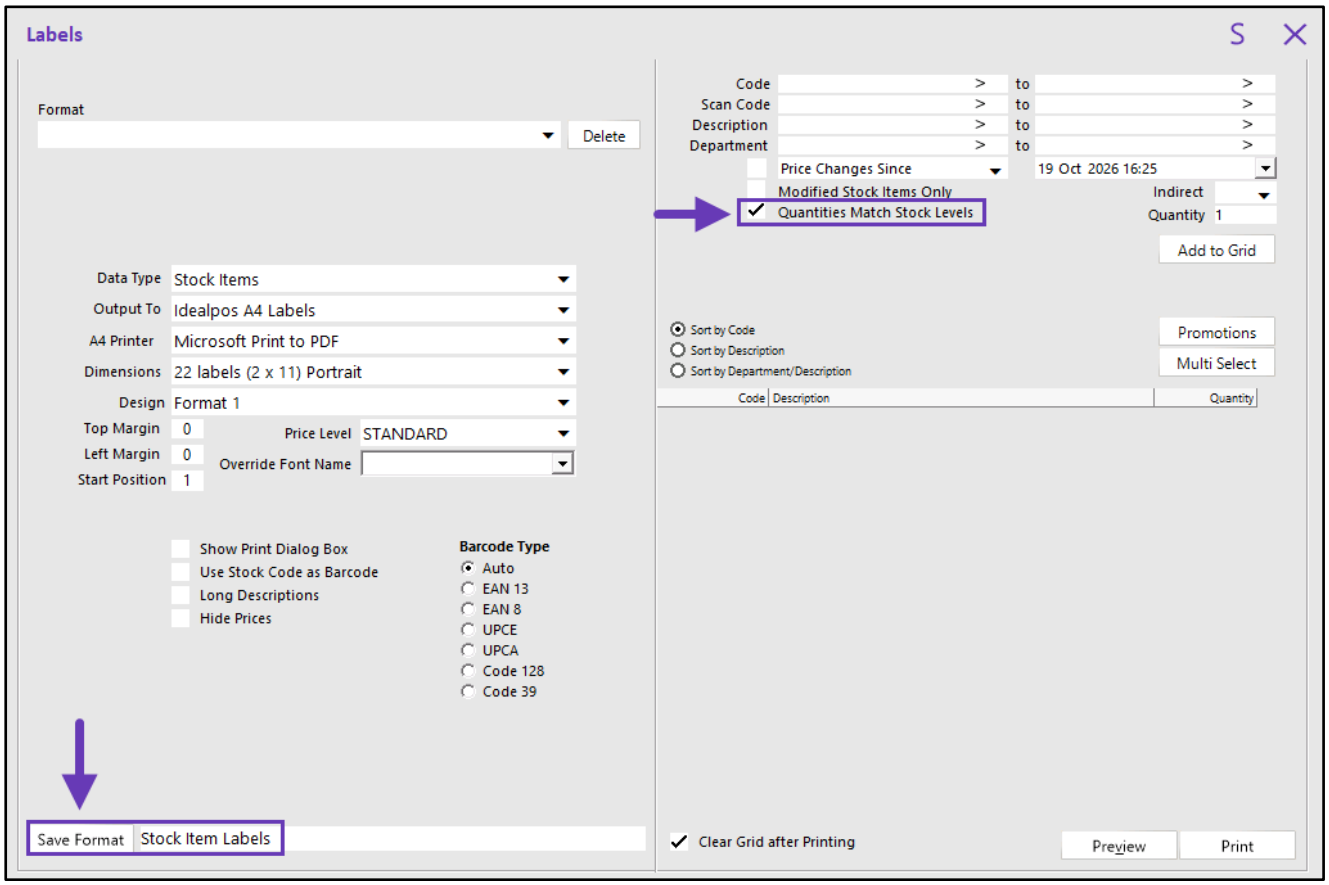
Labels

IP-8364 – Stock Item Labels – Saved Formats include 'Quantities Match Stock Levels'

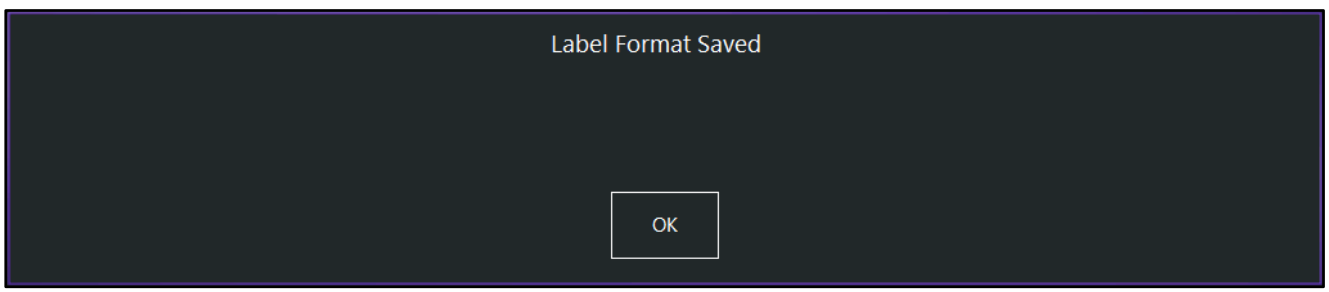
This functionality introduces the ability to include the state of the "Quantities Match Stock Levels" checkbox in the saved Label Format.
Prior to this change, enabling the "Quantities Match Stock Levels" checkbox and saving the Label Format would not include the enabled checkbox in the saved Label Format.
This functionality can be used in the Labels screen (Back Office > Utilities > Labels) or via the Scheduled Price Changes function (Back Office > File > Sales > Scheduled Price Changes > Select a Price Change Batch > Labels).

To configure and use this functionality, go to: Back Office > Utilities > Labels.

To create a new Label Format:
Configure the required label options > enable "Quantities Match Stock Levels" > Enter a Format Name > Save Format.

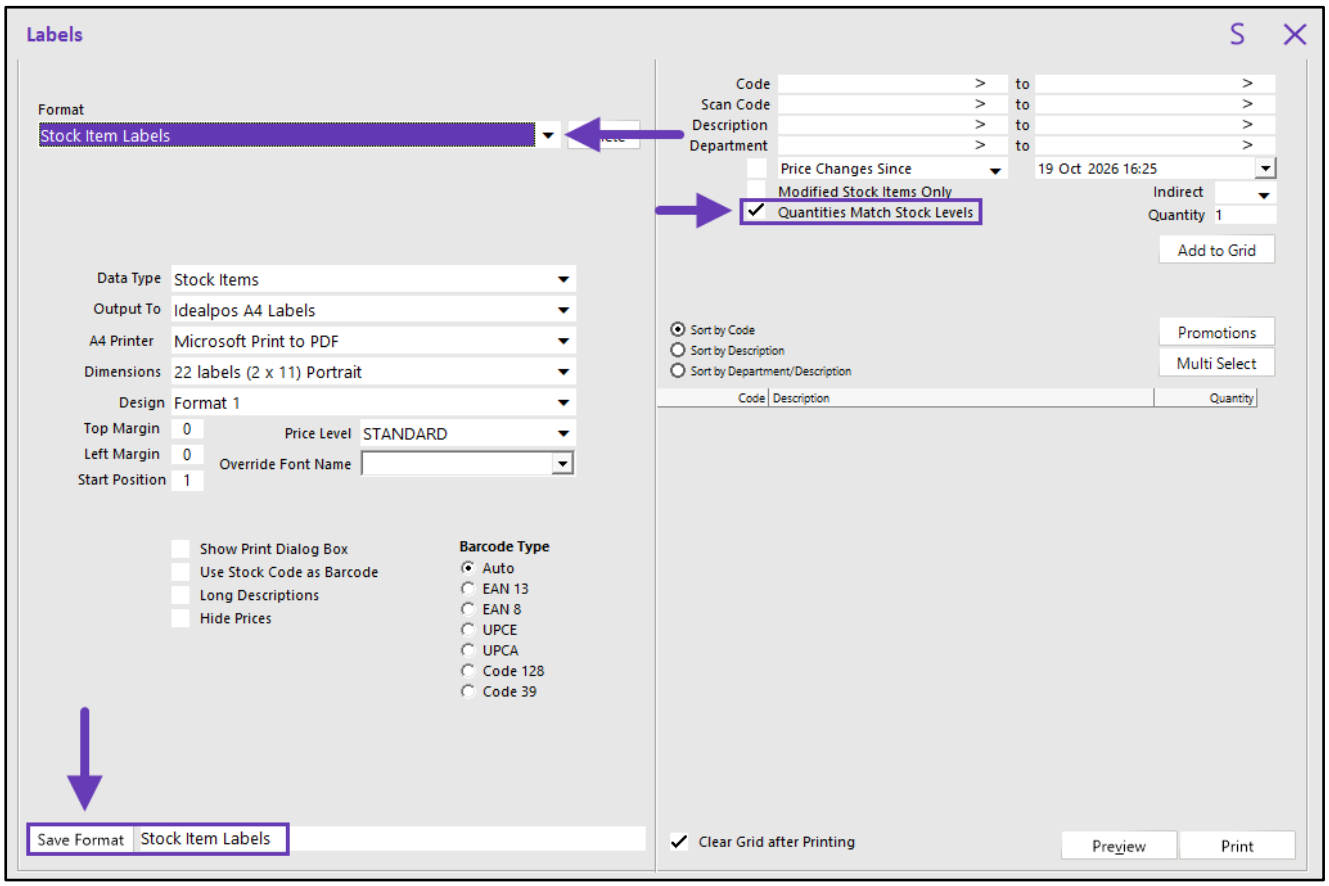


Press "OK" on the Label Format Saved prompt.

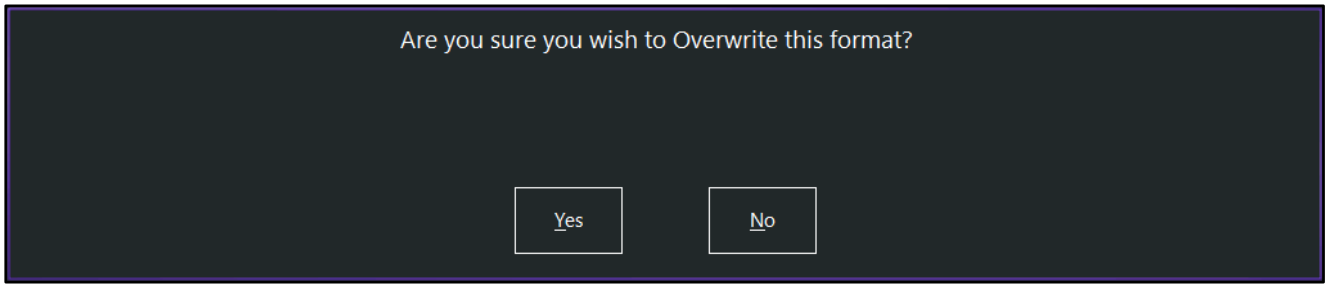


Return to top

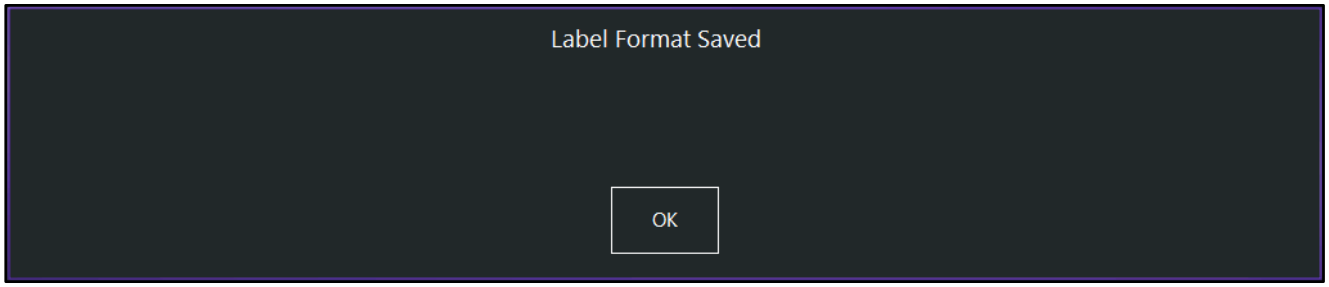
To update an existing Label Format:
Select the Label Format from the Format dropdown box > Enable "Quantities Match Stock Levels" > Save Format.



Confirm the Overwrite Format prompt by pressing "Yes".



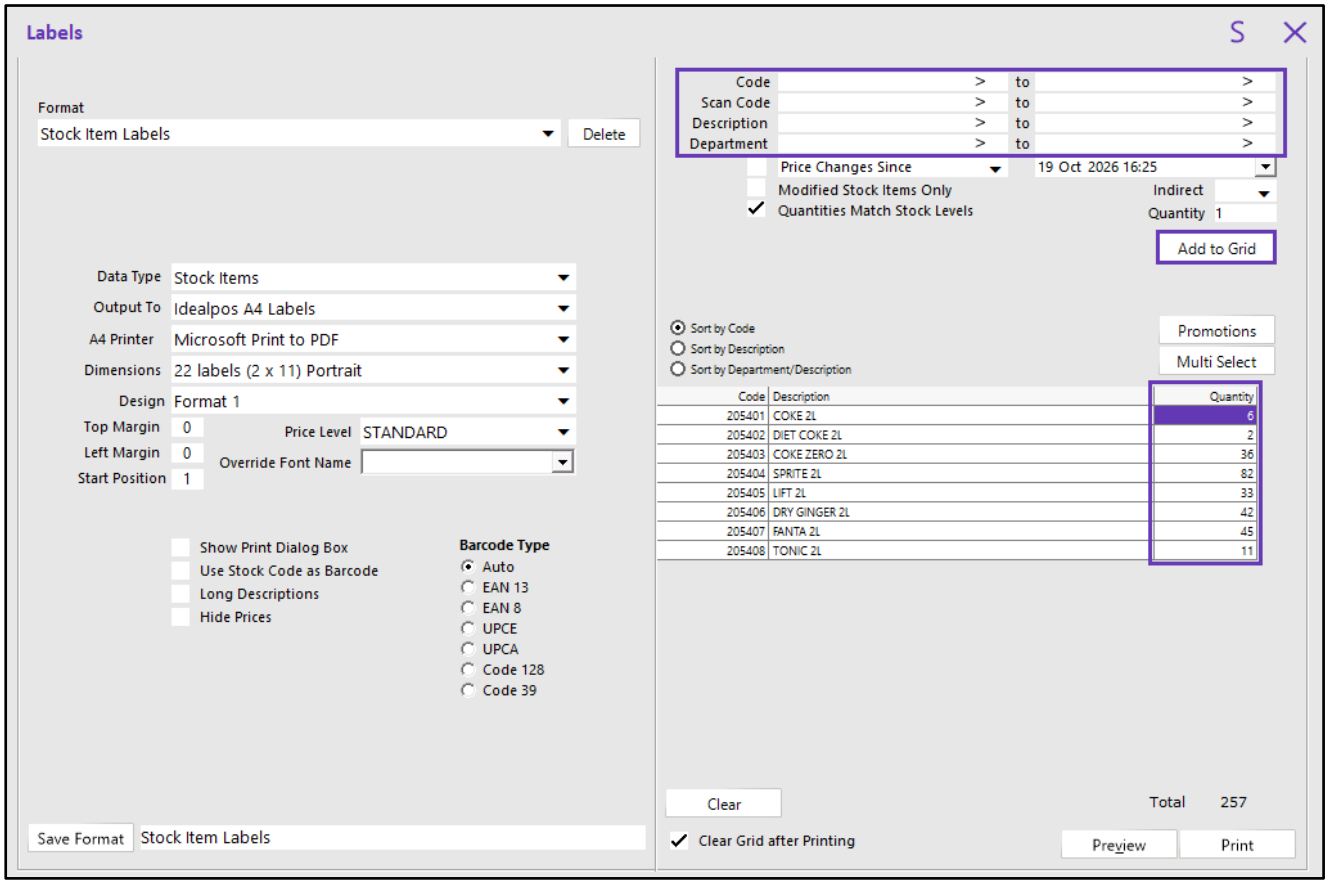
Press "OK" to the Label Format Saved prompt.



Return to top

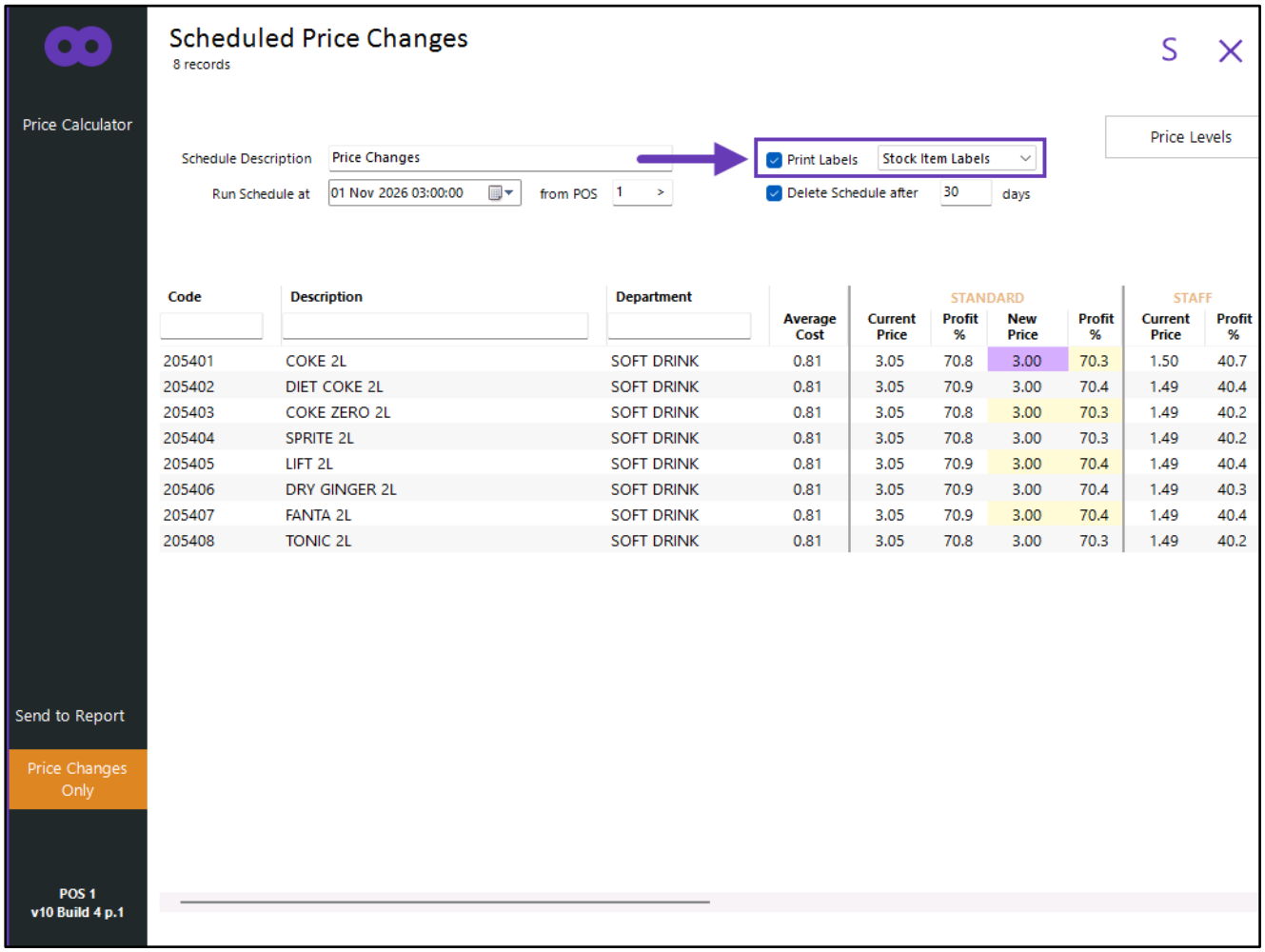
To use the function in the Labels screen:
Go to: Back Office > Utilities > Labels.

- Select a Label Format which has the "Quantities Match Stock Levels" checkbox enabled.
- Enter the required selection criteria in the Code/Scan Code/Description/Department fields.
- Press Add to Grid.
- Alternatively, the "Multi Select" button can be pressed > select the required Stock Items > OK.
- Stock Items are added to the grid with Quantities that match their Stock Levels.
- Preview/Print Labels as required.



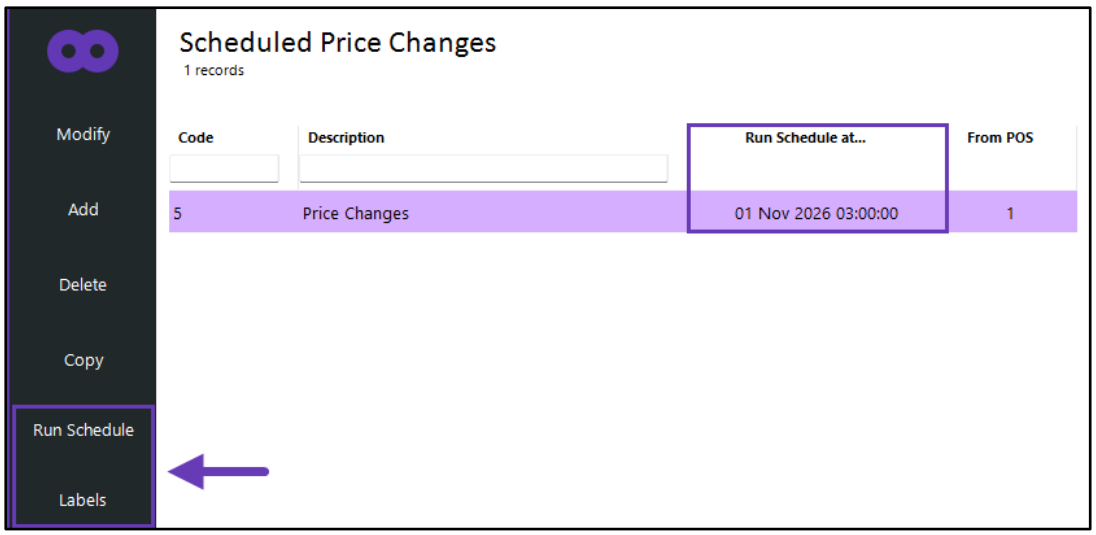
Return to top

To use the functionality from the Price Changes screen, ensure that the Stock Item Label Format has been saved as per the steps above, then go to: Back Office > File > Sales > Scheduled Price Changes.
Select a Scheduled Price Change > Modify > Enable Print Labels > Select a Label Format which contains the enabled "Quantities Match Stock Levels" option as configured above > Close the Scheduled Price Change to save.



All Stock Items within the Scheduled Price Change will have Labels printed using the "Quantities Match Stock Levels" when one of the following actions occur.

- Run Schedule manually via the "Run Schedule" button.
- Print Labels via the "Labels" button.
- Schedule runs automatically at the Run Schedule at time set in the Schedule.



Pocket Pad

IP-8317 – Pocket Pad Support for Gaming Loyalty

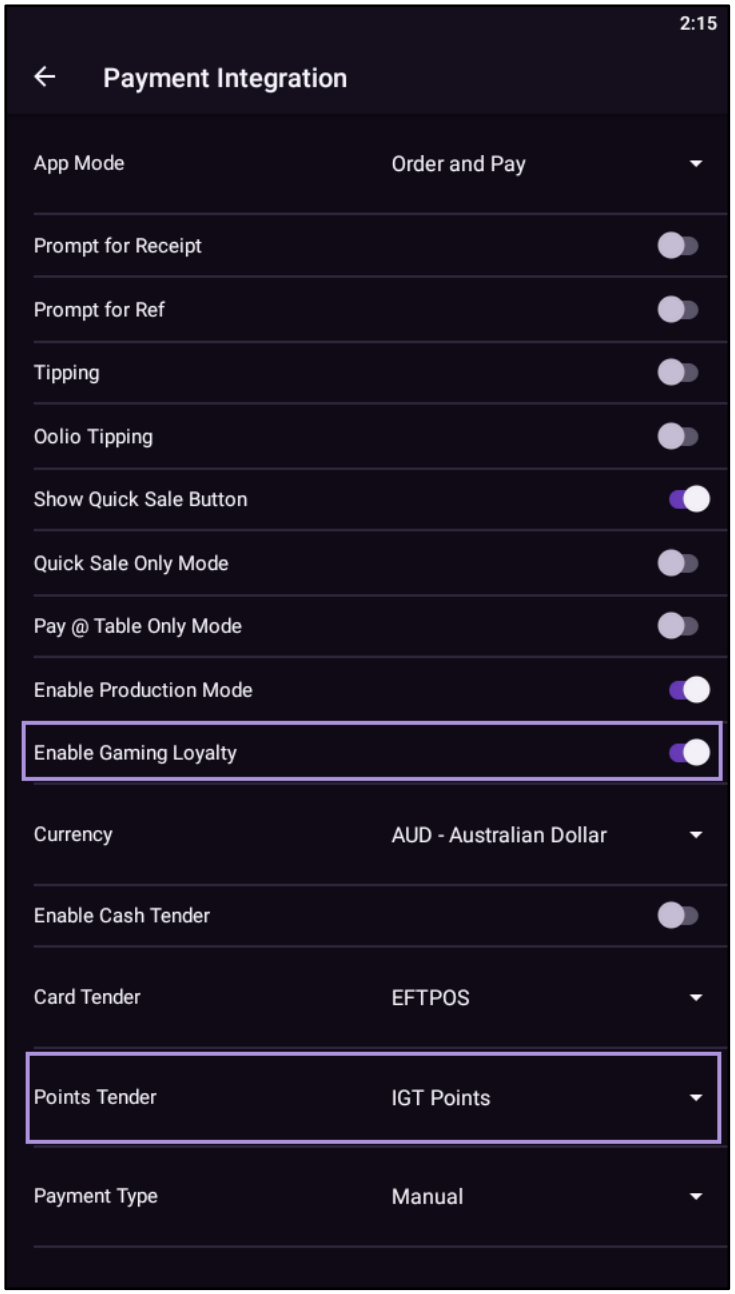
This functionality introduces support for Gaming Loyalty to **Pocket Pad v3.2.0 and newer**.
This enables Pocket Pad to scan or enter a member card during payment.
When paying a sale in Pocket Pad, the member will accrue points for the items purchased.
Pocket Pad also supports tendering the sale with Gaming Loyalty Points with this functionality.

Note – This functionality does not support Auto Discount for Points (i.e. Yes/No Option "Customer Type Discount Only on Points Redemption"/Auto % Discount setup in the Customer Type).

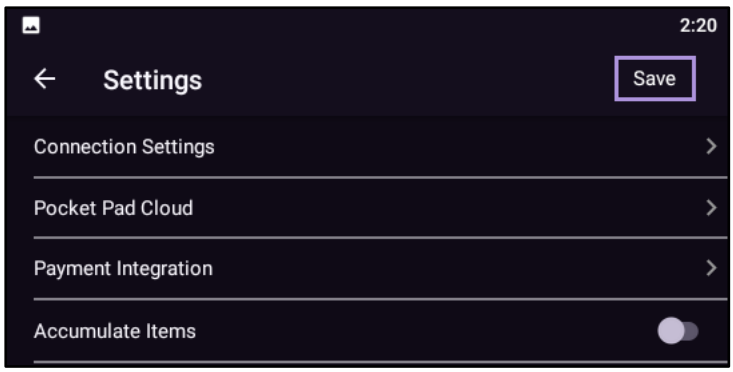
To configure and use this functionality, go to Pocket Pad > Settings > Enter Password > Payment Integration.

- **Gaming Loyalty:** Enable
- **Points Tender:** Select the Points Tender used for the Gaming Loyalty Integration.

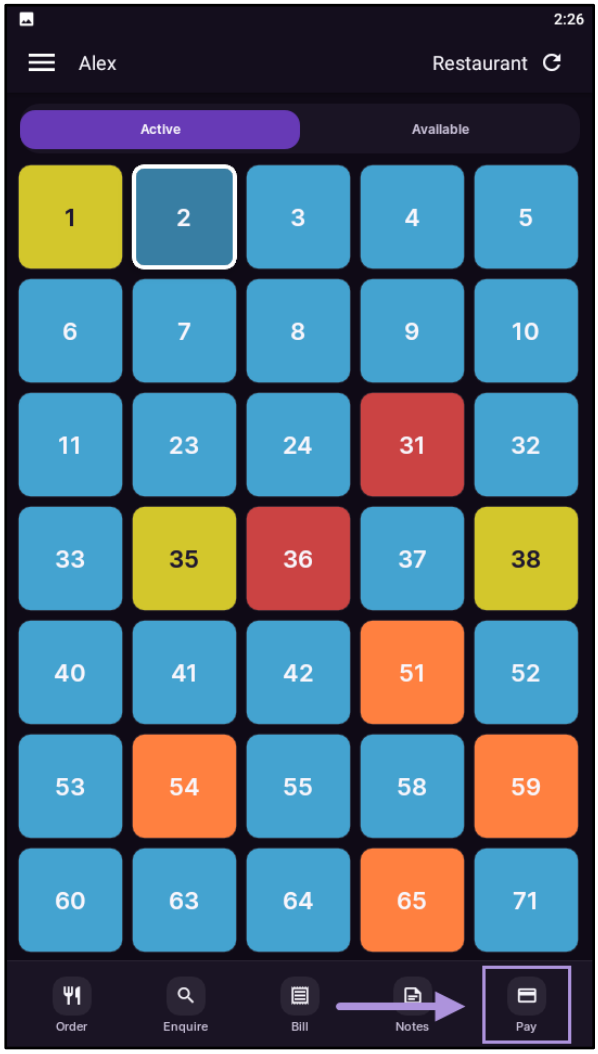
The Points Tender selected should match the Points Tender configured in Back Office > Setup > Global Options > Gaming > Redeem Tender.

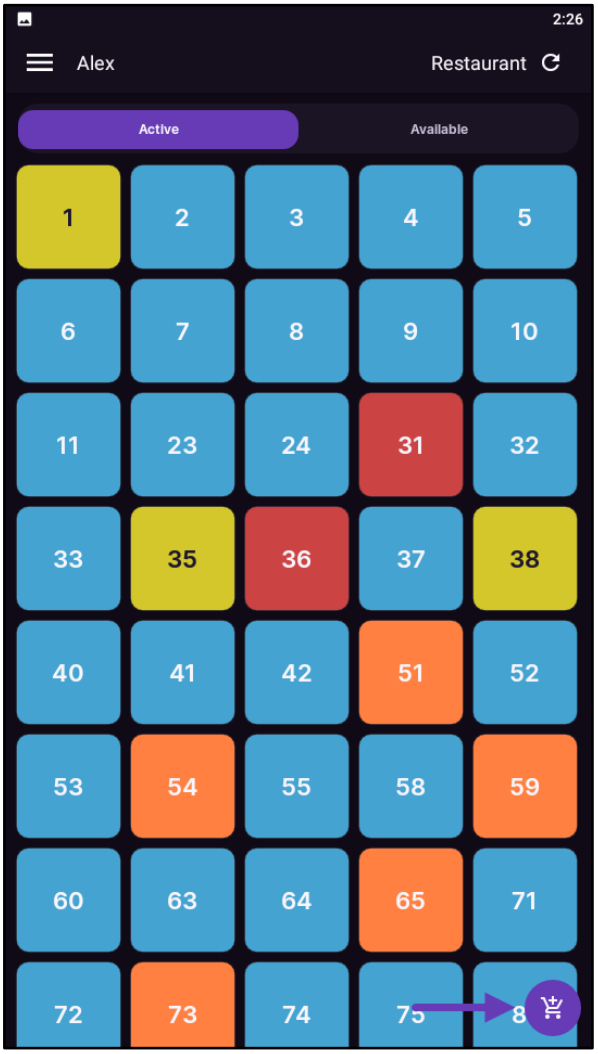


Press the back button on the top-left corner > Press “Save”.



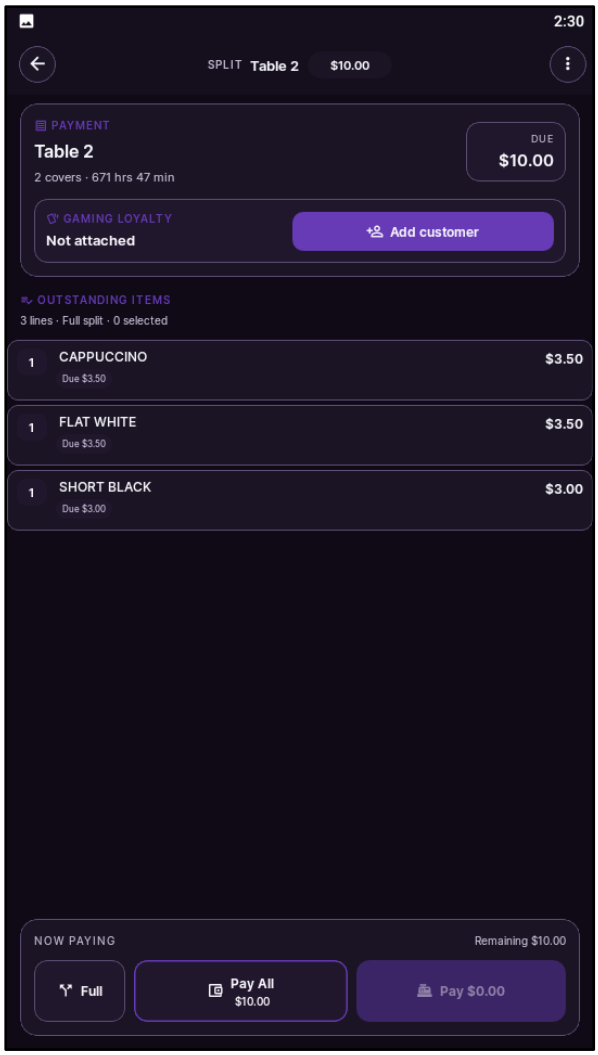
Select a Table > Pay.
or
Press the Quick Sale button on the bottom-right corner.





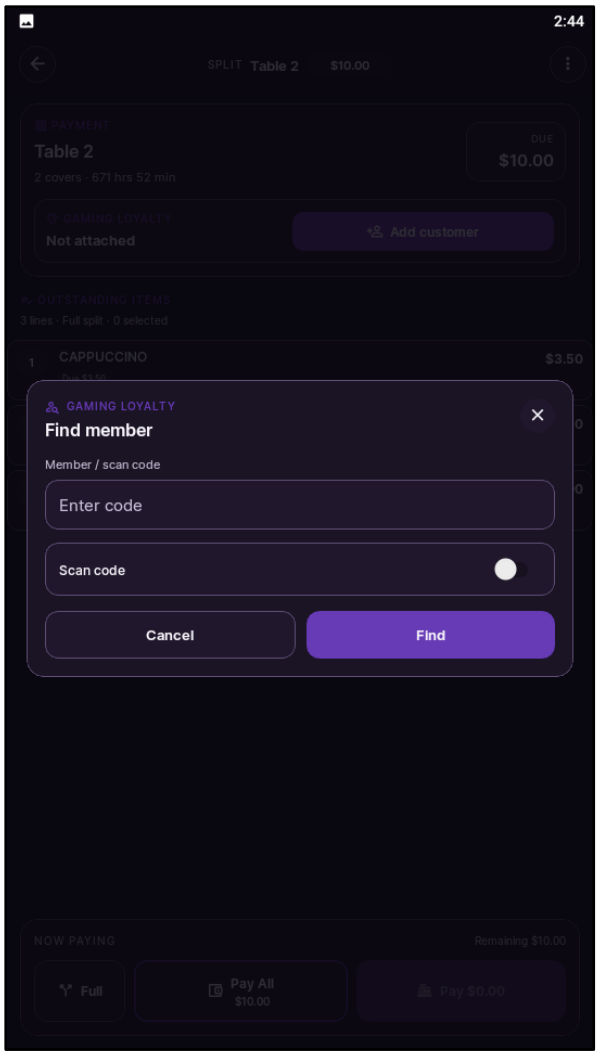
Return to top

If Quick Sale was selected > Add Items > Press Pay > Payment screen will appear as shown below.
If the Payment button was pressed to pay a table > Payment screen will appear as shown below.
Press the "Add customer" button at the top of the Payment screen.



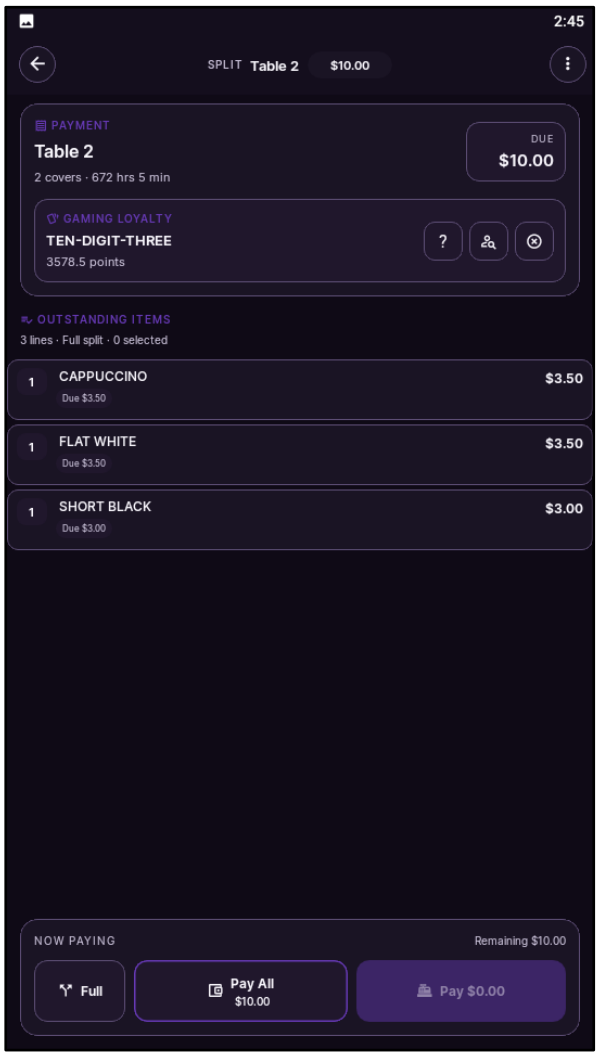
Return to top

The Find member screen is displayed.
If scanning or entering the Membership Number, disable the Scan code option.
If scanning a scan code, enable the Scan Code option.



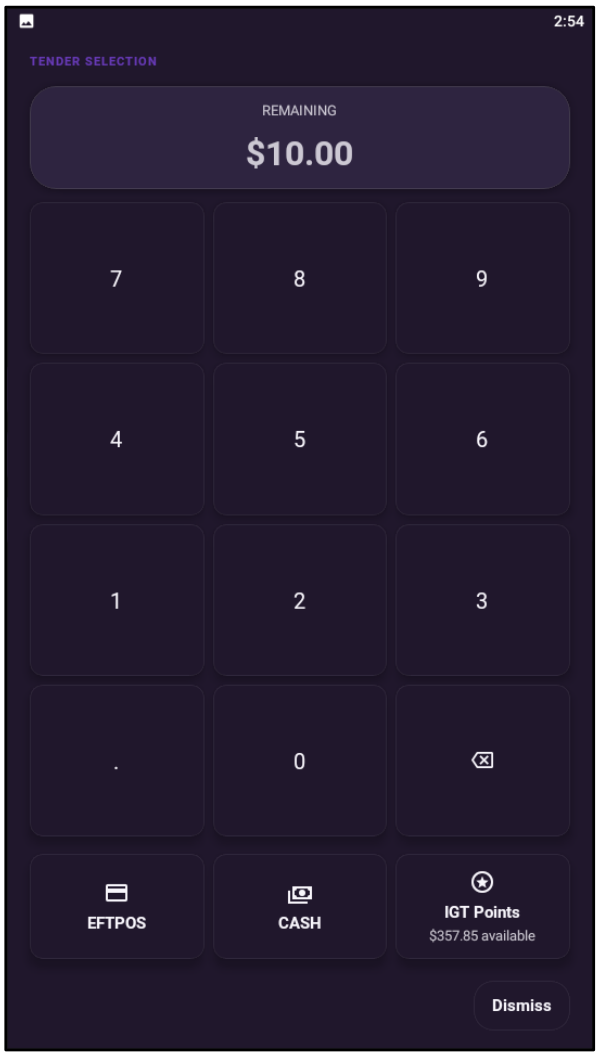
Return to top

After entering/scanning a Membership Number or Scan Code > Press "Find" > Customer details are displayed.
Press "Pay All" at the bottom of the screen.



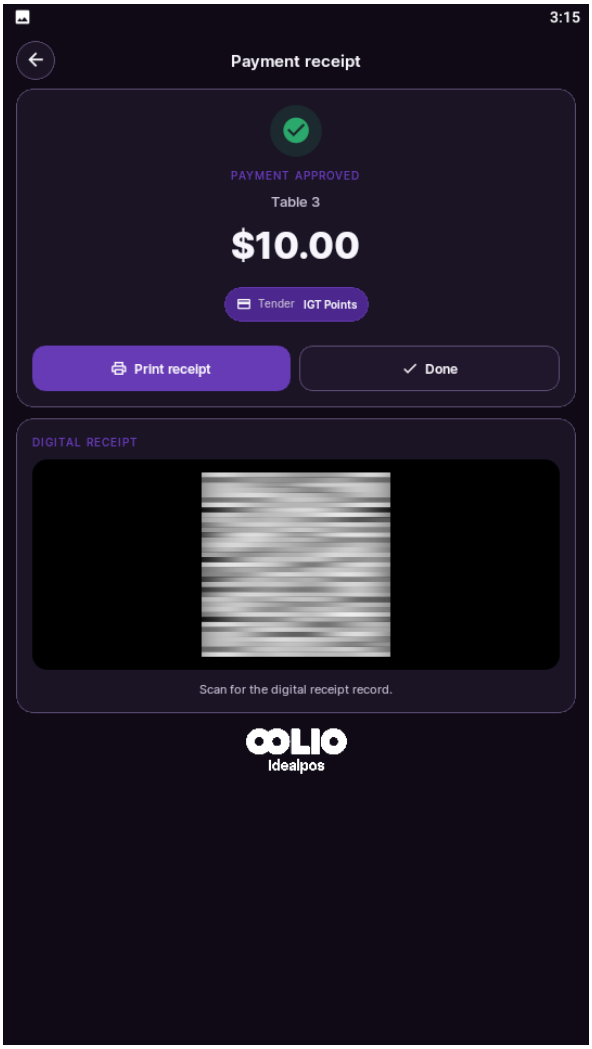
Return to top

On-screen numeric keypad appears.
By default, the entire sale amount is pre-entered.
Select the Tender Type at the bottom.
To perform a split payment, enter the amount with the on-screen numeric keypad, then select a tender type at the bottom of the screen.
Select the Points Tender to pay by Points.



Return to top

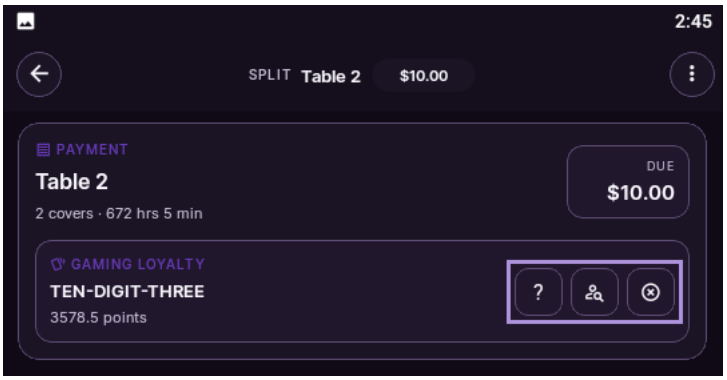
After paying with Points, the screen is closed.
If Prompt for Receipt is enabled, a receipt prompt is displayed.



If Prompt for Receipt is disabled or after finalising the receipt, the Table Map is displayed.

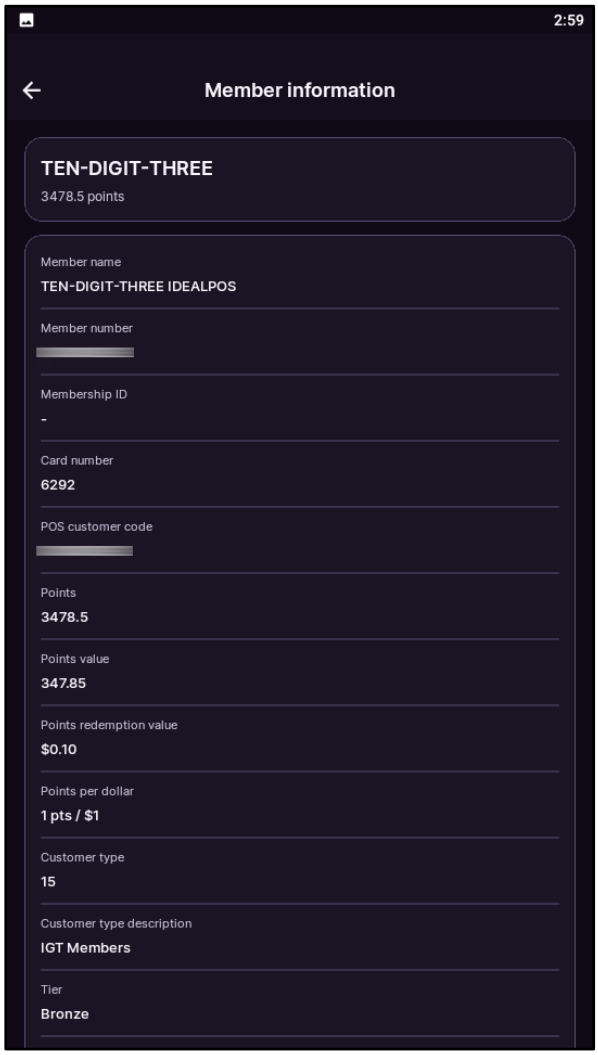
Return to top

Additional functionality available while paying:



- **?** – this button displays additional details about the member
- **Search button** – This opens the Find Member screen.
- **X button** – This removes the customer from the sale

The below example shows the Member Information screen accessed via the "?" button.



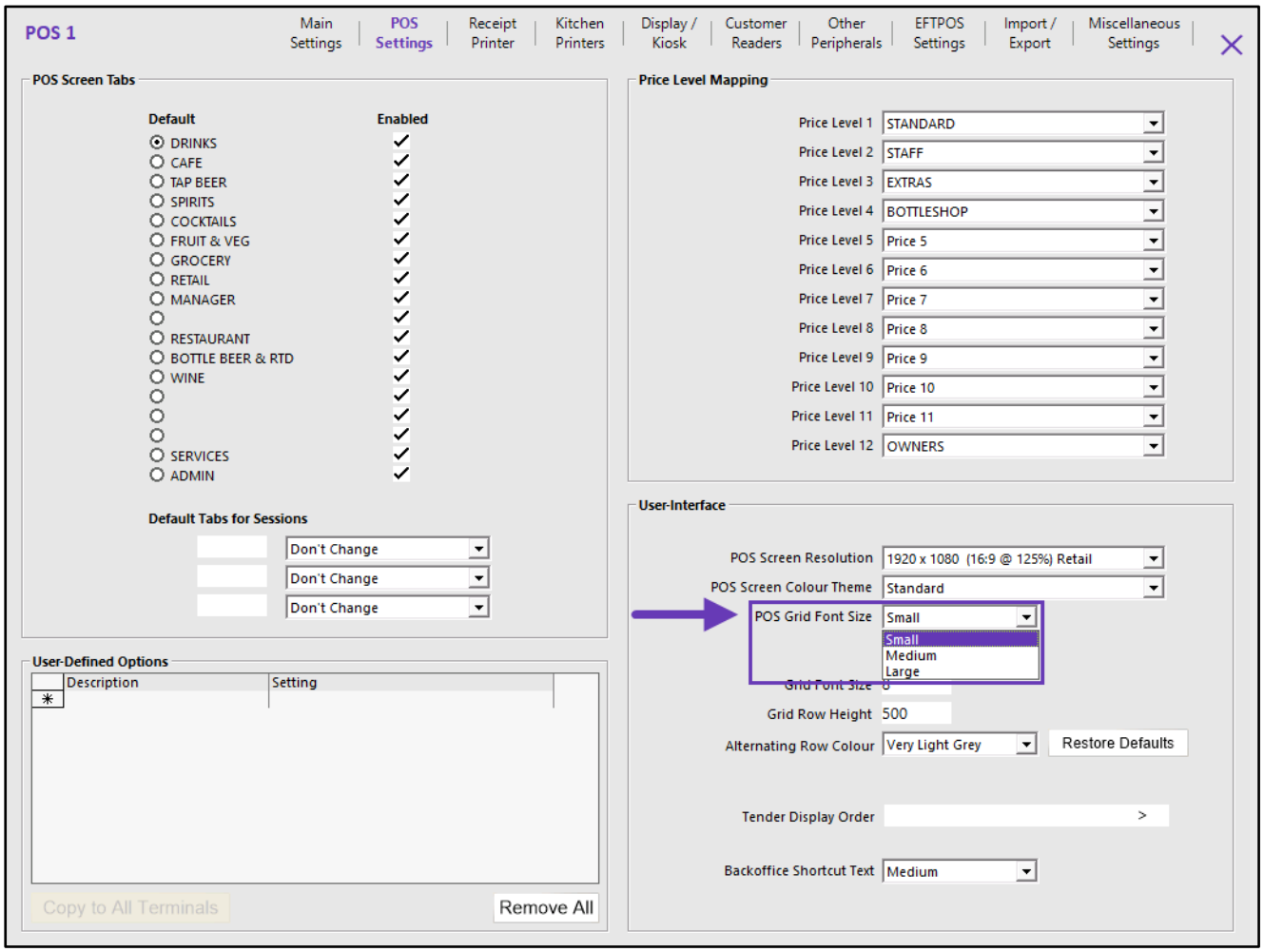
POS Screen

IP-8354 – POS Screen Retail Format – Ability to increase Font & Line sizes

This functionality introduces the ability to increase the Font & Line sizes for the 1920x1080 Retail POS Screen Resolution. Note that this functionality is ***not available*** for the other POS Screen Resolutions.

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

- **POS Screen Resolution**: 1920 x 1080 (16:9 @ 125%) Retail.
- **POS Grid Font Size**: Small, Medium or Large (Small is the standard/default size).

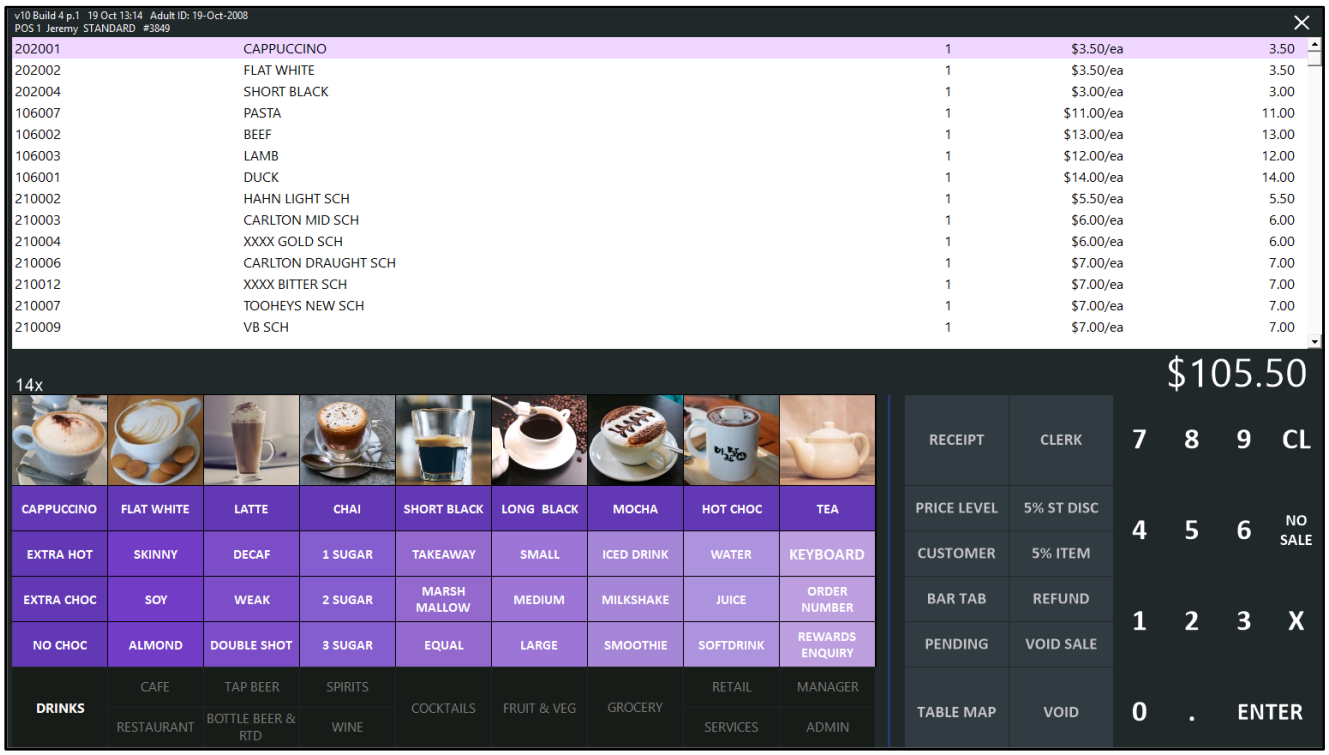


Once the required option has been selected, close the Modify POS Terminal window.
Examples of each of the POS Grid Font Sizes are shown on the following page.

Return to top

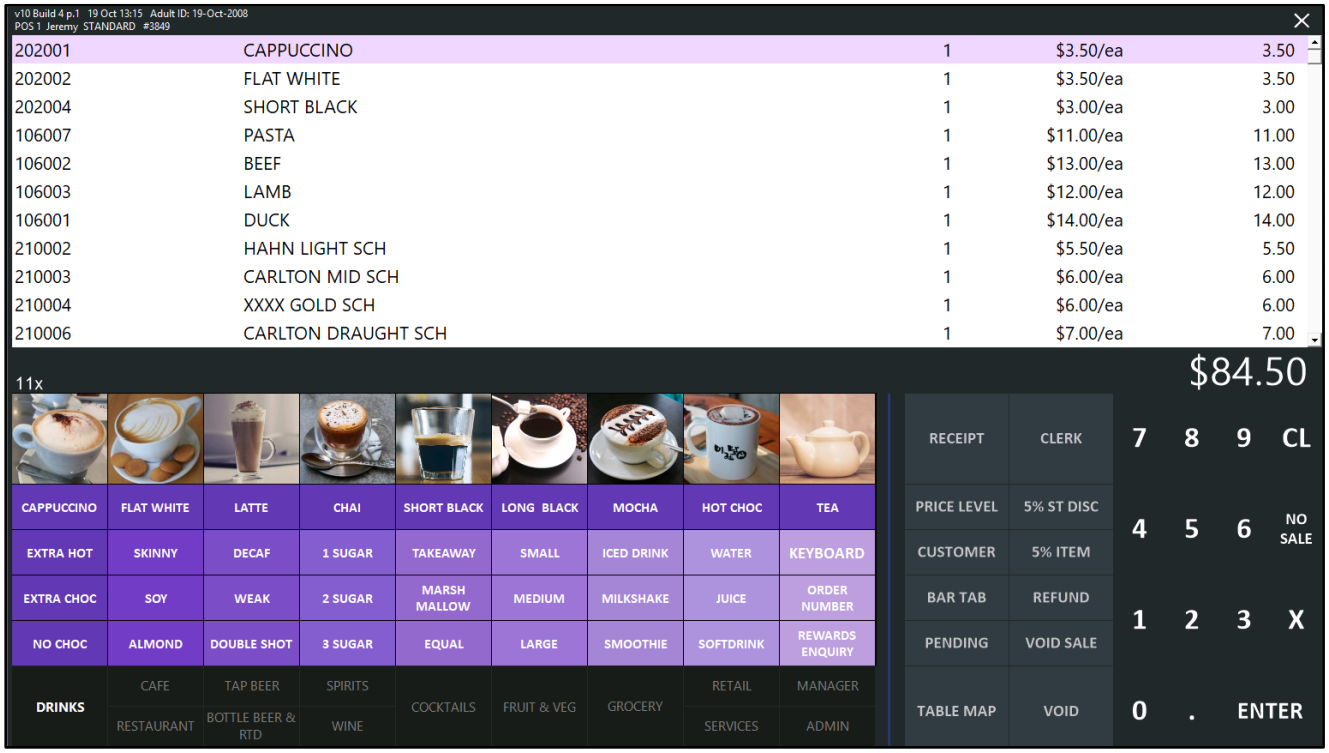
1920 x 1080 (16:9 @ 125%) Retail – POS Grid Font Size Small

The Small Font Size enables a maximum of 14 lines to be displayed at once as shown in the example below.



1920 x 1080 (16:9 @ 125%) Retail – POS Grid Font Size Medium

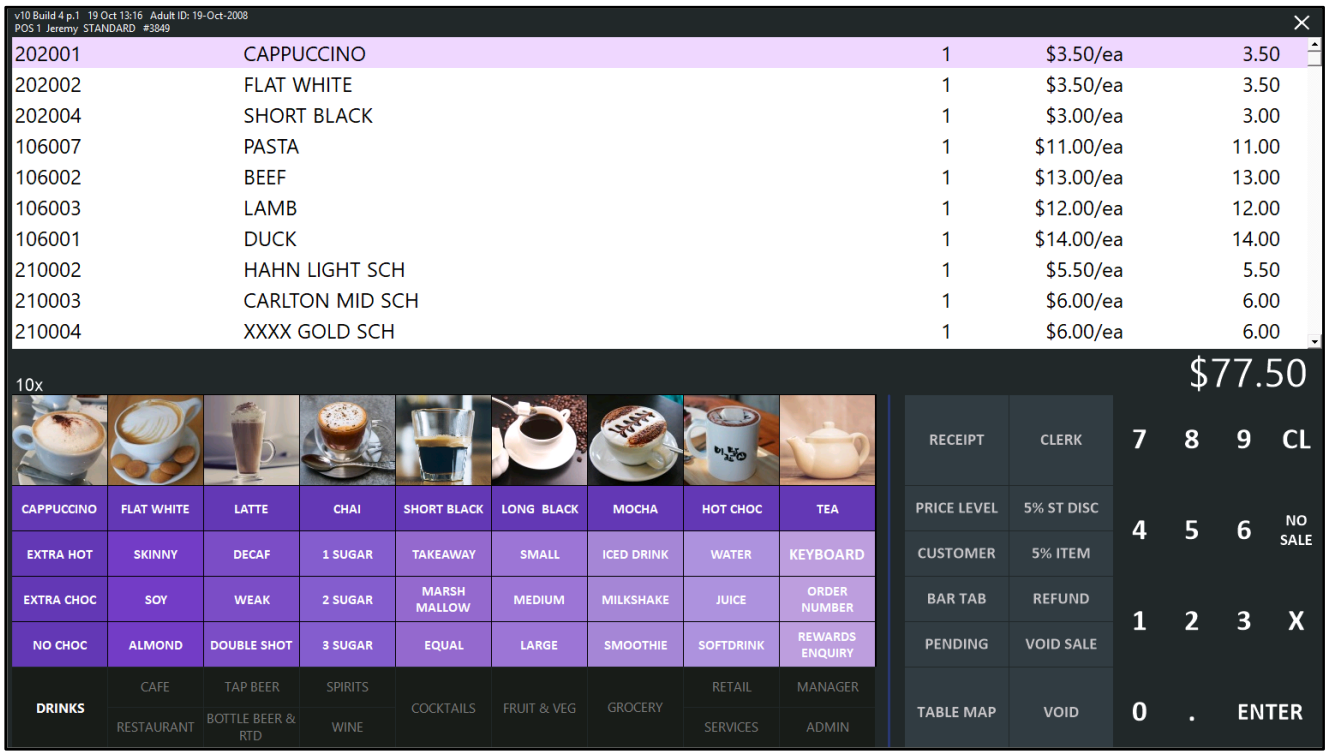
The Medium Font Size enables a maximum of 11 lines to be displayed at once as shown in the example below.



Return to top

1920 x 1080 (16:9 @ 125%) Retail – POS Grid Font Size Large

The Large Font Size enables a maximum of 10 lines to be displayed at once as shown in the example below.



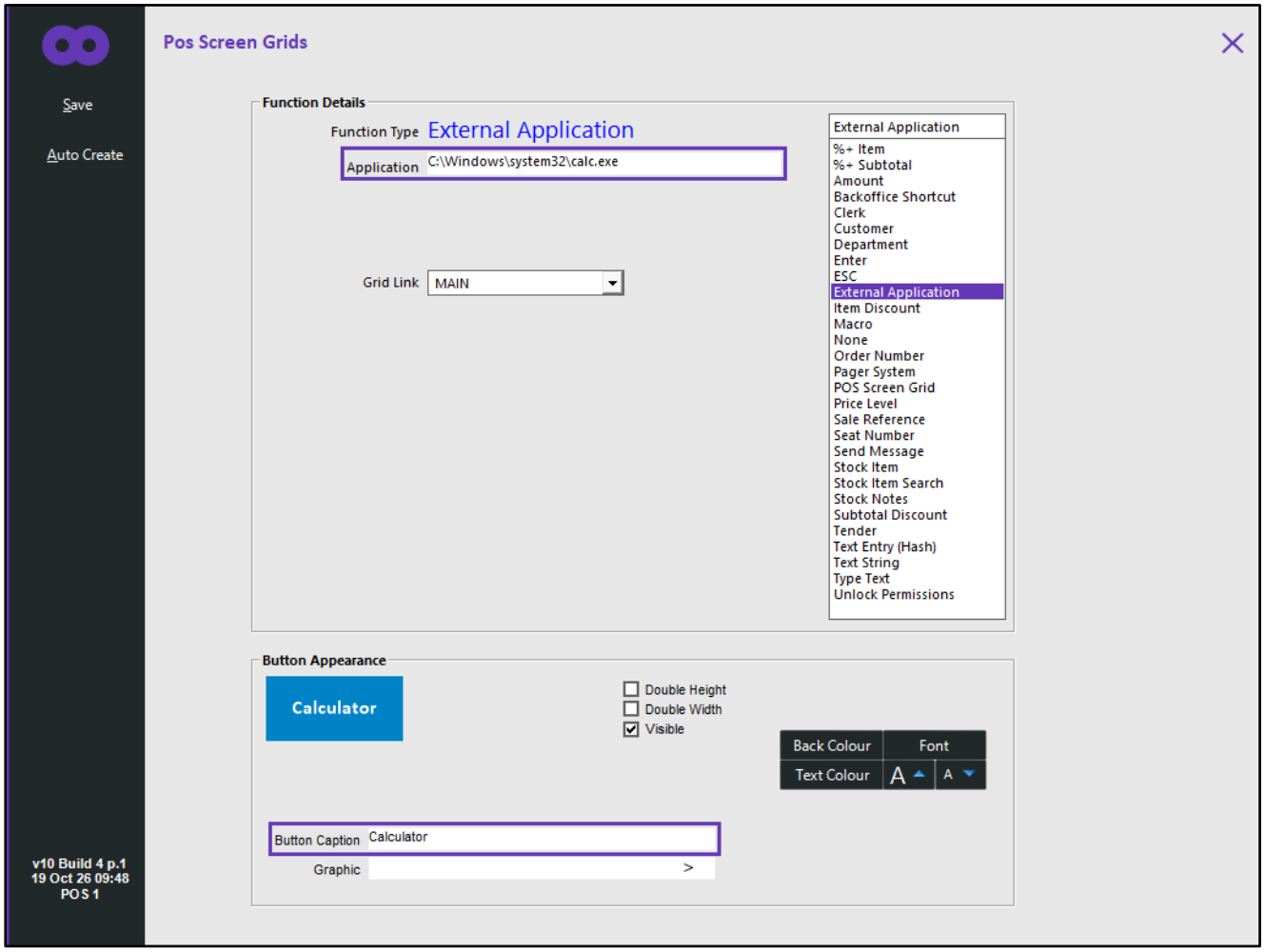
Return to top

IP-8374 – POS Screen Grids – Support for the External Application Function

This functionality introduces the ability to configure the External Application Function for POS Screen buttons within the POS Screen Grid.
Previously, this functionality was only available on POS Screen buttons within the main POS Screen Layout but wasn't available in POS Screen Grids.

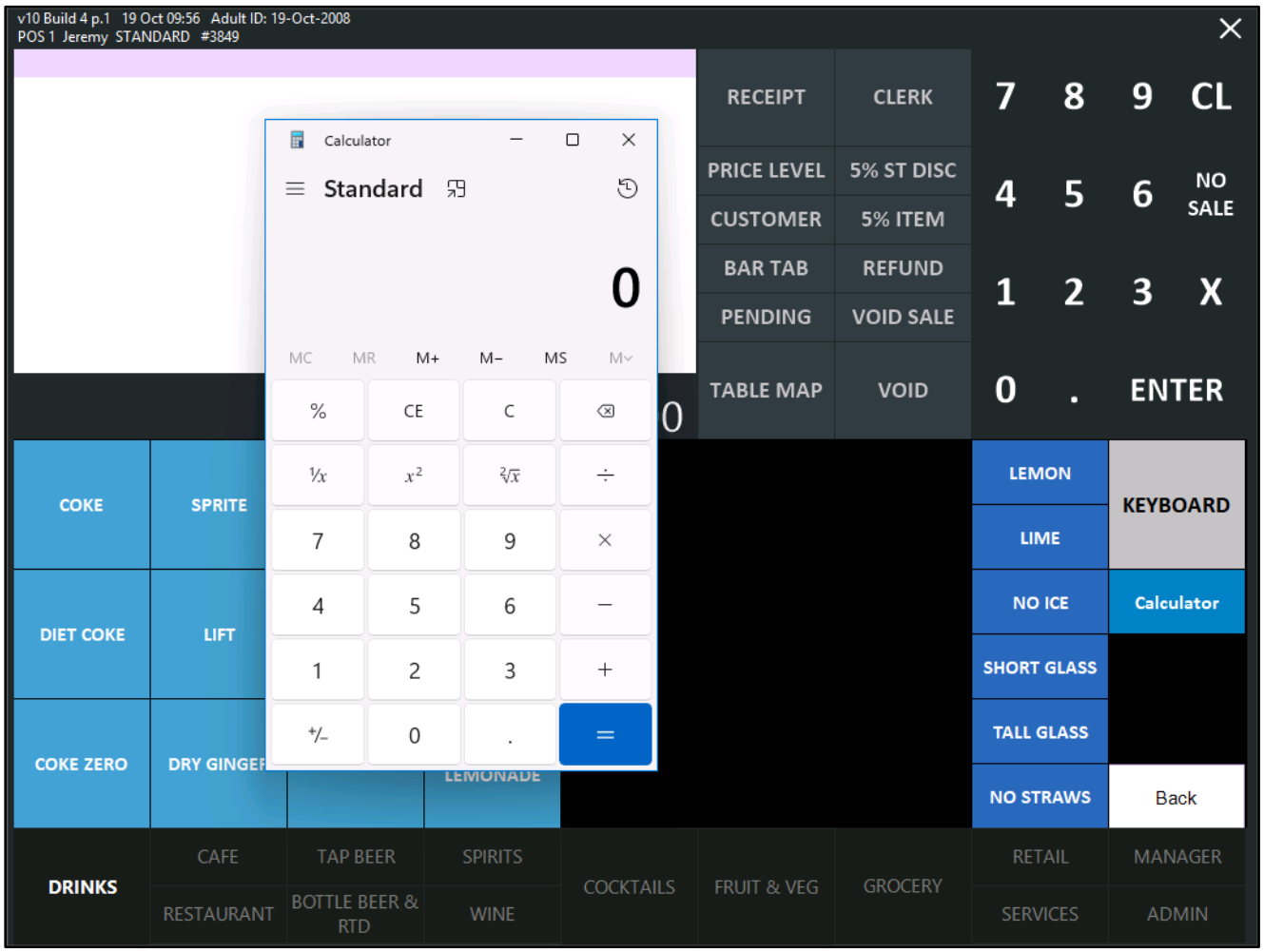
To configure this functionality, go to:
Back Office > Setup > POS Screen > Grids > Select a POS Screen Grid > Items.
Select a blank or unused button.

- **Function**: External Application.
- **Application**: Enter the full path to the Application EXE to launch.
- **Grid Link**: Select the Grid to open after the External Application is launched. To stay on the grid without switching grids, select the name of the current Grid which the button is being created within.
- **Button Appearance**: Customise as required.
- **Button Caption**: Enter a name for the button; e.g. enter the name of the External Application being launched by the button.



Return to top

When the POS Screen Grid is displayed, the External Application button will appear.
Pressing the button will launch the External Application.

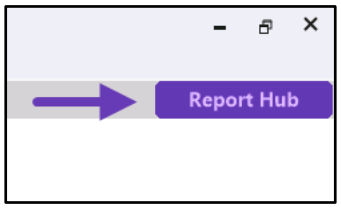


Report Hub

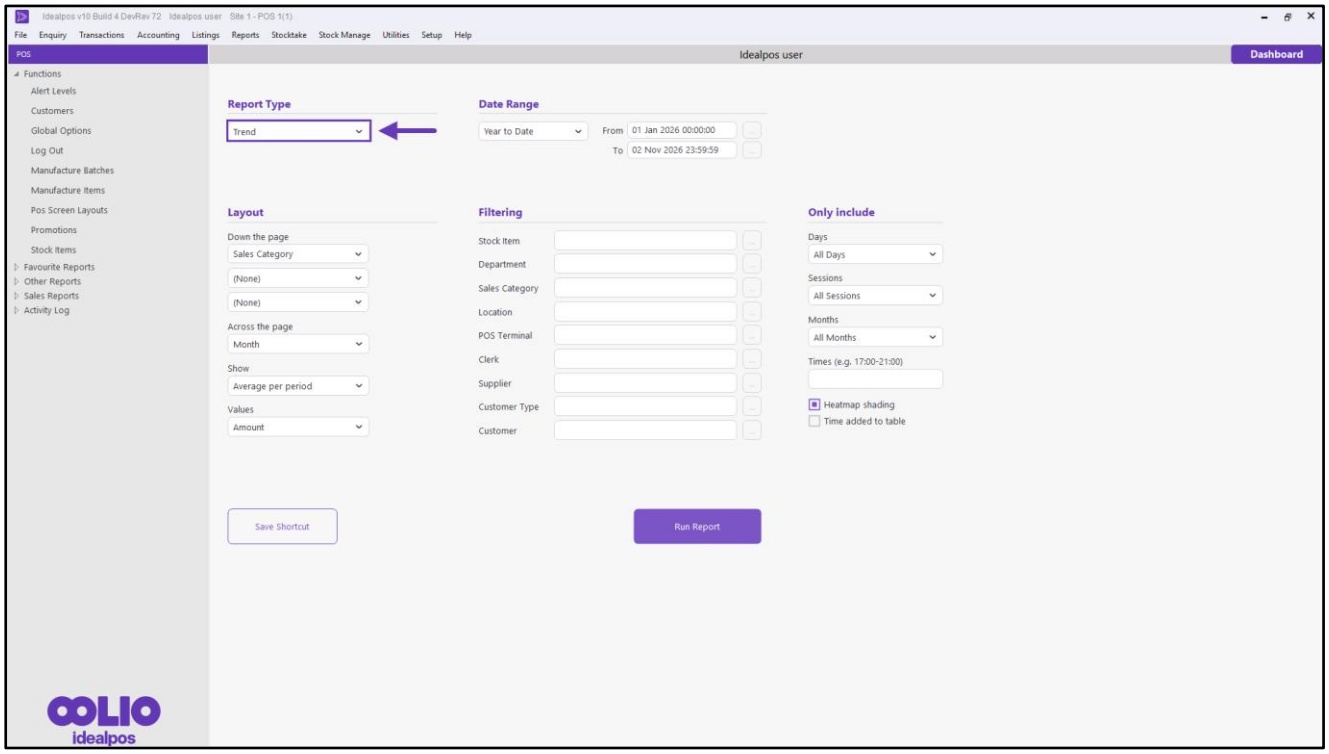
IP-8200 – Report Hub – Trend Report Functionality

This functionality introduces the ability to run a Trend Report in the Report Hub.
The Trend Report includes a "Heatmap shading" feature which shows each row with a different shade of purple based on the data being shown. E.g. Higher figures shaded in a darker purple while lower figures are shaded in lighter purple/white.

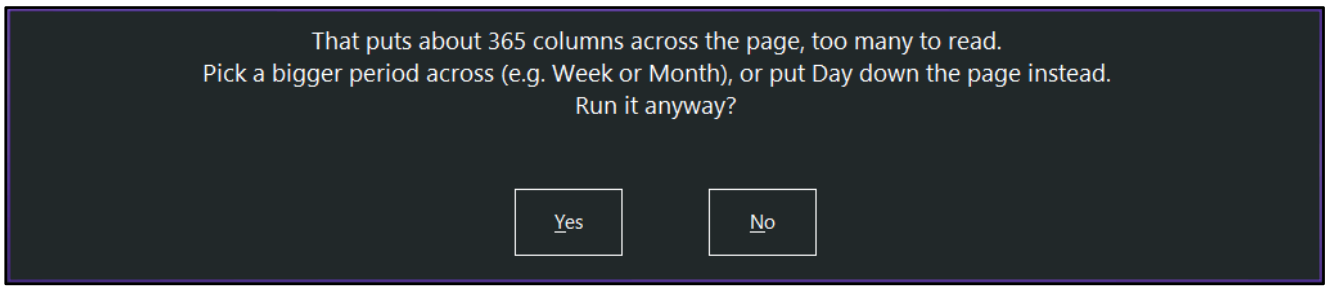
To use this functionality, go to: Back Office > Report Hub.



- **Report Type:** Trend

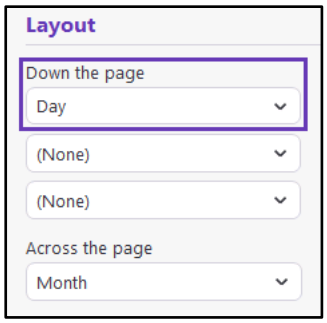


If the data type shown across the page generates too many columns, the report will display a prompt:

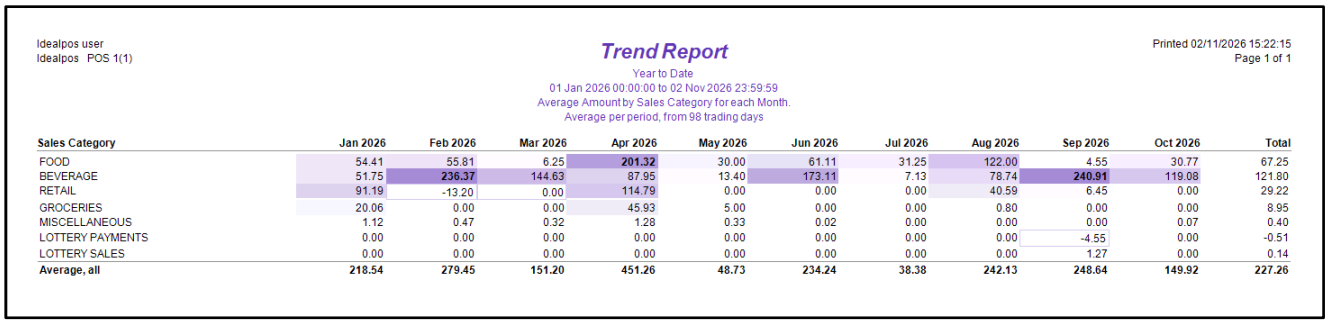


Return to top

To put the type (e.g. Day) down the page:
Ensure that Day is not listed in the "Across the page" dropdown.
Choose "Day" in the Down the page dropdown box.



When running the report, it will show the Trend using the selected options.
The "Heatmap shading" option will use purple shading to help distinguish between lower and higher values.



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Trend Report

Printed 02/11/2026 15:22:15
Page 1 of 1

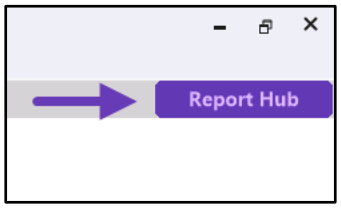
Year to Date
01 Jan 2026 00:00:00 to 02 Nov 2026 23:59:59
Average Amount by Sales Category for each Month.
Average per period, from 98 trading days

Sales Category	Jan 2026	Feb 2026	Mar 2026	Apr 2026	May 2026	Jun 2026	Jul 2026	Aug 2026	Sep 2026	Oct 2026	Total
FOOD	54.41	55.81	6.25	201.32	30.00	61.11	31.25	122.00	4.55	30.77	67.25
BEVERAGE	51.75	236.37	144.63	87.95	13.40	173.11	7.13	78.74	240.91	119.08	121.80
RETAIL	91.19	-13.20	0.00	114.79	0.00	0.00	0.00	40.59	6.45	0.00	29.22
GROCERIES	20.06	0.00	0.00	45.93	5.00	0.00	0.00	0.80	0.00	0.00	8.95
MISCELLANEOUS	1.12	0.47	0.32	1.28	0.33	0.02	0.00	0.00	0.00	0.07	0.40
LOTTERY PAYMENTS	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-4.55	0.00	-0.51
LOTTERY SALES	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.27	0.00	0.14
Average, all	**218.54**	**279.45**	**151.20**	**451.26**	**48.73**	**234.24**	**38.38**	**242.13**	**248.64**	**149.92**	**227.26**

Return to top

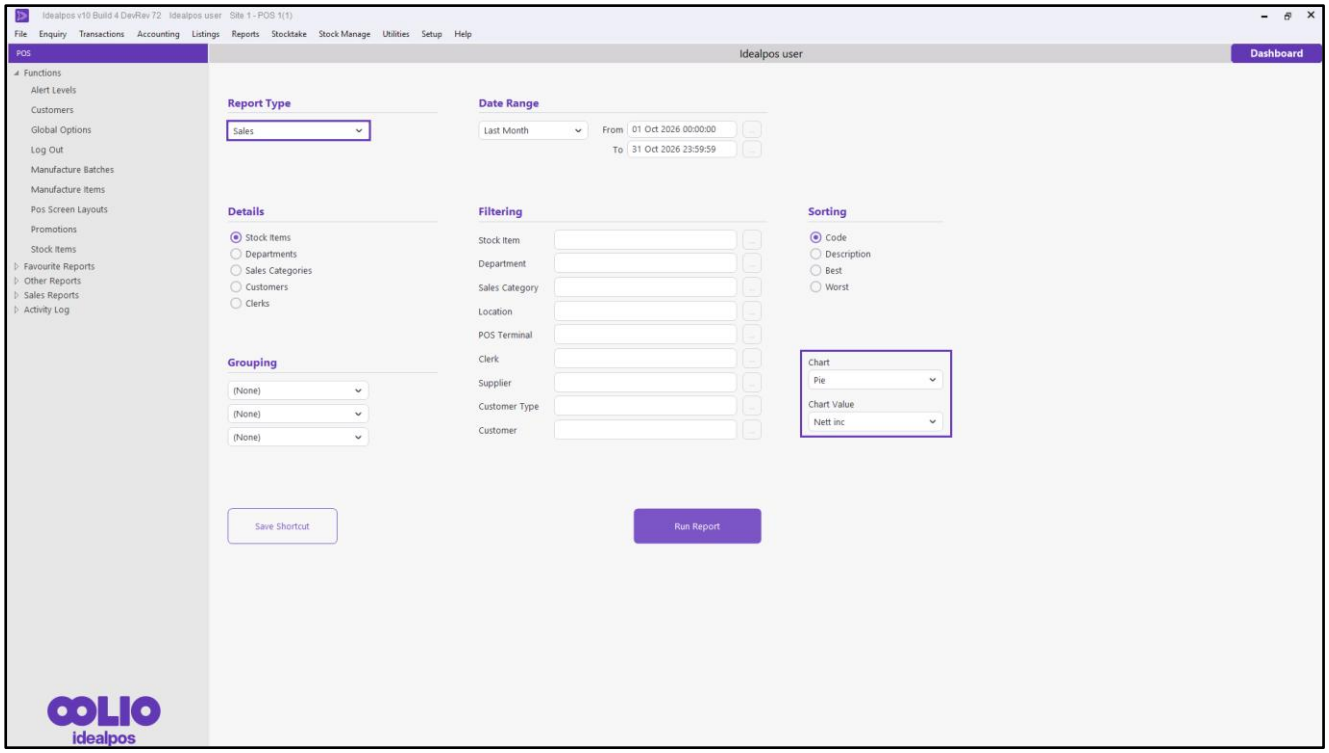
IP-8381 – Report Hub – Option to include Charts

This functionality introduces the ability to include Charts when running the Sales Report in the Report Hub.
To use this functionality, go to: Back Office > Report Hub.



Report Type: Sales
Chart: Pie, 3D Pie, Doughnut, 3D Doughnut, Bar, Horizontal Bar.

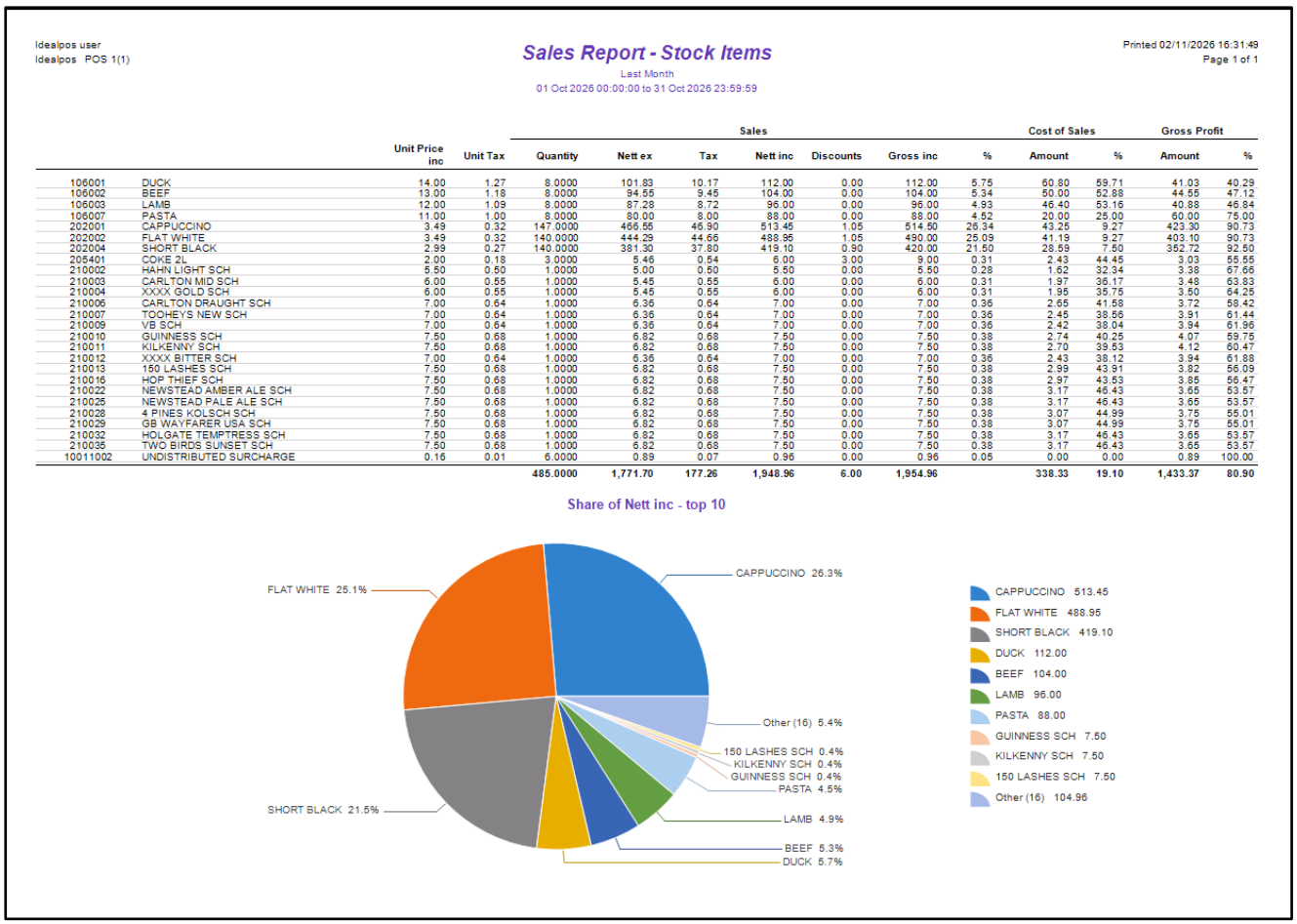
When a Chart has been selected, a Chart Value dropdown box will appear below.
Chart Value: Nett inc, Gross Profit, Quantity, Discounts.



Press the "Run Report" button.

Return to top

The Chart is displayed at the bottom of the report.



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Sales Report - Stock Items

Last Month
01 Oct 2026 00:00:00 to 31 Oct 2026 23:59:59

Printed 02/11/2026 16:31:49
Page 1 of 1

				Sales						Cost of Sales		Gross Profit	
		Unit Price inc	Unit Tax	Quantity	Nett ex	Tax	Nett inc	Discounts	Gross inc	%	Amount	%	Amount	%
106001	DUCK	14.00	1.27	8.0000	101.83	10.17	112.00	0.00	112.00	5.75	60.80	59.71	41.03	40.29
106002	BEEF	13.00	1.18	8.0000	94.55	9.45	104.00	0.00	104.00	5.34	50.00	52.88	44.55	47.12
106003	LAMB	12.00	1.09	8.0000	87.28	8.72	96.00	0.00	96.00	4.93	46.40	53.16	40.88	46.84
106007	PASTA	11.00	1.00	8.0000	80.00	8.00	88.00	0.00	88.00	4.52	20.00	25.00	60.00	75.00
202001	CAPPUCCINO	3.49	0.32	147.0000	466.66	46.90	513.46	1.05	514.50	26.34	43.25	9.27	423.30	90.73
202002	FLAT WHITE	3.49	0.32	140.0000	444.29	44.66	488.95	1.05	490.00	25.09	41.19	9.27	403.10	90.73
202004	SHORT BLACK	2.99	0.27	140.0000	381.30	37.80	419.10	0.90	420.00	21.50	28.59	7.50	352.72	92.50
205401	COKE 2L	2.00	0.18	3.0000	5.46	0.54	6.00	3.00	9.00	0.31	2.43	44.45	3.03	55.55
210002	HAHN LIGHT SCH	5.50	0.50	1.0000	5.00	0.50	5.50	0.00	5.50	0.28	1.62	32.34	3.38	67.66
210003	CARLTON MID SCH	6.00	0.55	1.0000	5.45	0.55	6.00	0.00	6.00	0.31	1.97	36.17	3.48	63.83
210004	XXXX GOLD SCH	6.00	0.55	1.0000	5.45	0.55	6.00	0.00	6.00	0.31	1.96	35.75	3.50	64.25
210006	CARLTON DRAUGHT SCH	7.00	0.64	1.0000	6.36	0.64	7.00	0.00	7.00	0.36	2.65	41.58	3.72	58.42
210007	TOOHEYS NEW SCH	7.00	0.64	1.0000	6.36	0.64	7.00	0.00	7.00	0.36	2.45	38.56	3.91	61.44
210009	VB SCH	7.00	0.64	1.0000	6.36	0.64	7.00	0.00	7.00	0.36	2.42	38.04	3.94	61.96
210010	GUINNESS SCH	7.50	0.68	1.0000	6.82	0.68	7.50	0.00	7.50	0.38	2.74	40.25	4.07	59.75
210011	KILKENNY SCH	7.50	0.68	1.0000	6.82	0.68	7.50	0.00	7.50	0.38	2.70	39.53	4.12	60.47
210012	XXXX BITTER SCH	7.00	0.64	1.0000	6.36	0.64	7.00	0.00	7.00	0.36	2.43	38.12	3.94	61.88
210013	150 LASHES SCH	7.50	0.68	1.0000	6.82	0.68	7.50	0.00	7.50	0.38	2.99	43.91	3.82	56.09
210016	HOP THIEF SCH	7.50	0.68	1.0000	6.82	0.68	7.50	0.00	7.50	0.38	2.97	43.53	3.85	56.47
210022	NEWSTEAD AMBER ALE SCH	7.50	0.68	1.0000	6.82	0.68	7.50	0.00	7.50	0.38	3.17	46.43	3.65	53.57
210025	NEWSTEAD PALE ALE SCH	7.50	0.68	1.0000	6.82	0.68	7.50	0.00	7.50	0.38	3.17	46.43	3.65	53.57
210028	4 PINES KOLSCH SCH	7.50	0.68	1.0000	6.82	0.68	7.50	0.00	7.50	0.38	3.07	44.99	3.75	55.01
210029	GB WAYFARER USA SCH	7.50	0.68	1.0000	6.82	0.68	7.50	0.00	7.50	0.38	3.07	44.99	3.75	55.01
210032	HOLGATE TEMPTRESS SCH	7.50	0.68	1.0000	6.82	0.68	7.50	0.00	7.50	0.38	3.17	46.43	3.65	53.57
210035	TWO BIRDS SUNSET SCH	7.50	0.68	1.0000	6.82	0.68	7.50	0.00	7.50	0.38	3.17	46.43	3.65	53.57
10011002	UNDISTRIBUTED SURCHARGE	0.16	0.01	6.0000	0.89	0.07	0.96	0.00	0.96	0.05	0.00	0.00	0.89	100.00
				485.0000	**1,771.70**	**177.26**	**1,948.96**	**6.00**	**1,954.96**		**338.33**	**19.10**	**1,433.37**	**80.90**

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Tax Monitoring

IP-8014 – Tax Invoice Monitoring System – Support for v3

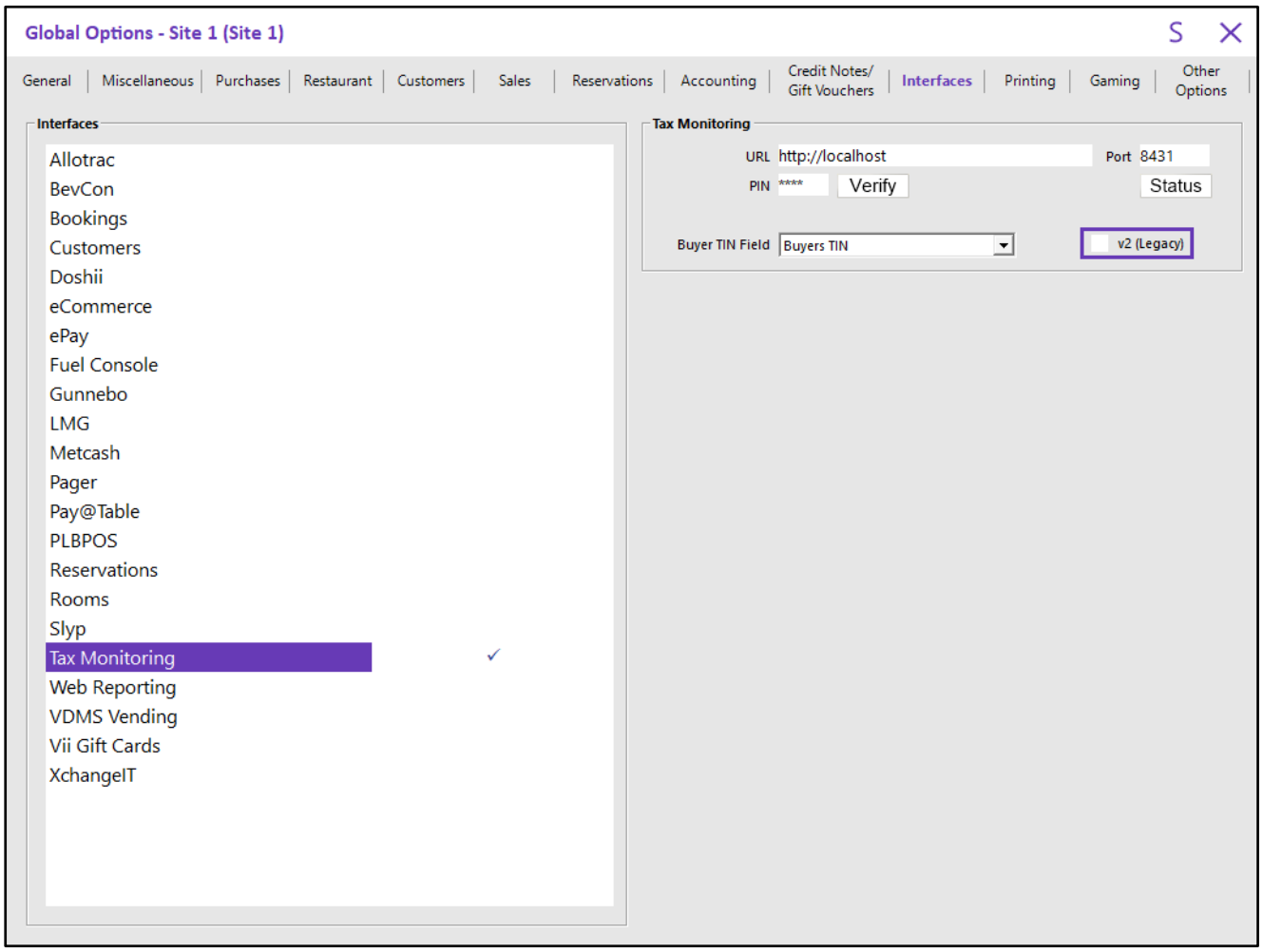
This functionality adds support for Tax Monitoring v3.
The Tax Monitoring integration is configured on sites in Samoa and Fiji to monitor tax as required by the Samoa and Fiji Governments.
Note that the latest version for Fiji is still version 2, while Samoa is v3.

Existing sites that are already configured and running v2 Tax Monitoring can upgrade to v3 Tax Monitoring.

The process to upgrade to Tax Monitoring v3 in Idealpos can be completed as follows:

- **Download/Install the latest SoftSDC application** – Go to https://userguide.idealpos.com.au > In the Table of Contents on the left-hand side, scroll down and select Tax Monitoring > DTI Tax Monitoring System v3 > Install & Configure SoftSDC > Complete the required steps. If the SoftSDC application is currently installed on each POS Terminal, the installation process will need to be completed on each POS Terminal to upgrade to the latest SoftSDC.
- **Upgrade Idealpos to Tax Monitoring v3** – Complete the process outlined below

Go to: Back Office > Setup > Global Options > Interfaces > Tax Monitoring > Uncheck "v2 (Legacy)"



After making the above change, close the Global Options window.
To ensure that the setting has taken effect, perform a Close Suite/Open Suite on all POS Terminals/Back Office.
Go to: Start menu > Idealpos > IPSUtils > Press "Close" > Confirm > Start Idealpos.
The upgrade is now completed; ensure that sales process successfully and Fiscal Receipts are produced as expected.

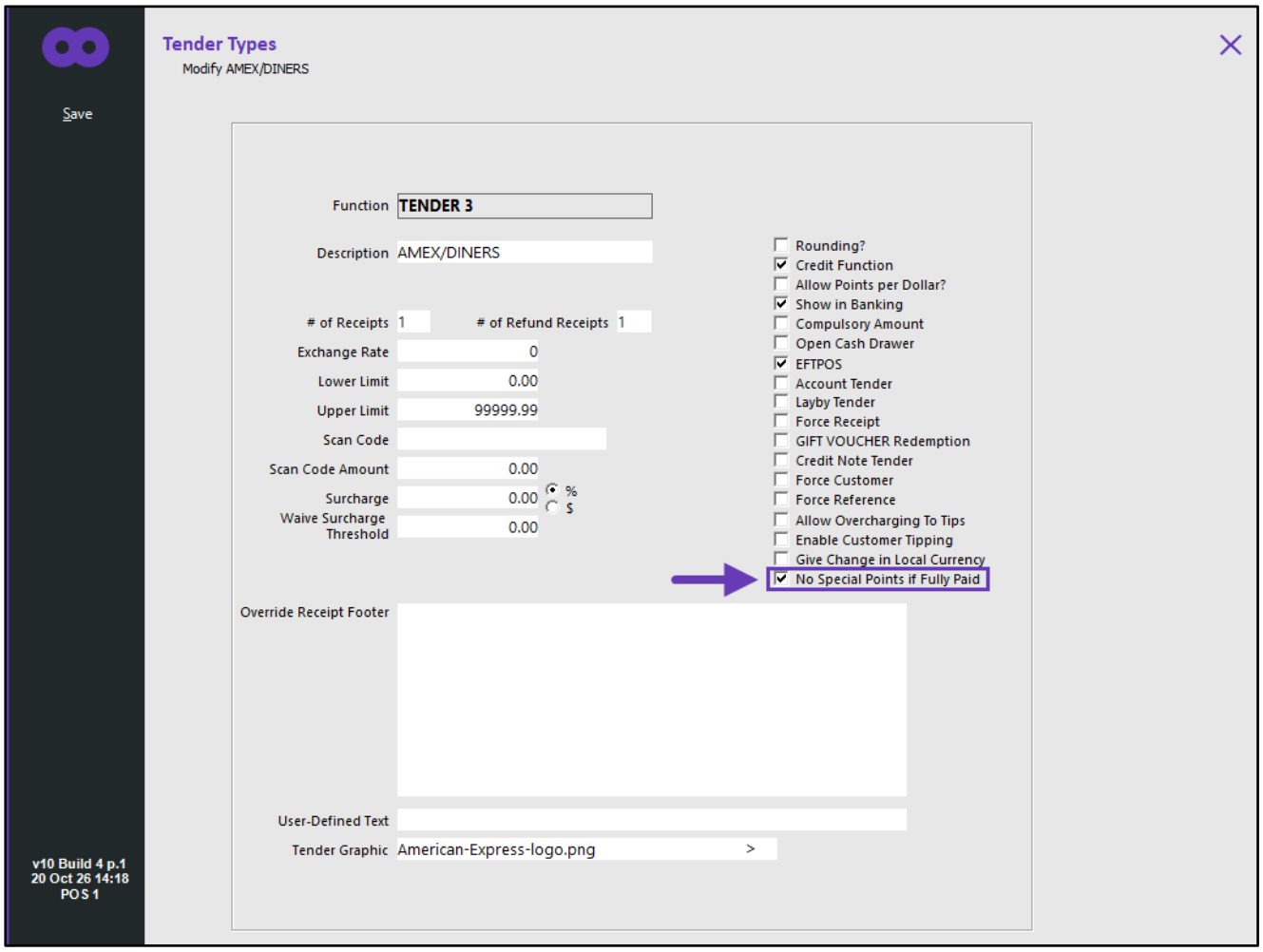
Tender Types

IP-8349 – Tender Types – "No Special Points if Fully Paid by This Tender" option

This functionality introduces the ability to disable Special Points from applying when fully paying a sale with a single tender (or when paying a sale with multiple tenders that each have the option "No Special Points if Fully Paid by This Tender" enabled). If split paying a sale with two Tender Types and only one Tender Type has this option enabled, Special Points will still apply.

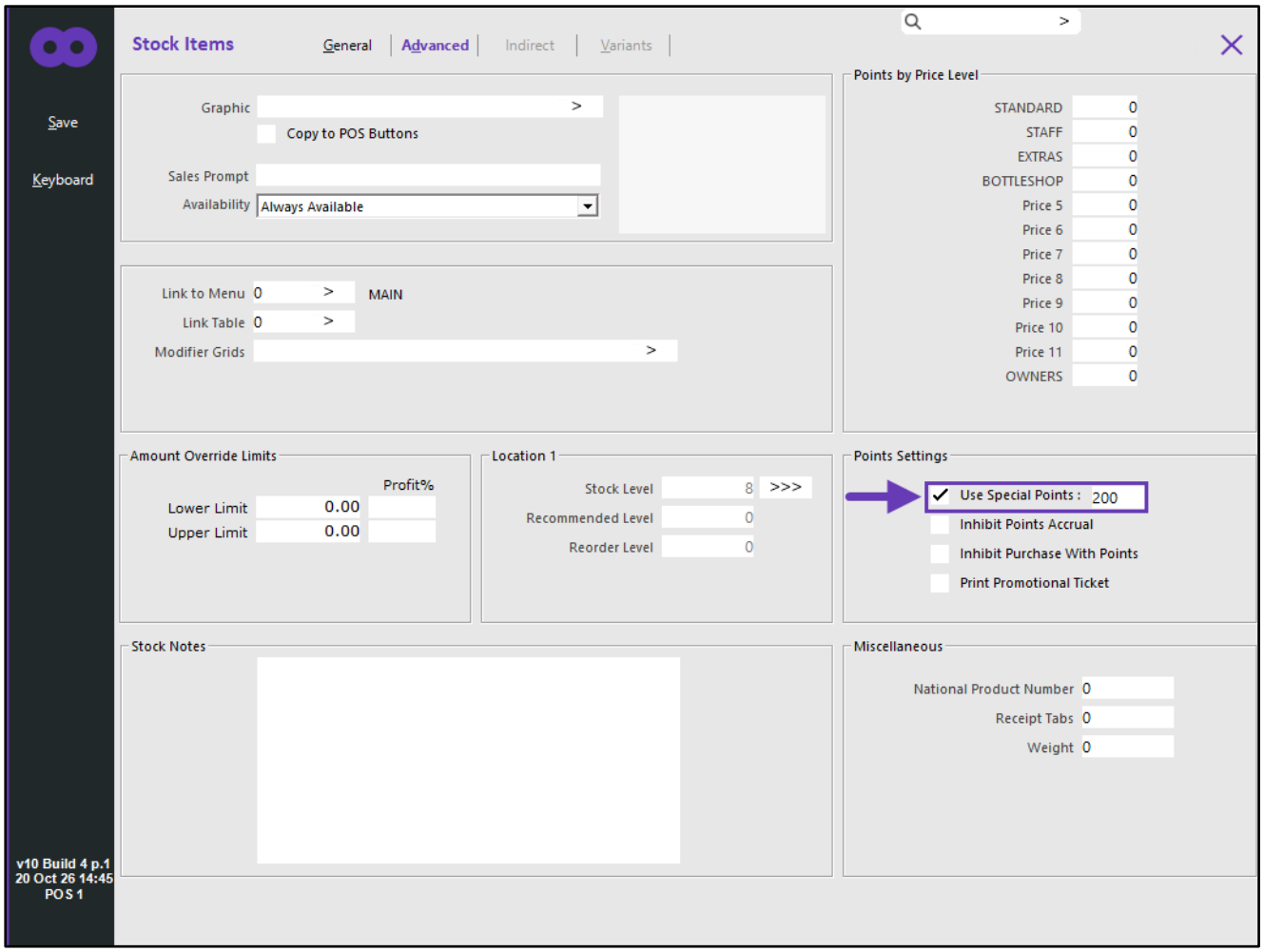
Special Points are a custom number of points that can be configured within a Stock Item; when the customer purchases Stock Item(s) that have Special Points configured, they will accrue those Special Points.
This "No Special Points if Fully Paid by This Tender" option will stop them from earning Special Points.

To configure this functionality, go to: Back Office > Setup > Tender Types > Select a Tender Type > Modify.
Enable the checkbox "No Special Points if Fully Paid" > Press "Save" on the top-left corner.



Return to top

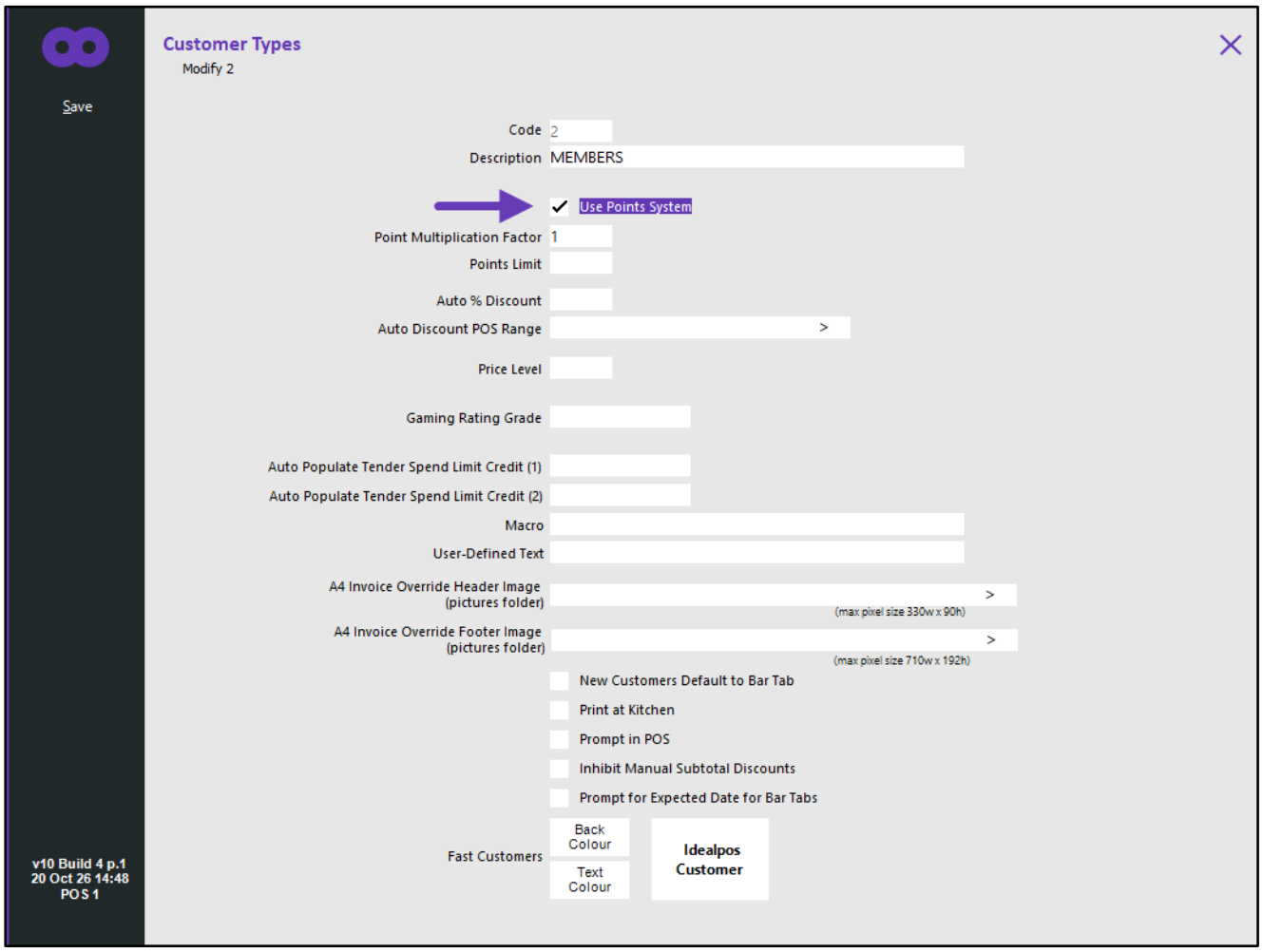
A Stock Item will need to have the "Use Special Points" option configured to demonstrate this functionality.
Go to: Back Office > File > Stock Control > Stock Items > Select a Stock Item > Modify > Advanced > Use Special Points.



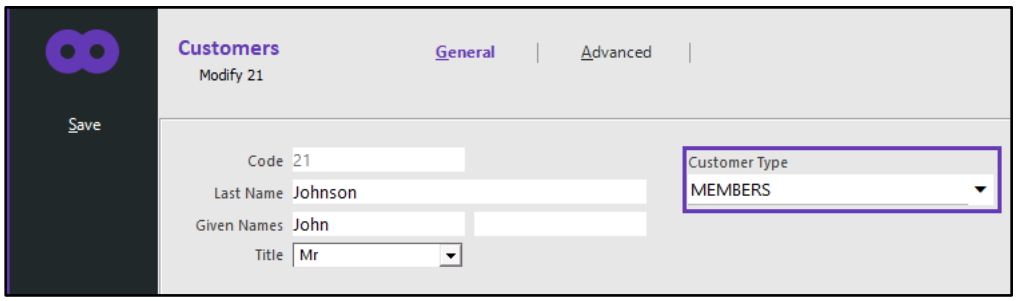
A Customer will also need to be linked to a Customer Type that has the "Use Points System" enabled.

Return to top

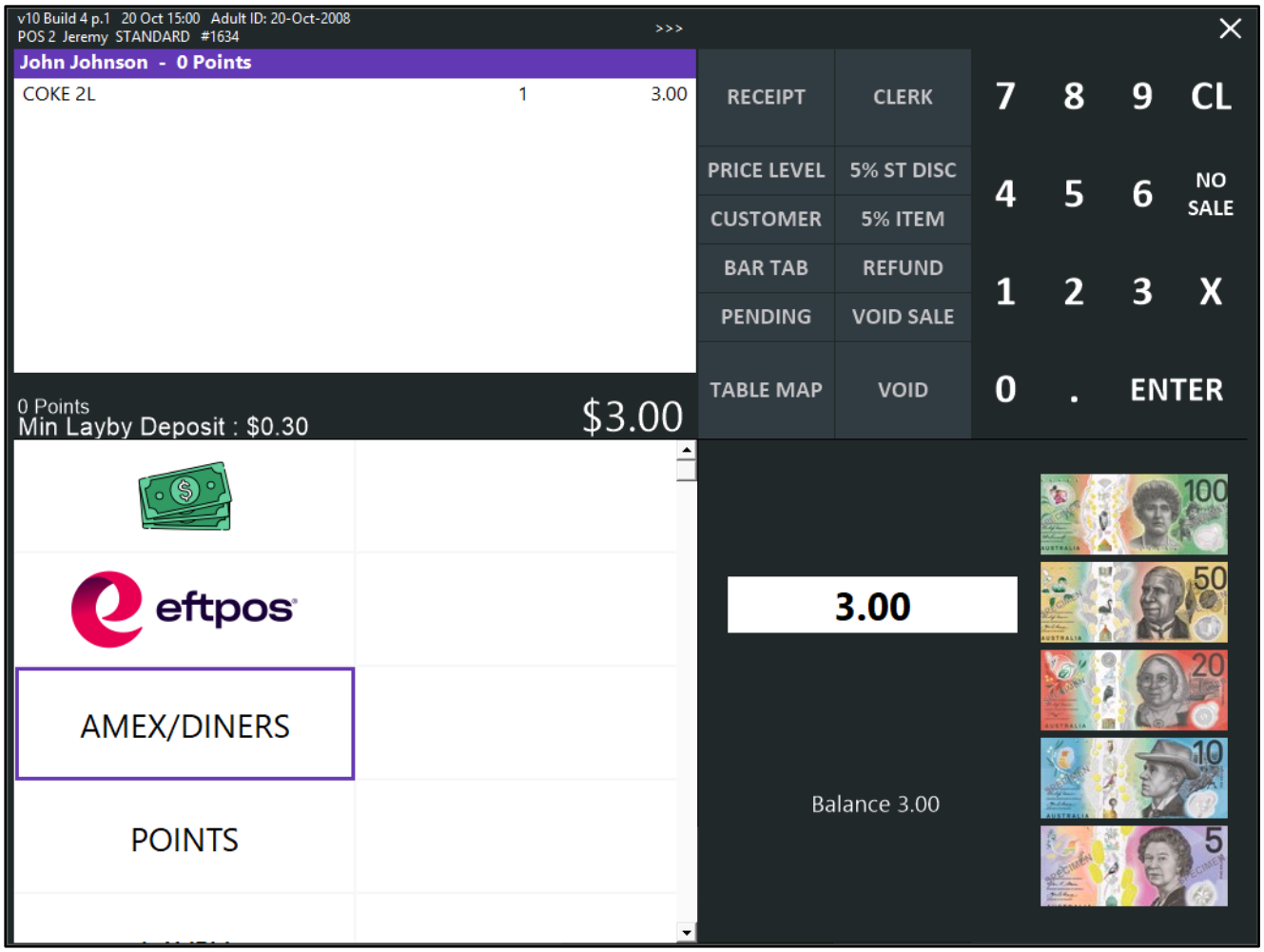
Go to: Back Office > File > Customers > Customer Types > Select a Customer Type > Modify > Ensure that the "Use Points System" checkbox is enabled.



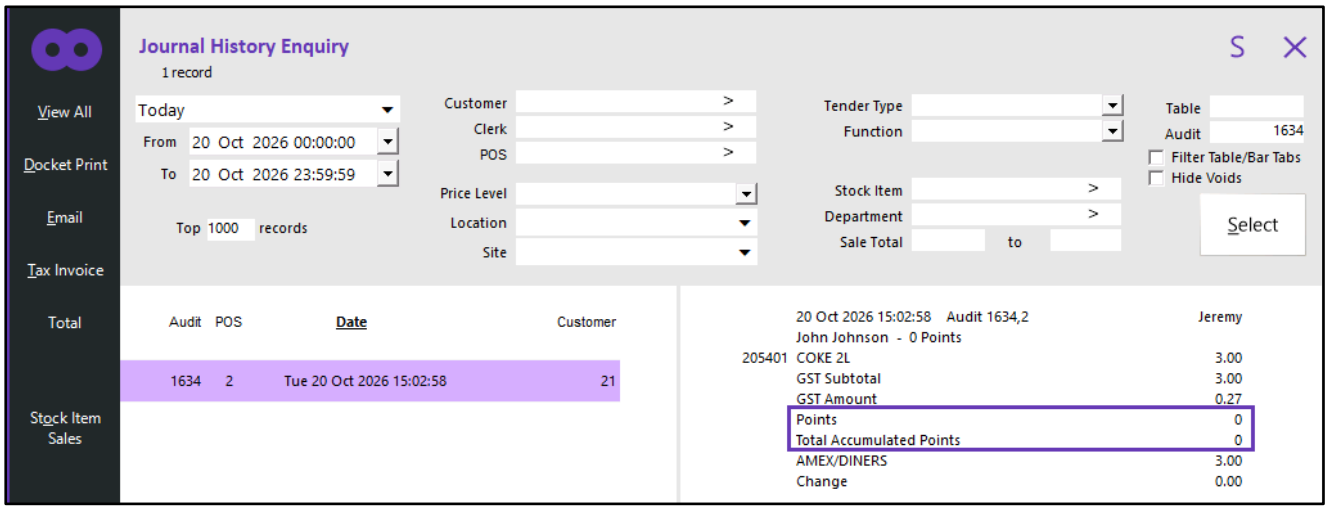
Ensure that a Customer is linked to a Customer Type that has the Use Points System enabled.
Go to: Back Office > File > Customers > Customers > Select a Customer > Modify.



Go to: POS Screen.
Add a Customer to the sale > add an item to the sale that has Use Special Points enabled > Tender the sale using a Tender Type that has the "No Special Points if Fully Paid" enabled.

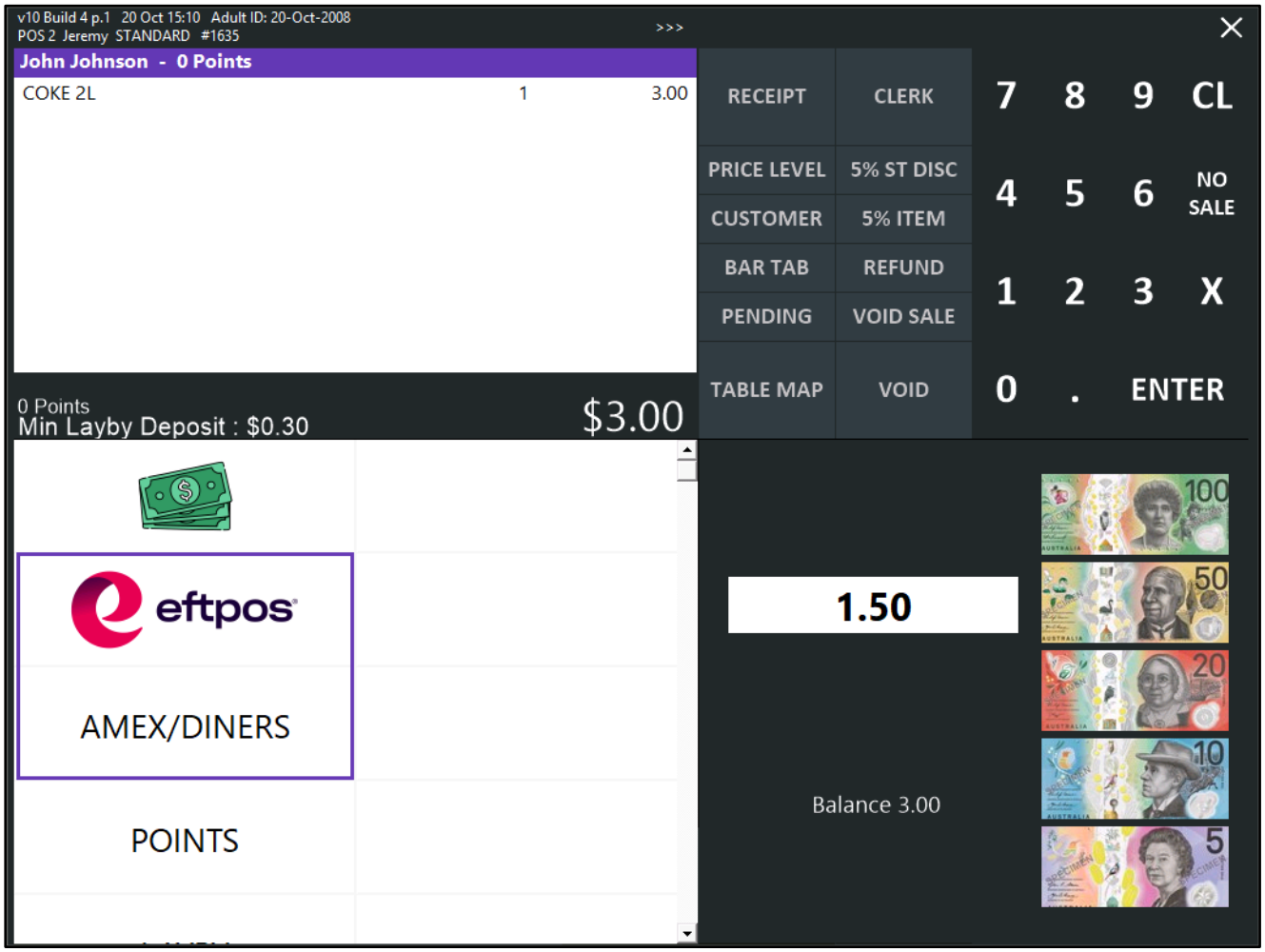


The Customer does not earn any Special Points for the item.
This is shown in the Journal History Enquiry (Back Office > Enquiry > Journal History).

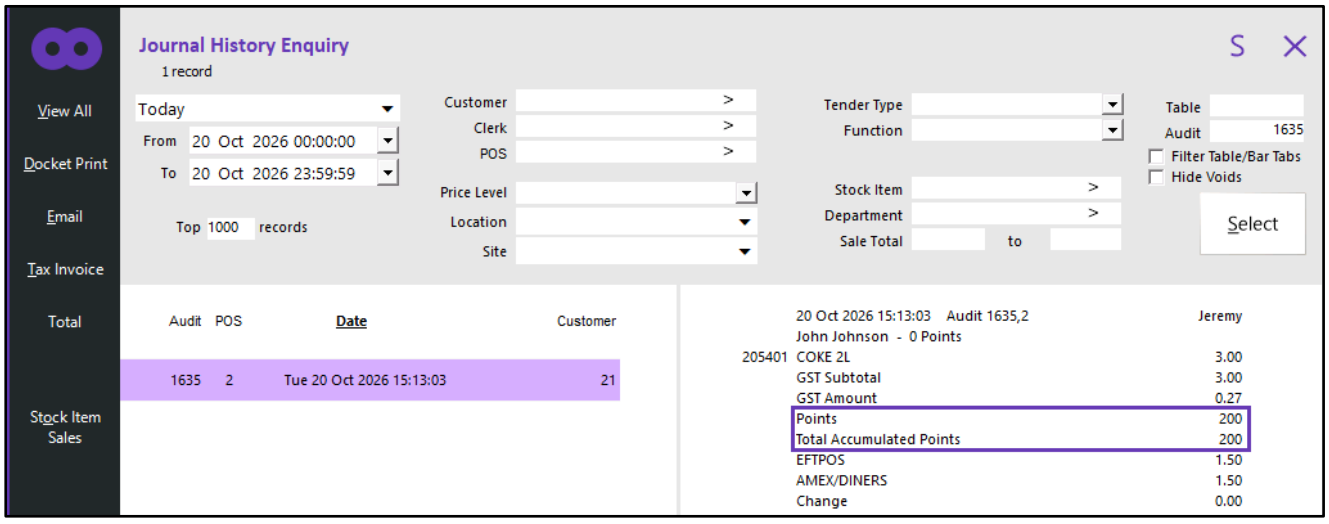


Return to top

When the customer purchases the same item and pays by splitting the payment between two Tender Types (one tender which has the option "No Special Points if Fully Paid" enabled, and another Tender Type which has the option disabled), or if they fully pay for their purchase with a Tender Type that has the option disabled, they will accrue Special Points that have been set in the Stock Item.



The Customer will earn Special Points for the item.
This is shown in the Journal History Enquiry (Back Office > Enquiry > Journal History).



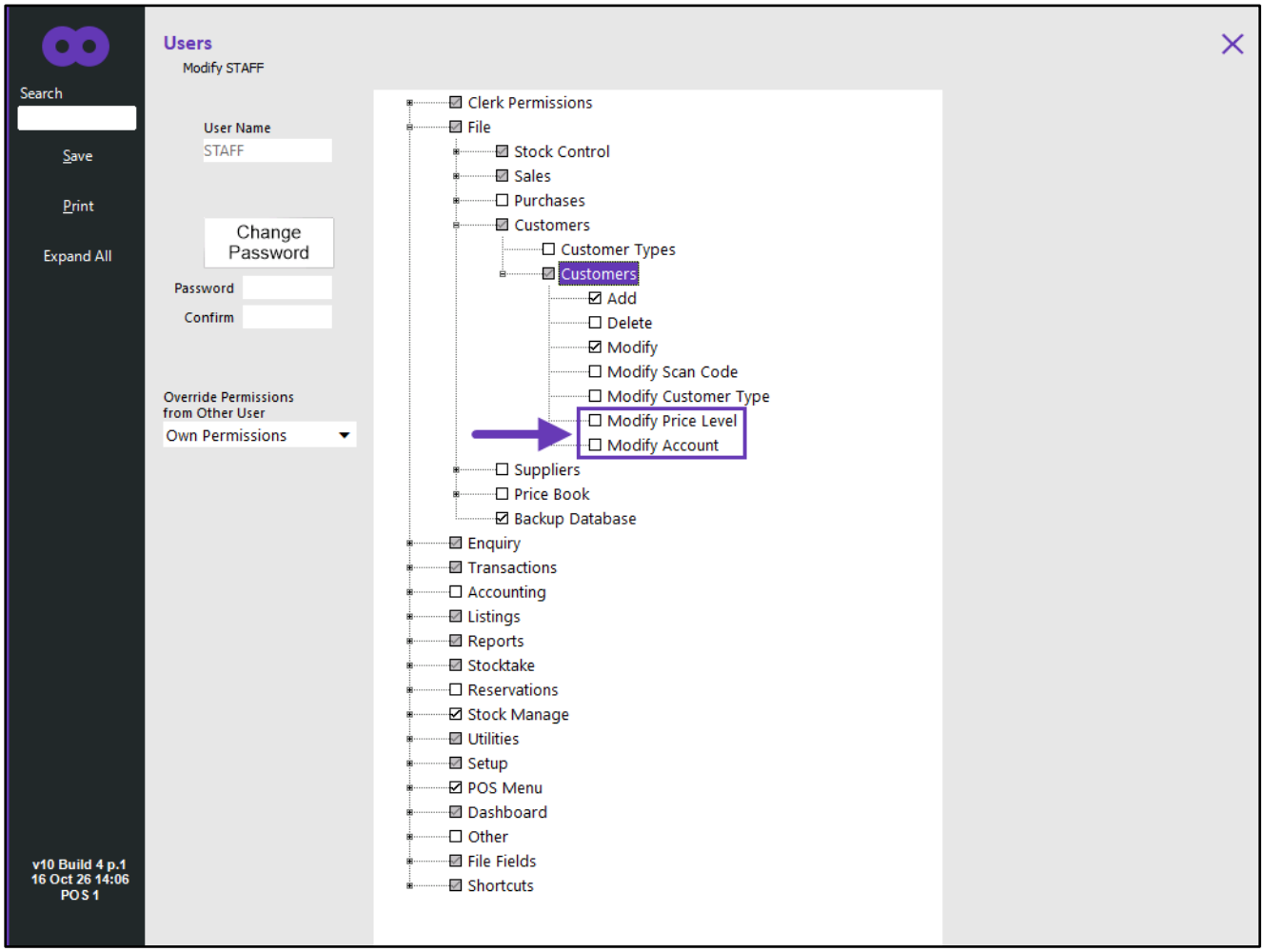
Users

IP-8301 – Extended Permissions for Customer Modification Fields

This functionality introduces the ability to control whether a User has access to modify the Price Level and Account fields in the Modify Customer screen.

To configure this functionality, go to: Back Office > Setup > Users > Select a User (other than Admin) > Modify. Expand File > Customers > Customers > toggle the Modify Price Level and Modify Account options as required. Note that if the "Modify" option is disabled for the Customers screen, the "Modify Price Level" and "Modify Account" options will not have any effect as the user will be unable to open the Modify Customer screen altogether.

Press "Save" on the top-left corner once the options have been set as required.



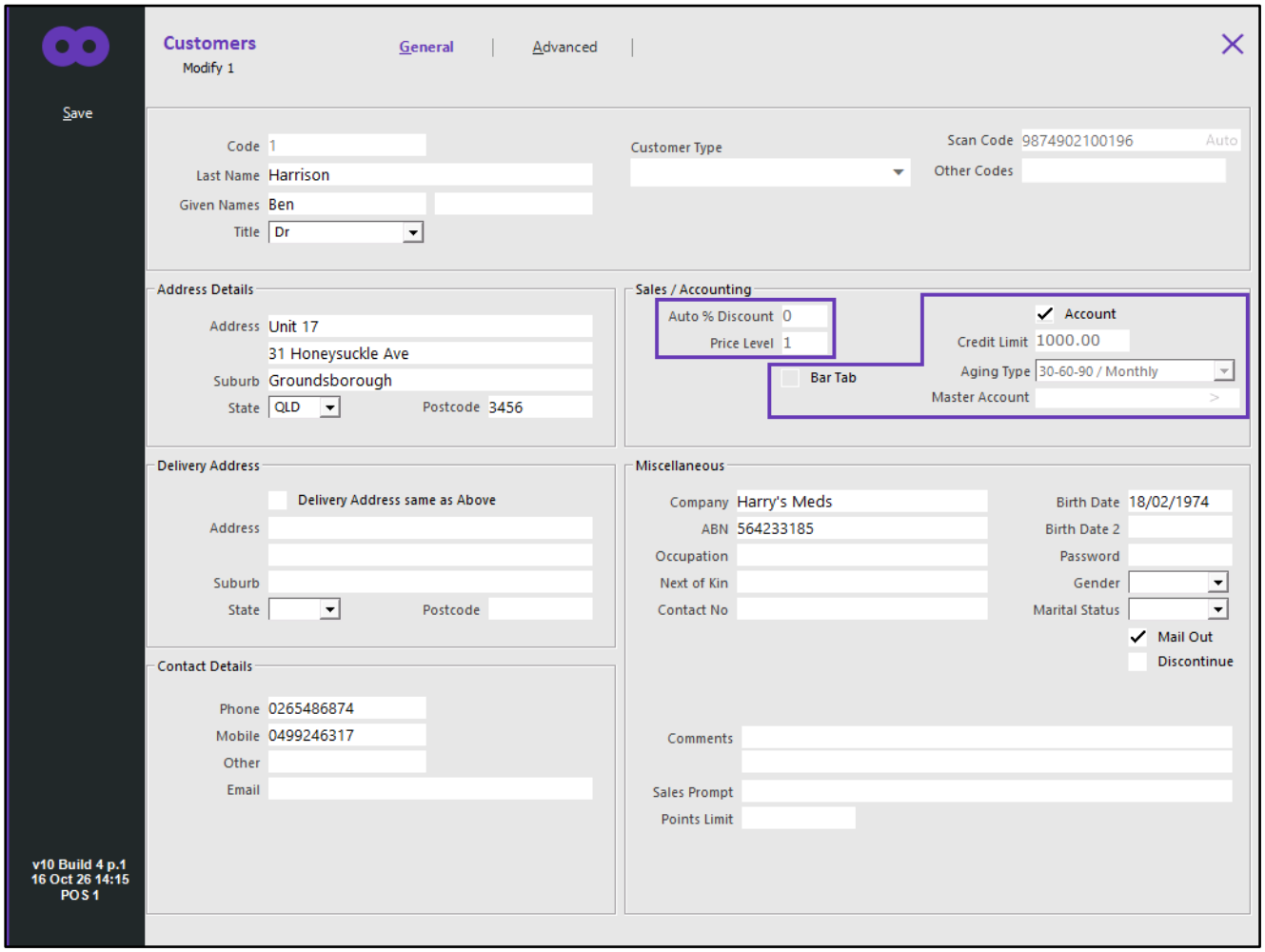
Go to: Back Office > File > Log Out.

Return to top

Login as a User that has been restricted from accessing the Modify Price Level/Modify Account options.
Go to: Back Office > File > Customers > Customers > Select a Customer > Modify.

Modify Price Level controls access to Auto % Discount/Price Level.
Modify Account controls access to the Account fields and Bar Tab checkbox.

When the options are disabled in User permissions, these fields are visible but will behave as read-only.
Any clicks or presses into these fields will be ignored.



Note that if the User has permission to Add Customer (but do not have permission to Modify Price Level and Modify Account), they will still have permission to configure the above fields when adding new Customers.
Once a Customer has been added, they will be unable to modify the above fields for the new Customer.

Yes/No Options

IP-8350 – Yes/No Option – Pending Sales/Web Orders – Use Location where Finalized

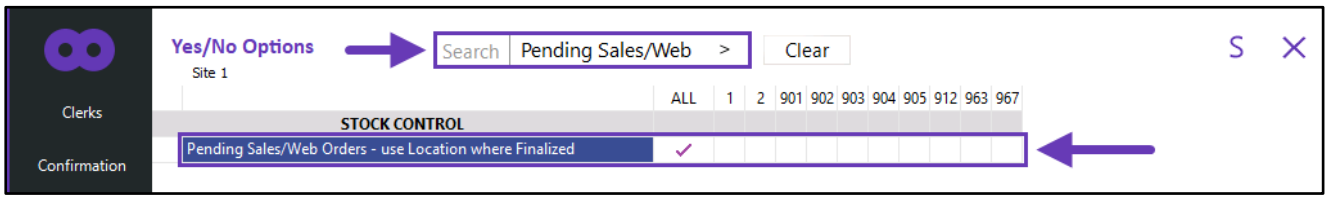
This functionality introduces the ability to use the Location where the Pending Sale or Web Order is Finalised.

When a Pending Sale or Web Order is finalised, the Stock Items in the Pending Sale or Web Order will have their Stock Levels deducted.
This functionality was previously hard-coded so that when a Pending Sale or Web Order was finalised, it would deduct the Stock Item's Stock Levels using the Location where the Pending Sale or Web Order was initiated (using the Location of the POS Terminal that initiated the Pending Sale or Web Order).

Enabling this Yes/No Option will deduct Stock Item's Stock Levels from the Location where the Pending Sale or Web Order is finalised (using the Location of the POS Terminal that finalises the Pending Sale or Web Order).
This will only apply to any Pending Sales or Web Orders that are finalised after this option is enabled.

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

Search: Pending Sales/Web
Enable Yes/No Option "Pending Sales/Web Orders – Use Location where Finalized"



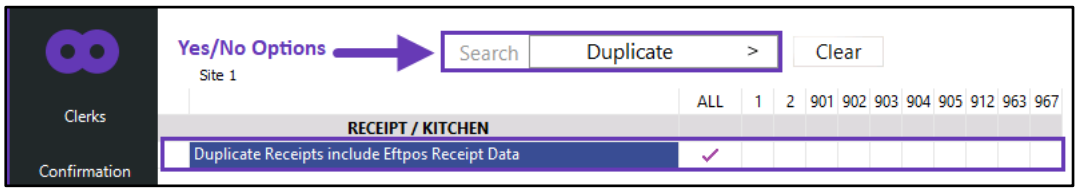
Close the Yes/No Options.
It is recommended that a full Close Suite/Open Suite is performed to ensure that this setting applies.

Return to top

IP-8380 – Yes/No Option – Duplicate Receipts include EFTPOS Receipt Data

This function introduces the ability to control whether Duplicate Receipts include EFTPOS Receipt Data via a Yes/No Option. This setting applies to Duplicate Receipts that are printed either via the Receipt button after the sale has been tendered or when printing a duplicate receipt via the Journal History Enquiry > Docket Print button.

To configure this functionality, go to: Back Office > Setup > Yes/No Options > Search: Duplicate.
Toggle Yes/No Option "Duplicate Receipts include Eftpos Receipt Data" on/off as required.



Duplicate Receipts printed either via the Receipt button or Journal History Enquiry > Docket Print will either show or hide EFTPOS Receipt Data depending on how the Yes/No Option is configured.

Examples shown below:
Below left = Yes/No Option turned off (Duplicate Receipt will exclude EFTPOS Receipt Data).
Below right = Yes/No Option turned on (Duplicate Receipt will include EFTPOS Receipt Data).

```
          I D E A L P O S

          601 Curtin Ave E
        Pinkenba  QLD  4008
            Australia

           TAX INVOICE
          123-456-789-11

       * * *  C O P Y  * * *

#000501-2 Jeremy 13-Oct-2026 15:08:54

- - - - B E V E R A G E - - - -
CAPPUCCINO*                    $3.50
FLAT WHITE*                    $3.50
SHORT BLACK*                   $3.00
                             ----------
T O T A L                     $10.00
                             ----------
GST Amount                     $0.91

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


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

*indicates taxable supply

          Powered by Idealpos
```

```
          I D E A L P O S

          601 Curtin Ave E
        Pinkenba  QLD  4008
            Australia

           TAX INVOICE
          123-456-789-11

       * * *  C O P Y  * * *

#000501-2 Jeremy 13-Oct-2026 15:08:54

- - - - B E V E R A G E - - - -
CAPPUCCINO*                    $3.50
FLAT WHITE*                    $3.50
SHORT BLACK*                   $3.00
                             ----------
T O T A L                     $10.00
                             ----------
GST Amount                     $0.91

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


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

------------------------
 *** MERCHANT COPY ***
  TEST MERCHANT TITLE
   TEST MERCHANT NAME
        LINE2

15:08:48 13/10/26

SAVINGS ACCOUNT

PURCHASE   AUD    $10.00
                 --------
TOTAL      AUD    $10.00

APPROVED - 00
------------------------


*indicates taxable supply

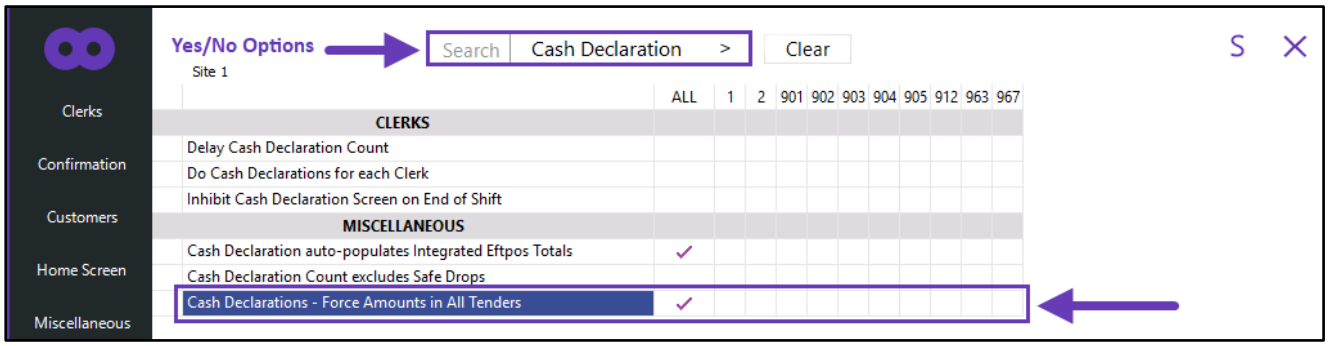
          Powered by Idealpos
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Return to top

IP-8391 – Yes/No Option – Cash Declarations – Force Amounts in All Tenders

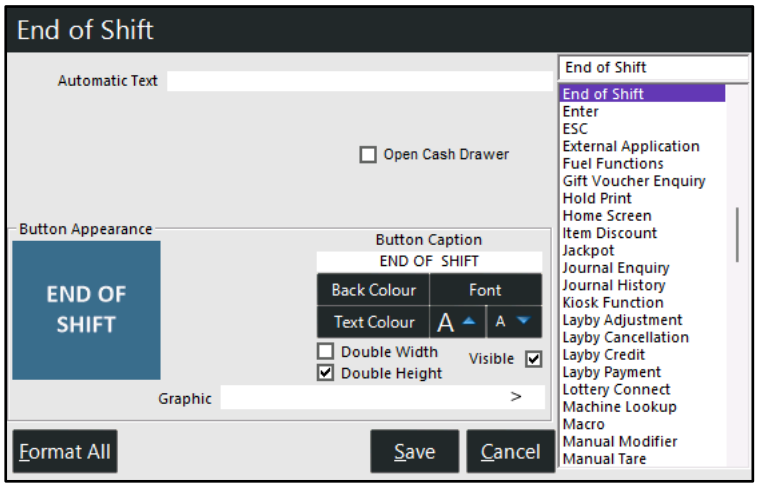
This function introduces the ability to Force an Amount to be entered for all Tender Types on the Cash Declaration window when performing an End of Shift. If there is no amount to enter for a specific Tender Type, 0 will need to be entered. This functionality will prevent Tenders from being missed on the Cash Declaration.

To configure and use this functionality, go to: Back Office > Setup > Yes/No Options.
Search: Cash Declaration
Enable Yes/No Option "Cash Declarations – Force Amounts in All Tenders".



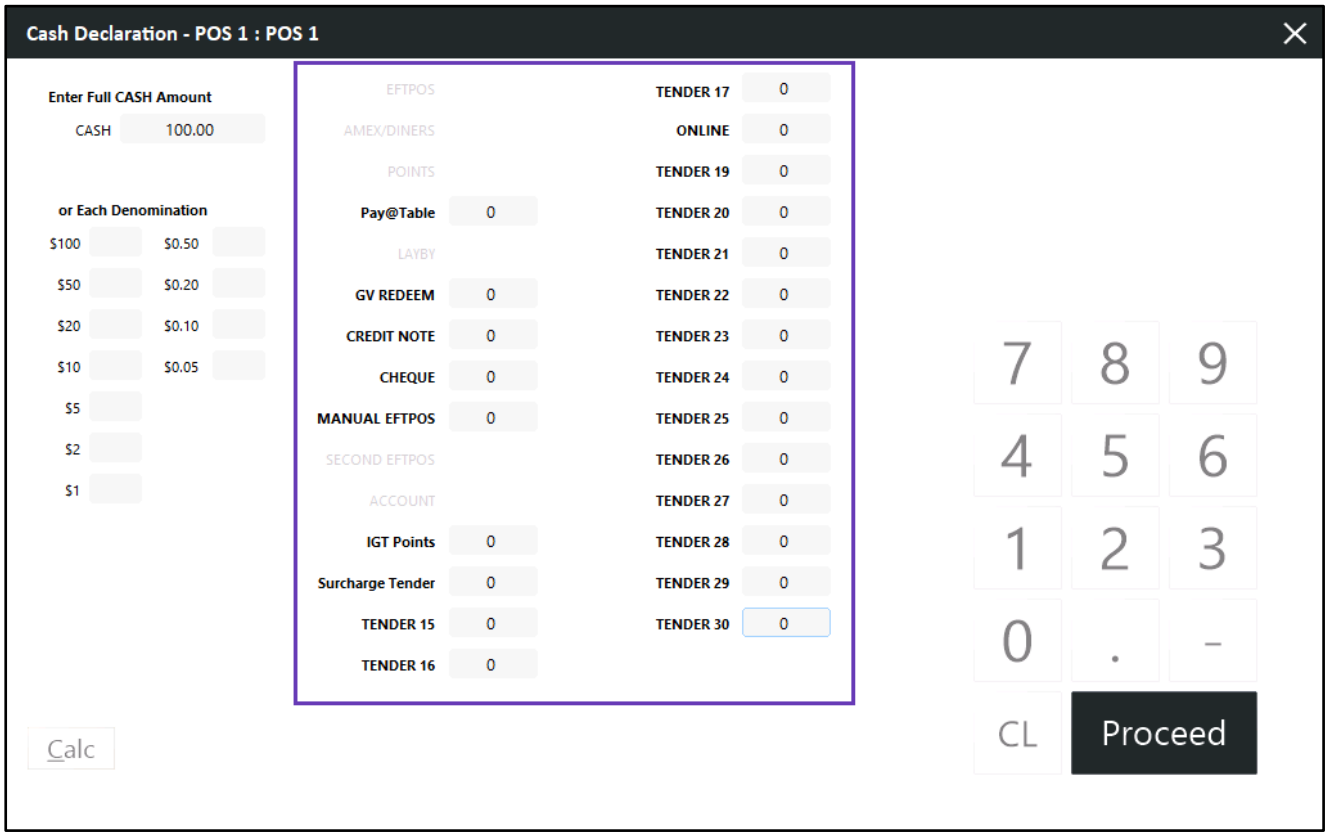
If a button on the POS Screen does not already exist for the End of Shift function, it will need to be created.
Go to: Back Office > Setup > POS Screen > POS Screen Setup > Select a POS Screen Layout > Buttons.
Select a POS Screen Tab > Select a blank/unused button and configure as follows:

- **Function:** End of Shift
- **Button Appearance:** Customise as required.

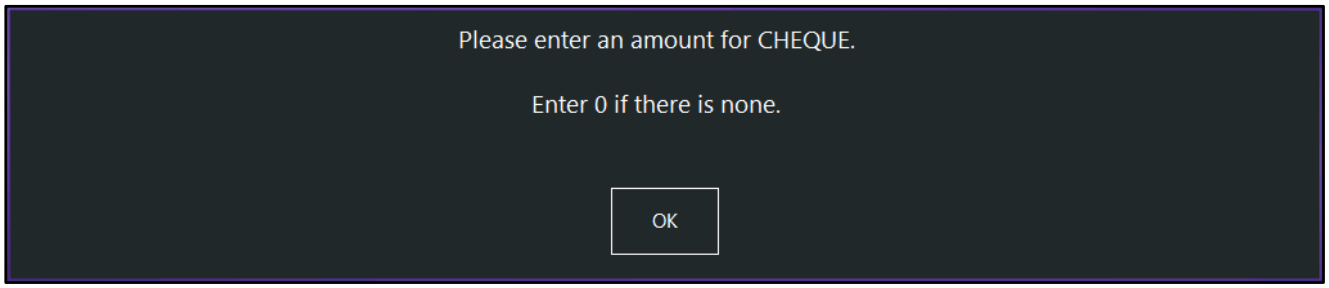


Return to top

Go to: POS Screen
Press the "End of Shift" button > the Cash Declaration window opens.
An Amount will be forced for each Tender Type field.
If there is no amount to enter for a Tender Type, enter a value of 0 as shown in the example below.



If the Proceed button is pressed when a Tender Type is left as blank, a prompt will be displayed prompting to enter an amount for the Tender Type.



After all Tender Types have been populated, the "Proceed" button can be pressed to finalise the Cash Declaration.