NCR Silver Pro Restaurant Edition Manager's Guide

Use this guide to help walk through many of the functions like pay in/out, shift open/close, and more.

CONTENTS

INTRODUCTION

The purpose of this guide is to provide you, the restaurant manager, the help you need to provide better service to your guests, and to quickly resolve any troubleshooting problems. For purposes of this document, manager and owner are considered one and the same. This guide provides step-by-step procedures for performing most of the daily activities with which you are involved. Some functions you perform on the device in the POS, and for other functions you must access Silver Back Office through a Web browser.

OPENING YOUR RESTAURANT

This section discusses the functions it is necessary to perform at the beginning of each day.

CLOCKING YOURSELF IN

As a manager, you are an employee. Clock yourself in to perform manager tasks for the day.

1. At the beginning of your shift, from the POS home screen, tap **Clock In**. The Select Job Code screen appears.
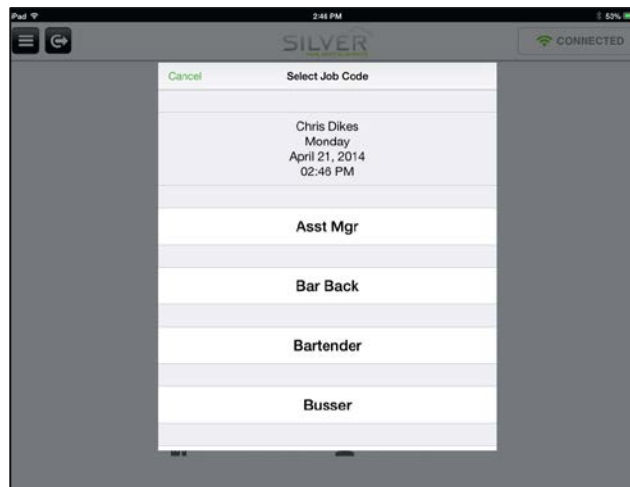
2. Tap the **job code** for the job you will perform during this shift. The POS home screen re-appears.

3. Continue to the next procedure to start a **financial shift**.

STARTING A FINANCIAL SHIFT

As a manager, to access the Point-of-Sale and takeout and delivery functions, it is necessary to start a financial shift.

1. On the POS home screen, tap **Point of Sale** or **Takeout/Delivery**. A 'Starting New Shift' prompt appears.

2. Tap **Yes**. The POS floor plan or Takeout/Delivery appears, depending on your selection, unless you are required to select a cash drawer. If you are required to select a cash drawer, the Select a Cash Drawer screen appears.
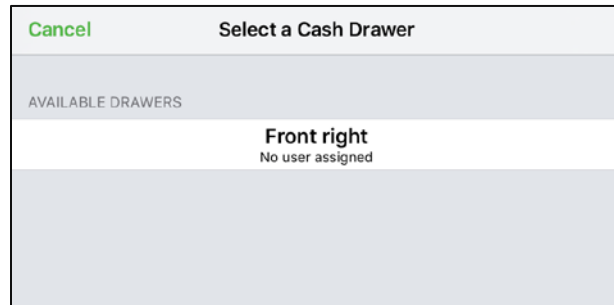
3. (Drawer Checkout Only) Select the **cash drawer** you want to use.

   NOTE: If the maximum number of users are already assigned to the cash drawer, the drawer is grayed out and you cannot assign yourself to the cash drawer.

   If you are the first user assigned to the drawer and the system requires you to enter a starting bank amount, an open cash drawer prompt appears and you must enter a cash amount.

   If you are the second user assigned to the drawer, the Tabs screen appears.

4. (Drawer Checkout Only) Tap **Open** to open the cash drawer so you can count the cash in the drawer.
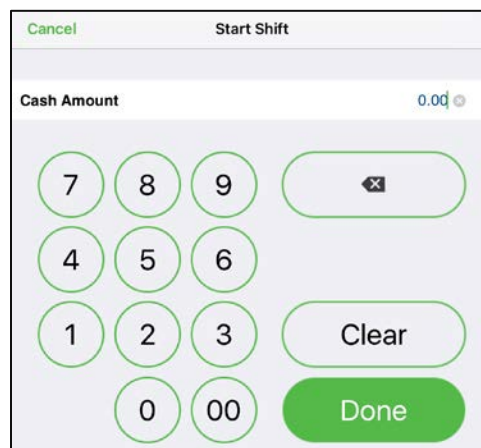
5. (Drawer Checkout Only) Enter the **cash amount** in the drawer and tap **Done**. A Drawer Paid In Chit prints. The Tabs screen appears.

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RUNNING YOUR RESTAURANT

Running your restaurant refers to the everyday functions you perform during the day, or shift. You may need to reset employee PIN numbers and passwords, delete items and guest checks, perform refunds, petty cash transactions, print an in-progress financial shift report, reopen a financial shift and much more.

PERFORMING SECURITY PROCEDURES

All employees log in with their unique four-digit PIN; however, you might need to change their four-digit PIN for security reasons, or when an employee forgets their PIN. For employees granted access to Silver Back Office, you might need to change their password, as well.

CHANGING AN EMPLOYEE PIN

1. Log in to **Silver Back Office** through a Web browser.

2. Select **EMPLOYEES**.

3. Select the **employee** for which you want to change a PIN. The Employee Detail screen appears.

4. Click **Change PIN**. The Change POS PIN screen appears.

5. In PIN, type the **new four-digit PIN.**

6. In Confirm PIN, retype the **new four-digit PIN.**

7. Click **Save Changes** to return to the Employee Detail screen.

8. Click **Save Changes**.

CHANGING AN EMPLOYEE PASSWORD

1. Log in to **Silver Back Office** through a Web browser.

2. Select **EMPLOYEES**.

3. Select the **employee** for which you want to change their password. The Employee Detail screen appears.

4. Click **Reset Password**. The Reset Password screen prompt appears with the temporary password for the employee. The system also emails the temporary password to the employee. When the employee logs in to Silver Back Office with the temporary password, the system requires the employee to change their password.

ENDING A BREAK EARLY

For restaurants with required breaks, there may be times when you need an employee to return from a break early. If an employee does not have the ability to approve ending a break early, the system prompts you, the manager, to enter your **four-digit PIN** and tap **Override**.

PERFORMING GUEST CHECK PROCEDURES

At times, you may need to perform maintenance on guest checks.

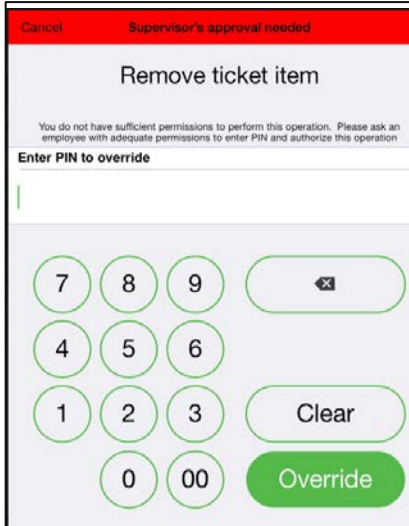## DELETING AN ITEM OR A GUEST CHECK

An employee may require manager approval to delete an item from a guest check or to delete a guest check. Depending on the state of the guest check, NCR Silver Pro Restaurant considers the deleting of an item or a guest check to be a clear or a void.

Deleting an item *__before__* finalization results in a clear.

Deleting an item *__after__* finalization results in a void.

Finalization occurs when you submit the items for order to the kitchen, tap Pay, tap SEND (table service only), tap SAVE (quick service only), back out of the order, log out of the POS app, or press the home button on the iPad.

The Shift End report for the employee contains a summary of the voids and clears performed by the employee during a financial shift. You can also review voids and clears performed by employees in the Void Audit Report, or at the POS Transactions page in Silver Back Office.

If an employee does not have the ability to remove an item from a guest check, or to remove all items from a guest check, the system prompts you, the manager, to enter your **four-digit PIN** and tap **Override**.

APPLYING AND APPROVING A DISCOUNT

You can provide a discount to a customer at either the item level or the guest check level. If an employee does not have the ability to approve a discount, the system prompts you, the manager, to enter your **four-digit PIN** and tap **Override**.

REFUNDING A CHECK

Perform a refund to offset a transaction for a closed check that was ordered incorrectly or when a guest asks for their money back. Refund mode is only active for a new check. You cannot perform a refund on a pending or closed check.

1. At the order entry screen, tap ▤ to display the slide out menu. You can also access this slide out menu at the floor plan screen.

2. Tap **Refund Mode**. The order entry screen appears and Refund appears across the guest check screen.

3. Enter the **items** for which you want to provide a refund.

4. Tap **Refund**. The 'tender' screen appears.

5. Tap **Cash** to issue a cash refund.

   -OR-

   Slide the **credit card** through the credit card reader to refund the entire amount to the card.

   -OR-

   Tap **Credit**, enter the **amount** to refund, tap **Done**, and slide the **credit card** through the credit card reader.

6. For credit card refunds, have the customer sign the **signature screen** with his or her finger, or a stylus, if prompted, tap **Accept**, tap OK, and then tap **Close**.

   -OR-

   Have the customer sign the **printed receipt**, and the tap **Close**.

   The system returns to the floor plan screen.

ADDING ITEMS TO A CLOSED CHECK

Open closed guest checks when an employee closes it prematurely. After opening a check, you can add items to the order.

You can only open a closed guest check during the day for which it occurred and while the shift of the employee financially responsible for the guest check is still active.

1. At the order entry screen, tap ▤ to display the slide out menu. You can also access this slide out menu at the floor plan screen.

2. Tap **Recall/Reprint**. The Recall/Reprint screen appears. The app defaults to display the tickets created, open and completed, on 'This station.' This station refers to the device you are using. To access completed tickets created on another device, tap **All Stations**.
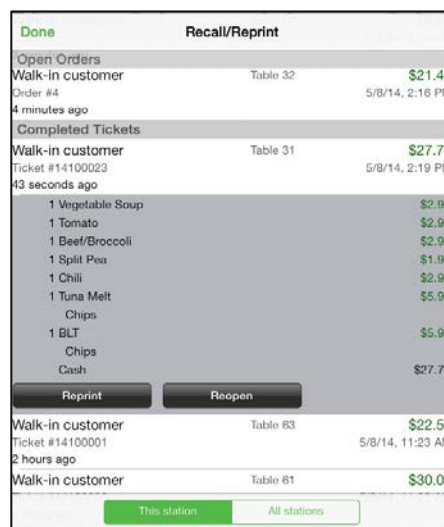
3. Tap the **completed ticket** you want to reopen. The order details appear with the option to reopen the guest check.

4. Tap **Reopen**. The system opens the guest check and the Pay button replaces the Close button.

5. Tap the **items** you want to add to the guest check and finalize the **order** as normal. The system updates the amount due with the total of the items added to the guest check.

ADJUSTING THE PAYMENT FOR A CLOSED CHECK

You can open a closed guest check to change the payment for the guest check.

1. Open the **closed guest check**. Refer to 'Adding Items to a Closed Check' above for opening a closed check.

2. At the guest check screen, swipe the **tendered amount** from right to left and then tap **Remove**. The system removes the tender from the guest check.

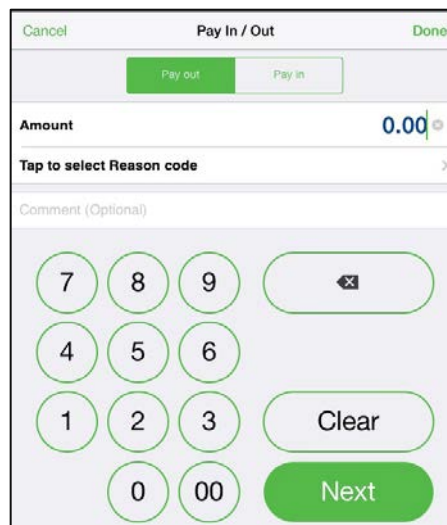3. Tap **Pay** and process the **payment** for the order.

PERFORMING CASH DRAWER PROCEDURES

Perform cash maintenance, for such things as adding and removing petty cash from the drawer, using Pay In and Pay Out. Pay In and Pay Out are petty cash accounts and the system posts transactions involving these accounts to the Shift End report of the employee who was active on the device when the transactions occurred.

PERFORMING A PAY OUT

Perform a pay out when you are taking petty cash out of the cash drawer.

1. At the order entry screen, tap ▤ to display the slide out menu. You can also access this slide out menu at the floor plan screen.

2. Tap **Pay In/Out**. The Pay In/Out screen appears and defaults to 'Pay out.'

3. Enter the **amount** for the cash transaction.

4. Tap **Tap to select a Reason code**. The 'Reason codes' screen appears.

5. Tap the **reason code** to apply to the payout transaction. The Pay In/Out screen appears.

6. Type a **comment** for the cash transaction, if necessary.

7. Tap **Done.** The system prints a Pay Out receipt to the default printer and returns to the floor plan screen.
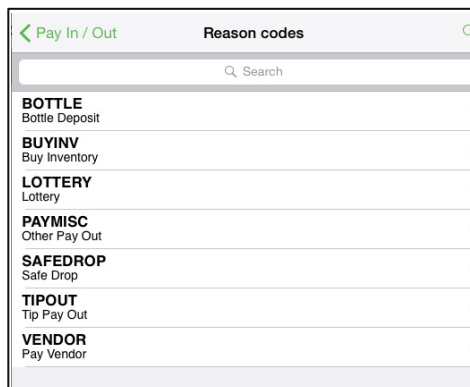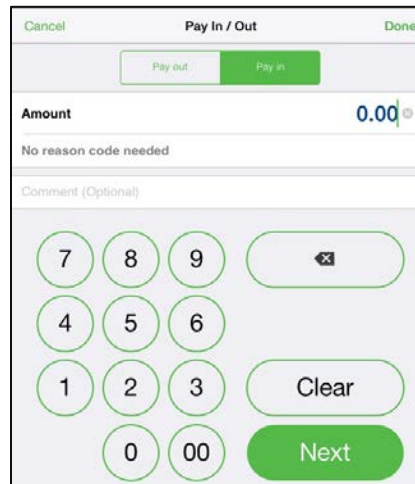
PERFORMING A PAY IN

Perform a pay in when you are adding petty cash to the cash drawer.

1. At the order entry screen, tap ☰ to display the slide out menu. You can also access this slide out menu at the floor plan screen.

2. Tap **Pay In/Out**. The Pay In/Out screen appears.

3. Tap **Pay in**.

4. Enter the **amount** for the cash transaction.

5. Tap **Next**.

6. Enter a **comment** for the cash transaction and tap **Done**. The system prints a Pay In receipt to the default printer and returns to the floor plan screen.

OPENING THE CASH DRAWER

You may need to open a cash drawer without entering a sale to provide change for a cash drawer. You can use the cash drawer key or use No Sale to open the drawer. You can only use No Sale when no ordered items appear on the guest check.

1. At the order entry screen, tap **No Sale**. The 'Pick a drawer' screen appears.


2. Tap the **cash drawer** you want to open. The cash drawer opens and the system returns to the order entry screen.

REDIRECTING A PRINTER

When a printer fails to print, appears at the top left side of the screen. You can re-redirect one printer to another if a printer stops working.

Scenario: You have two kitchen printers, one for Expo and another for Grill. The Expo printer is not working. You can re-direct the Expo printer to the Grill printer.

1. Tap to display a drop-down list of printer errors.
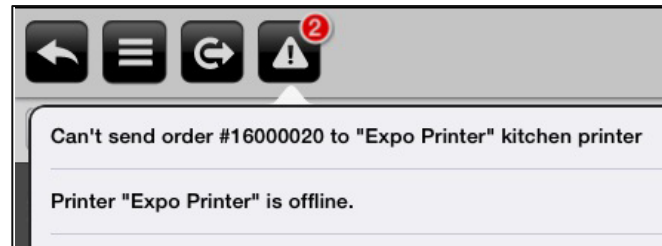
2. Tap **Printer 'xxxx xxxx' is offline**. The 'Printer "xxxx xxxx" is offline' screen appears.
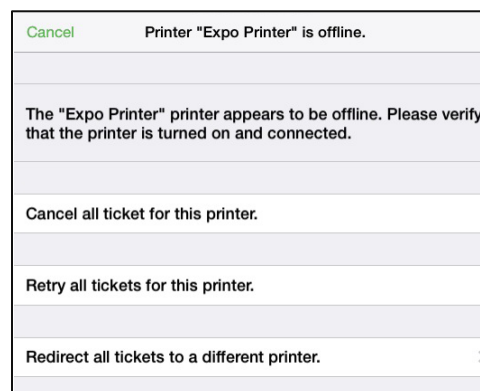
3. Tap **Redirect all tickets to a different printer**. The SELECT THE TARGET PRINTER screen appears.

4. Tap the **printer** to which you want to redirect the print jobs from the offline printer.

    The printer prints any pending print jobs from the offline printer.

    If you expect the printer to remain offline for an extended period of time, access Silver Back Office through a Web browser and reconfigure your printer settings. In the scenario above, you would add the Grill Printer to the Expo Printer Group.

RESENDING AN ORDER TO A KITCHEN PRINTER

1. At the order entry screen, tap to display the slide out menu. You can also access this slide out menu at the floor plan screen.

2. Tap **Recall/Reprint**. The Recall/Reprint screen appears and defaults to 'This station.' This station refers to the device you are using. To access orders created on another device, tap **All Stations**.
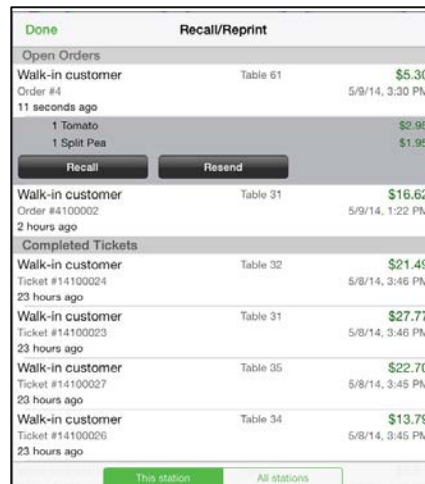
3. Tap the **order** you want to resend to the kitchen printer. The system displays the order details.

4. Tap **Resend**. The 'Select printer' screen appears.

5. Tap **Resend ticket to configured printers**. The system prints a kitchen chit to the configured kitchen printer and returns to the Recall/Reprint screen.

   NCR Silver Pro prints '*****RESENT*****' on a resent kitchen chit.

6. Tap **Done** to exit the Recall/Reprint screen.

PRINTING A RECEIPT TO A DIFFERENT PRINTER

Scenario 2: You have two receipt printers, Receipt Printer 1 and Receipt Printer 2. Receipt Printer 1 is not working. To print receipts to receipt printer 2, you do not need to change any configuration settings. When the system cannot print to the configured printer, the system prompts you to select a different printer. If the receipt printer fails to work, the cash drawer associated with the printer will not automatically open. It is necessary to use the cash drawer keys to open it to provide change.

When the system fails to print to the default printer, the Printer Failure prompt appears. Tap **Redirect**. The Printer screen appears.

Tap the **printer** to which you want to print a receipt. In the scenario above, tap Printer 2. The system prints the receipt to the selected printer.

PERFORMING EMPLOYEE PROCEDURES

As a manager, you may need to print an in-progress financial shift report for an employee. They may need to review their sales to determine how much to tip out to a fellow employee, such as a server.

At times, you may need to reopen the financial shift of an employee. The employee may have forgotten to adjust their tips before closing the financial shift or they may have inadvertently closed their financial shift.

PRINTING AN IN-PROGRESS SHIFT END REPORT

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.
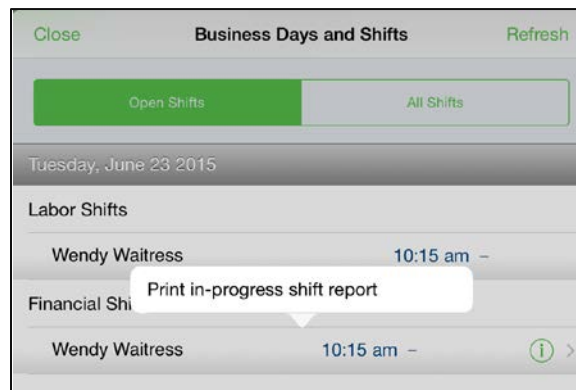
4. Tap **Print in-progress shift report**. The report prints to the default printer.

REOPENING A FINANCIAL SHIFT

Before reopening a financial shift for an employee, check to make sure they do not already have an 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.

In offline mode, if you open a financial shift on an iPad, then close the financial shift, you can reopen the offline mode financial shift, but only while in offline mode and only on the device on which you originally opened the financial shift.

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.
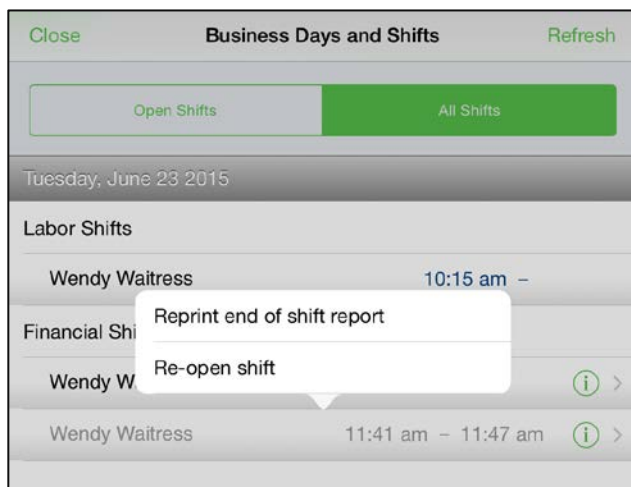
5. Tap **Re-open financial shift**. A confirmation prompt appears.

6. Tap **Yes**. A Shift reopened prompt appears.

7. Tap **OK**.

8. Tap **Close**.

MANAGING YOUR MENU

As a manager, you may be responsible for such things as adding or editing items and categories, editing prices, or adding and activating events. On a device, you can add items and categories to your menu.

NOTE: You cannot manage your menu from a device in multi-store.

MANAGING YOUR MENU ON A DEVICE

On a device, you can add items and categories. To edit or remove an item or a category, access Silver Back Office through a Web browser.

ADDING A CATEGORY TO THE MENU

1. At the order entry screen, tap [⊕] in the category on the bottom right side of the screen. The New category screen appears.

2. Type the **name** for the new category.

3. Tap **Save**. The system adds the category to the category on the order entry screen. When the data sync occurs between the device and the host, the system updates the host with the new category.

ADDING AN ITEM TO THE MENU

1. At the order entry screen, tap the **category** for which you want to add an item.

2. Tap [⊕] in the item on the top right side of the order entry screen. The Add Item screen appears.

3. Enter the **information** for the item.

4. Tap **Save**. The system adds the item to the menu according the category you selected. When the data sync occurs between the device and the host, the system updates the host with the new item.

RUNNING REPORTS

View reports to monitor the progress of sales and labor at your restaurant. You view some reports on a device and others you access in Silver Back Office.

VIEWING SHIFTS ON A DEVICE

View shifts on a device to monitor the labor and financial shifts for your restaurant.

1. At the POS home screen, tap ▤ to display the slide out menu.

Close	**Business Days and Shifts**	Refresh
Open Shifts		All Shifts
Friday, May 9 2014		
Labor Shifts		
Chris Dikes		01:22 pm –
Jimmy Orders		04:47 pm –
Financial Shifts		
Chris Dikes		01:22 pm –
Jimmy Orders		04:47 pm –

2. Tap **View Shifts**. The Business Days and Shifts screen appears and defaults to Open Shifts.

   Tap **Refresh** to update the information on the screen.

   Tap **All Shifts** to view both open and closed shifts.

3. Tap **Close** to exit the Shifts screen.

VIEWING REPORTS IN SILVER BACK OFFICE

NCR Silver Pro contains a number of reports to assist you in managing your restaurant. Access Silver Back Office through a Web browser to view these reports. You can also access POS Transactions to review details about specific transactions.

VIEWING POS TRANSACTIONS

Use POS Transactions to view or export details on specific transactions, such as deleted guest checks, and items and payments deleted from a guest check. In Silver Back Office, select **RESULTS > POS Transactions**.

Tickets you delete appear with 'Deleted Ticket' as the Transaction Type.

To review deleted items in a guest check:

1. Select **RESULTS > POS Transactions**.

2. Select the **guest check**.

3. Click **Lines**. Deleted items appear with a line strike through the item.

To review a deleted payment in a guest check:

1. Select **RESULTS > POS Transactions**.

2. Select the **guest check**.

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3. Click **Payments**. The deleted payment appears with a line strike through the payment.

CLOSING YOUR RESTAURANT

NCR Silver Pro requires little time when closing your restaurant. Employees are responsible for ending financial shifts and clocking out.

PERFORMING EMPLOYEE CHECKOUT PROCEDURES

Employees with financial shifts must end those shifts prior to clocking out. If an employee has open orders, the system prevents the employee from ending a financial shift. The employee must close the orders, or in Tableservice mode, another employee must take ownership of those open tables.

Once an employee ends a financial shift, a Shift End report prints to the default printer.

If an employee ends a financial shift and must reopen it, for such things as adjusting tips, you can do so. See 'Reopening a Financial Shift' earlier in this document.

Closing a financial shift differs slightly whether an employee is assigned to a cash drawer or not.

CLOSING A FINANCIAL SHIFT NOT ASSIGNED TO A CASH DRAWER

The employee taps End Shift and a Shift End Report prints to the receipt printer.

CLOSING A FINANCIAL SHIFT WHEN ASSIGNED TO A CASH DRAWER

When assigned to a cash drawer, the employee closing the cash drawer must enter a blind cash amount. If required, they may also need to enter a 'leave in drawer' amount. At the cash reconciliation screen, the system indicates whether the employee is over or short. If the employee is over or short, they may need to recount the cash in their drawer. If an employee does not have the access to recount their cash, the system prompts you, the manager, to enter your **four-digit PIN** and tap **Override**.

REPRINTING A SHIFT END REPORT

In some cases, it may be necessary to reprint a Shift End report for an 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 **All Shifts**.

4. Tap ⓘ next to the financial shift of the employee whose report you want to reprint. A 'Reprint end of shift report' prompt appears.
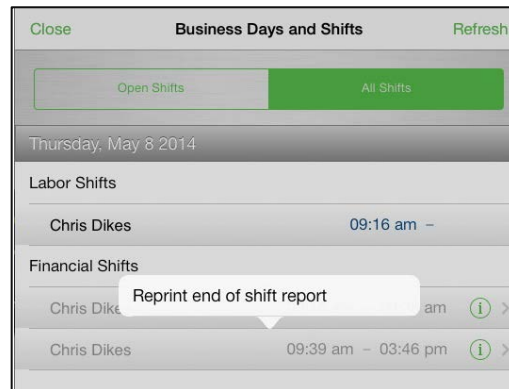
5. Tap **Reprint end of shift report**. The report prints to the default printer.

UNDERSTANDING THE SHIFT END REPORT
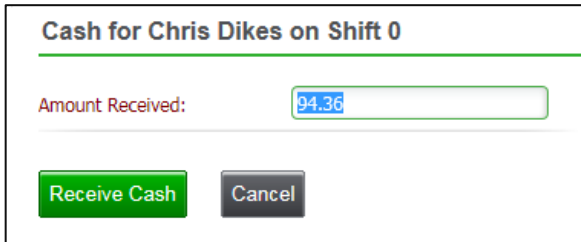
The Shift End Report calculates sales and payment amounts of the employee and determines the amount of cash an employee owes at the end of their shift. The report includes sales, discounts, taxes, gift cards sold, payments, petty cash transactions, voids, and credit card tips.

TOTAL CASH OWED is the final amount of cash the employee owes to the store or is due from the store.

RECEIVING CASH FROM THE EMPLOYEE AT THE SHIFT END

After the employee ends a financial shift and counts their till, you enter the cash you received from the employee minus any starting cash amount in the cash drawer. The amount you receive from an employee should equal the TOTAL CASH OWED amount.

1. Log in to **Silver Back Office** through a Web browser.

2. Select **RESULTS > FINANCIAL SHIFTS**.

3. Click **Receive Cash** for the employee and the date for which you are receiving cash. A 'Cash for Employee Name on Shift X' prompt appears.
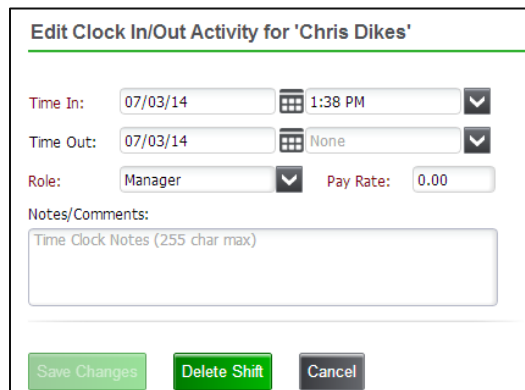
4. Type the **amount received**. The system defaults to the expected amount to receive, which is the amount from the TOTAL CASH OWED line of the Shift End Report.

5. Click **Receive Cash**. The system returns to the Financial Shifts screen and adds the amount to the 'Cash/Check Received By Store' Column. The 'Received By' column contains the name of the manager who received the money.

EDITING EMPLOYEE LABOR SHIFTS

At times, it may be necessary to edit a labor shift, if an employee forgets to clock in or clock out. When you edit a labor shift for an employee, the system marks the shift with an '*' to indicate an edited shift.

If an employee forgets to clock in, have the employee clock in on a device, and edit the start of the labor shift at the conclusion of their shift. If you edit the start of an active shift in Silver Back Office prior to the employee ending their shift, when the employee accesses the device the POS resubmits the clock in and creates a new shift.

1. Log in to **Silver Back Office** through a Web browser.

2. Select **RESULTS > LABOR SHIFTS**.

3. Click the **employee** whose shift you want to edit. The Edit Clock In/Out Activity for 'Employee Name' appears.

4. Select the **time in** or **time out** from the drop-down list.

5. Type a **reason** in Notes/Comments for the edit.

6. Click **Save Changes**.

CLOCKING YOURSELF OUT

As a manager, remember that you are an employee. Clock yourself out at the end of your shift.

1. At the POS home screen, tap **Clock Out**. The Clock Out prompt appears.

2. Tap **Yes**. The system logs you out and the login screen appears.

CONNECTION STATUS

NCR Silver Pro Restaurant enables you to quickly determine the connection status of a device through the use of a cloud icon in the POS app. The cloud icon appears on every screen in the POS app. The color of the cloud icon indicates the connection status of the device. When you tap the cloud icon, a connection drop-down menu appears indicating the specific state of the device connection to the Silver host, to Silver Server (if required), and to the credit processor (if you are using integrated credit). Additionally, you can initiate a series of actions from the connection drop-down menu, such as synchronizing data with the Silver host, putting the device in offline mode, or returning the device to online mode.

THE CLOUD ICON

The cloud icon is always visible on a device. It appears on the top left of the login screen and on the top right of all other screens. Depending on the connection state, the cloud icon may appear as green, yellow, or red.

indicates all connections are active and online.

indicates at least one connection is unstable or unreachable.

indicates at least one connection is unreachable.

It is possible for one device to display a green cloud icon while another device displays a yellow or red cloud icon. For example, your restaurant may include a bar with poor or no WiFi signal.

The cloud icon color displays the ***lowest current connection state*** at the moment. For example, if the device can connect to the Silver host and to the credit processor, but not to the server, the cloud icon appears as red.

When you tap the cloud icon, a connection drop-down menu appears revealing the connection status of the device to the Silver host, Silver Server, and to the credit processor. Additionally, action buttons to synchronize the iPad with the Silver host and, if necessary, to put the iPad into offline mode or online mode appear. You can also tap each connection state to view additional information.

The following table lists the possible connection states, the corresponding color, the message the POS app displays, and the available action or message.

Connection	Status Color	Message	Available Action or Message
Host	Green	Host is Online	**Action**: Data Sync
	Yellow	Host is Unstable	**Action**: (none) **Message**: Check WiFi settings.
	Red	Host is Unreachable	**Action**: (none) **Message:** Check WiFi settings and Internet connection.
Server	Green	Server is Online	**Action**: Go Offline
	Red	Server is Unreachable	**Action**: Go Offline **Message**: Check WiFi settings.
		Offline Mode	**Action**: (none) **Message**: Check WiFi settings.
		Offline Mode, Server Reachable	**Action**: Go Online **Message**: (none)
Credit Processor	Green	Credit Processor is Online	**Action**: (none)
	Yellow	Credit Processor is Unreachable	**Action**: (none) **Message**: Offline Credit Enabled.
	Red	Credit Processor is Unreachable	**Action**: (none) **Message**: Offline Credit Not Configured.

CONNECTION TERMINOLOGY

It is helpful to understand the terminology used by NCR Silver Pro Restaurant to describe the connection state of a device.

Online — Specifies the device as connected to the Silver host, to Silver Server, or to the credit processor. The device can send and receive data to the specified source.

Unstable — Indicates the device as temporarily unable to connect to the Silver host.

Unreachable — Specifies the device as unable to connect to the Silver host, to Silver Server, or to the credit processor. The device cannot send or receive data to the specified source.

HOST CONNECTION

The POS app seeks to connect to the Silver host to synchronize data between the device and the Silver host. This synchronization occurs at least every three minutes. The host status color indicates the ability of the device to connect to the Silver host.
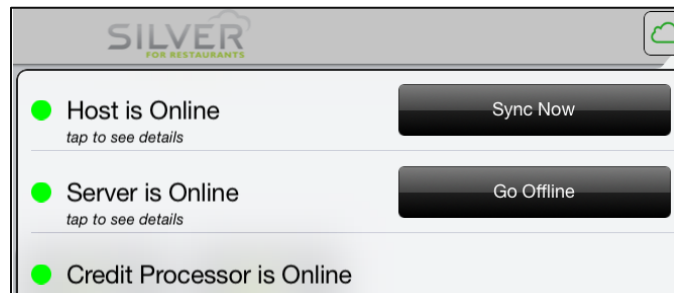
With a host status color of green, you have an Internet connection, which allows the POS app to connect to the Silver host and synchronize data. You can also synchronize the data manually. Tap the **cloud icon** to display the connection status menu, and then tap **Sync Now**.

With a host status of yellow, the POS app may not be able to connect to the host. Check your Wi-Fi settings.
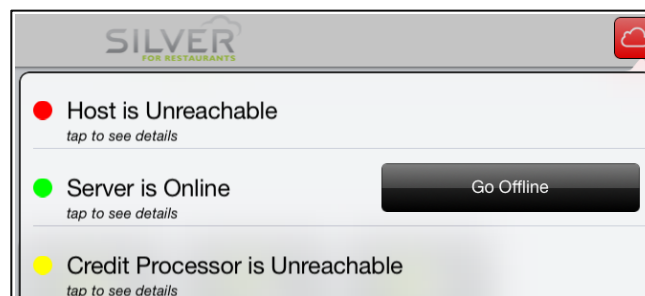
With a host status of red, you do not have an Internet connection, which prevents the POS app from connecting to the Silver host. When the host status color is red, the credit processor status color is yellow or red, depending on your offline credit configuration. Even with a host status color of red, it is possible for your server status color to be green, if the POS app can connect to the server but not to the Internet. When your host color status appears red, check your Wi-Fi settings and your Internet connection.

SERVER CONNECTION

If you employ multiple devices in your restaurant, you must use a server with the Silver Server software. When using devices in conjunction with a server, you have the option to operate the device in online mode or offline mode. The default mode for devices is the online mode; however, when a device loses a connection to the server, you can use the offline mode to continue operations in your restaurant. It is possible for one device to maintain a connection to the server, while another device loses connection to the server. For example, your restaurant may include a bar with poor or no Wi-Fi signal. You can use both devices, albeit with certain parameters.

If the server status color changes to red, make sure your server is running and check the wireless connection of the device to ensure your device is on the same Wi-Fi as the server.

UNDERSTANDING ONLINE AND OFFLINE MODE

The following provides an overview of the mode options and the functions you can perform.

Online mode — Allows you to read and edit orders and shifts created on any device in online mode.

Offline mode — Allows you to read and edit orders and shifts created on the device in offline mode, but only allows you to read orders that were created in online mode. While in the offline mode, the device does not attempt to sync data with the server. The device stays in offline mode until an employee returns the device to online mode. When working in offline mode, one of two status options appear:

Offline Mode — The device is running in offline mode and the server is not available.

Offline Mode, Server Reachable — The device is operating in offline mode, but the server is now available. While in 'Offline Mode, Server Reachable,' orders created on the device in offline mode appear as read-only to a device in online mode. With this status mode, any employee can choose to return the device to online mode and synchronize the data, or keep the device in offline mode and return it to online mode at a later time.

WHEN A DEVICE BECOMES DISCONNECTED FROM THE SERVER

If the server status color changes to red, the device has become disconnected from the server. The following occurs:

- The system prevents an employee from editing orders or adding new orders while the device is disconnected from the server.

- The device continually seeks to reconnect to the server.

- To use the device while it is disconnected from the server, a manager, or an employee with the appropriate access level, must put the device in offline mode.

SWITCHING TO OFFLINE MODE AND STARTING SHIFTS

When the device becomes disconnected from the server, a manager, or an employee with the appropriate access level, must put the device in the offline mode for employees to resume using the device in the restaurant.

To put a device in offline mode:

1. Tap the **cloud icon**. The connection status drop-down menu appears.
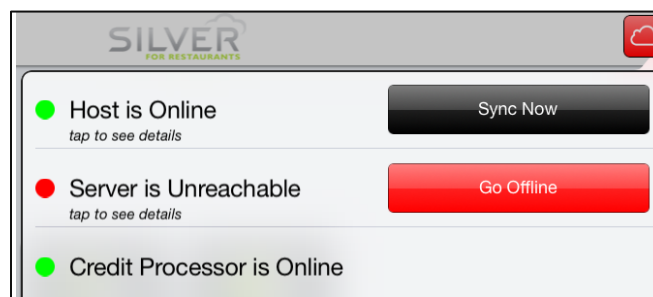
2. Tap **Go Offline**. The 'Supervisor's approval needed' screen appears.

3. If your access level allows you to put a device into offline mode, type your **four-digit PIN** and tap **Override**.

   -OR-

   If you cannot put a device into offline mode, obtain **manager assistance**.

   The system logs out the employee and returns to the login screen.

4. Enter your **four-digit PIN** and tap **Login**. To enter orders and accept payments, it is necessary to start a financial shift.

To start a labor shift in offline mode:

When you put a device into offline mode, employees who have already clocked in do not need to do so again. If an employee arrives to start a new labor shift, a manager, or an employee with the appropriate access level, must authorize the start of a labor shift.

1. At the login screen, type your **four-digit PIN** and tap **Login**.

2. Tap **Clock In**. The Select Job Code screen appears.

3. Tap the **job code** for the job you will perform during this shift. A 'Supervisor's approval needed' prompt appears.

4. If your access level allows you to start a financial shift for employees using a device in offline mode, type your **four-digit PIN** and tap **Override**.

   -OR-

   If you cannot start a financial shift for a device in offline mode, obtain **manager assistance**.

To start a financial shift in the offline mode:

When you put a device in offline mode, employees using the device to enter orders and accept payments must start a new financial shift. To start a financial shift on a device in offline mode, it is necessary for a manager, or an employee with the appropriate access level, to authorize the starting of a financial shift.

The only instance in which a user does not need to begin a new financial shift is when they have already started a local, financial shift on the device.

NOTE: If you are using Drawer Checkout mode and an employee assigned himself to the cash drawer when online, then the employee does not need to start a new financial shift.

1. At the POS home screen, tap **Point of Sale** or **Takeout/Delivery**. A 'Starting New Shift' prompt appears.

2. Tap **Yes**. A 'Supervisor's approval needed' prompt appears.

3. If your access level allows you to start a financial shift for employees using a device in offline mode, type your **four-digit PIN** and tap **Override**.

    -OR-

    If you cannot start a financial shift for a device in offline mode, obtain **manager assistance**.

WORKING WITH OPEN ORDERS IN OFFLINE MODE

When you put a device in offline mode, orders created in online mode become locked to the offline device and appear as read-only to a device in offline mode.

A device in offline mode cannot create orders at the table level. You can only create orders at the tab level on a device in offline mode.
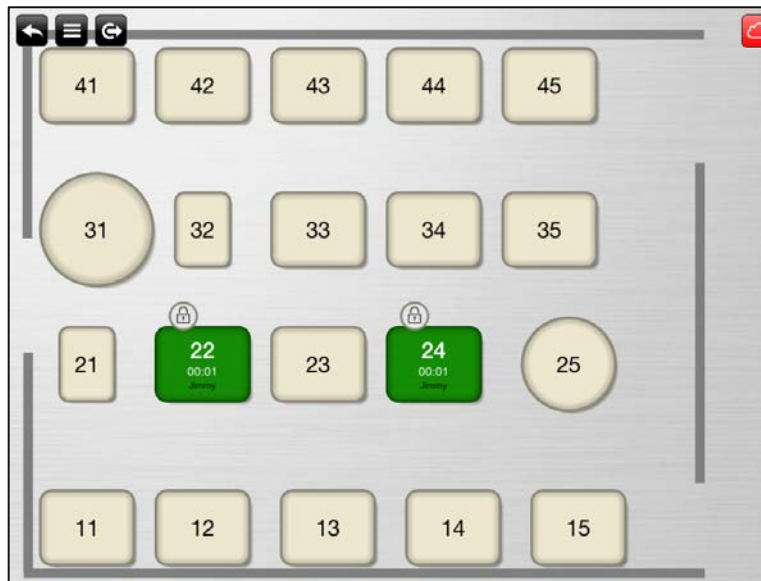
On the floor plan, the system places a locked icon above the table or tab for those online orders which are now locked to a device in offline mode.
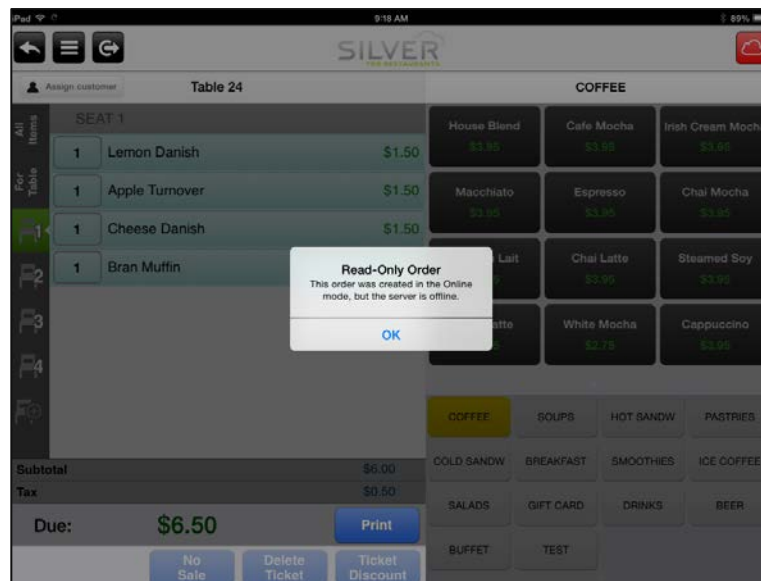
When you attempt to access a locked, online mode order with a device in offline mode, a prompt appears informing you that the order is read-only and editing is disabled.

To re-create an existing, open online mode order on an offline device:

1. Tap the **order** you want to view. The 'Read-Only Order' prompt appears.

2. Tap **OK**.

3. Gather the **information** from the order. To print a copy of the order, tap **Pay**, and then **Print.** The Print button replaces the Pay button.

   -OR-

Write down the **order information**.

4. Tap to access the floor plan screen and select **Tabs**.

5. Tap **ADD TAB**.

6. Enter the **order information**.

7. Finalize the **order**. When you finalize the order, a prompt appears to assign a customer to the order.

8. Enter an **identifying name** for the tab, one to help identify the table for which it belongs, such as the customer name or 'From table 62.'

   After you return the device to online mode, if you replicated online mode orders as new tab orders on an offline mode device, you may need to void the tickets of those read-only online mode orders that you replicated.

To enter a new order on a device in offline mode:

When you put a device in offline mode, it is necessary to access the Tabs screen and enter orders as a new tab. While the device remains in offline mode, you can only edit these orders on the device on which you created the order.

Orders entered on a device operating in 'Offline Mode, Server Reachable' appear as read-only to other devices.

1. Tap **ADD TAB**

2. Enter the **order information**.

3. Finalize the **order**. When you finalize the order, a prompt appears to assign a customer to the order.

4. Enter an **identifying name** for the tab, one to help identify the table for which it belongs, such as the customer name or 'From table 62.'

   After you return the device to online mode, if you replicated online mode orders as new tab orders on an offline mode device, you may need to void the tickets of those read-only online mode orders that you replicated.

RETURNING TO ONLINE MODE

While in offline mode, when the device can connect to the server, the connection status changes to 'Offline Mode, Server Reachable.' The device does not automatically return to online mode. An employee must initiate the action to return the device to online mode.

1. Tap the **cloud icon**. The connection status drop-down menu appears.
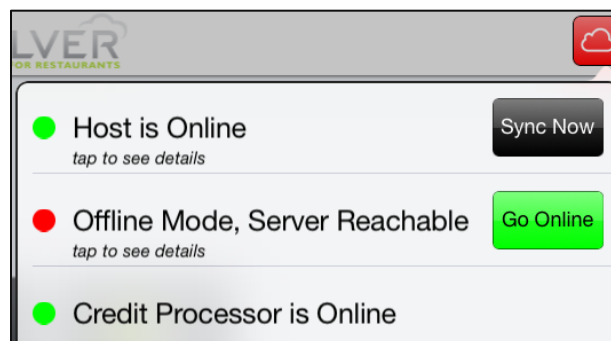
2. Tap **Go Online**. The POS app verifies it can connect to the server. When the offline device successfully connects to the server, the POS app logs out the current user and the cloud icon color changes to green. The login screen appears for the employee to log back in to the POS.

When you successfully return a device to online mode, the following occurs:

- Each employee on the device is logged out of the device.

- Silver Server replicates and synchronizes the data, including orders and shifts, from the offline device.

- Silver Server converts the offline mode orders to online mode orders, making them accessible to all connected, online mode devices.

- If you replicated locked online mode orders as new tabs, you may need to void the ticket of the formerly locked orders; otherwise, you will have an open order at the end of the shift.

CREDIT PROCESSOR CONNECTION

With an Internet connection, the credit processor connection color status is green, which allows you to process credit card transactions. Without an Internet connection, the credit processor color status changes to yellow or red, depending on your offline credit configuration. Yellow indicates you are using offline credit, whereas red indicates offline credit is not available. This means you are not able to accept credit cards as payment.

Offline credit is a configuration in Silver Back Office and there are no steps for you to initiate offline credit on a device when you lose an Internet connection. The system automatically reverts to offline credit status, if previously configured, and when the Internet connection returns, the POS app returns to online credit status.

Do NOT delete the POS app on a device in which you have offline credit card transactions requiring submission to a merchant processor. If you delete the POS app with pending offline credit card transactions, you will delete the credit card information and be unable to submit the transactions to your merchant processor.

USING OFFLINE CREDIT TRANSACTIONS

You process offline credit card transactions as normal. When you reach the threshold amount for an individual transaction or the total amount of transactions for a device, the system prevents you from completing the transaction. It is then necessary to delete items from the order to get under the threshold to be able to accept the credit card for offline payment, access Internet connectivity for authorization, or accept another form of payment.

You can view and manage offline credit transactions on the POS at the Pending Credit screen.
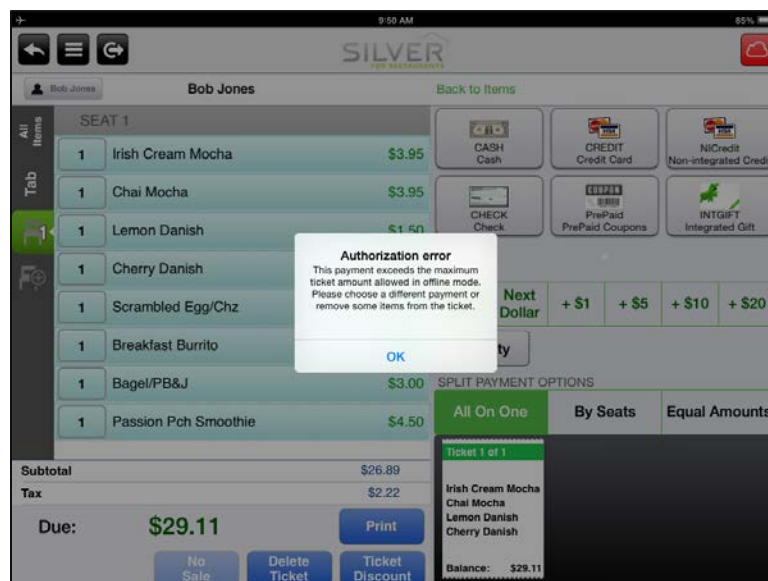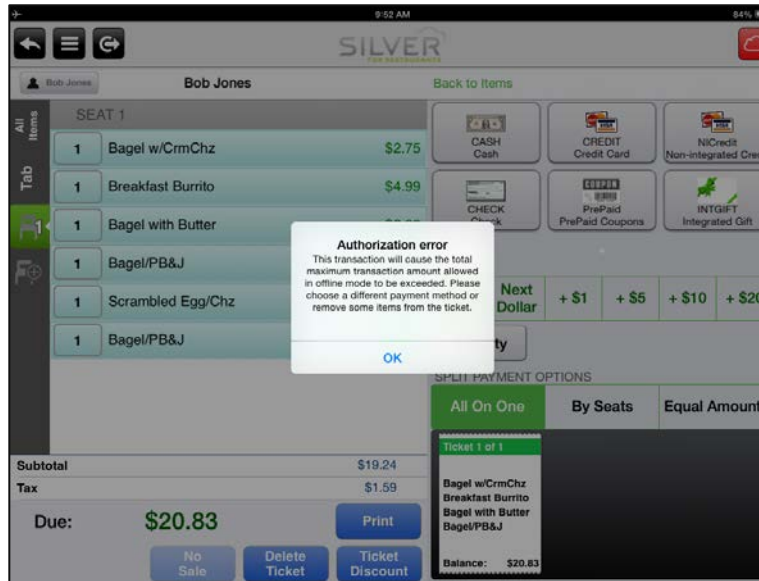
MANAGING OFFLINE CREDIT TRANSACTIONS

The Pending Credit screen contains credit payments which have not been authorized by the credit processor.

When you return to an Internet connection, the system submits the credit card transactions for approval. It is not necessary to log in to the POS app as long as the app is active.

VIEWING PENDING OFFLINE CREDIT TRANSACTION ON THE POS

1. Log in to **NCR Silver Pro** to access the POS home screen.

2. Tap [icon] to display the **slide out menu**.

3. Tap **Pending Credit**. The Pending Credit Transactions screen appears and you can view the offline credit card transactions entered on the device that have not yet been approved. The screen also includes the total amount of offline credit transactions entered on the device.

4. Tap **Close** to exit the Pending Credit Transactions screen. Continue to the next section to review how to manage Pending Credit transactions.

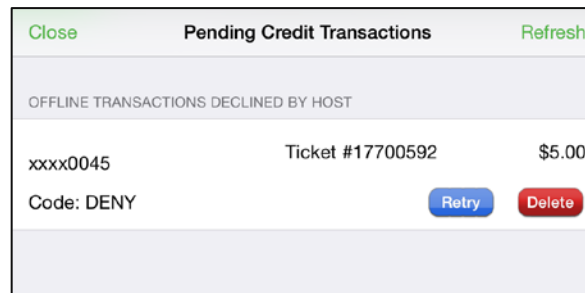## MANAGING PENDING OFFLINE CREDIT CARD TRANSACTIONS ON THE POS

When the credit card processor approves a pending offline credit card payment, the POS removes the payment from the Pending Credit screen. For pending credit payments which the processor does not approve, an explanation appears under the credit card number. You may continue to retry the payment or delete it.

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.

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**. Once you delete the credit card payment, you will no longer be able to retrieve the credit card data.

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.

VIEWING OFFLINE CREDIT REPORTS IN SILVER BACK OFFICE

In Silver Back Office, you can view an offline credit report to review your offline credit transactions. The report includes the device that accepted the transaction, the ticket number, batch ID, authorization code, if you have submitted the card for processing, cardholder name, card number, and transaction amount. You can filter the report to include all offline credit card transactions, pending, approved, and declined transactions.

BUSINESS DAYS

Since the business day of a restaurant may not follow a calendar day, NCR Silver Pro introduces the concept of business dates. A business date is a period of operation, which generally corresponds to one day of open business. For example, a restaurant may open at 5 p.m. on Monday and close at 4 a.m. on Tuesday. This would equate to one business date in NCR Silver Pro.

In some instances, a restaurant may remain open twenty-four hours. In these scenarios, NCR Silver Pro allows two business dates, the previous date and the current date, to overlap.
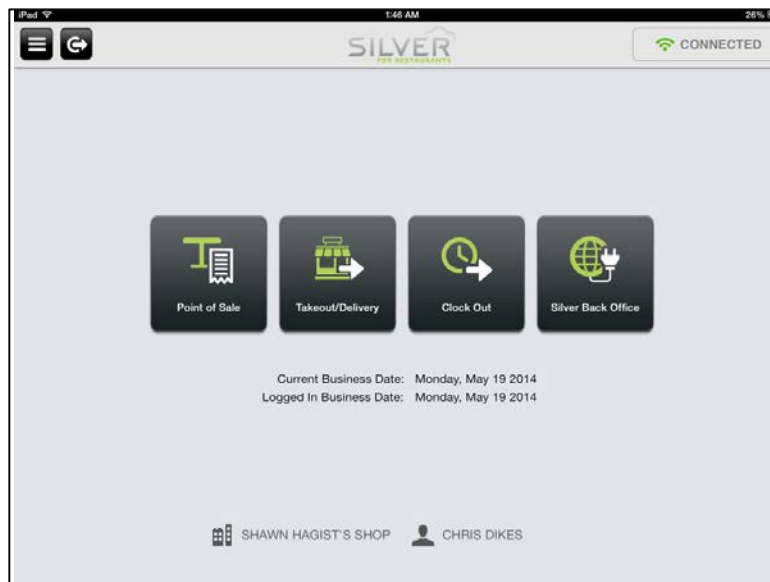
At the POS home screen, the system identifies the current business date and the logged in business date.

The End of Day process, which closes a business date, cannot run until the closure of all orders and shifts. This guide explains business dates, what you can and cannot do when two business dates overlap, and the process for closing a business date.

Once you close a business date, no one can log in to a closed business date to create or edit shifts or orders.

DEFINING BUSINESS DATE THRESHOLDS

NCR Silver Pro contains two thresholds for determining when a business date ends.

Business date threshold – At 3 a.m., your local time, the system attempts to end the current business date. If no open orders or shifts exist, the system automatically closes the business date. If open orders or shifts exist, the system keeps attempting to close the business date, while keeping the previous business date open, until 8 a.m.

The system starts a new business date at 3 a.m., even if it cannot close the existing business date, allowing you to have two business dates open and active for the same time period.

Business date cutoff threshold — At 8 a.m., your local time, if the previous business date remains open, the system restricts access to that business date, even though it may contain open guest checks or shifts. At this point, a manager must close any open orders or shifts for the previous business date.
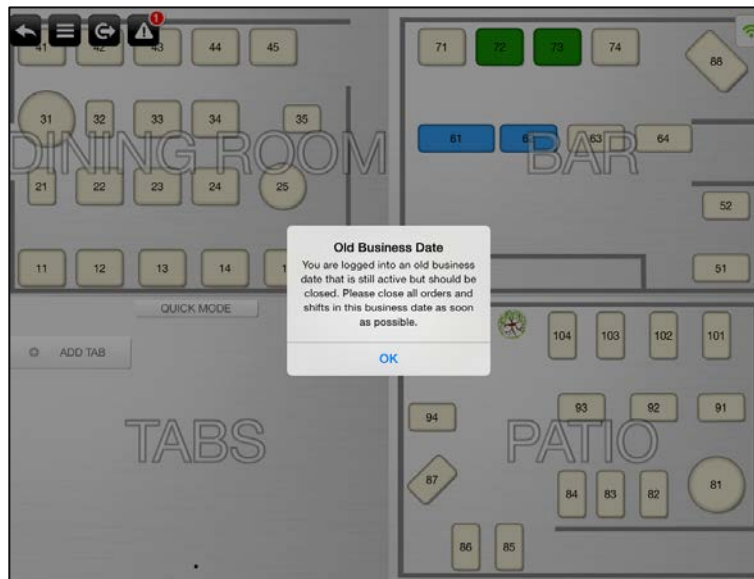

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WORKING WITH TWO OPEN BUSINESS DATES

In some instances, it is possible to have two business dates open and active at the same time, from 3 a.m. to 8 a.m.
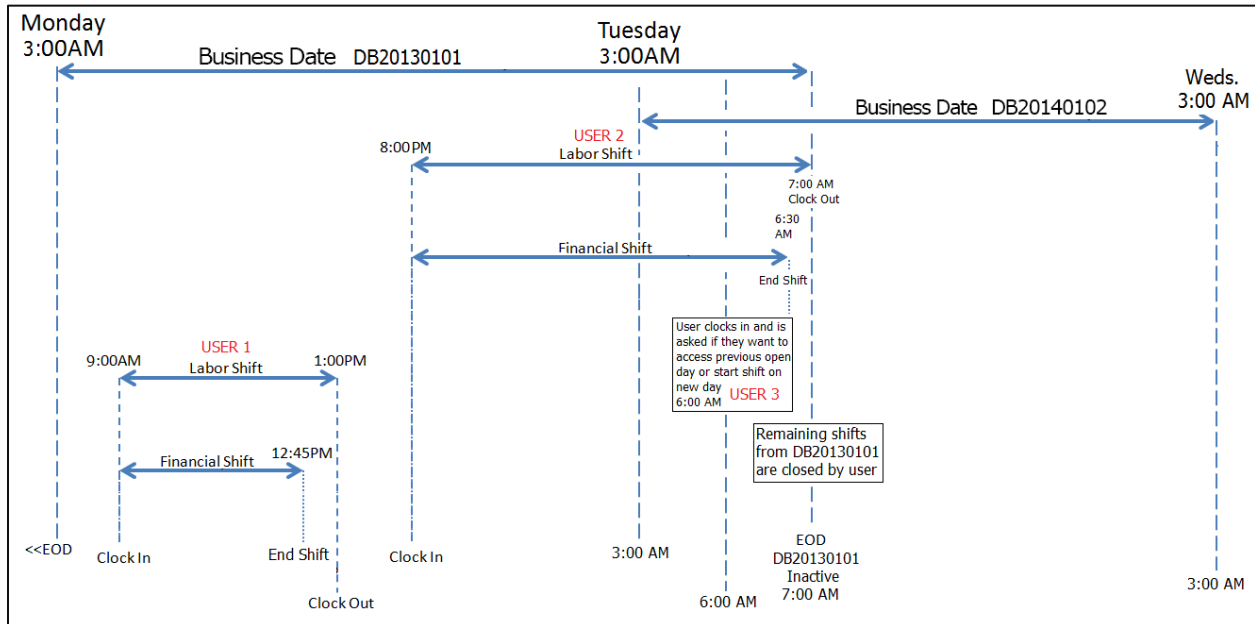
When this occurs:

- The system considers employees who clocked in prior to 3 a.m. to be working under the previous business date.

Upon each log in to the POS, the system prompts the employee to close their orders and shifts for the previous date; however, the employee can continue entering orders and receiving payments under the previous date.

- A non-manager employee, who clocked in to NCR Silver Pro prior to 3 a.m.:

Can continue working under their existing labor and financial shift for the previous business date.

Cannot start a new financial shift for the previous business date.

At 8 a.m., the system restricts the employee from logging in to the previous business date, even if they have open shifts and orders.

- For a manager, upon each log in, the system prompts the manager to choose the business date they want to access.
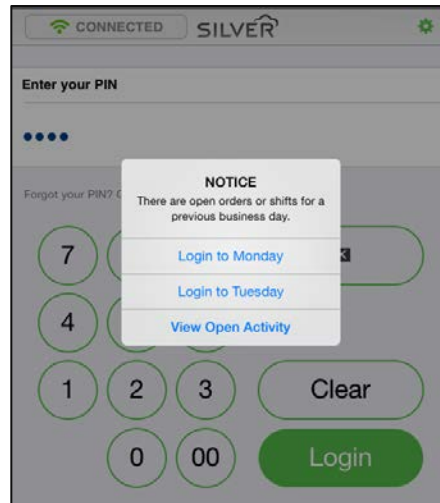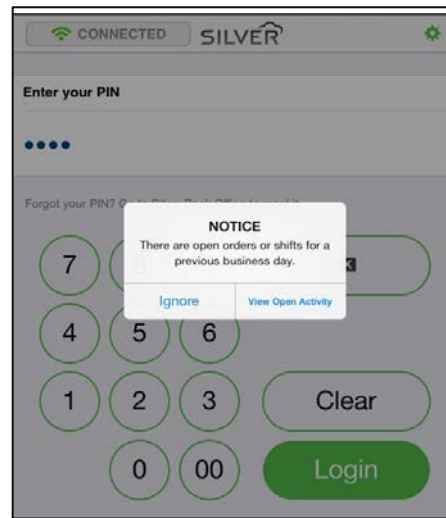

If a manager chooses the previous business date, the system also prompts the manager to close any open orders or shifts.

If a manager chooses the current business date, the system allows a manager to clock in and start a new financial shift; however, a manager cannot edit an order created in the previous business date.

- An employee who clocks in after 3 a.m., but before 8 a.m.:

Can start a labor and financial shift for the current business date.

CLOSING A BUSINESS DATE MANUALLY

When open orders and shifts exist at 8 a.m., the system restricts access to the previous business date and cannot automatically close the business date. It is necessary for a manager to manually close the business date. The system provides the manager with two options for manually closing a business date. One is to initiate a Force Close, which automatically closes all shifts and orders, and the second is to close each order and shift separately.

When open orders and shifts from a previous business date exist, the system prompts the manager each time they log in to the POS. The manager can tap **Ignore** to continue to the POS home screen, or tap **View Open Activity** to access the Open Business Dates screen.

USING FORCE CLOSE

Force Close enables you to close a business date by closing all open shifts and orders for a previous date at one time. When you initiate a force close, the system:

- Closes all open orders and the employee associated with the order is financially responsible. If you have open orders saved to a credit card, the system closes those orders to the saved card. The system closes all other orders to cash.

- Closes all open financial shifts.

- Closes all open labor shifts to the time at which you execute a Force Close. You may need to access Silver Back Office through a Web browser to edit the labor shift for the employee.

To initiate a force close:

1. After logging in to the POS, tap **View Open Activity**. The Open Business Dates screen appears.
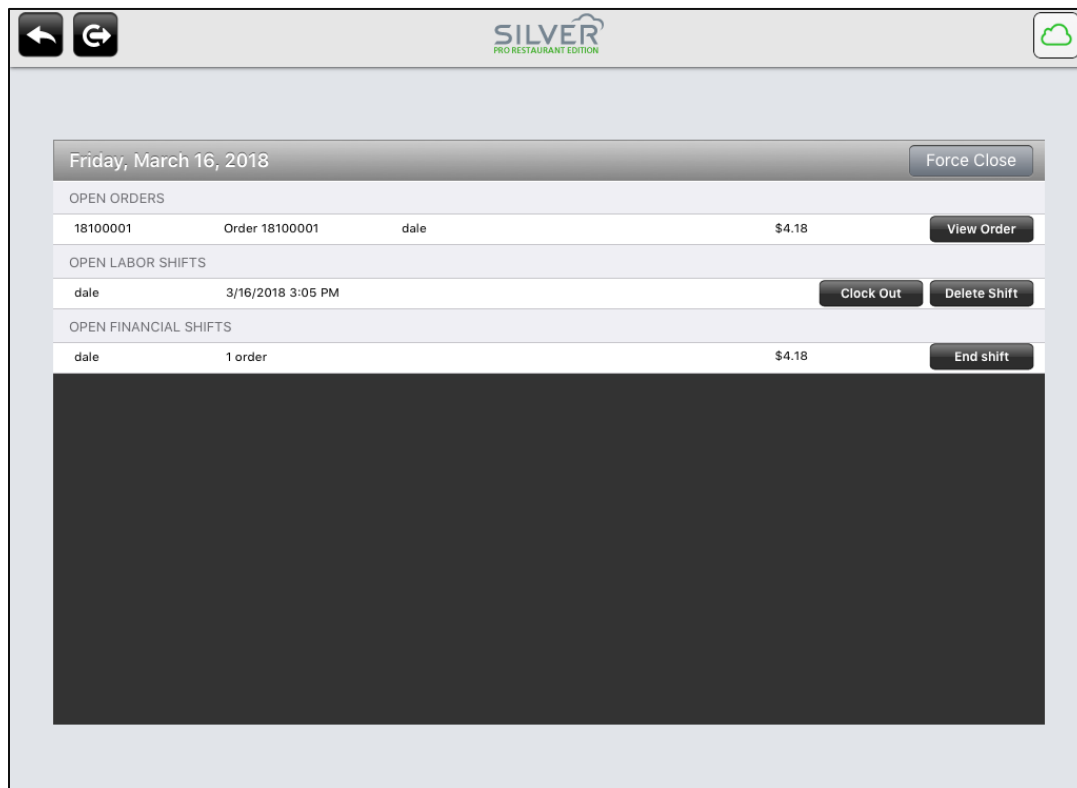
2. You can view any open orders on the POS and close them before ending the shift. When viewing an order, you can complete many functions in order to close out a ticket in the same way you would during an active shift. For security and reporting accuracy, you cannot make adjustments that impact the final total, order mode or any payments already applied to the order.

3. You can tap **End Shift** to end any open shift.

4. Tap **Force Close** next to the date for which you want to close all open orders and shifts. The system closes the open orders and shifts and marks the previous business date as closed.

   You may have up to seven previous business dates which require you to close them. After seven days, the system archives the business date preventing anyone from editing open shifts or orders for that date.

CLOSING EACH ORDER AND SHIFT

Instead of using Force Close, you can close each open order and shift manually. This method provides you various options to close orders, to clock out or delete labor shifts, and to end financial shifts.

CLOSING OPEN ORDERS

You can close open orders to cash or to the saved credit card on the guest check, which assigns financial responsibility to the server responsible for the order. If you close a guest check to a saved card, this may result in the assignment of sales totals to one day and the settlement of the credit card authorization on a separate day. You can also void the guest check.

1. At the Open Business Dates screen, tap **Close to Cash**, **Close to Saved Card**, or **Void Order** for the order. A prompt appears.
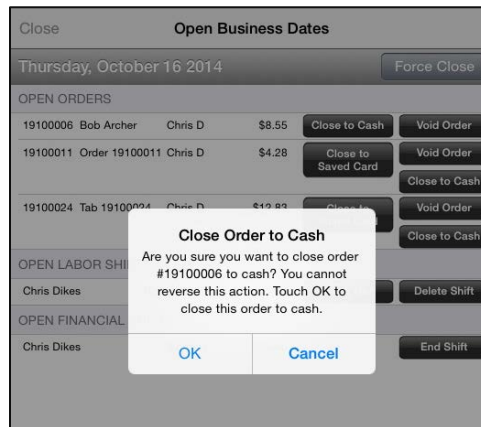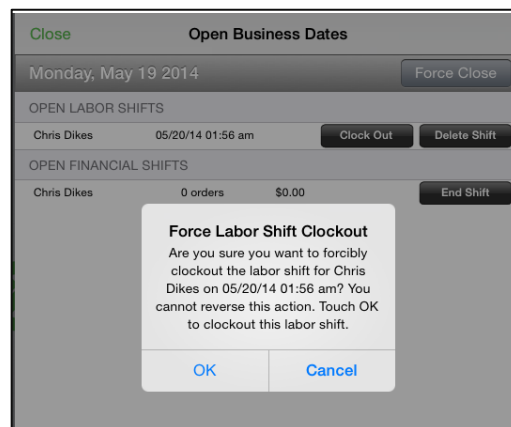
2. Tap **OK**. The system closes the order in the selected manner and returns to the Open Business Dates screen.

3. Repeat for **each open order**.

CLOSING OPEN LABOR SHIFTS

You can close an open labor shift, or you can delete the labor shift for an employee. If you close the labor shift, the system clocks out the employee at the time you tap Clock Out. You may need to access Silver Back Office through a Web browser to edit the labor shift for the employee.

1. At the Open Business Dates screen, tap **Clock Out** or **Delete Shift** for the selected employee. A prompt appears.
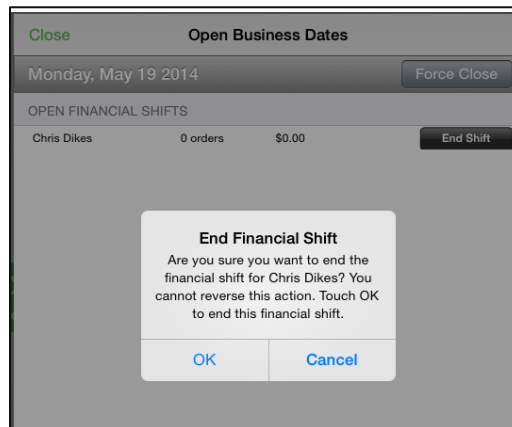

2. Tap **OK**. The system closes the labor shift as selected, and returns to the Open Business Dates screen.

3. Repeat for **each employee** with an open labor shift.

CLOSING AN OPEN FINANCIAL SHIFT

When you end an open financial shift, the system closes any open orders to cash, if you have not already closed the open orders associated with the employee. Before closing an open financial shift, ensure you close any open orders.
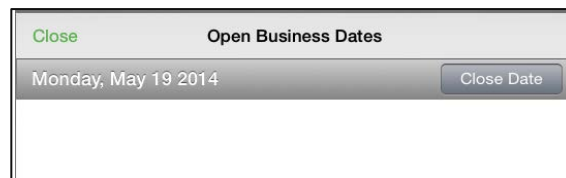
1. At the Open Business Dates Screen, tap **End Shift** for the selected employee. A prompt appears.

5. Tap **OK**. The system closes the financial shift and returns to the Open Business Dates screen.

6. Repeat for **each employee** with an open financial shift.

INITIATING THE MANUAL CLOSE OF A BUSINESS DATE

After closing each order and shift for the specified previous business date, you can then manually close the business date.

1. At the Open Business Dates screen, tap **Close Date.** The system closes the business date.

2. Tap **Close** to exit the Open Business Dates screen.

WORKING WITH OFFLINE MODE ORDERS AFTER CLOSING A BUSINESS DATE

When a device in the offline mode returns to the online mode, Silver Server attempts replication. The formerly offline mode device discovers a closed business date and logs out the user. It is necessary for a manager to close the open orders and shifts.

ARCHIVING PREVIOUS BUSINESS DATES

The system allows a previous business date to remain available for closing by a manager for seven days. After seven days, the system archives the previous business date and prevents a manager from accessing the business date to close orders or shifts.
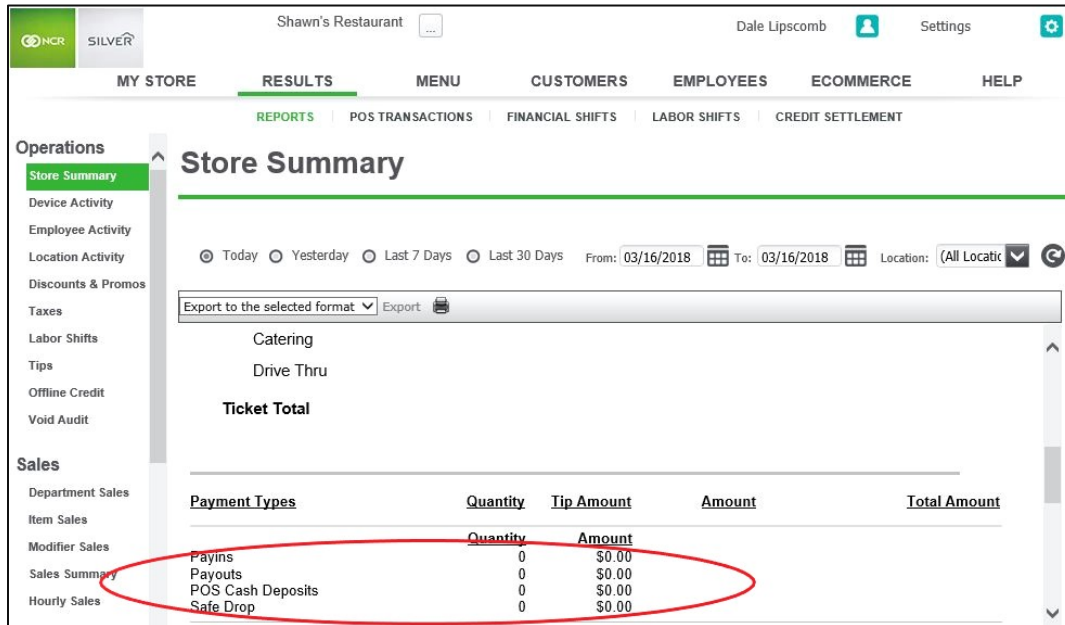
HELP

NCR Silver Customer Care: 877-270-3475

Customercare.ncrsilver.com

APPENDIX A: SAFE DROPS

The Safe Drop Pay Out can be used to track money that's been taken out of the POS and put into a safe but should still be included in a bank deposit.

Safe Drops are reported separately from POS Cash Deposits on the store summary page so that managers can more accurately track the store's money.

Safe Drop Example:

The example below illustrates how a Safe Drop work:

- Cashier completes a $349.00 cash sale.

- The Manager does a $10.00 Miscellaneous Payout (Pay Out Other) to get some supplies for the store.

- The Manager completes a $100.00 Safe Drop (with the exclude from store summary cash deposit flag enable)

- Shift ends

If the financial shift started with $0.00 in cash.

- After transaction1, the financial shift has $349.00 in cash.

- After the first pay out, the financial shift has $339.00 in cash.

- After the safe drop, my financial shift has $239.00 in cash.

- Once the shift ended, the cash drawer has $239.00 in cash, which is placed into the safe.

- At the end of the day, the manager takes the $100 safe drop from the shift and the $239 from the shift to the bank. He has $339.