Idealpos 10 Build 3 - Update History

Update Details:

END OF SHIFT **2**

IP-8237 – Default Float Entry Amount 2

EXPORT/IMPORT DATA **4**

IP-8269 – Stock Items Export – Support for Product Number field 4

IP-8260 – Metcash – Export/Import Departments – Support for Metcash Linking Fields 6

GAMING **10**

IP-8142 – Gaming Points Redemptions – Support Non-Discounted Buckets and Discounted Buckets 10

METCASH INTEGRATION **11**

IP-8216 – Metcash Host – Support for HO/SM modules 11

POCKET PAD **12**

IP-8275 – Pocket Pad – Support for Names on Tables 12

POS TERMINAL SETTINGS **16**

IP-8271 – User-Defined Option to Hide User-Defined Copy and Remove buttons 16

PROGRAMMABLE BARCODES **18**

IP-8288 – Programmable Barcodes – Standard Search if Programmable Item not found 18

REPORT HUB **20**

IP-8253 – Report Hub – New Journal Report Type Reports 20

SHORTCUTS **24**

IP-8262 – Shortcuts – Easy access to Collapse All/Expand All Functions 24

STOCK ITEM ATTRIBUTES **25**

IP-8186 – Attribute Types – Default Column field to prefill when Adding Stock Items 25

SURCHARGES **27**

IP-8205 – Surcharges On/Off Functionality 27

XCHANGEIT LOTTERY INTERFACE **33**

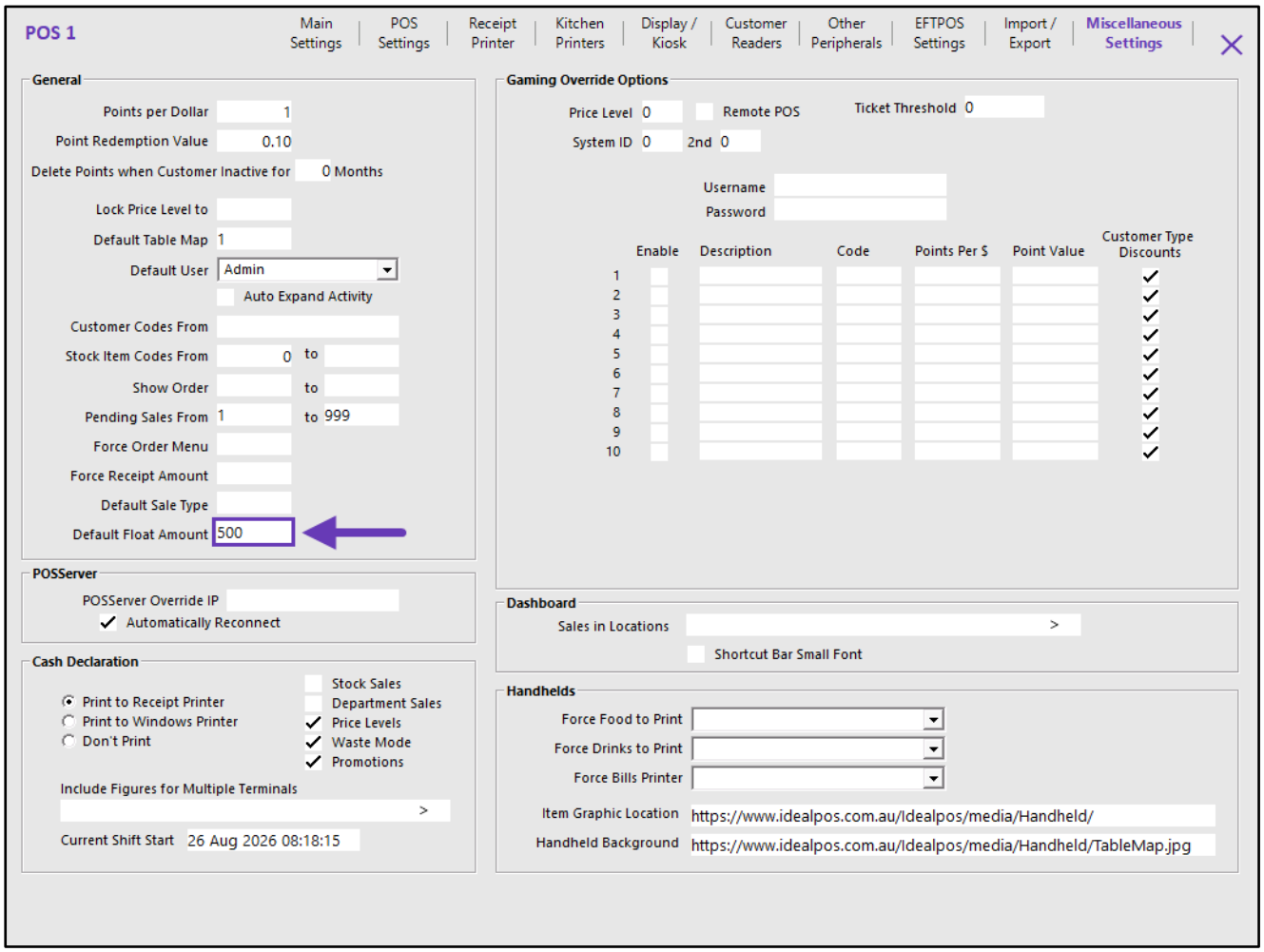
IP-8151 – XchangeIT Lottery Interface 33

End of Shift

IP-8237 – Default Float Entry Amount

This functionality introduces the ability to set a Default Float Entry Amount.
This can be utilised when a venue always fills the float with the same cash amount, removing the need for the Clerk to manually enter the amount each time.

To configure and use this functionality, go to:
Back Office > Setup > POS Terminals > Select a POS Terminal > Modify > Miscellaneous Settings.
Enter the desired amount into the Default Float Amount field.

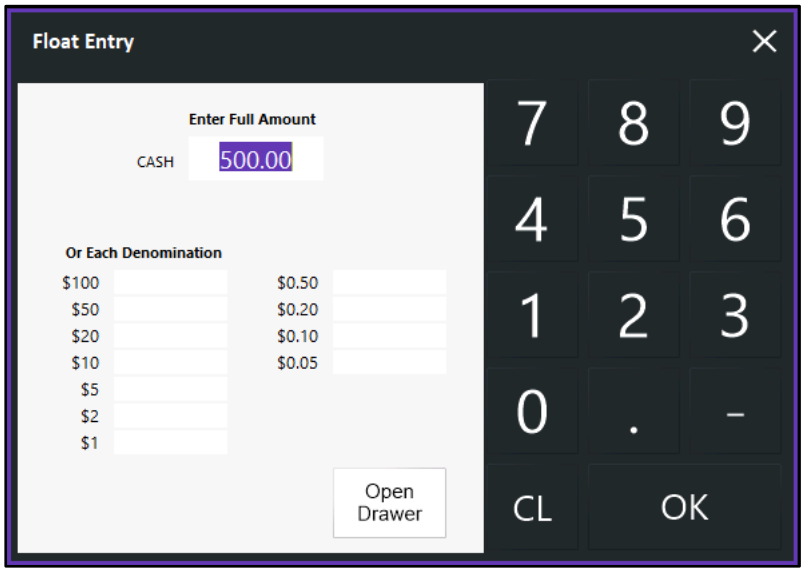


Close the Modify POS Terminal window.
Repeat the above process for each POS Terminal that requires a Default Float Amount.

Return to top

When the Clerk logs in, the Float Entry will be displayed; the Default Float Entry Amount will be pre-filled in the CASH field.

Note – If the Float Entry function has not been used before, an End of Shift will need to be performed to activate the Float Count Entry for the first time; Perform an End of Shift by pressing the "End of Shift" button.



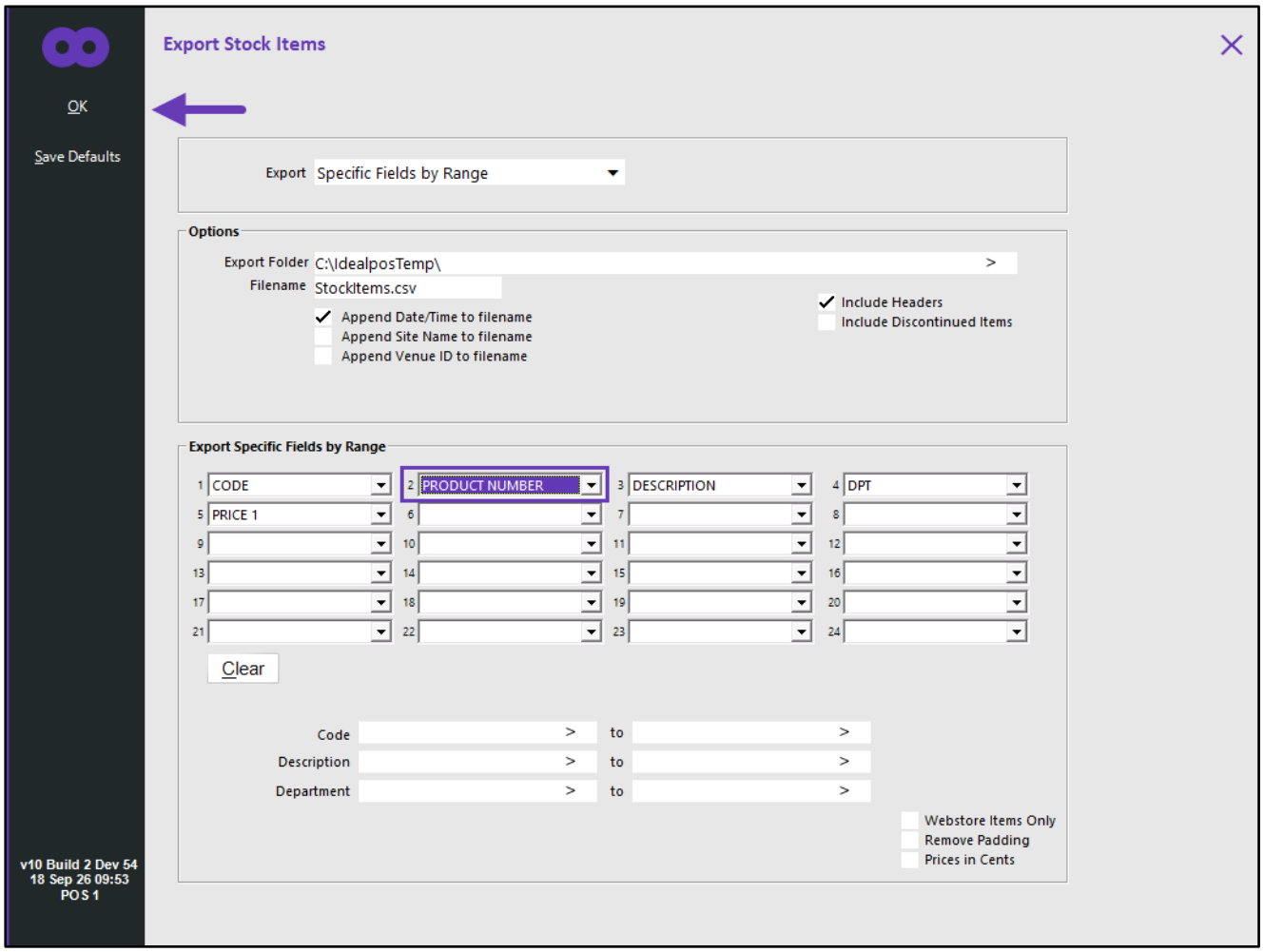
Export/Import Data

IP-8269 – Stock Items Export – Support for Product Number field

This functionality introduces the ability to export the Product Number field in the Stock Items Export.
The Product Number is stored in the National Product Number field in the Stock Item Advanced tab.
If WEX Fuel Cards are enabled with Quest EFTPOS, the National Product Number field in the Stock Item Advanced tab appears as Quest Product Number; the Quest Product Number will be exported when exporting the Product Number.

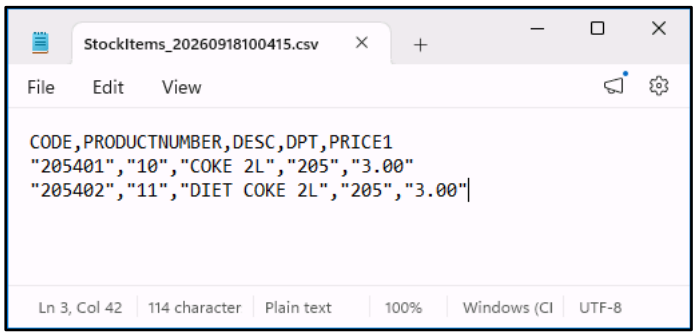
To use this functionality, go to: Back Office > Utilities > Export Data > Stock Items > Export Specific Fields by Range.
The Product Number field is also available when using the Automatic Export Format.

In one of the 24 dropdown boxes under Export Specific Fields by Range, select "PRODUCT NUMBER".
Also ensure that the Export Folder, Filename and other options are toggled as required.
Press "OK" to commence the Export.

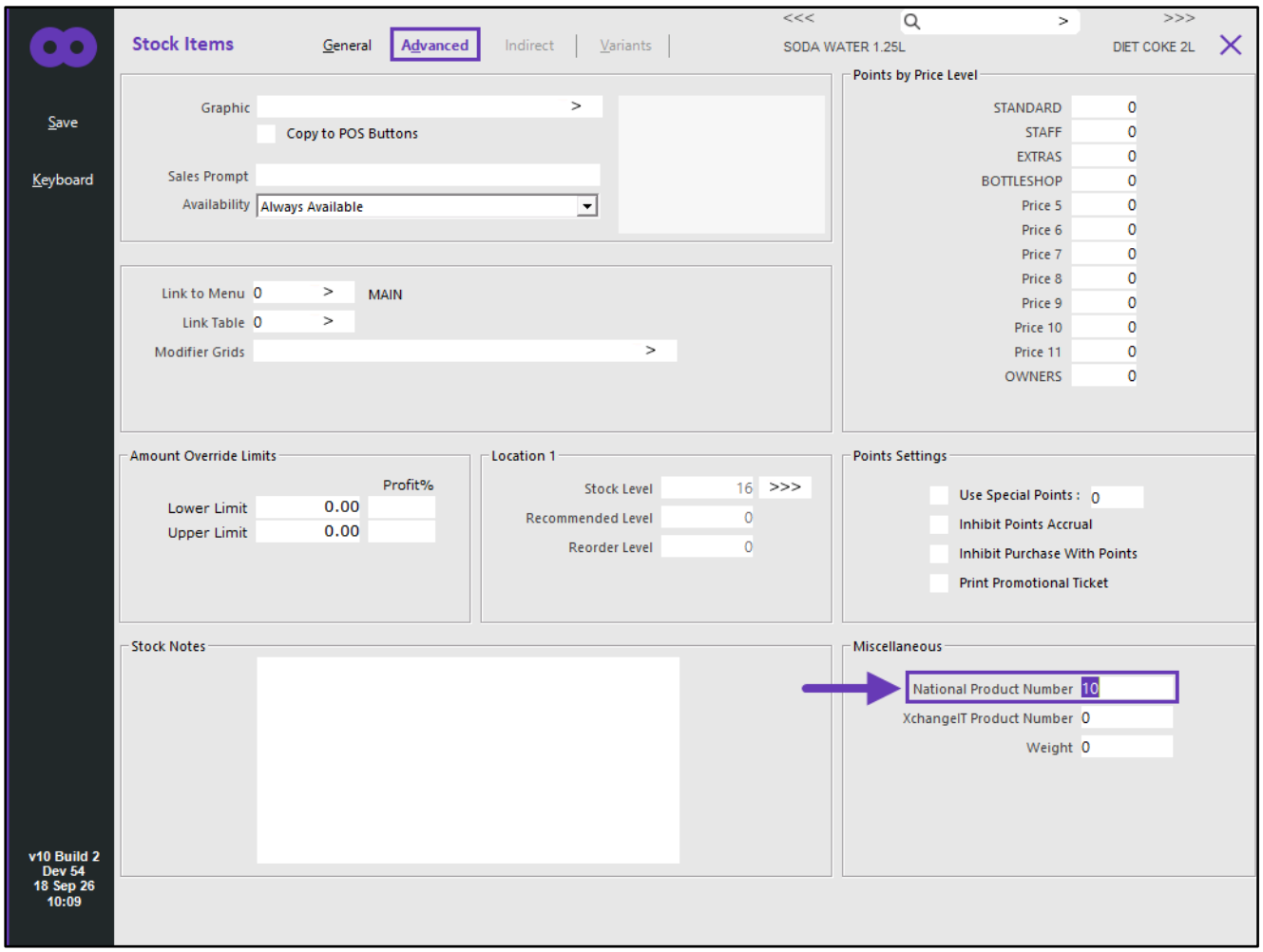


Return to top

The Stock Items as exported to the Folder/Filename configured above.
The Product Number is included in the Export.



The Product Number appears in the Stock Item Advanced tab.
Go to: Back Office > File > Stock Control > Stock Items > Select a Stock Item > Modify > Advanced > National Product Number.

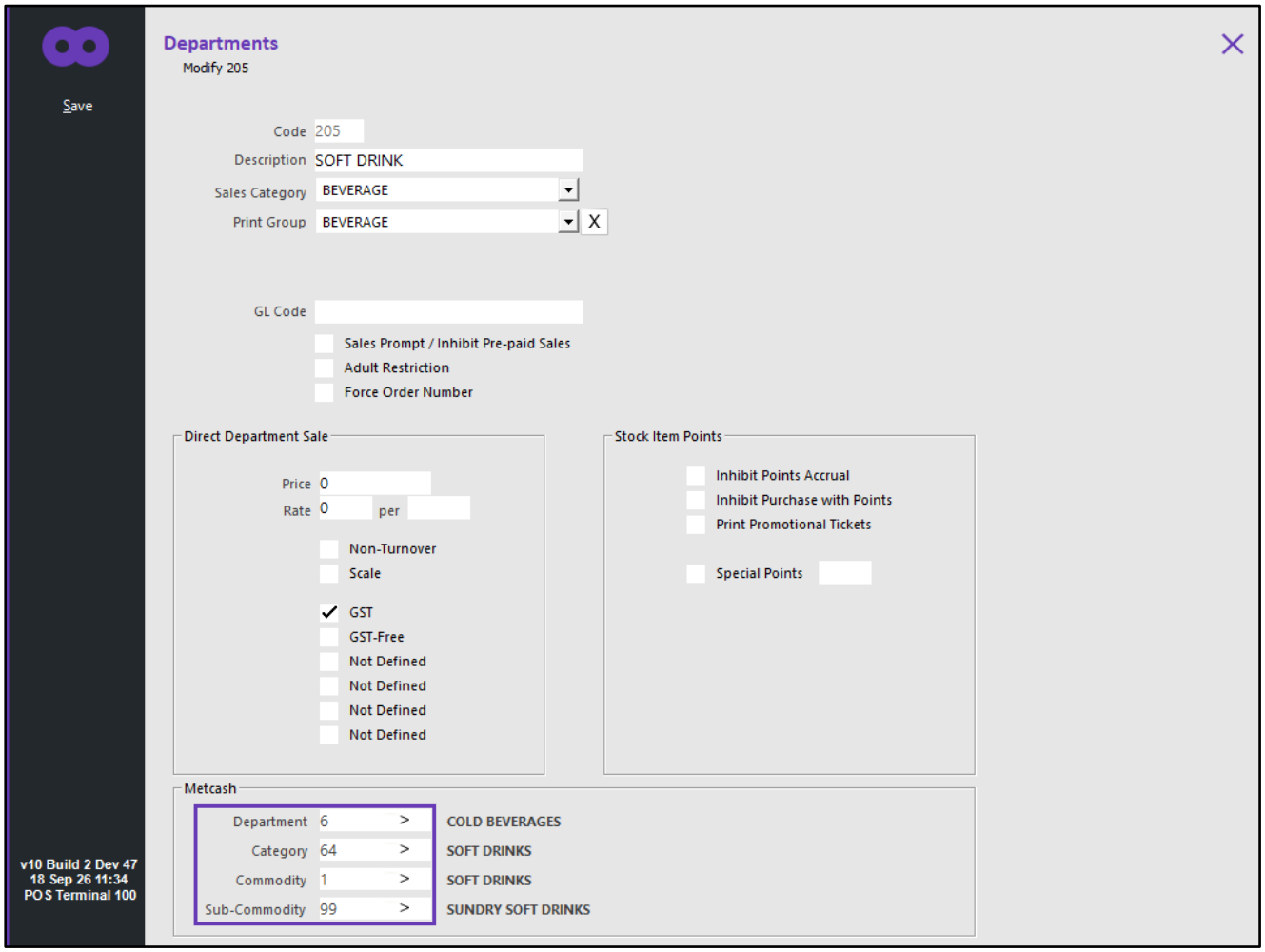


Return to top

IP-8260 – Metcash – Export/Import Departments – Support for Metcash Linking Fields

This functionality adds support for Metcash Linking Fields when Exporting or Importing Departments.
This functionality only works when the Metcash Basic or Metcash Advanced module is enabled in the Licence Gateway.
This functionality is only for importing Departments and linking them to Metcash MSC fields using existing Metcash MSC data that has been previously imported via a Metcash Host.
This functionality will not import the actual Metcash MSC data (e.g. the Metcash Departments, Metcash Categories, Metcash Commodities, Metcash Sub-Commodities) as this is done via the Metcash Host File Import.

The Metcash Linking Fields are the Department, Category, Commodity and Sub-Commodity fields that appear in the Metcash section when modifying a Department via Back Office > File > Sales > Departments > Select a Department > Modify.



Return to top

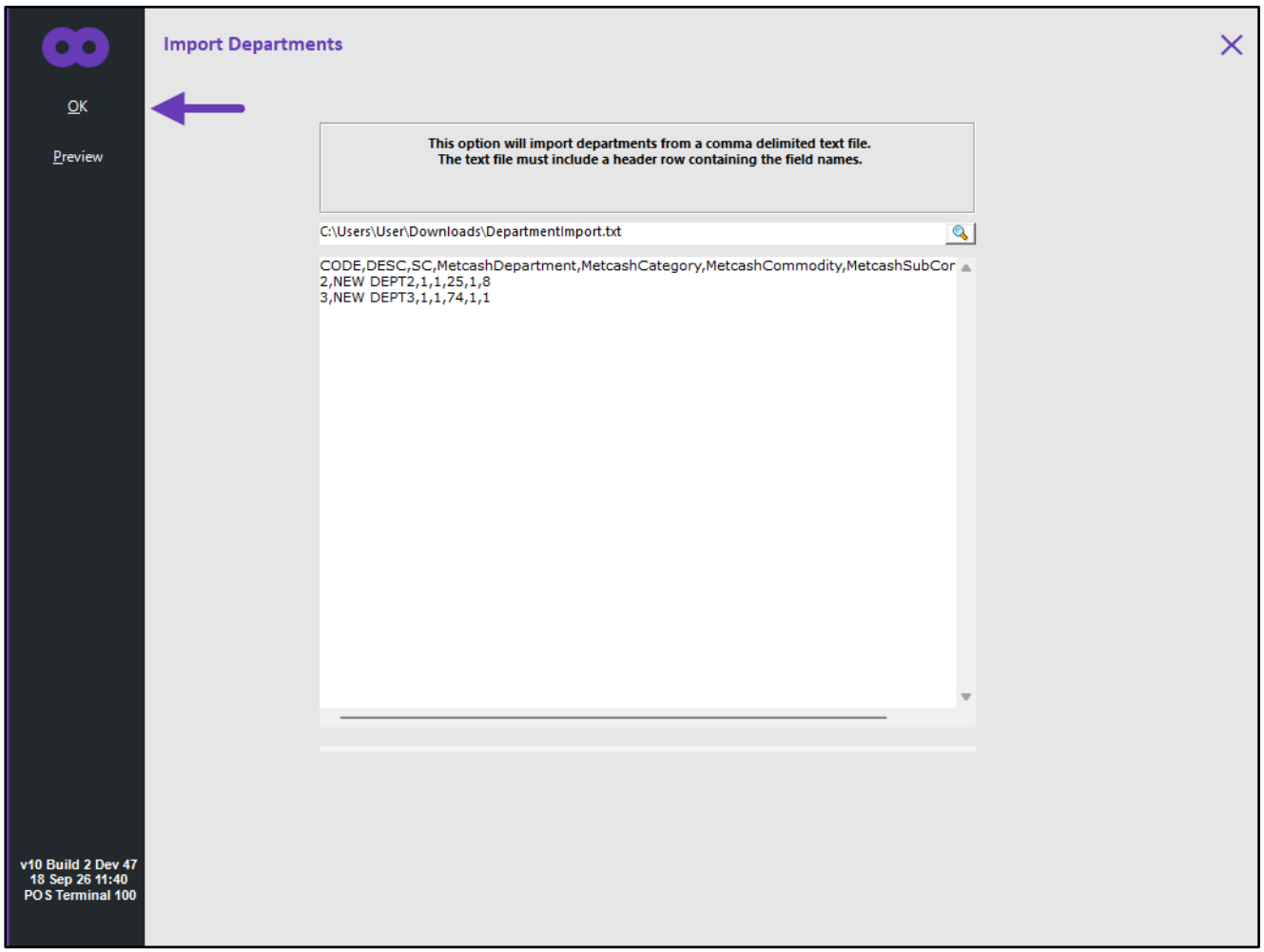
When using the Import Departments functionality to import Metcash Linking Fields, use the following headers, noting that **all 4 fields must be included** in the import file.
MetcashDepartment, MetcashCategory, MetcashCommodity, MetcashSubCommodity

When specifying the Metcash Linking Fields in an import file, note that the Metcash MSC data must be a valid combination.
E.g. When importing the data, ensure that the MetcashSubCommodity is associated with the MetcashCommodity which is associated with the MetcashCategory which is associated with the MetcashDepartment.

An example of a basic import file is shown below:

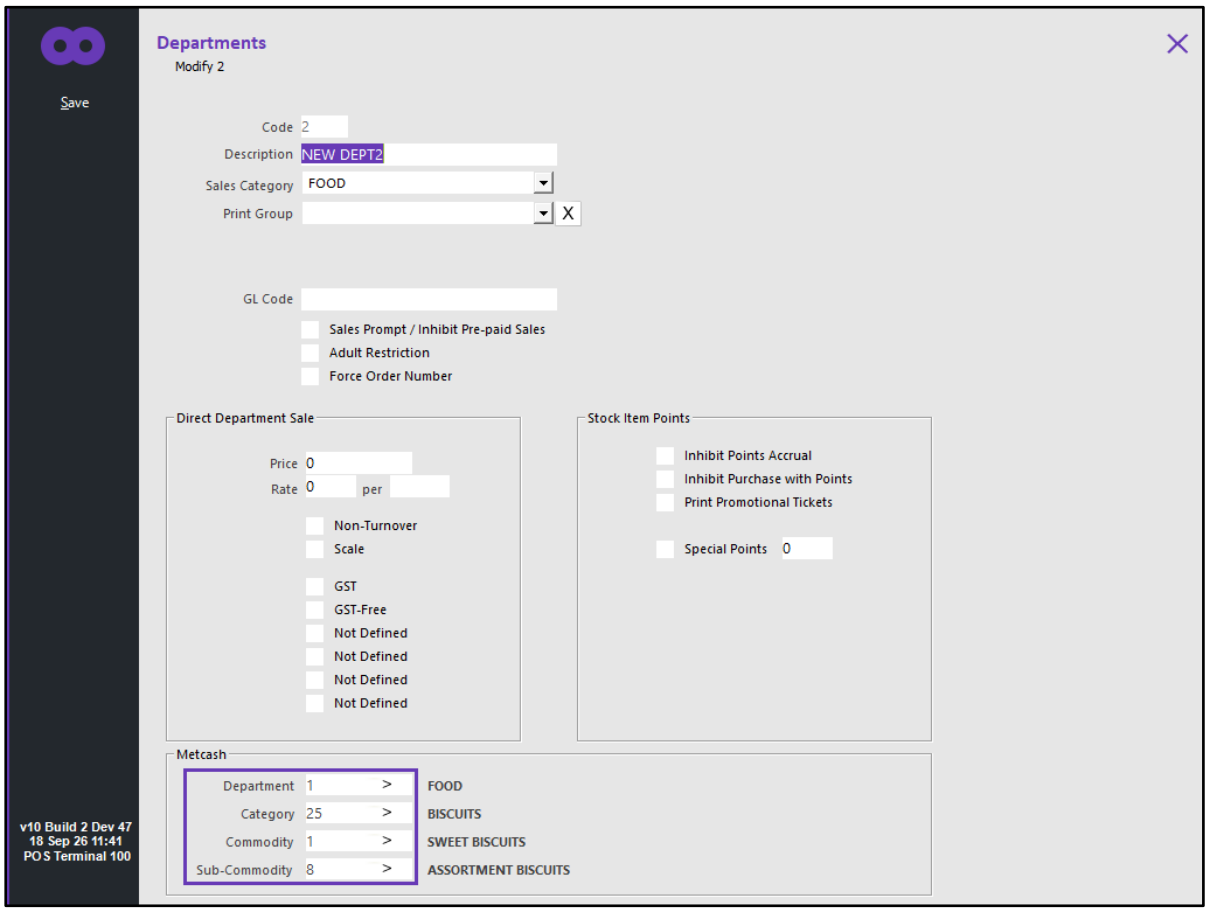
CODE,DESC,SC,MetcashDepartment,MetcashCategory,MetcashCommodity,MetcashSubCommodity
2,NEW DEPT2,1,1,25,1,8
3,NEW DEPT3,1,1,74,1,1

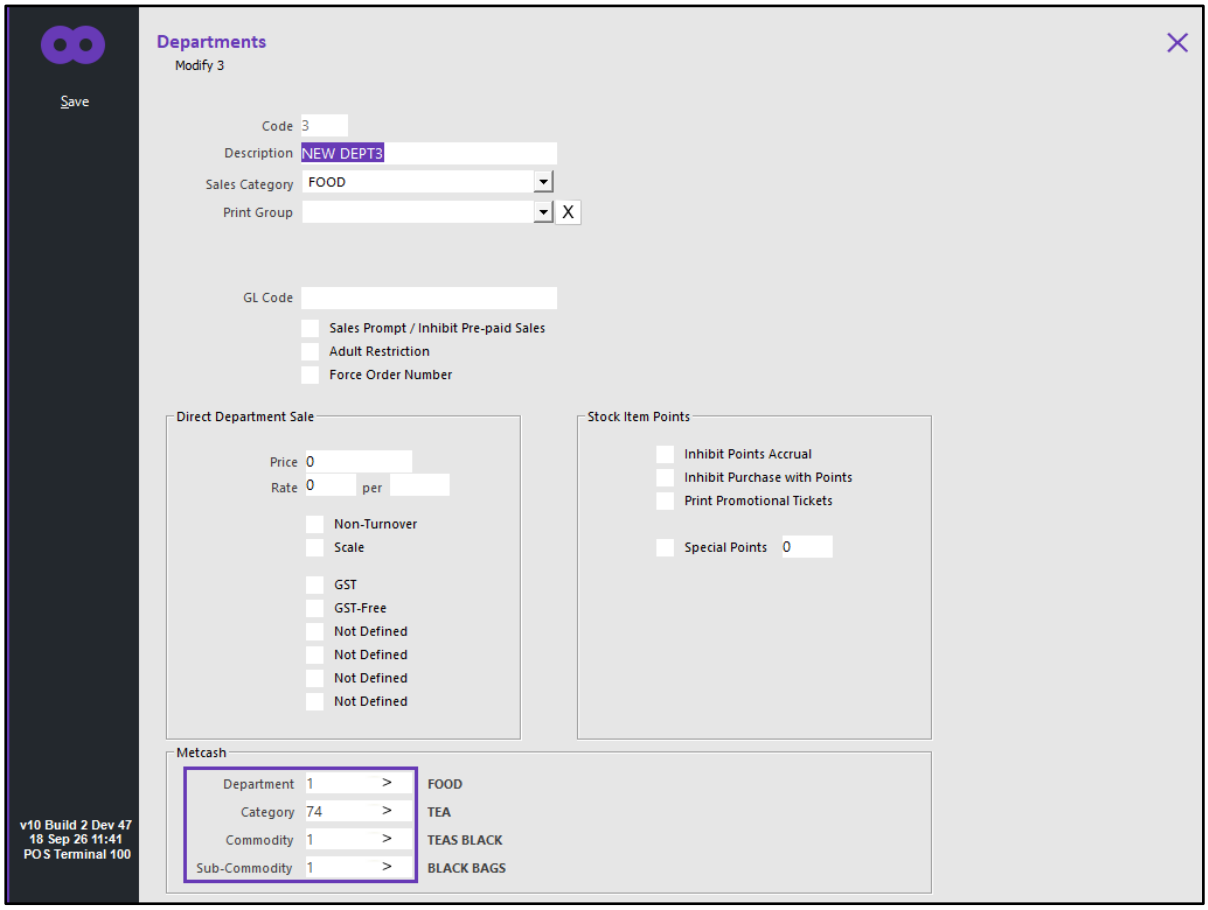
To import new Departments with Metcash Linking fields, go to: Back Office > Utilities > Import Data > Departments. Browse to the folder/file that contains an import file containing the above Headers > Import.



Return to top

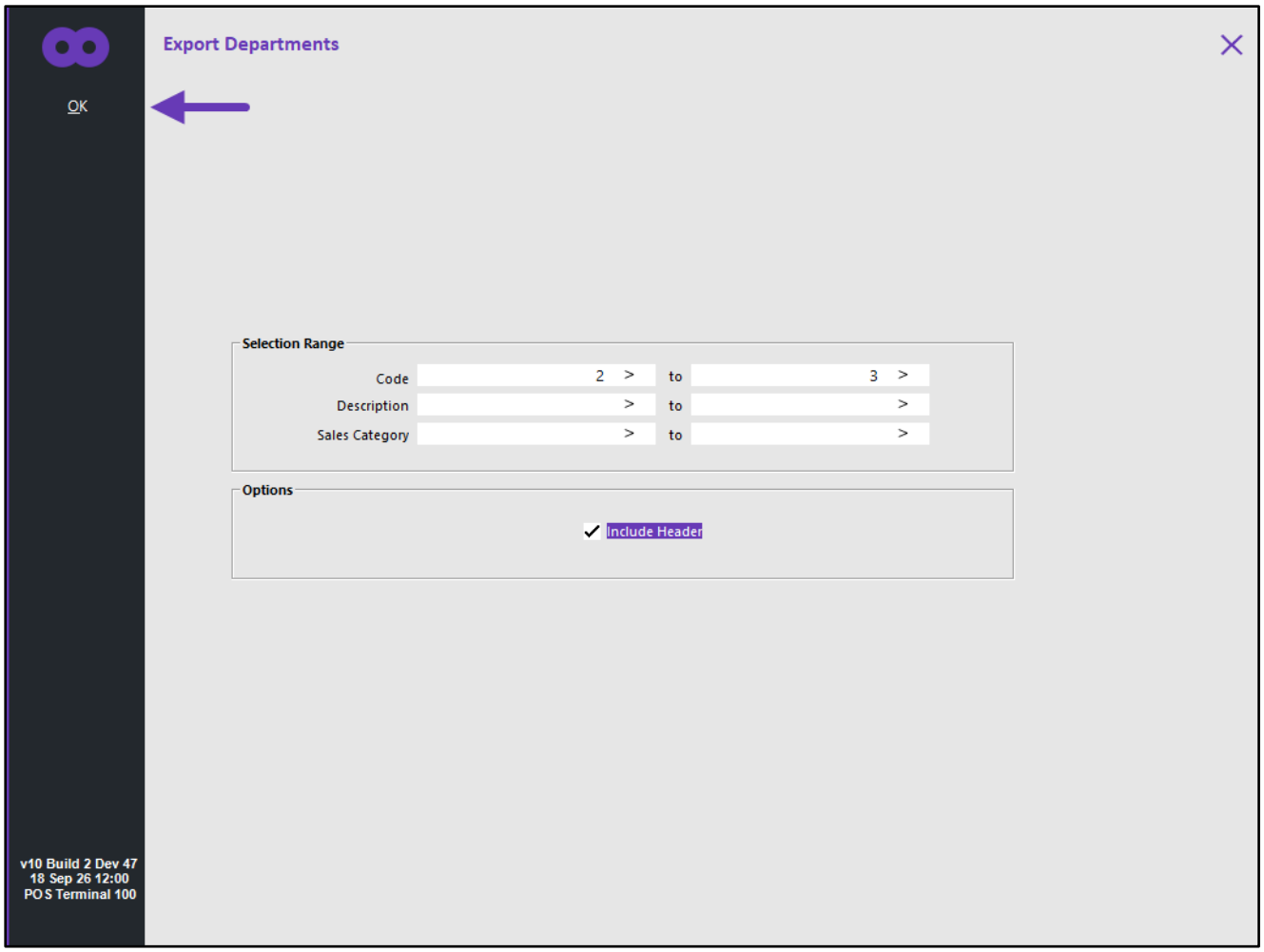
After importing the Departments, (assuming sample Host data supplied by Metcash was previously imported), the Departments will be linked to the following Metcash Linking Fields.





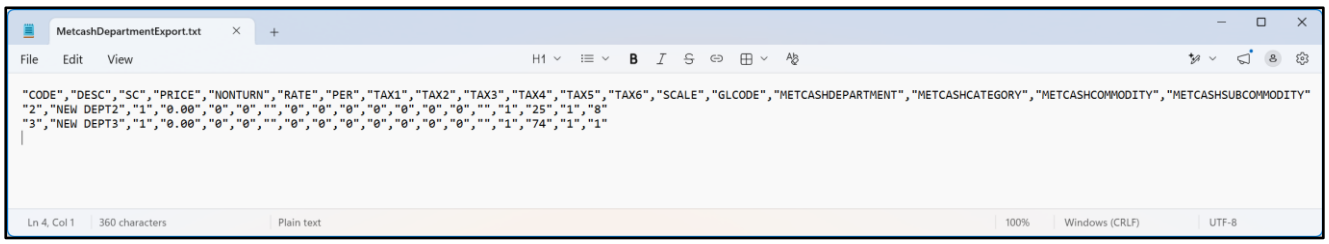
Return to top

A Department Export will also include the Metcash Linking Fields.
Go to: Back Office > Utilities > Export Data > Departments.
If required, enable “Include Header” and choose the Selection Range to export > Press “OK”



After pressing “OK”, choose a Folder and Filename > Save.

The Departments will be exported with the Metcash Linking Fields.
The below is an example of the exported Departments with the Metcash Linking Fields.



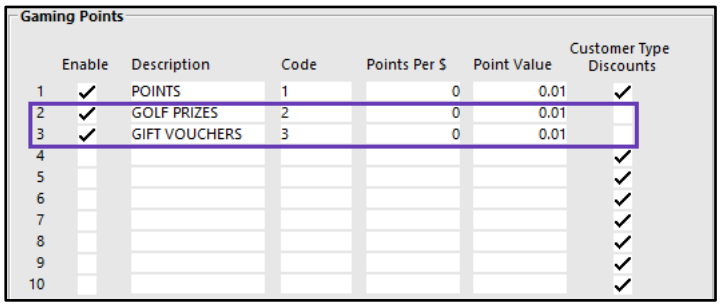
"CODE","DESC","SC","PRICE","NONTURN","RATE","PER","TAX1","TAX2","TAX3","TAX4","TAX5","TAX6","SCALE","GLCODE
","METCASHDEPARTMENT","METCASHCATEGORY","METCASHCOMMODITY","METCASHSUBCOMMODITY"
"2","NEW DEPT2","1","0.00","0","0","","0","0","0","0","0","0","0","","1","25","1","8"
"3","NEW DEPT3","1","0.00","0","0","","0","0","0","0","0","0","0","","1","74","1","1"

Gaming

IP-8142 – Gaming Points Redemptions – Support Non-Discounted Buckets and Discounted Buckets

This functionality adds support for Non-Discounted Buckets and Discounted Buckets when performing Gaming Points Redemptions.

I.e. In Back Office > Setup > Global Options > Gaming > Gaming Points > Customer Type Discounts which are enabled and disabled

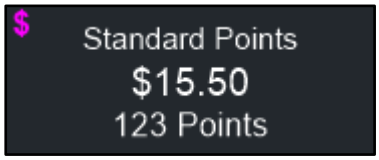


Gaming Points

	Enable	Description	Code	Points Per $	Point Value	Customer Type Discounts
1	✓	POINTS	1	0	0.01	✓
2	✓	GOLF PRIZES	2	0	0.01	
3	✓	GIFT VOUCHERS	3	0	0.01	
4						✓
5						✓
6						✓
7						✓
8						✓
9						✓
10						✓

Part of this change allows the full amount to be paid on the chosen bucket which is non-discounted.
As multiple amounts can be displayed and selecting POINTS on the Tender Grid with the amount to pay (typically the entire sale is paid with points, or the remaining Points balance), the title of the bucket choosing form has been changed to "Choose Point Type".

In addition, the buckets that will get the automatic discount will display a small pink symbol on the top left.



Metcash Integration

IP-8216 – Metcash Host – Support for HO/SM modules

This functionality adds support for Metcash Host functionality to be used with Head Office/Site Management.
This functionality is currently intended to have Metcash Scan Data handled across a group with Head Office/Site Management.
E.g.
At Head Office, Import the Metcash Host > link Metcash Products to Idealpos Stock Items either automatically, manually and via Department linking.
When creating new Idealpos Stock Items from the Metcash Products, the new Stock Items will contain the MSC data > Stock Items can then be copied from the base items to the Sites > Stock Items are created at the Site Management Terminals with MSC data.
MSC data for Stock Items will be sent back to Metcash as the items are sold.

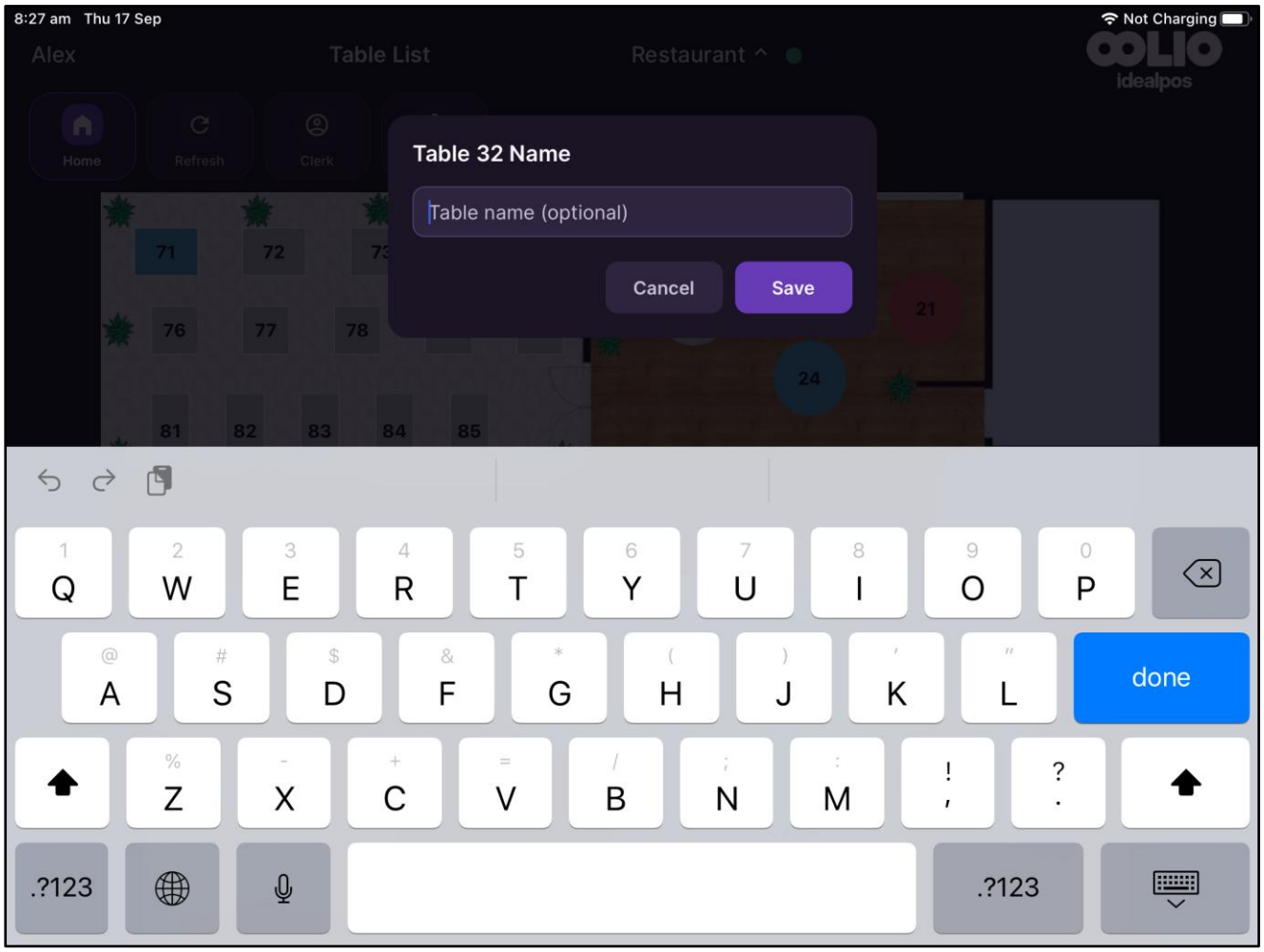
As part of this functionality, the Metcash Linking Fields (Metcash Department, Metcash Category, Metcash Commodity, Metcash Sub-Commodity) are also correctly populated at the Head Office and the Site Management Terminals.

Pocket Pad

IP-8275 – Pocket Pad – Support for Names on Tables

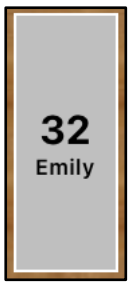
This functionality adds support for Names on Tables in Pocket Pad.
Pocket Pad can now display the Name that has been set on a Table as well as being able to set or modify a Table Name.
To utilise this functionality, Pocket Pad v3.1.9 or higher is required.

To set a Table Name in Pocket Pad, long-press on a Table > The Table Name prompt appears > Enter a Name.

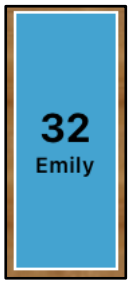


Return to top

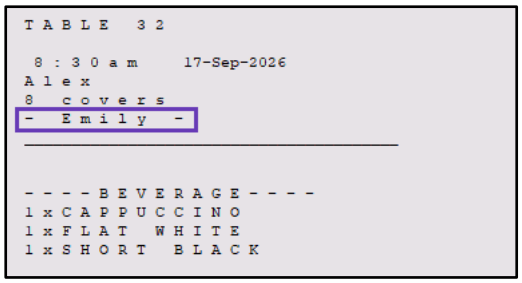
The entered name is displayed on the Table in Pocket Pad.



Select the Table > Press "Start Order" > Add Items > Send the Order > The Table Status changes to Ordered.

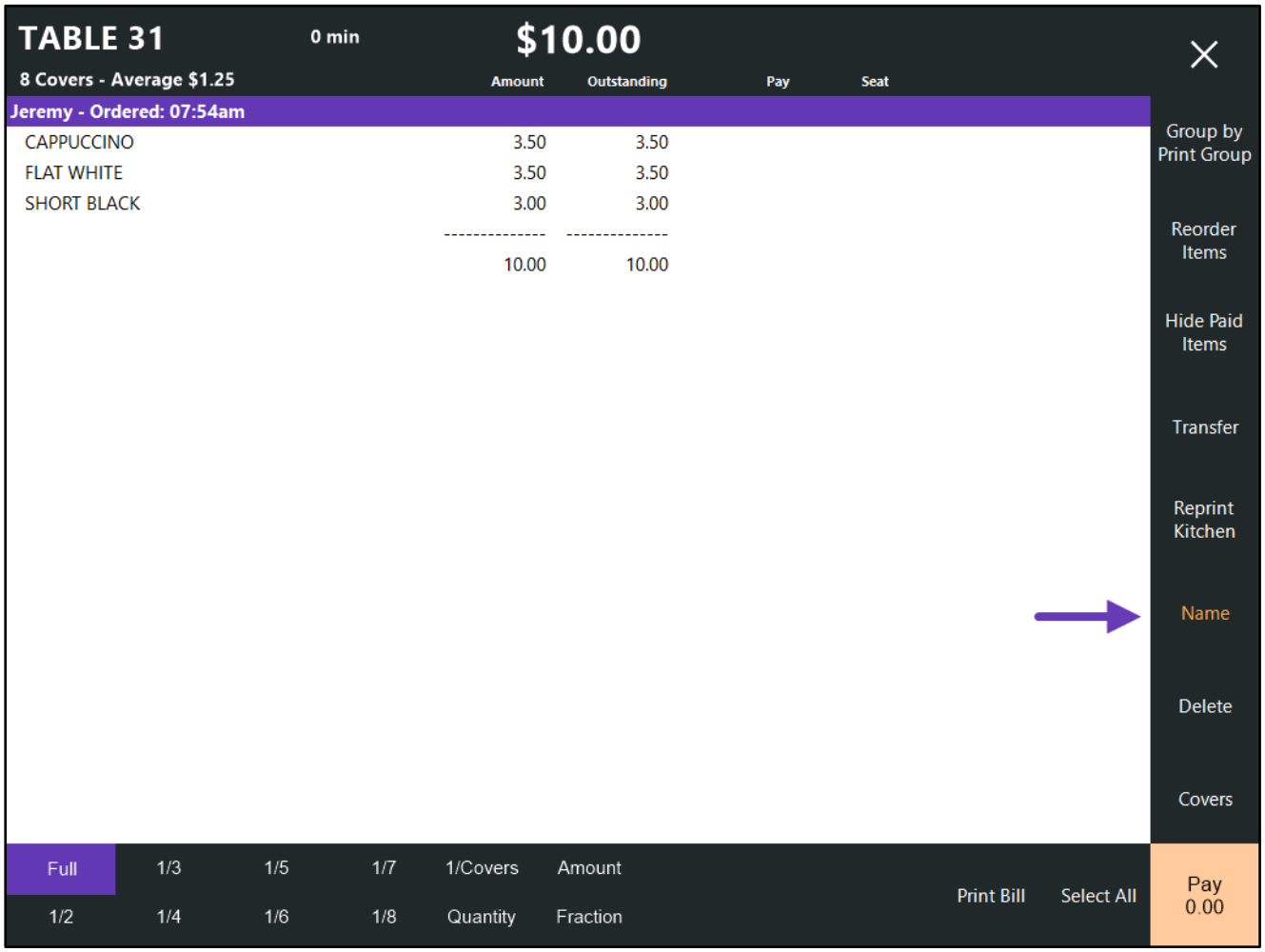


The Table Name is printed on the Kitchen Docket.

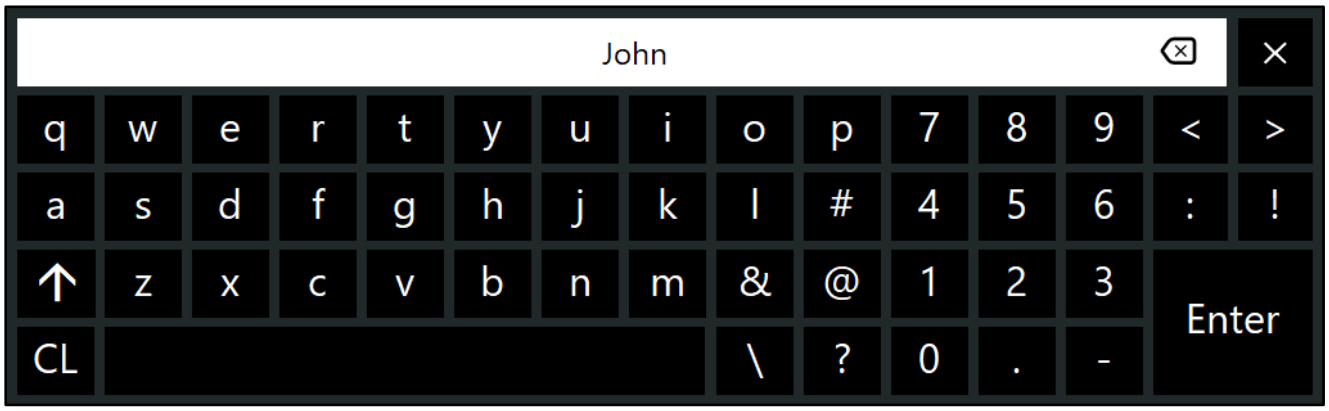


Return to top

Table Names that are set from Idealpos will be displayed in Pocket Pad.
E.g. From the POS Screen > Press the "Table Map" button > select a Table > Press "Details".
Press the "Name" button to set a Table Name (Note; the Name .



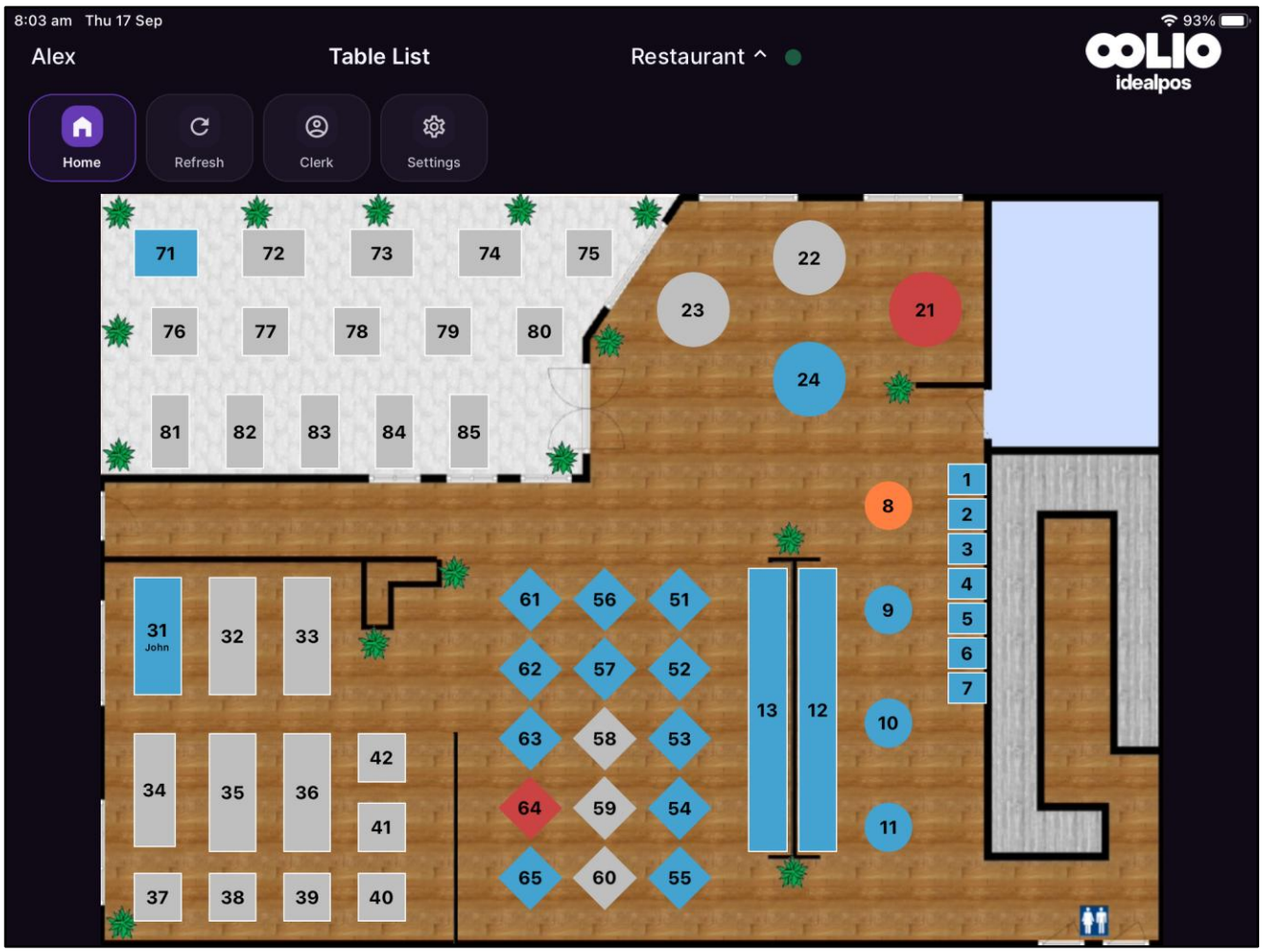
Enter a Table Name with the on-screen keyboard.



The Table Name is shown on the Idealpos Table Map.

Return to top

The Table Name will be displayed in Pocket Pad.

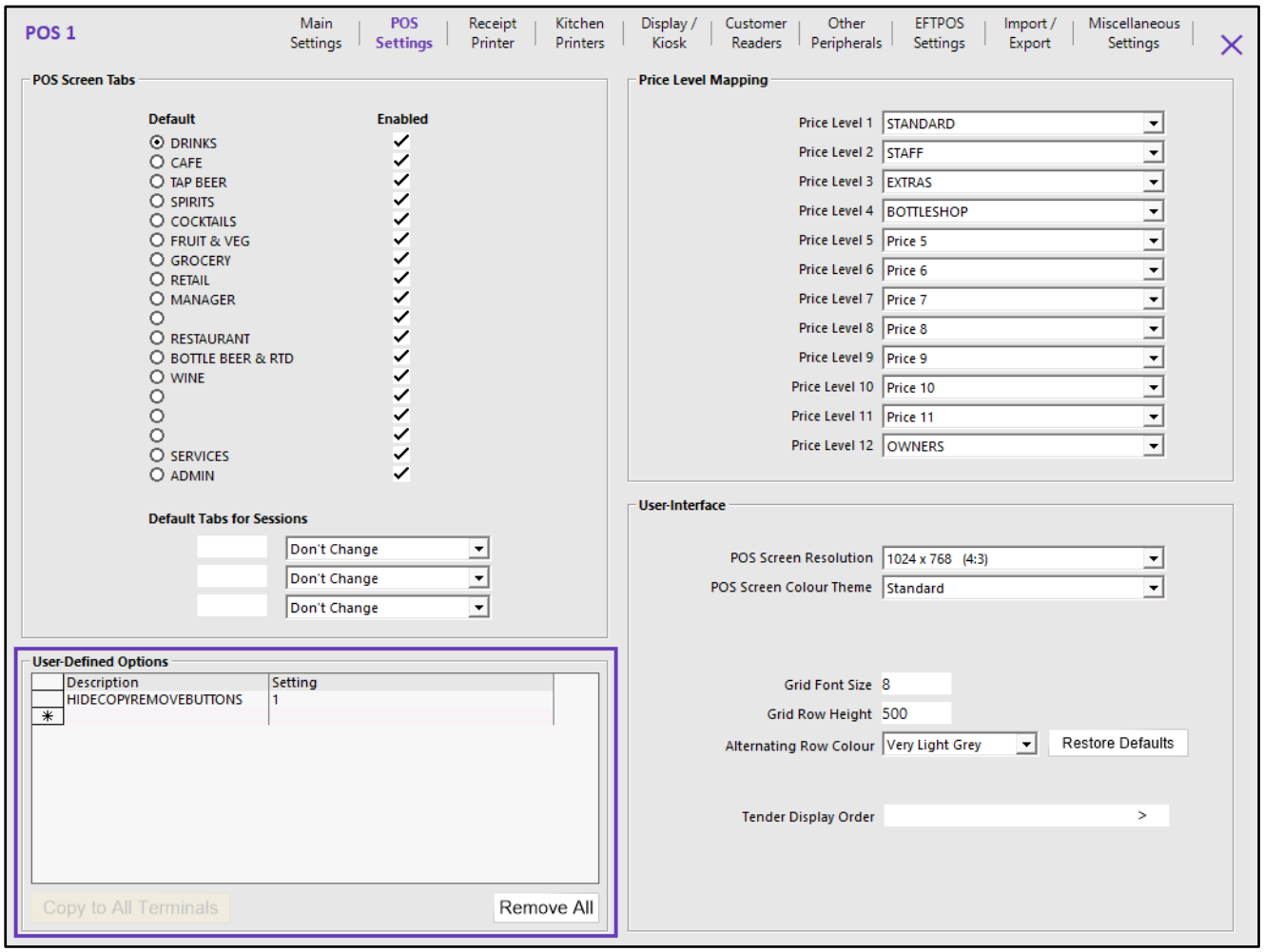


POS Terminal Settings

IP-8271 – User-Defined Option to Hide User-Defined Copy and Remove buttons

This functionality introduces the ability to hide the Copy and Remove buttons that appear below the User-Defined Options section in the POS Terminal Settings.
To configure this functionality, go to:
Back Office > Setup > POS Terminals > Select a POS Terminal > Modify > POS Settings tab.
Create the following User-Defined Option:

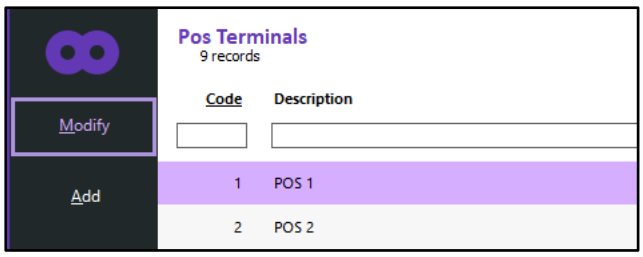
- **Description:** HIDECOPYREMOVEBUTTONS
- **Setting:** 1



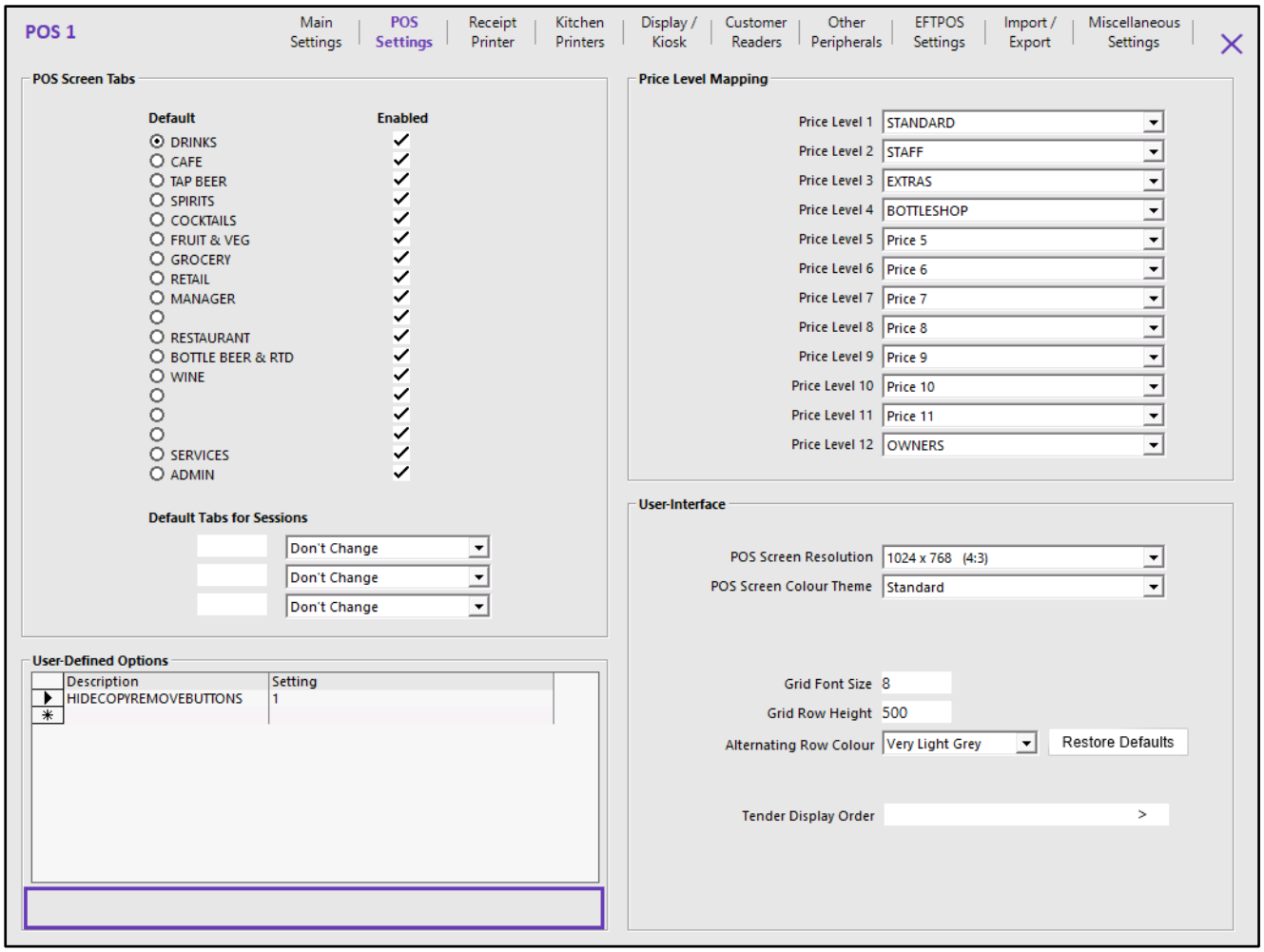
Close the Modify POS Terminal window.

Return to top

Select the same POS Terminal > Modify.



Select the "POS Settings" tab.
The "Copy to All Terminals" and "Remove All" buttons are now hidden for the POS Terminal that contains the HIDECOPYREMOVEBUTTONS User-Defined Option in its list of User-Defined Options.
In the above steps/example, the User-Defined Option was created on POS 1.
When the POS Terminal settings for POS 1 are modified from POS 1 or any other POS Terminal, the "Copy to All Terminals" and "Remove All" buttons will be hidden for POS 1 as shown in the example below.



If required, repeat the above process to create the User-Defined Option for each POS Terminal that requires the "Copy to All Terminals" and "Remove All" buttons to be hidden.

Programmable Barcodes

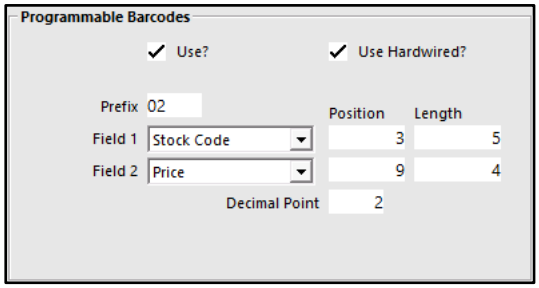
IP-8288 – Programmable Barcodes – Standard Search if Programmable Item not found

This functionality will perform a standard search if the scanned programmable barcode item is not found.
This functionality will trigger when a store has standard Scan Codes which fall in the same range as Programmable Barcodes.

Two example scenarios are outlined below that show how this works.

Scenario 1 – Programmable Barcodes option used from Global Options > Sales

The Programmable Barcodes section in Idealpos (Back Office > Setup > Global Options > Sales) is configured as follows:



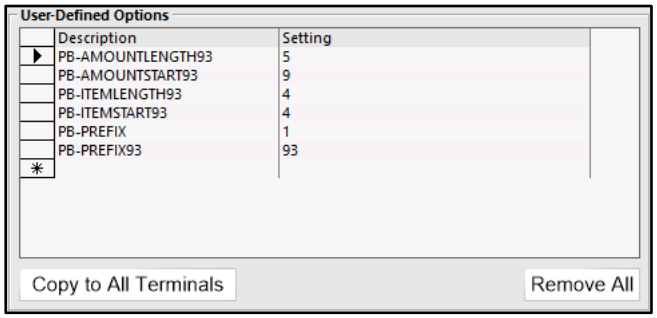
Stock Item Code	Stock Item Scan Code Field	Barcode Printed on Product	Programmable?	Behaviour
1	0200600000008	0200600000008	No	When the Barcode is scanned on the POS Screen and it doesn't return a match based on the Programmable Barcodes settings in Global Options > Sales, a standard search will be done using the Scan Code – if it matches a Stock Item, the matching Stock Item is added to the sale using the Stock Item's Sell Price. Prior to this change, the POS Screen would display an "Item Not Found" message as it didn't do a standard search when the Programmable Barcode Item wasn't found.
191	Blank	0200191113460	Yes	When the Barcode is scanned on the POS Screen and it returns a match to a Stock Item Code based on the Stock Code position in the barcode as-per the Programmable Barcodes settings in Global Options > Sales, the item is added to the sale using the price or quantity from the barcode (depending on whether Price or Quantity is set in the Programmable Barcodes settings).

Return to top

Scenario 2 – User-Defined Options with Programmable Barcode configuration

User-Defined Options exist in Back Office > Setup > POS Terminals > Modify > POS Settings as follows:

- PB-AMOUNTLENGTH93=5
- PB-AMOUNTSTART93=9
- PB-ITEMLENGTH93=4
- PB-ITEMSTART93=4
- PB-PREFIX=1
- PB-PREFIX93=93

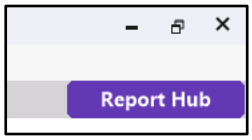


Stock Item Code	Stock Item Scan Code Field	Barcode Printed on Product	Programmable?	Behaviour
2	9317471008437	9317471008437	No	When the Barcode is scanned on the POS Screen and it doesn't return a match based on the Programmable Barcode User-Defined Options, a standard search will be done using the Scan Code – if the scanned Barcode matches a Stock Item, the matching Stock Item is added to the sale using the Stock Item's Sell Price. Prior to this change, the POS Screen would display an "Item Not Found" message as it didn't do a standard search when the Programmable Barcode Item wasn't found.
160	Blank	9300160600562	Yes	When the Barcode is scanned on the POS Screen and it returns a match to a Stock Item Code based on the Stock Code position in the barcode as-per the User-Defined Options, the item is added to the sale using the price from the barcode.

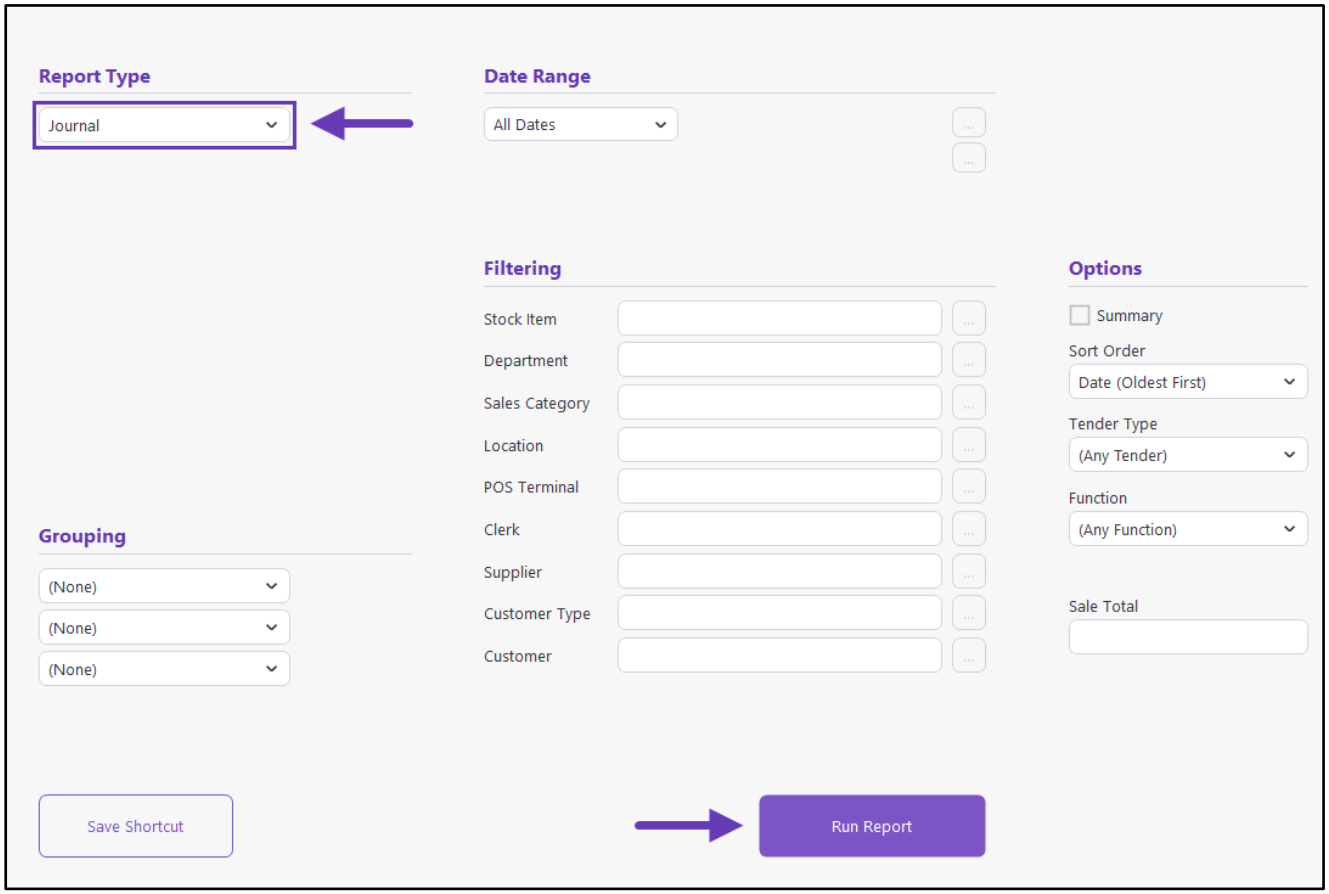
Report Hub

IP-8253 – Report Hub – New Journal Report Type Reports

This functionality adds a new "Journal" Report Type to the Report Hub.
To access and run the Journal Report Type in the Report Hub, go to:
Back Office Dashboard > Press "Report Hub" on the top-right corner.

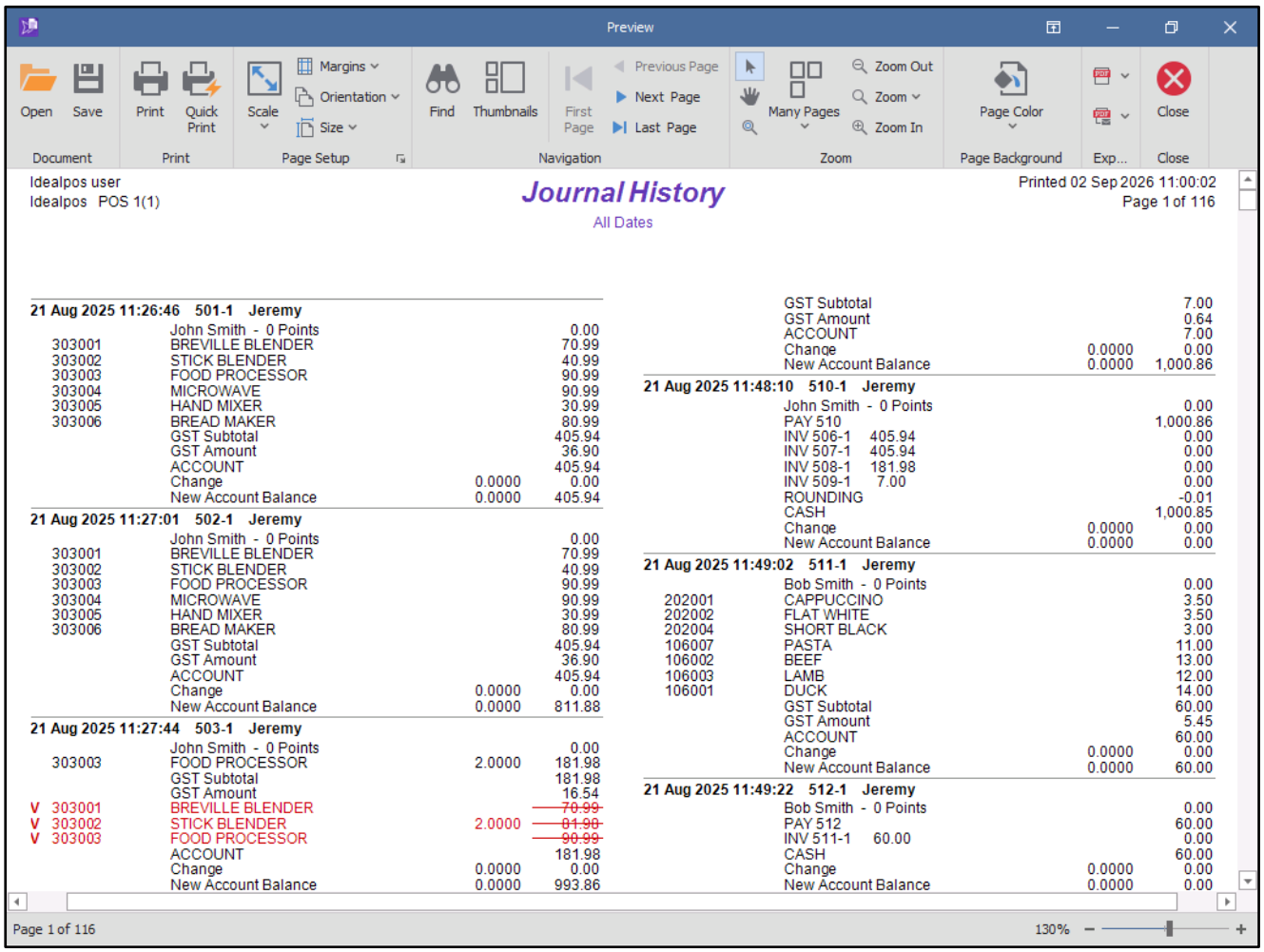


Select "Journal" from the Report Type dropdown box, select the required selection criteria and press "Run Report".
The Filtering fields support entry of codes as single values, comma separated values, as a range or a combination.
E.g. 202001,202002,303001-303006.



Return to top

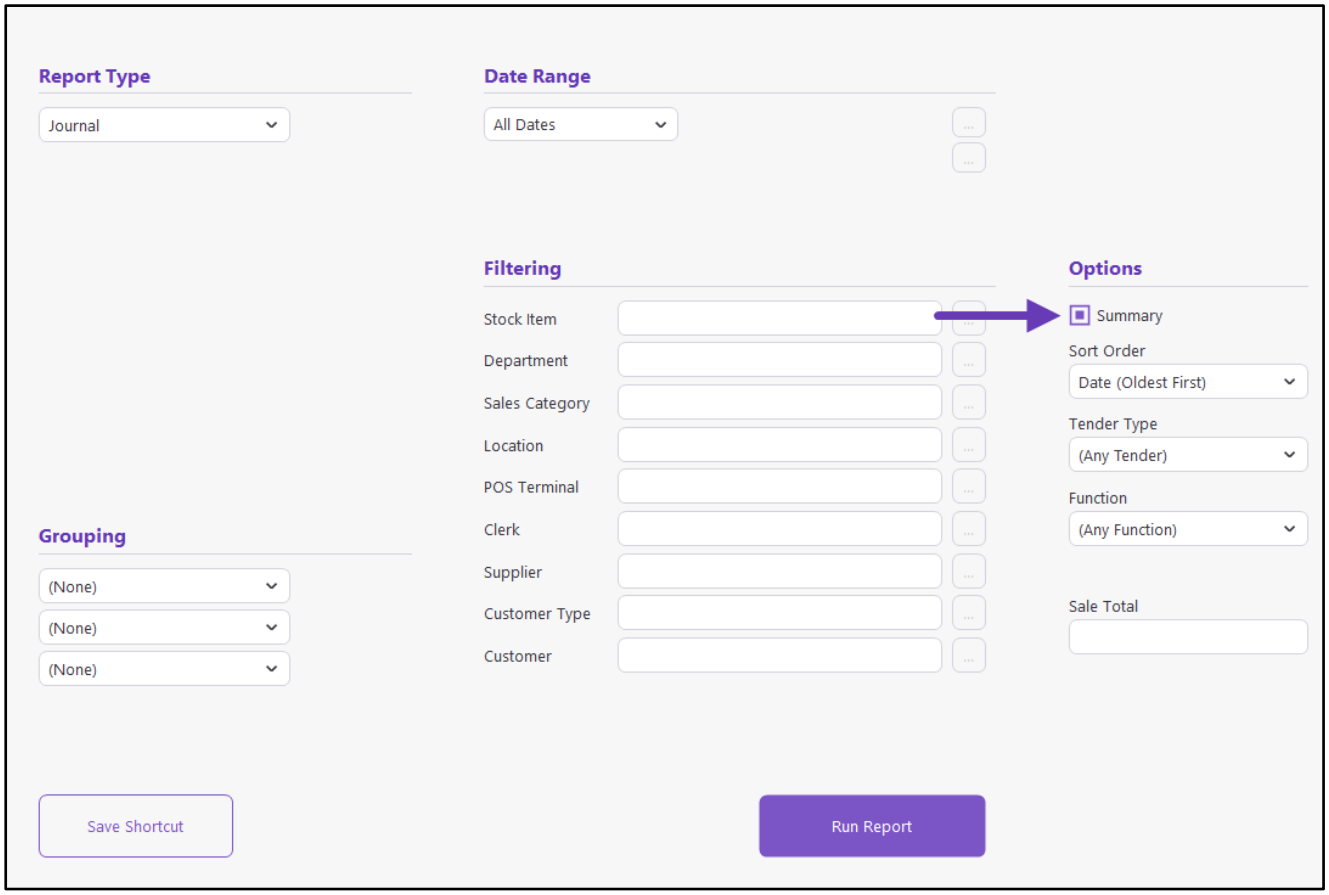
The Report will be generated and displayed within a modern report viewer.
The modern report viewer supports CTRL + scroll up/down to zoom in and out.



Return to top

A new feature supported by the Journal History Report in the Report Hub is the ability to run the report with the Summary option enabled (to show each Journal as a single line), then click on any line to open the details of the selected Journal in a new Preview report window.

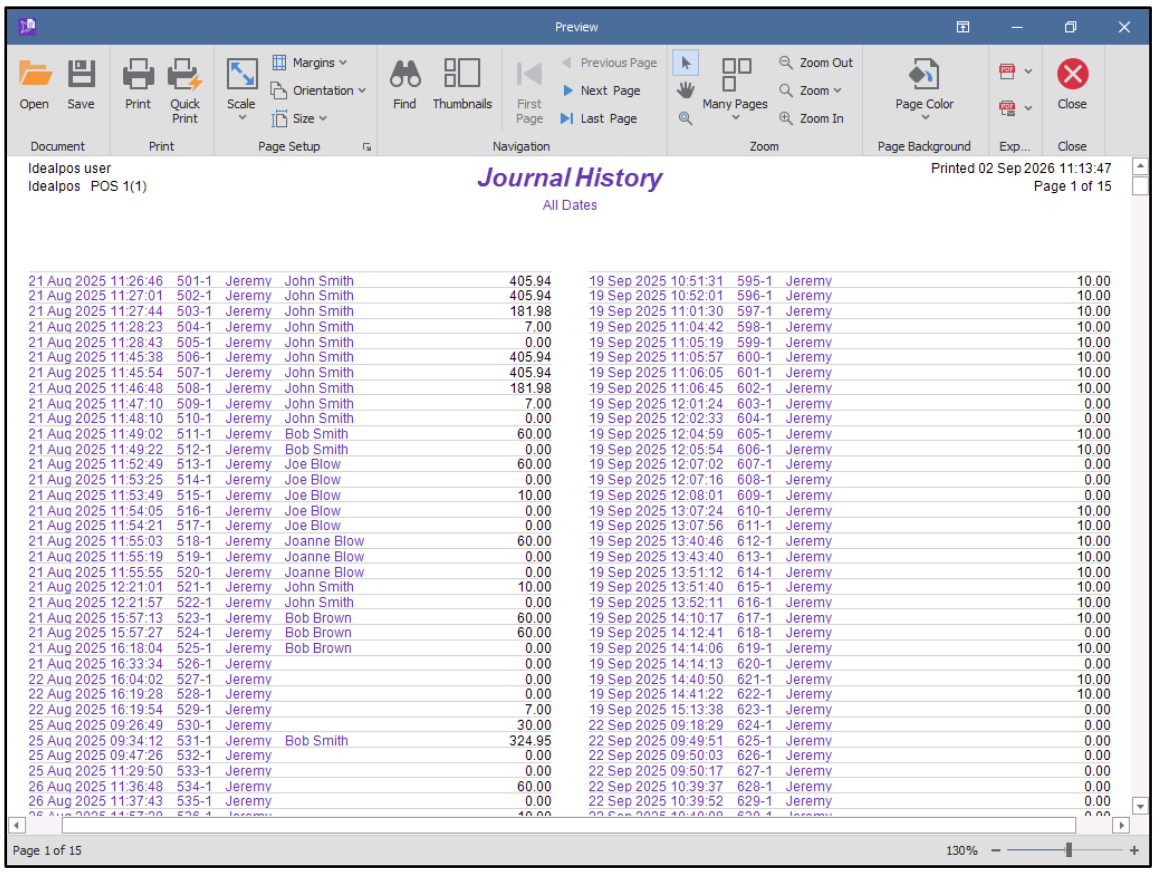
To use this functionality, enable the “Summary” checkbox > Press “Run Report”.



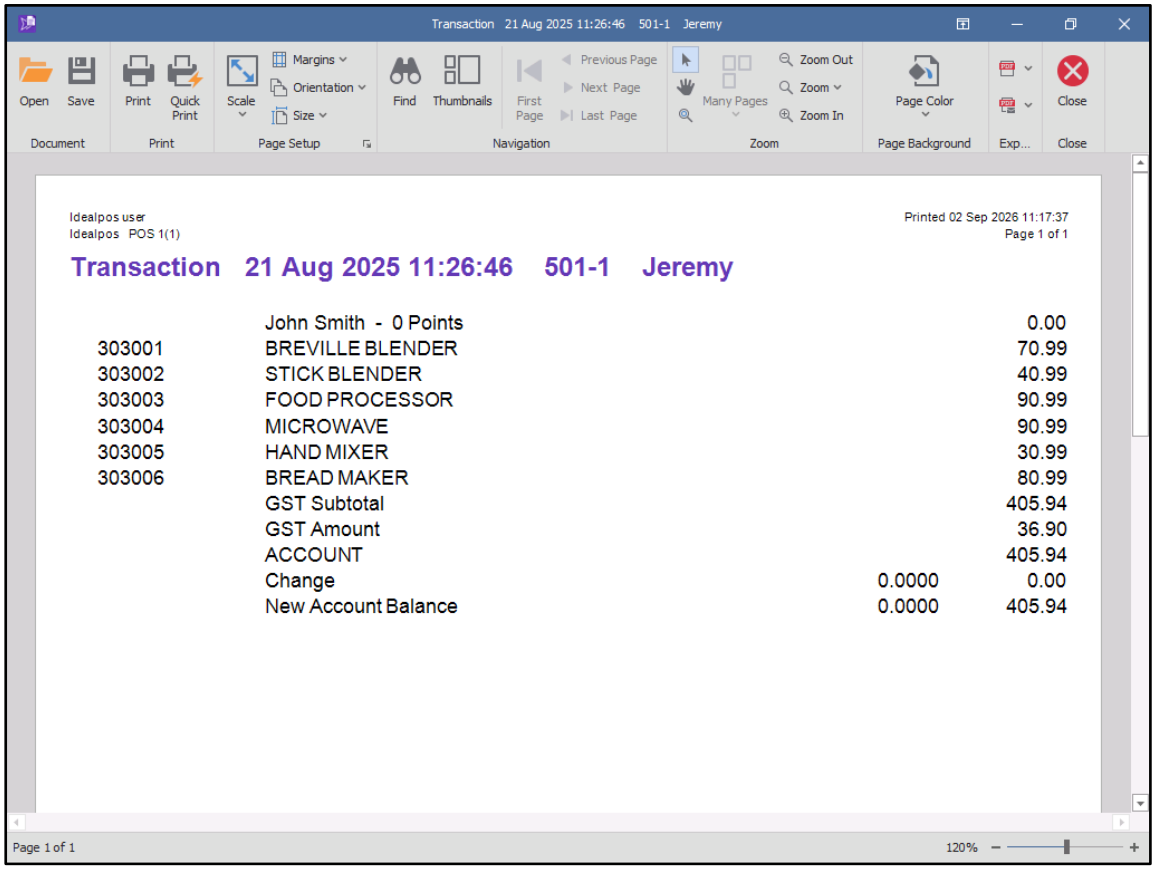
Update History

Return to top

The Journal History report will appear as a summary; any line can be clicked to show more details.



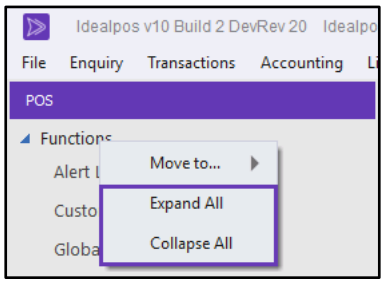
Clicking on a line will show details for the selected Journal in a new preview window.



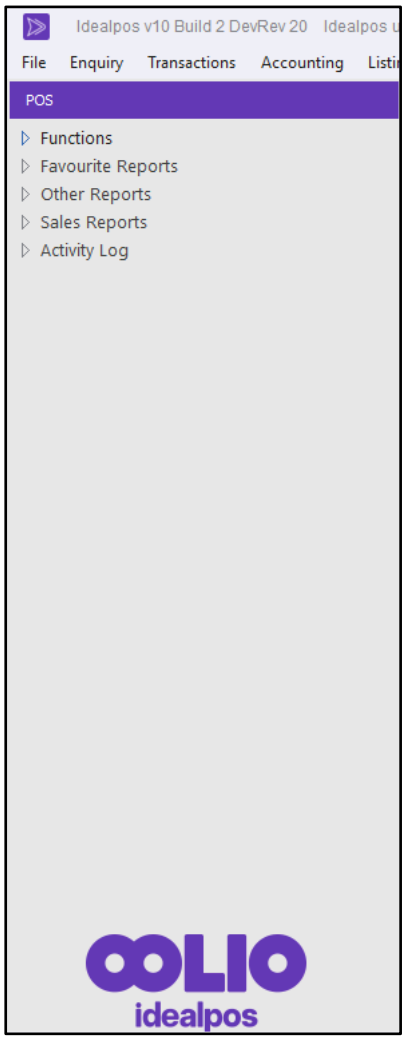
Shortcuts

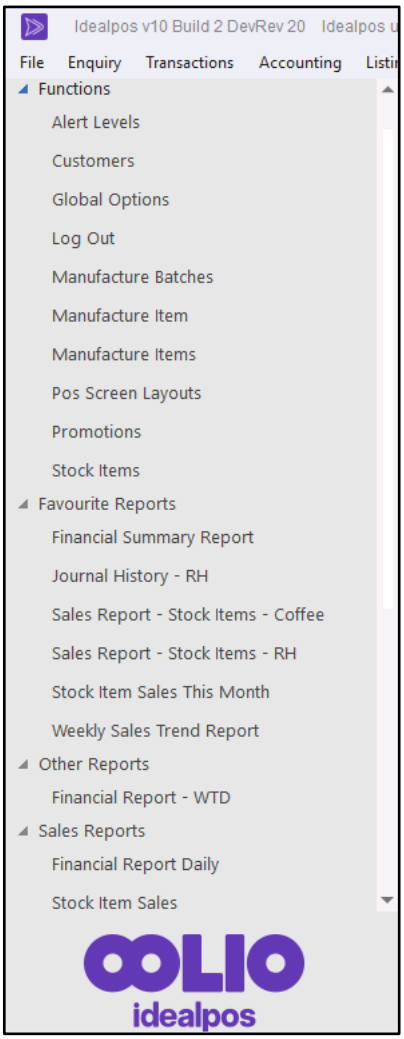
IP-8262 – Shortcuts – Easy access to Collapse All/Expand All Functions

This functionality introduces the ability to easily access the Collapse All/Expand All Functions for Back Office Shortcuts. Prior to this enhancement, the Collapse All/Expand All functionality was only available via the Settings cog > Shortcuts > Expand All/Collapse All.
This functionality has been added to the right-click menu of the Back Office Shortcuts on the left-hand side of the Back Office Dashboard.
To use this functionality, go to: Back Office > right-click on any Shortcut/Shortcut group on the left-hand side of the Back Office Dashboard > Select Collapse All or Expand All as required.



Collapse All will collapse all the Shortcut Groups as shown below left.
Expand All will expand all the Shortcut Groups as shown below right.



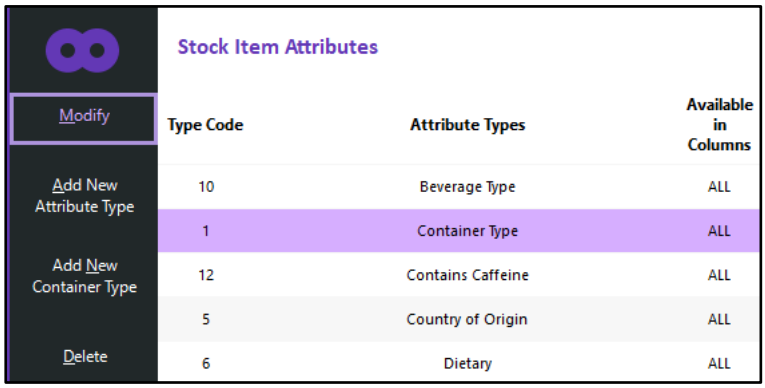


Stock Item Attributes

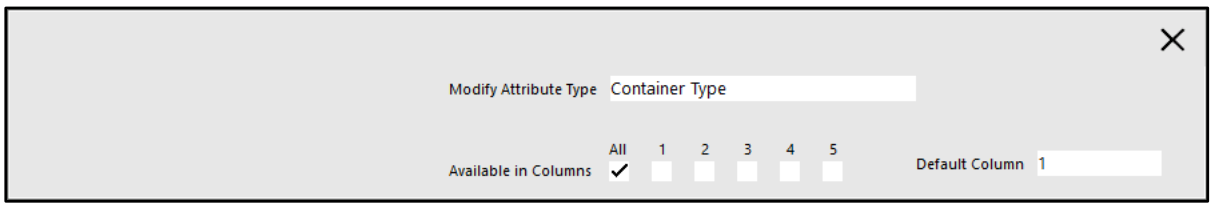
IP-8186 – Attribute Types – Default Column field to prefill when Adding Stock Items

This functionality introduces the ability to configure prefilling Default Attribute Types when adding new Stock Items. When new Stock Items are added, their Attribute Type dropdown boxes will be automatically pre-filled using the Attribute Types that have been assigned to those Attribute Columns.
This is useful to help maintain consistency across Stock Items and reduce the amount of time spent manually selecting Attribute Types when creating new Stock Items.

To configure and use this functionality, go to: Back Office > File > Sales > Stock Item Attributes.
Select a Stock Item Attribute on the left-hand side > Modify.

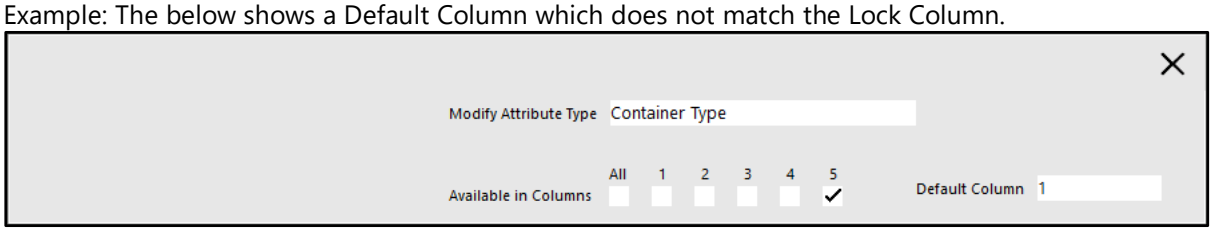


In the Default Column field, enter the Default Column number for the Attribute Type > Press "Save" on the top-left.

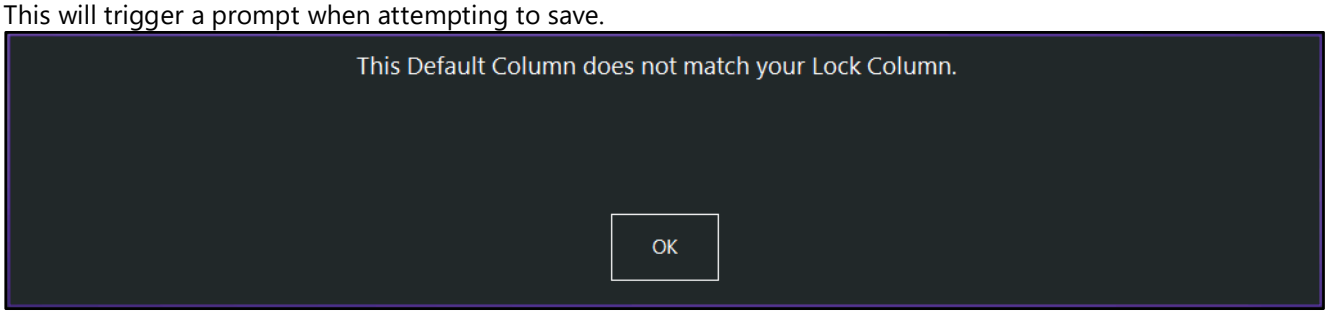


The value entered in the Default Column field is checked against the "Available in Columns" checkboxes.
If the Available in Columns checkboxes restrict an Attribute Type to one or more columns and the value entered in the Default Column field does not match those columns, a prompt "This Default Column does not match your Lock Column" will be displayed when attempting to save the change.

Example: The below shows a Default Column which does not match the Lock Column.



This will trigger a prompt when attempting to save.

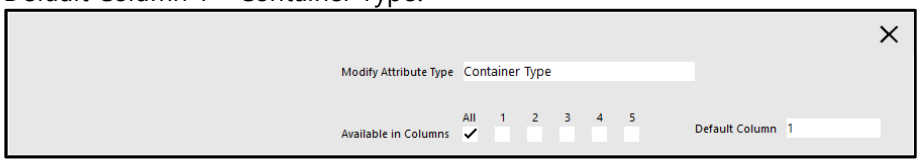


Return to top

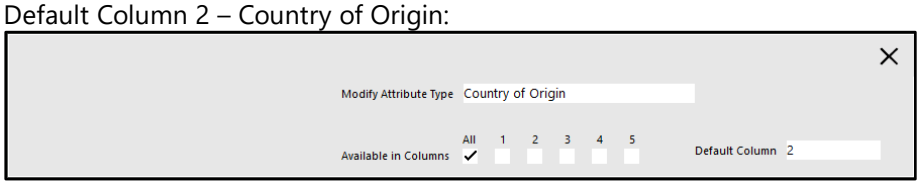
Repeat the above process to set a Default Column for up to 5 Default Columns.

Example configuration and behaviour:

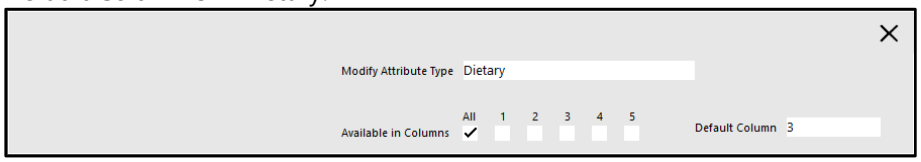
Default Column 1 – Container Type:



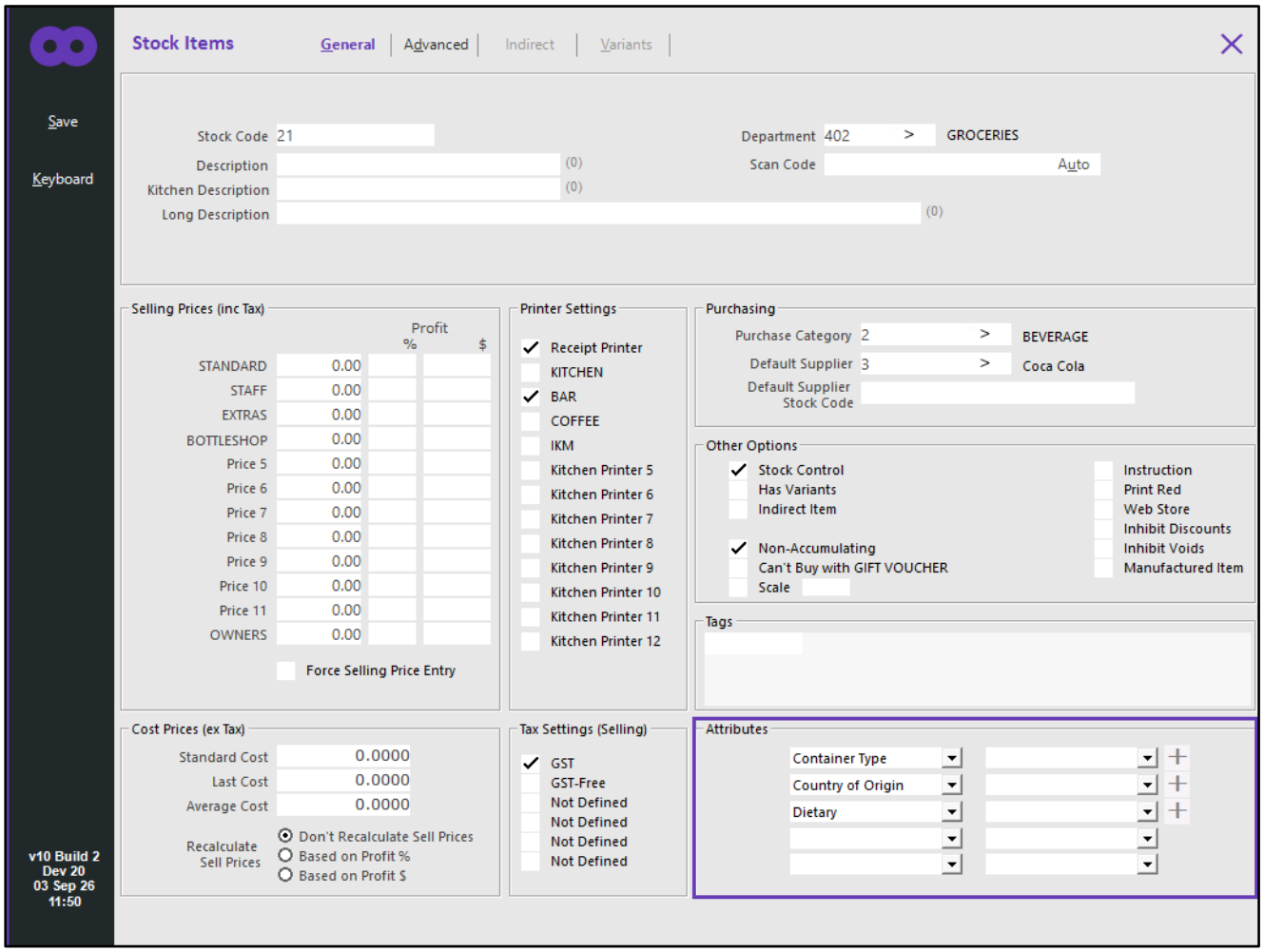
Default Column 2 – Country of Origin:



Default Column 3 – Dietary:



When creating a new Stock Item via Back Office > File > Stock Control > Stock Items > Add, the Attributes dropdown boxes will be pre-filled using the configuration above.
For each pre-filled Attribute Type (left column), the required Attribute (right column) will need to be selected.



Surcharges

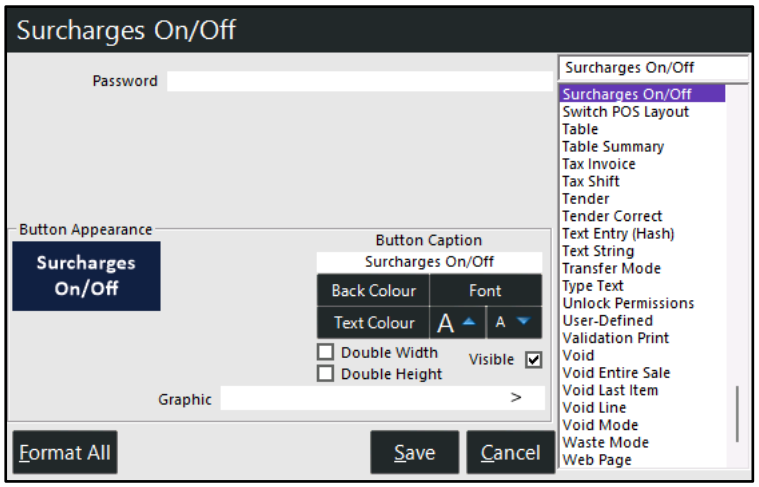
IP-8205 – Surcharges On/Off Functionality

This functionality introduces the ability to switch Surcharges On/Off via a POS Screen Function/Button with the option to password protect the button to prevent unauthorised use.
This function can be used to temporarily stop Surcharges from applying while utilising functions such as Subtotal Discounts or other scenarios that require Surcharges to be temporarily turned off.
This function will only turn Surcharges On/Off which are currently active that have been configured via Back Office > File > Sales > Surcharges.
This function will not turn off Surcharges that apply to Tender Types, nor will it turn off manual surcharges that have been triggered via the "%+ Item" or "%+ Subtotal" POS Screen buttons.

A new Yes/No Option called "Surcharges Off Function – One Sale Only" has also been added which can be toggled on/off as required.
When the Yes/No Option is enabled, the Surcharges Off Function will only apply to one sale.
When the Yes/No Option is disabled, the Surcharges Off Function will continue to apply until it is turned off (or until the POS Screen is closed/opened or Idealpos restarted).

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

- **Function:** Surcharges On/Off
- **Password:** When a Password is entered, the correct Password will need to be entered to turn Surcharges Off.

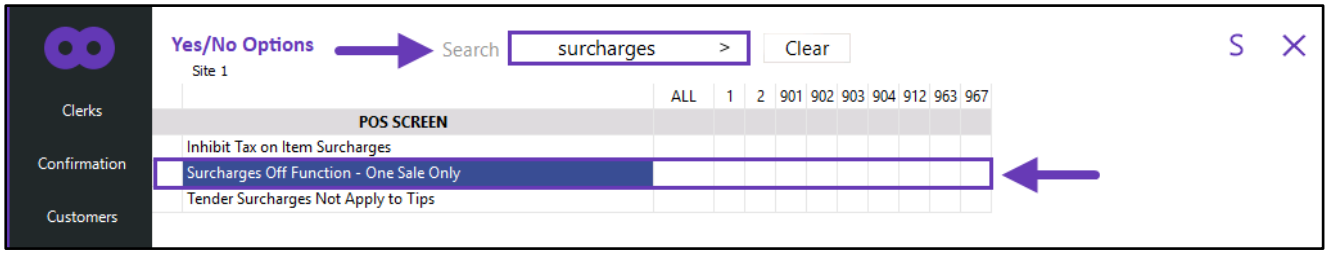


Press "Save" to save the button.

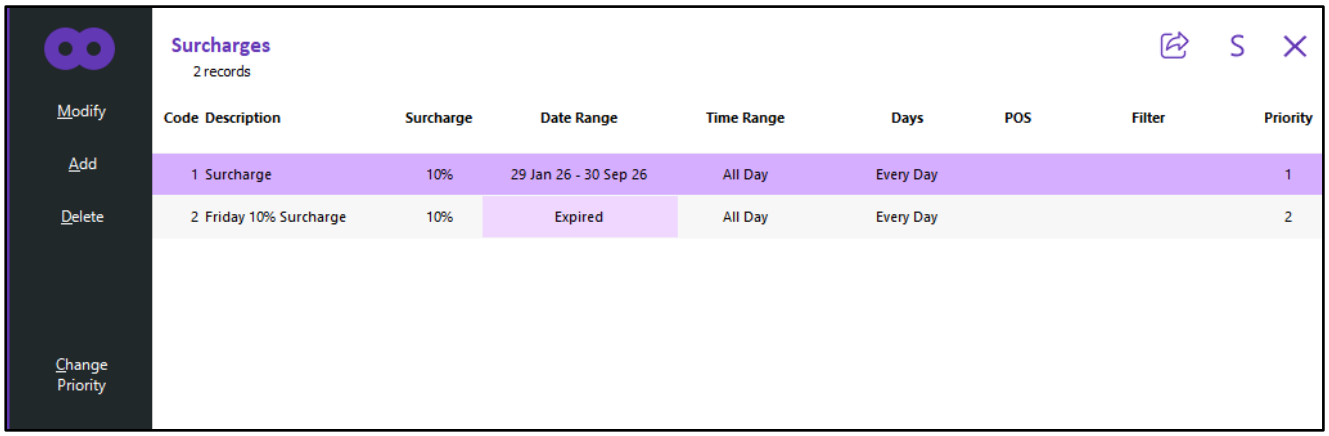
Note – If setting a Password, it is recommended that the Yes/No Option "Allow Live Button Programming" is disabled. This will prevent unauthorised staff from using the Live Button Programming function to modify the button/view the Password/modify the Password while using the POS screen.

Return to top

To configure the Yes/No Option, go to: Back Office > Setup > Yes/No Options > search: Surcharges.
Set the Yes/No Option "Surcharges Off Function – One Sale Only" as required.
If the option is checked, the Surcharges Off function will only apply to one sale.
If the option is unchecked, the Surcharges Off function will continue to apply until it is turned off (or until the POS Screen is closed/opened or Idealpos restarted).

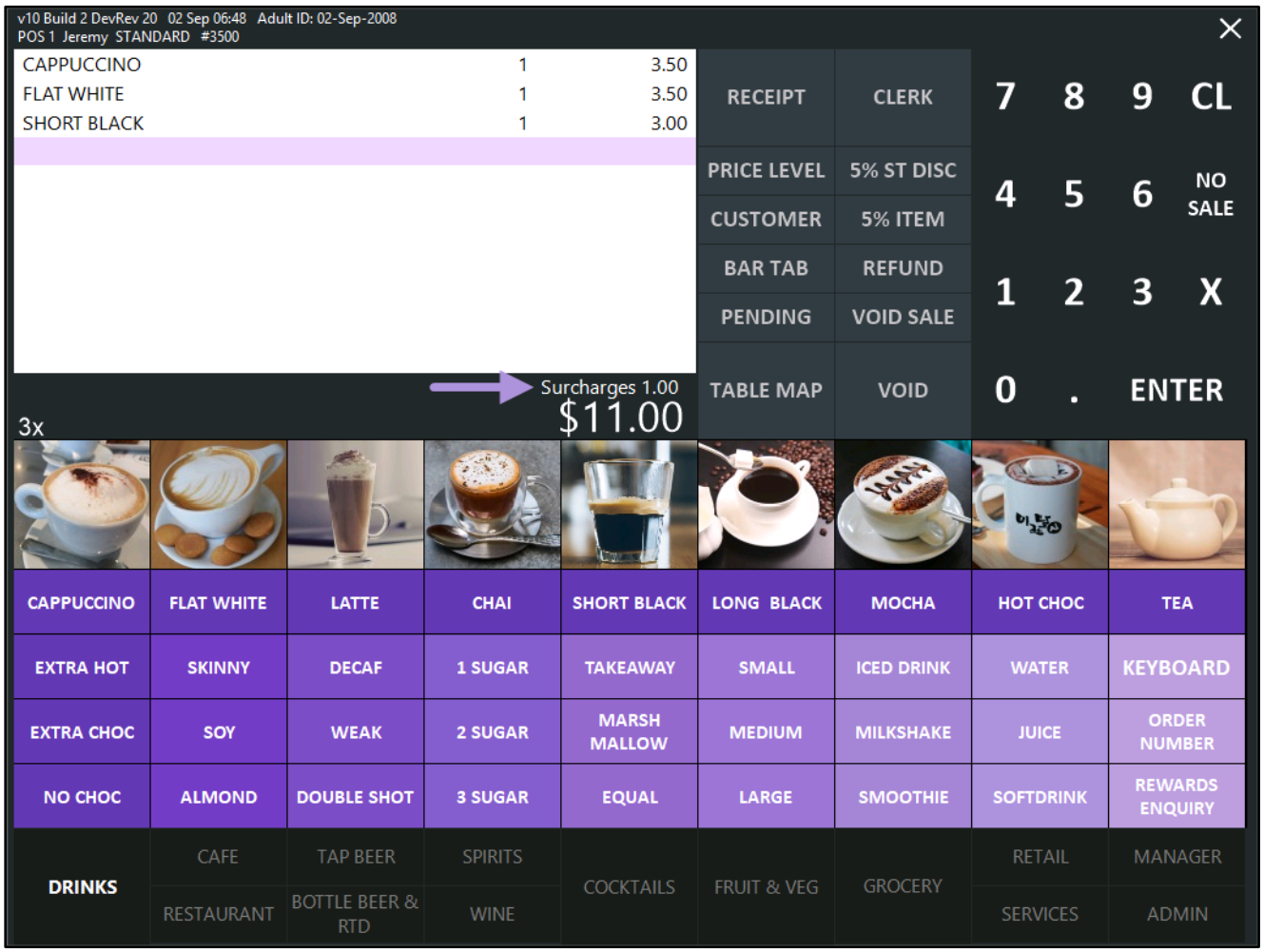


Close the Yes/No Options.
Ensure that a Surcharge exists and is currently active (go to: Back Office > File > Sales > Surcharges).

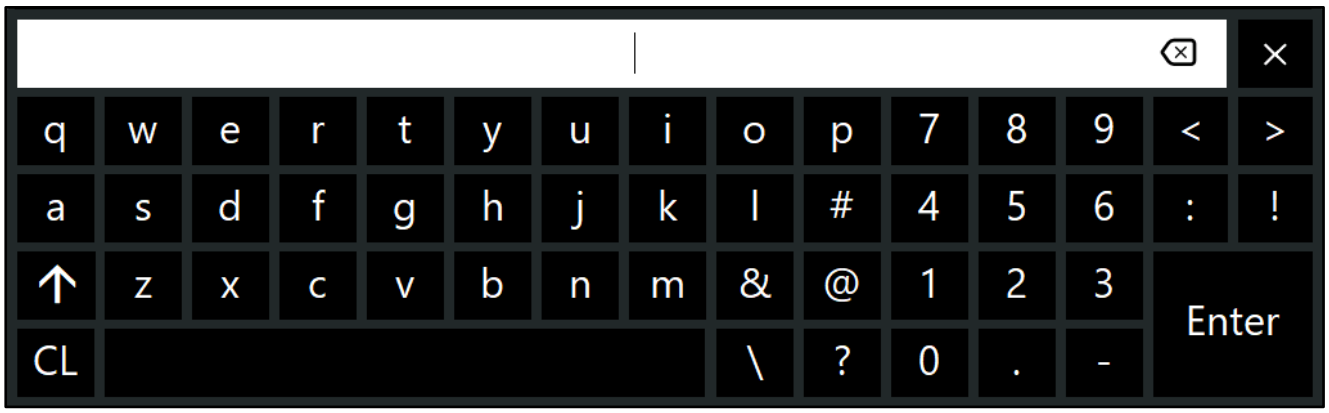


Return to top

Go to: POS Screen.
Add items to the sale > Surcharge applies.

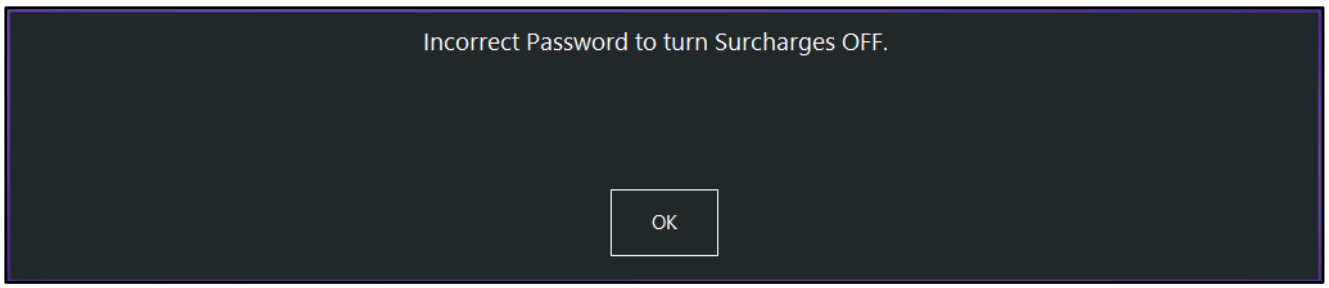


Press the "Surcharges On/Off" button.
If a Password was set, an on-screen keyboard will be displayed; enter the Password to continue.



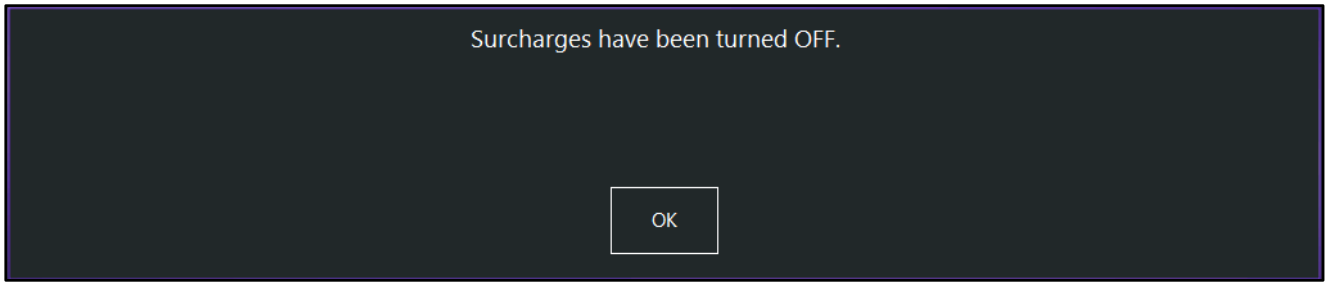
Return to top

If the wrong Password is entered, a prompt will be displayed, and the Surcharges will remain enabled.

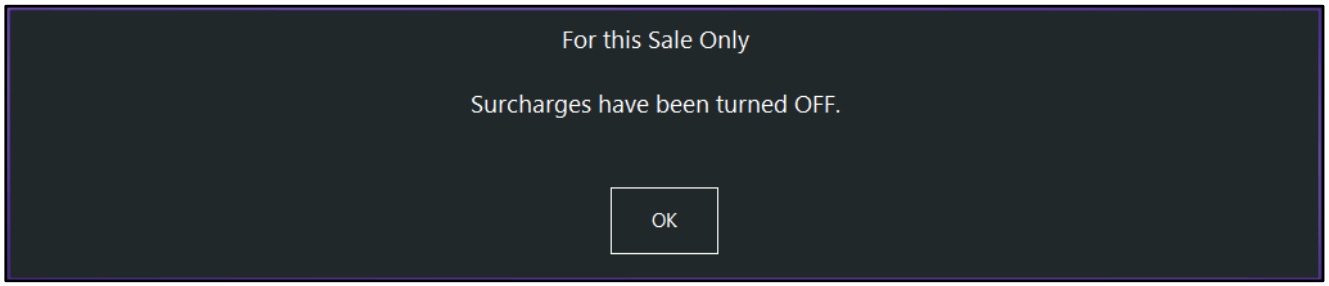


When the correct Password has been entered (or if no Password was set), a confirmation prompt will be displayed that the Surcharges have been turned OFF.
The confirmation prompt will vary depending on whether the Yes/No Option "Surcharges Off Function – One Sale Only" is enabled.

If Surcharges Off Function – One Sale Only is disabled, the following prompt is displayed.

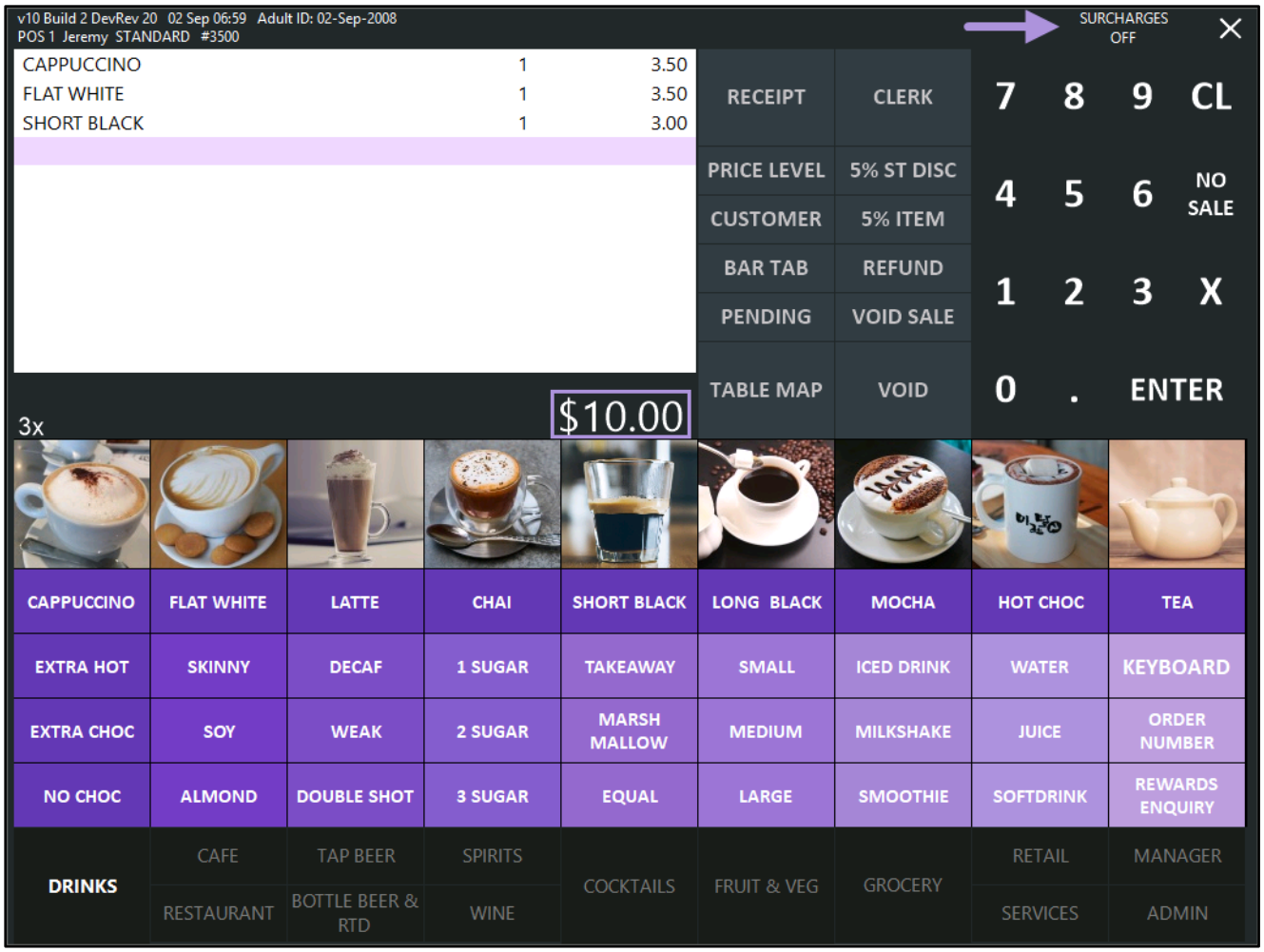


If Surcharges Off Function – One Sale Only is enabled, the following prompt is displayed.

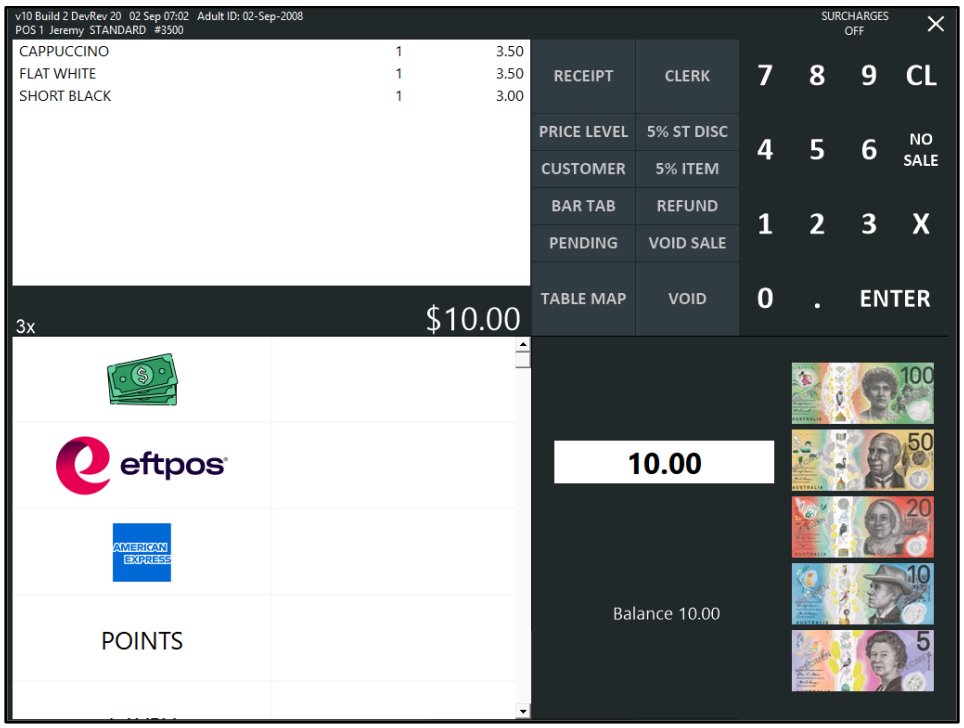


Return to top

When Surcharges are turned off, the Surcharges text will not appear above the total sale amount, the total sale amount will not include Surcharges and the "SURCHARGES OFF" text will appear on the top-right corner of the POS Screen.



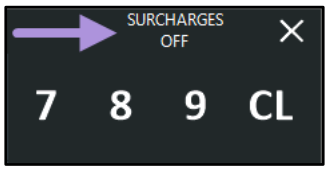
The sale can be finalised without the Surcharges applying.



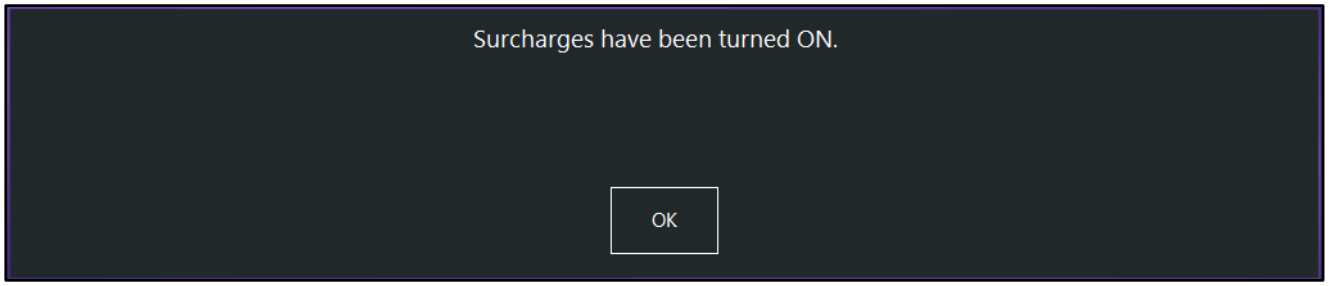
Return to top

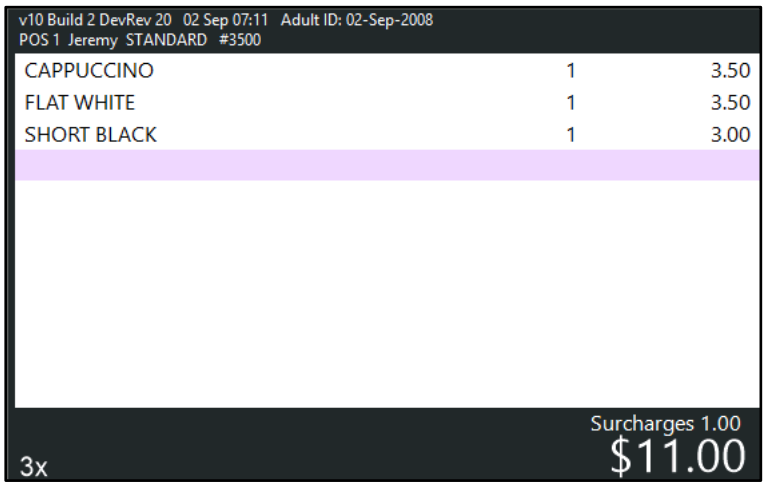
After the sale is finalised, Surcharges will either be re-enabled or will remain turned off, depending on how the Yes/No Option "Surcharges Off Function – One Sale Only" is configured.

If Surcharges need to be turned back on at any stage, this can be done by either pressing the Surcharges On/Off button on the POS Screen or press the "SURCHARGES OFF" text on the top-right corner of the POS Screen.



This will trigger the "Surcharges have been turned ON" prompt and Surcharges will apply to the sale.





XchangeIT Lottery Interface

IP-8151 – XchangeIT Lottery Interface

This functionality introduces the ability to configure Idealpos with the XchangeIT Lottery Interface.
The XchangeIT Lottery Interface enables Idealpos to process lottery sales and lottery payments from the XchangeIT Terminal Connect service.
The below is a summary of how this interface works.

Sale of Lottery products

- The customer at the newsagency fills out lottery slip(s) with their lottery numbers and presents them to the operator.
- The operator inserts the customer's lottery slip(s) into the S8/Wave 8 Lottery Terminal.
- The S8/Wave8 Lottery Terminal prints out a slip containing a list of Lottery products that were purchased with a barcode at the bottom of the slip – the operator will scan the barcode on the slip into the Idealpos POS Terminal.
- Alternatively, the operator can press a Lottery Connect button on the Idealpos POS screen which will request the current "sessions" in the Lottery message pool; they can then select the correct session that corresponds to the customer's purchase.
- The Lottery products that were purchased will be entered into the sale.
- The sale is tendered and the customer pays for the lottery products.
- After the sale is tendered, the S8/Wave 8 Lottery Terminal will print the final lottery tickets for the operator to give to the customer.

Payout of Lottery products

- The customer presents their lottery ticket to the operator
- Operator inserts the customer's ticket into the S8/Wave 8 Lottery Terminal.
- If the ticket is a winning ticket, a Payout slip is printed from the terminal.
- Operator scans the payout slip barcode into the Idealpos POS Terminal.
- Alternatively, the operator can press the Lottery Connect button on the POS Screen which will request the current "sessions" in the Lottery message pool; they can then select the correct session that corresponds to the customer's win.
- The winning lottery item will appear in the sale as a refund.
- Sale is tendered and winnings are paid out to the customer.

For more information about configuring and using this new interface, refer to the XchangeIT Lottery Interface Topic in the User Guide.
https://userguide.idealpos.com.au > In the Table of Contents on the left-hand side, scroll down to the bottom and select XchangeIT Lottery Interface.