NCR Silver Pro Restaurant Edition

v3.8 Release Notes

Release Date: August 31, 2015

New 3.8 Silver Pro features

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Price Lists

Overview

Price Lists provide a convenient way for you to manage all of your prices in one place. Not only can you edit pricing for items, items with variations, modifiers, and promotions, you can also schedule *when* these price changes take effect. Previously, the system required you edit each record to change a price and the change took effect as soon as you saved the record.

For multi-store operations, Price Lists enable you to manage pricing for individual stores. In prior versions, you had to create a price override at the store level for each item. With Price Lists, you can create a price list, edit the prices on one screen, and assign the price list to a specific store.

Configuration

Price Lists are configured in Silver Back Office.

1. In Silver Back Office, select **MENU > PRICE LISTS**.
2. Select **ADD A PRICE LIST**.
3. Under 'Price List Settings,' type a **name** for the price list.
4. Select the **trigger** to activate the price list. You can make the price list active at all times, active at all times on a particular start date, or active within the parameters of an event, which you configure in Menu > Events.

   If you have a price list with a start date of 01/01/2015 and no end date, and a second price list with a start date of 09/01/2015 and no end date, the first price list remains active until 09/01/215 when the second price list takes effect.

5. (Multi-Store only) Click **Assign Stores** to assign the price list to a store. The Stores screen appears. Select the **stores** for which to assign the price list and click **Done**.
6. Under 'Prices,' select the **filter** by which to edit prices from the drop-down list. The options are 'All,' Items,' 'Modifiers,' and 'Promotions.'

   -OR-

   Type the **name** of the object for which to search and click to initiate a search. You can type the entire name of the object or a string of characters. For example, if you type 'be,' the search results include all objects containing the character string 'be.'

   The matching objects appear on the screen. Each object is identified with:
   - An **object type**, such as 'Item,' 'Item Variation,' 'Modifier,' 'Modifier Variation,' and 'Promotion.'
   - An **object identifier**, such as 'Category,' 'Modifier Group,' or 'Promotion.'
   - The **item name**.
   - The **default price**, which is the price of the object on the individual record.
7. Under 'List Price,' type the **price** for the item.
8. Click **Save**.

Refer to product documentation located at https://customercare.ncrsilver.com/articles/Help/Configuring-Price-Lists for all of the details on the configuration and operation of Price Lists.

Event Based Pricing Configuration Change

Overview

Previously, setting prices for an event, such as Happy Hour or a July 4th Special, required you to add event pricing for each item you planned to include in the event. With the introduction of price lists, we've streamlined how you set prices for an event. After you add an event, create a price list, associate it to the event, and then edit the prices for the items for the event. This change enables you to set your prices for events quicker and with more accuracy.

Configuration

Event based pricing is configured in Silver Back Office at MENU > PRICE LISTS.

Refer to product documentation located at

https://customercare.ncrsilver.com/articles/Help/Configuring-Price-Lists for all of the details on the configuration and operation of Price Lists for events.

Charges

Overview

Charges, a new feature in 3.8, allow you to add non-sales revenue items to an order, such as a delivery charge, membership fee, bottle deposit, or other miscellaneous fee. Charges can be added manually to a guest check, or you can assign a charge to a takeout or delivery order, which will cause the charge to automatically appear on the ticket when the order mode is selected. Charges can be for a flat amount, a percentage, or a prompt for price at the POS. We report charges on the Store Summary report as a separate line item and outside of the net sales calculation.

With Charges, we've added two new access levels. One, 'Charges,' controls which users can access the Charges pages in Silver Back Office, and the other, 'Add Charge to a Ticket,' controls which users can manually add a charge to a ticket.
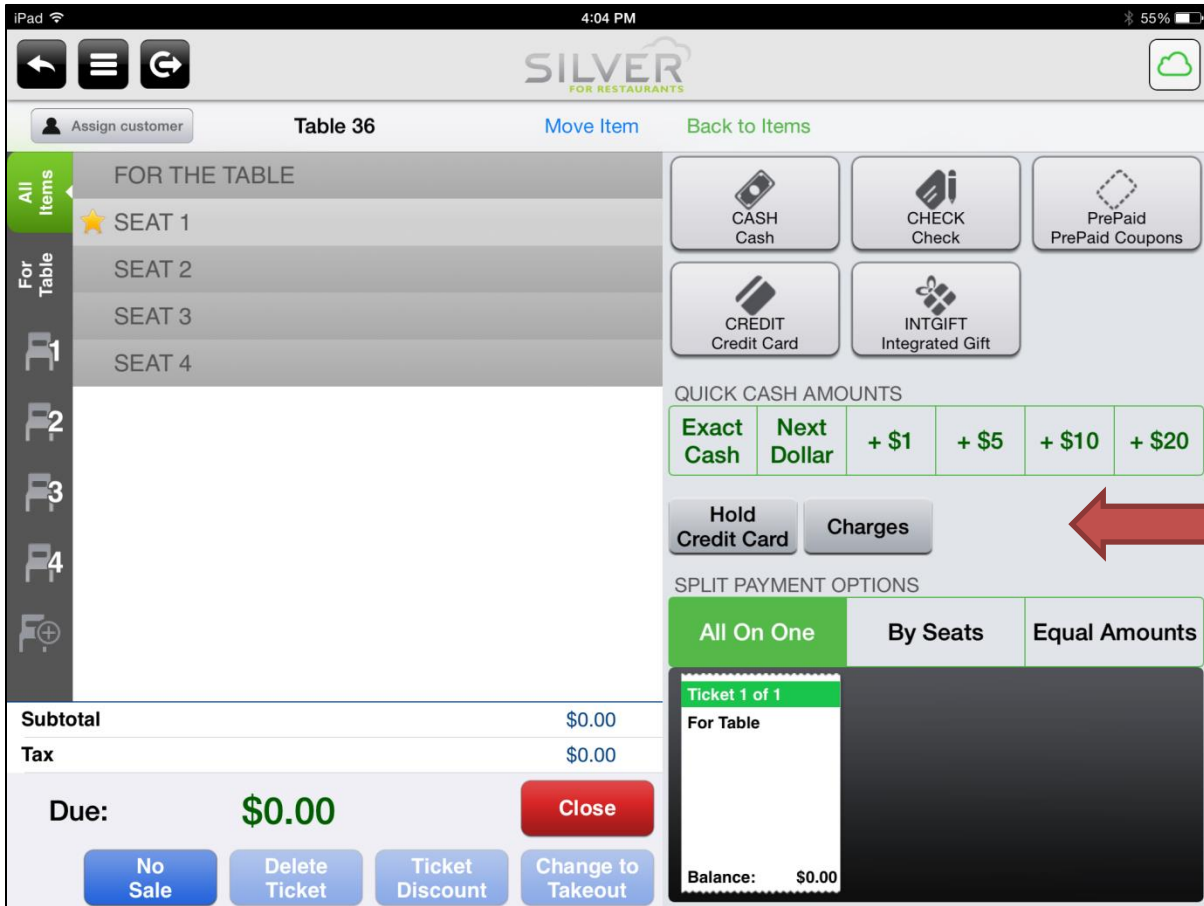
After you create a charge, the system adds a Charges button to the payment screen.

Configuration
Charges are configured in Silver Back Office.

1. Navigate **to Settings > Charges**.
2. Click **Add a Charge**. A Charge popup appears.

Charge

* Indicates required field.

Charge Name * Short Name (20 char max)

Description Long Name (30 char max)

Active ☐

❷ External ID

Tax and Pricing

Charge by *   ◉ Amount   ○ Percent

Charge Price   ☐ Prompt for Price at POS

Tax Category *   [▾]

[Save Changes] [Cancel]

3. Enter a **name** for the charge.
4. (Optionally) Enter a **description** for the charge.
5. Select **Active** to activate the charge.
6. (Optional) Type **an external ID number** for the charge. If you leave the External ID blank, the system automatically assigns an External ID to the charge after you save the record.
7. Under 'Tax and Pricing,' select the **method** by which to assess the charge.
   If you select **Amount**:
   - For a flat amount charge, type the **dollar amount** for the charge.
   - For a prompt for price charge, meaning a popup will appear on the POS and you will enter the amount of the charge, leave the **charge price** blank and select **prompt for price**.

   If you select **Percent:**
   - Enter the **charge percentage** to use.
   - (Optional) Enter the **minimum price** for the charge. For example, you enter the minimum price as $2.00 and the charge percentage as 10%. If a guest check subtotal is $5.00, rather than the charge being .50, it will be $2.00, which is the minimum amount.
   - (Optional) Enter the **maximum amount** for the charge. For example, you enter the maximum price as $10.00 and the charge percentage as 10%. If a guest check subtotal is $500.00, rather than the charge being $50.00, it will be $10.00, which is the maximum amount.
   - (Optional) Enter the **closest amount** for which to round the charge amount. For example, the rounded amount is .10. If the charge amount is $1.07, the system will round the charge to the nearest .10. In this example, the charge will be $1.10

8. Select the **tax category** from the drop-down list.
9. Click **Save**.

You assign a charge to an order mode in Silver Back Office as well.

1. In Silver Back Office, select **Settings > Store > Store Options**.
2. Under 'Enable Takeout/Delivery,' select the **takeout charge** from the drop-down list.
3. Select the **delivery charge** from the drop-down list.
4. Click **Save**.

# Customer Filtering

Requirements
Multi-store operations.

Overview
We've enhanced the assignment of customers to stores to provide a more accurate customer database for each store. This can provide you with a more accurate representation of the customers who visit specific stores, enable you to target your marketing efforts at the customers belonging to a specific store, and not clutter the POS of one store with customer records from another store.

Previously, in a multi-store environment, if Store 1 added a customer, that customer was also added to the customer database of Store 2. Starting with v3.8, if a new customer is assigned to a ticket at Store 1, that customer will only be assigned to the customer databases of the company and Store 1.

If the customer visits Store 2, the employee can enter the customer name and tap 'More results,' which will search the Customers database at the Company level and provide matching results. The employee can then select the customer and assign him to the ticket. The customer is then assigned to both Store 1 and Store 2.

For existing customers, they will be considered customers of all stores. The customer filtering enhancement pertains to new customers.
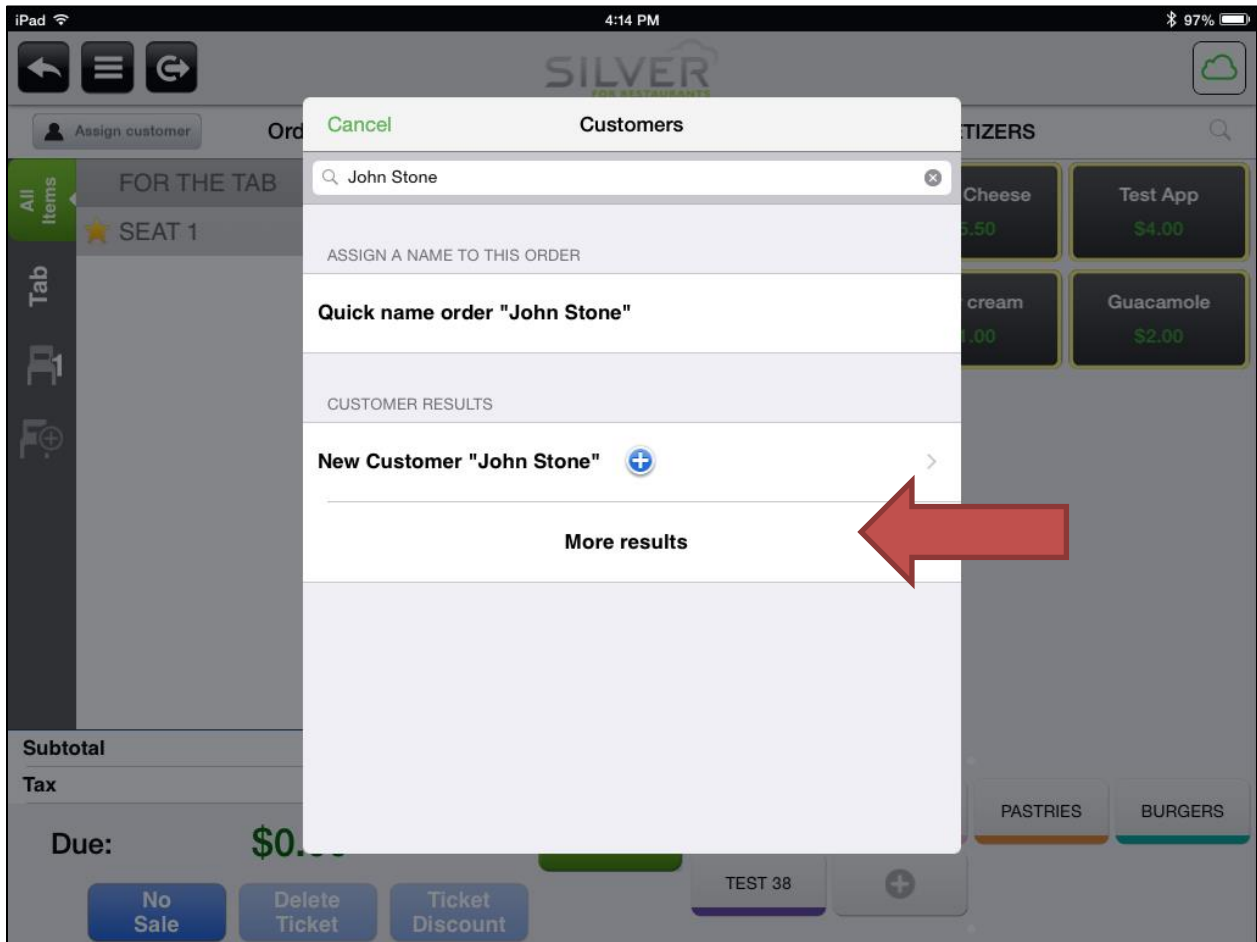
Guest Count Reporting

Requirements

Table Service mode only.

Overview

Guest count reporting enables you to determine the number of guests served in your restaurant. The guest count total is calculated by the number of seats served.

The Guest count total is reported in the following places: on the bottom of a Shift End report for an employee, on the bottom of the Store Summary report, and as a column on the Sales Summary report.

Print an In-progress Financial Shift

Overview

At times, you may need to print an in-progress financial shift report for an employee. The employee may need to review their sales to determine how much to tip out to a fellow employee.

1. At the POS home screen, tap ☰ to display the slide out menu.
2. Tap **View Shifts**. The Business Days and Shifts screen appears.
3. Tap ⓘ next to the financial shift of the employee for whom you want to print an in-progress shift report. A prompt appears.
4. Tap **Print in-progress shift report**. The report prints to the default printer.
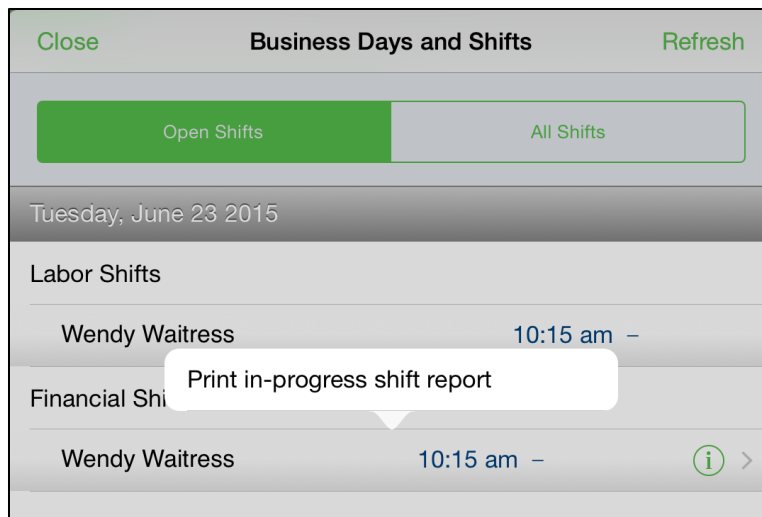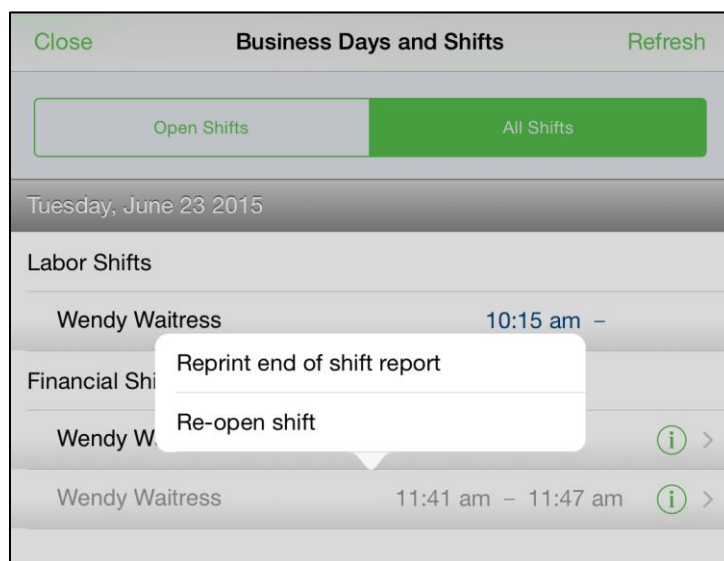
Reopen a Financial Shift

<u>Overview</u>

Beginning with v3.8, you can reopen the financial shift of an employee. The employee may have forgotten to adjust their tips before closing their financial shift, or they may have inadvertently closed their financial shift.

If you are reopening a financial shift for a reason other than to allow the employee to adjust their tips, check to make sure the employee does not have an already open financial shift. The system will allow an employee to have an open financial shift and to reopen a previously closed financial shift as well. Thus, it is possible for an employee to have two or more open financial shifts. If an employee has two open financial shifts, upon touching Point of Sale, Takeout/Delivery, or Adjust Tips, the system prompts the employee to select a financial shift. The system will also prompt an employee to select a financial shift, if they have multiple shifts open, after each log out and log in to the POS.

1. At the POS home screen, tap ▤ to display the slide out menu.
2. Tap **View Shifts**. The Business Days and Shifts screen appears.
3. Tap **All Shifts**.
4. Tap ⓘ next to the financial shift of the employee whose financial shift you want to reopen. A prompt appears.

5. Tap **Re-open financial shift**. A confirmation prompt appears.
6. Tap **Yes**. A Shift reopened prompt appears.
7. Tap **OK**.
8. Tap **Close**.

Larger Kitchen Chit Printing

Overview

Also in v3.8, we've added an option to allow you to set the kitchen chit font size to large or small. By default, the font size will be set to large. Kitchen chit font size is controlled by the kitchen printer configuration in the POS.

Configuration

If you decide to turn off the large font size for kitchen chits, you must do so on each iPad you use. If you prefer the large font size for kitchen chits, there is nothing to do.

1. On the POS, tap ☰ to access the slide out menu.
2. Tap **Settings**.
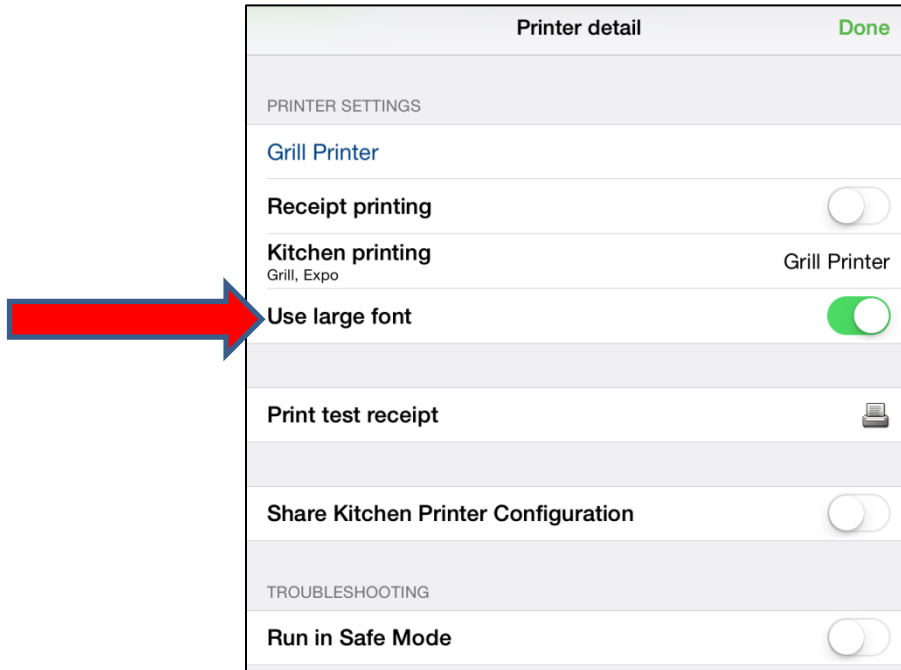
3. Tap **Configure printers**.
4. Under 'Printers,' tap the **kitchen printer** for which you want to turn off the large font size.
5. Under 'Printer Settings,' swipe the **Use large font button** to the left to turn off large font.
6. Tap **Done** to exit the Printer options screen.
7. Tap **Close** twice to exit the Settings screen.

Location Activity Report

<u>Overview</u>

The Location Activity report enables you to review the sales activity for various locations. For example, you are a single store merchant, yet you operate at different locations, such as 'Café,' 'Food Truck 1,' and 'Food Truck 2.'

The locations that appear on the report are determined by the locations defined at Settings > Taxes in Silver Back Office.

For multi-store operations, the Location Activity report is not available at the company level.

CD's Cafe
14770 Trinity Blvd
Fort Worth, TX 76155

Location Activity

Monday, July 06, 2015 - Monday, July 13, 2015
All Locations

Location Name	Gross Sales	Discounts & Promotions		Refunds		Net Sales	# of Trans.	Avg. Sales	Voids	Clears
		Qty	$ Amount	Qty	$ Amount					
CD's Cafe	$1,520.01	16	$103.57	77	$195.50	$1,213.24	174	$6.97	$1,650.67 (929.9800)	$899.00 (367)
Food Truck	$151.25	2	$10.00	6	$12.00	$128.11	17	$7.54	$0.00 (0)	$0.00 (0)
Online	$0.00	0	$0.00	0	$0.00	$0.00	0	$0.00	$0.00 (0)	$0.00 (0)
Totals	**$1,671.26**	**18**	**$113.57**	**83**	**$207.50**	**$1,341.35**	**191**	**$7.02**	**$1,650.67 (929.98)**	**$899.00 (367)**

Fix: Prepaid Coupon Reconciliation in Silver Back Office Financial Shifts

<u>Overview</u>

We've fixed a bug with prepaid coupons and financial shifts. Previously, prepaid coupons did not calculate correctly in the 'Cash Owed' calculation on the Financial Shifts page in Silver Back Office.

Fix: Gift Card Sales Discount Reporting

<u>Overview</u>

We've fixed the way we handle gift card discounts as well as report them. In versions 3.7 and below, you could apply a ticket discount to the sale of a gift card. Starting with v3.8, you can only apply a line item discount to the sale of a gift card.

In addition, we fixed a bug so that the Store Summary report accurately reflects Gift Card discounts.

# Fix: Improved Handling of Offline Credit Transactions

<u>Overview</u>

With v3.8, we've improved how we handle offline credit transactions. If you have offline credit enabled and you lose connection to your credit processor, offline credit enables you to continue to accept credit cards as payment. You can view these transactions on the Pending Credit screen on the POS. As soon as you regain connection to the credit processor, the POS submits these offline credit transactions for approval. Previously, once the POS received a response from the processor, either to approve or decline the credit card payment, the POS removed the payments from the Pending Credit screen. Thus, for declined payments, there was no way to resubmit them to the processor.

In v3.8, if an offline credit card payment not approved, that payment will remain on the Pending Credit screen, thereby allowing you to resubmit the payment for approval, or should you choose, delete the declined offline credit card payment.

To resubmit a pending credit card payment for authorization:

1. Tap ▤ to display the slide out menu.
2. Tap **Pending Credit**.
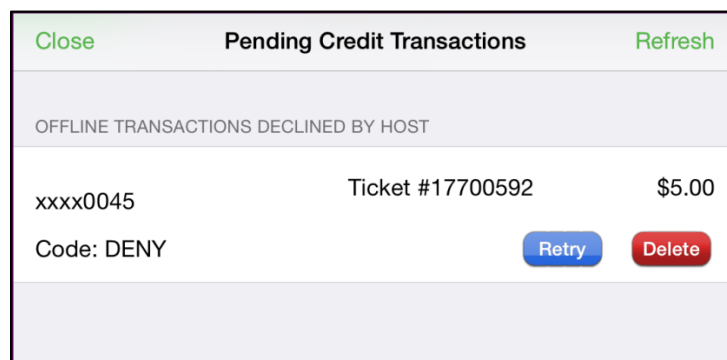
3. Tap **Retry** for the credit card payment you want to resubmit to the credit card

processor. A prompt appears.

4. Tap **OK**. The POS submits the credit card payment to the processor. If the processor approves the payment, the POS removes the credit card payment from the Pending Credit screen. You will be able to see the authorization in Credit Settlement in Silver Back Office. If the processor declines the credit card, a prompt appears. Tap **OK**.

To delete an offline credit card payment:

In some instances, such as a card being declined, it may be necessary to delete an offline credit card payment.

Proceed with caution. **Deleting a pending offline credit card payment removes the payment from the transaction, but it does not void the POS transaction.**

Furthermore, once you delete the pending credit card payment, there is no way to retrieve the credit card information.

1. Tap ▤ to display the slide out menu.
2. Tap **Pending Credit**.
3. Tap **Delete** next to the credit card payment you want to remove. A prompt appears.
4. Tap **OK**. The POS removes the credit card payment from the Pending Credit screen.