

# Quick Service for NCR Silver Pro Restaurant Edition



SILVER



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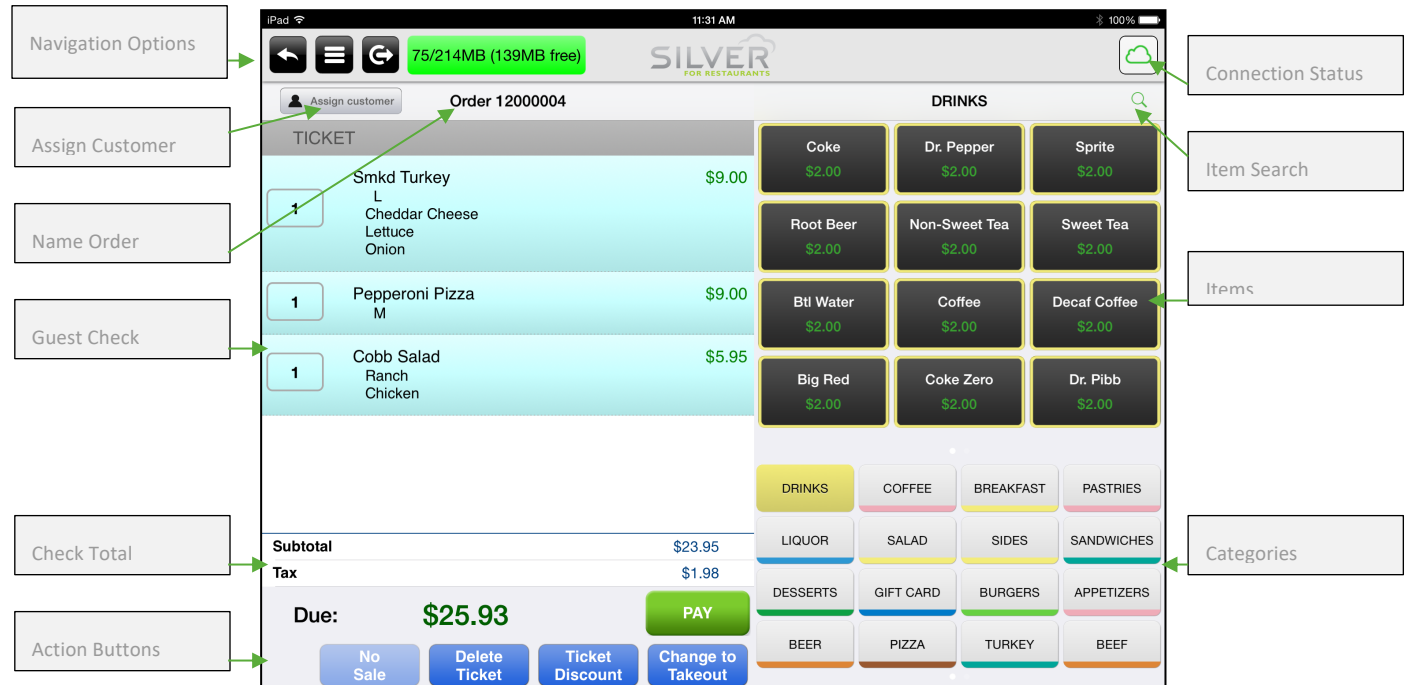
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

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## INTRODUCTION

For Quick Service operations or Table Service operations using Quick Mode, NCR Silver™ Pro enables you to quickly enter orders, collect customer information, accept payments, and much more.



**Navigation options** — Tap  to return to the previous screen, tap  to display a slide out menu, or tap  to log out of the app.

**Assign customer** — Tap **Assign customer** to attach a customer name to the order. Use this button to capture customer information.

**Order number** — Indicates the order number for the order. You can also use this to name an order.

**Guest check** — Displays the items ordered.

**Check total** — Displays the subtotal, the tax, the discounts, if any, and the total amount due.

**Action buttons** — Tap a button to initiate an action for the order.

**Connection status** — Tap to view the connection status of the device to the host, to the Silver Server, if configured, and to the credit processor. A green signal indicates online, a yellow signal indicates unstable, and a red signal indicates unreachable. Action buttons enable you to synchronize data, enter offline mode, and return to online mode.

**Item Search** — Tap to initiate a search for an item.

**Items** — Tap an item to add it to the order. Swipe left to right or right to left to display more items.

**Categories** — Tap a category to display a list of available items from that category.

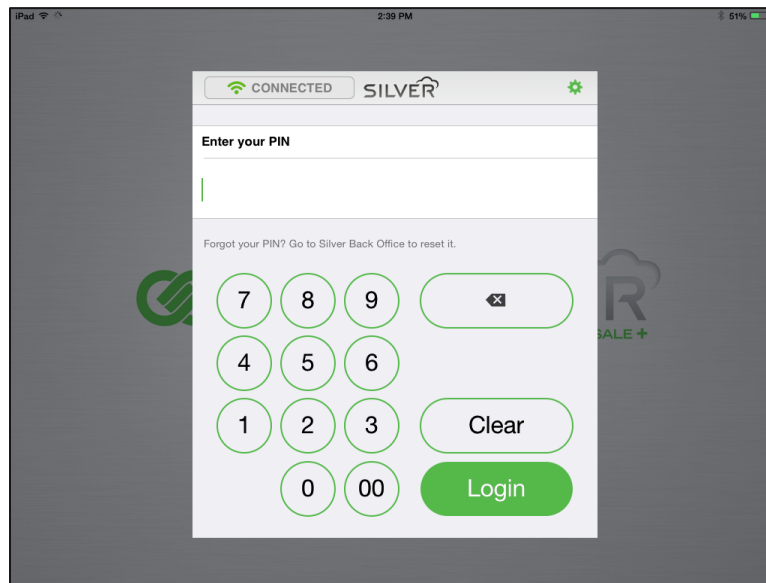


## LOGGING IN

It is necessary for you to log in with your four-digit PIN or swipe your badge each time you access NCR Silver Pro Restaurant. Once you log in, you can clock in and clock out, start and end a financial shift, if necessary, enter customer orders, and accept payments.

### PIN ENTRY

1. Tap **NCR Silver Pro Restaurant** on the device. The login screen appears.



2. Enter your **PIN**.
3. Tap **Login**. The POS home screen appears.

### MSR LOGIN

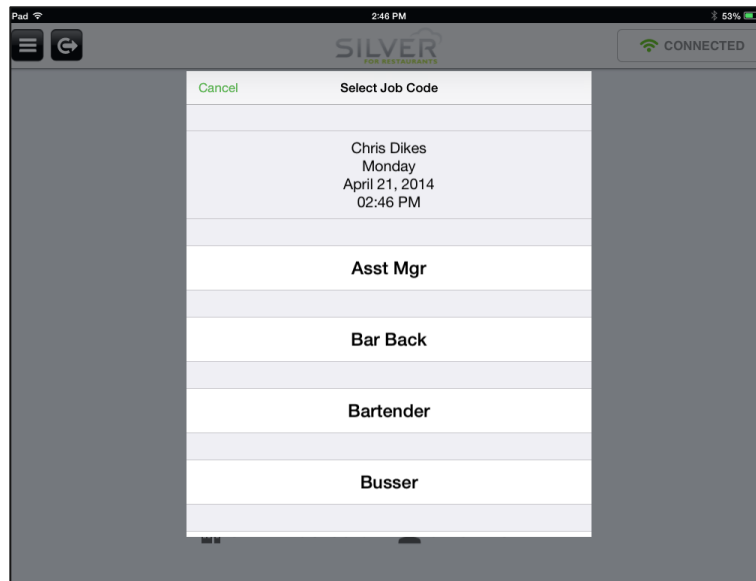
For iOS users with employee identification cards, swipe your card at the Login screen with the magstripe facing up.

## STARTING SHIFTS

NCR Silver Pro contains two types of shifts, Labor and Financial. All employees clock in at the beginning of a shift, but only employees enter orders or accept payments must start a financial shift. For restaurants with breaks configured, you can also start and end unpaid breaks.

### CLOCKING IN

1. At the beginning of your shift, from the POS home screen, tap **Clock In**. The Select Job Code screen appears.

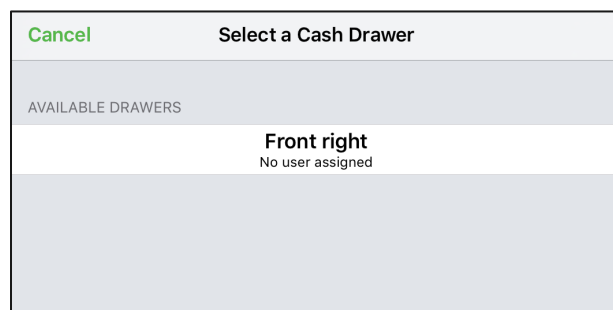


2. Tap the **job code** for the job you will perform during this shift. The POS Home Screen re-appears. Additional options may be available based on the job code you select.
3. Tap to Logout, if you are not performing order entry, or continue to the next procedure to start a **financial shift**.

## STARTING A FINANCIAL SHIFT

It is necessary to start a financial shift prior to entering orders or accepting payments. When you start a financial shift, End Shift replaces Clock Out on the POS home screen.

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.



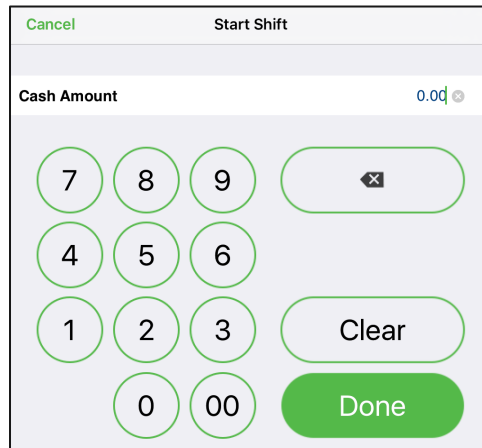
3. (Drawer Checkout Only) Select the **cash drawer** you want to use.

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.


- (Drawer Checkout Only) Tap **Open** to open the cash drawer so you can count the cash in the drawer.



- (Drawer Checkout Only) Enter the **cash amount** in the drawer and tap **Done**. A Drawer Paid In Chit prints. The Tabs screen appears.

## STARTING A BREAK

Once you clock in, if breaks are required by the restaurant, a Start Break icon is present on the POS home screen. If you have open orders, the system prevents you from starting a break. Those open orders must be assigned to another person before you can start a break.

- On the POS home screen, tap **Start Break**.  
If a mandatory break time is required, a prompt appears. Tap Yes.  
An end break button with a timer appears.
- Tap  to logout.

## ENDING A BREAK

You end a break by logging in and tapping End Break. If a mandatory break time is required and you have not been on break for the required time, a supervisor's approval is required in order to end the break early.

## ENTERING AN ORDER

You enter items for a customer order at the order entry screen. As you select items for order, they appear from the guest check.



- At the POS home screen, tap **Point of Sale**. The order entry screen appears.
- Tap a **category** on the bottom right side of the screen to change the category of items that appear on the top right side of the screen.  
If you have set up **favorites** in the back office, your favorites category will always appear first.







You can also tap **Item Search** on the top right side of the device to search for an item.

3. Tap an **item** to add it to the guest check. If modifiers or variables exist for the item, a selection screen appears; otherwise, the item appears on the guest check.
4. Finalize the **order**. The following actions send an order to the kitchen:
  - Tap **Pay**.
  - Tap **Send**.
  - Tap  to log out.
  - Tap  to return to the POS home screen.
  - Press the **home button** on the iPad.

## CONVERTING AN ORDER TO A DIFFERENT ORDER TYPE

You can easily convert an order to a takeout or delivery order. You can also tender to the order as a takeout order.

At the guest check screen, tap **Change to Takeout**. A pop-up appears with the following options:

- **Pay as Takeout** — Tap to pay the dine in order as a takeout order. The system recalculates the taxes and remains at the guest check screen.
- **Move to Takeout Queue** — Tap to convert the order to a takeout order. The system prompts you to assign a customer, if you have not already done so, and to select a target time before moving the order to the takeout queue.
- **Move to Delivery Queue** — Tap to convert the order to a delivery order. The system prompts you to assign a customer, if you have not already done so, and to select a target time before moving the order to the delivery queue.
- **Cancel** — Tap to cancel the conversion of the dine in order.

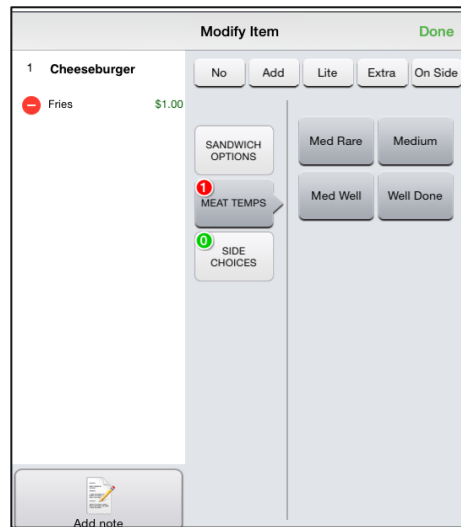
## WORKING WITH ITEMS

Some menu items include option modifiers, such as mustard or mayonnaise. Other items contain variables or forced modifiers that require you to make additional selections. You can also add notes, such as 'Rush!!!' to an ordered item.

## WORKING WITH MODIFIERS

When you select an item with at least one forced modifier, the system defaults to the entry of the forced modifiers. You cannot leave the order until you select all outstanding forced modifiers. Items for which you must select a modifier appear with a red badge; a green badge indicates the successful selection of a modifier. A badge does not appear on optional modifiers.

1. Tap an **item** to add it to the guest check. If forced modifiers exist for the item, the 'Modify Item' screen appears. If the item does not contain any forced modifiers, tap the item on the order entry screen to access the Modify Item screen.



2. Make the forced modifier selections.

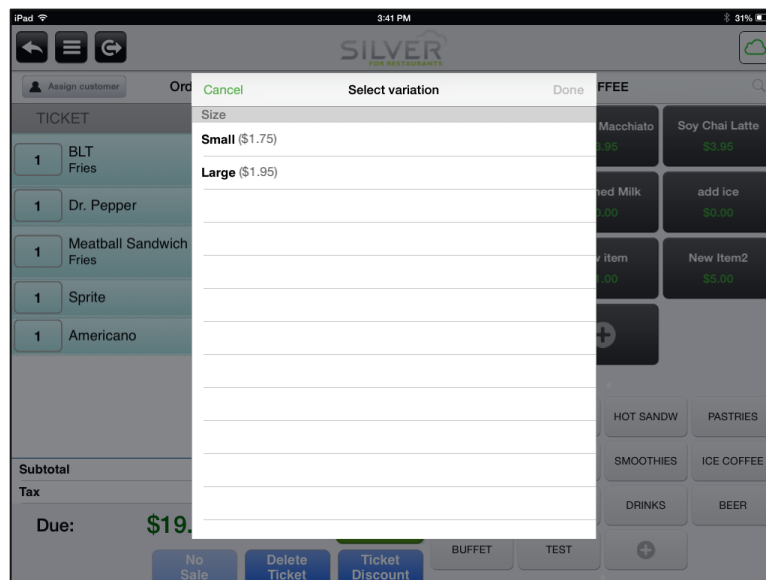
Some items contain default forced modifiers, such as 'Fries,' or 'Medium.' To change the default modifier, tap and then tap **Delete**. When you remove a default forced modifier, a red badge appears next to the forced modifier group of the item, and it is necessary to make another selection.

3. Make the **optional modifier selections**, if any. Tap the **No**, **Add**, **Lite**, **Extra**, or **On Side** buttons and then make the customer selections.
4. Tap **Done**.

## WORKING WITH VARIATIONS

Items with variations appear with 'Variables' under the item name on the item menu. Items with variations require you to make selections prior to finalizing the order.

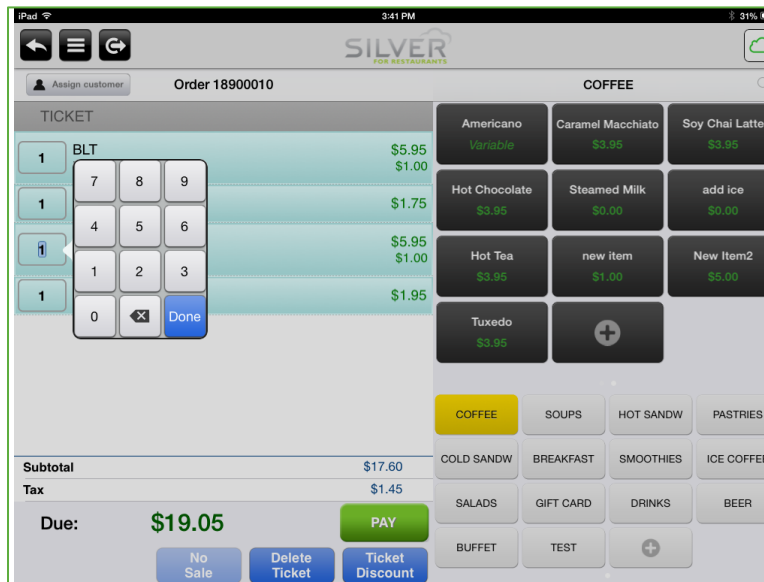
1. Tap an **item** to add it to the guest check. If variations exist for the item, the 'Select variation' screen appears.



2. Make the **variation selections**.
3. Tap **Done**.

## CHANGING THE QUANTITY OF AN ITEM

1. In the guest check, tap the **quantity** to the left of the item description. A numeric keypad appears.



2. Enter the **new quantity** for the item.
3. Tap **Done**.

## ITEMS WEIGHED BY THE SCALE

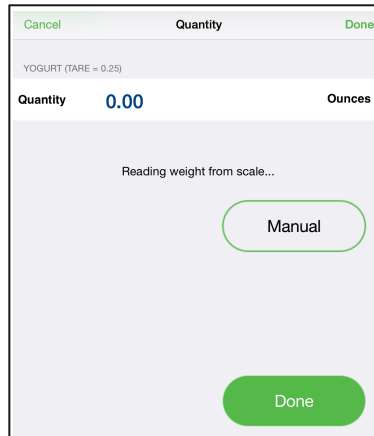
Your scale must be set up ahead of time. Search “scale” on [www.customer.ncrsilver.com](http://www.customer.ncrsilver.com) and find the instructions for your model. Once you select an item on the POS and place the item on the scale, the scale sends the weight of the item to the POS. If necessary, you may reweigh the item or enter a manual weight for the item.

When you need to delete a weighed item from the ticket, you delete it as you would any other item on the POS. At the order entry screen, swipe the item to the left, a popup appears, and tap Delete.

If the item for sale is set to a different weight measurement than the scale, the POS converts the measurement to the correct weight and quantity on the POS.

### To add a weighed item to the guest check:

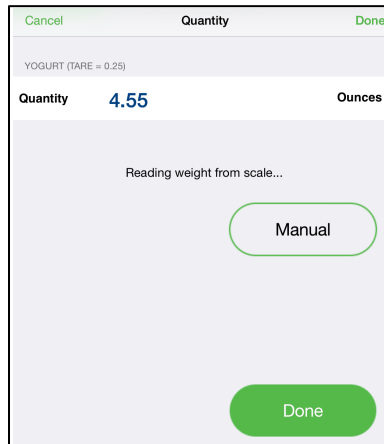
1. At the guest check screen, select the **item**.



The quantity screen appears and the quantity amount appears as 0.00. To the right of the item name is the tare weight of the item.

2. Place the **item** on the scale. The scale sends the data to the POS.

The Quantity amount is the actual weighed amount.



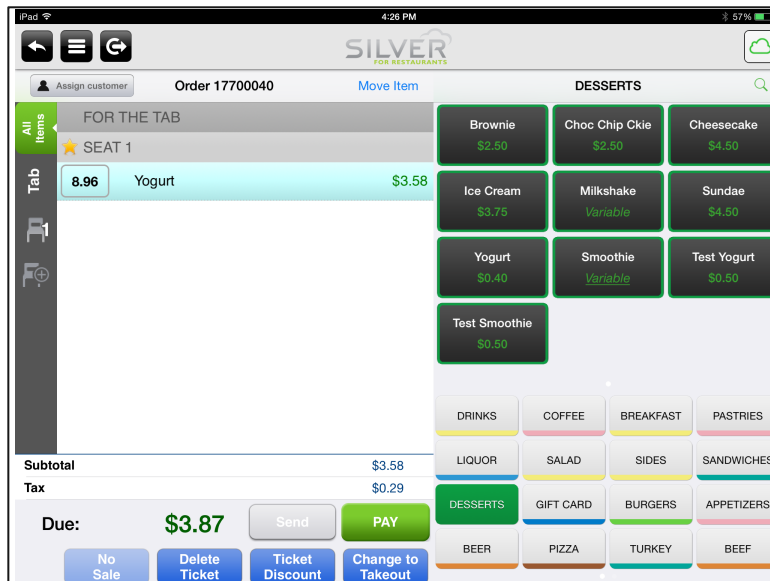
3. Tap **Done**. Once you tap Done, the POS adds the item to the guest check.

The quantity amount that appears on the POS is the net weight (gross weight minus the tare weight).

If after receiving a weighed quantity amount from the scale AND prior to tapping Done, you add or remove more of the same item from the scale, the scale recalculates and send the updated weight to the POS.

If you have tapped Done and need to reweigh the item, delete the item from the guest check, select it again, and place the item on the scale.





The final weight is listed as the quantity to the left of the item.

4. Continue the **transaction** as normal.

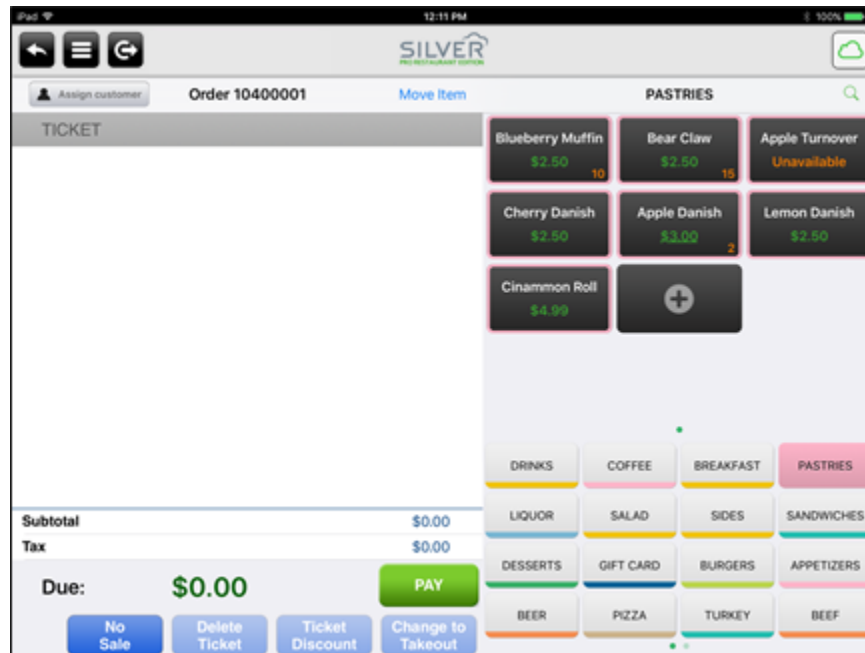
#### To enter a manual amount for the weighed item:

In some instances, you may decide to enter a manual weight for the item.

1. At the Quantity screen, after the POS receives the data from the scale, tap **Manual**.  
If your user role does not contain the permission to enter a manual weight for an item, the Supervisor's approval screen appears.
2. Type the **new amount**.
3. Tap **Done**. The POS adds the item to the guest check and the weight of the item is listed as the quantity to the left of the item.  
You can also override the weight of the item by increasing or decreasing the item quantity at the order entry screen.
4. Continue the **transaction** as normal.

#### ITEM AVAILABILITY

Item Availability enables you to create an item countdown at the POS, also known as '86ing items'. You set the item count at the POS and each time an employee adds the item to a guest check, the POS decrements the quantity on hand. When you access the order entry screen, you see the available quantity on hand or an item's unavailability. If an item is unavailable, employees cannot add it to an order until a supervisor edits the quantity on hand or removes the limit.




Item availability should not be confused with inventory.

Note: If you use multiple devices in a restaurant and do not use Silver Server, the system cannot synchronize item availability across devices.

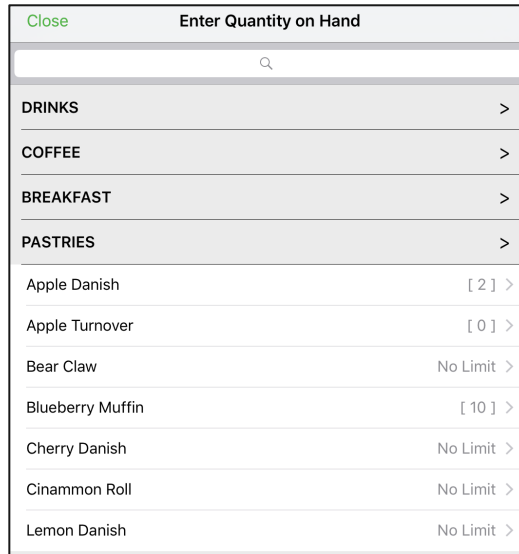
You can edit item availability through 'Enter Quantity on Hand' at the POS home screen or by long-pressing the item on the order entry screen.

#### To set item availability at the POS home screen:

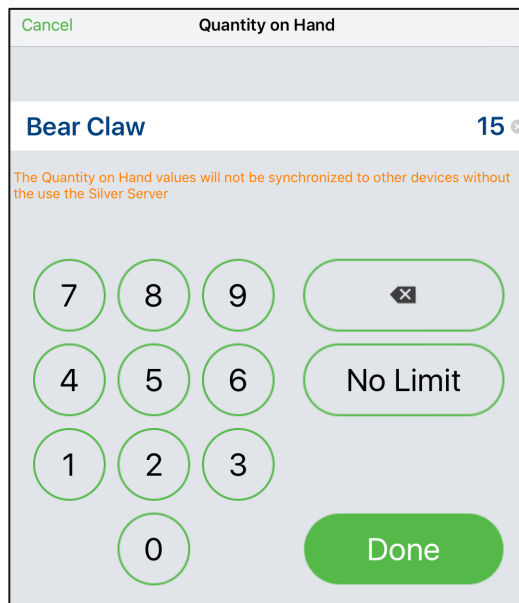
1. At the POS home screen, tap  to access the slide out menu.
2. Tap 'Enter Quantity on Hand.'
3. Tap the **category** containing the items for which you want to enter an item amount.

Enter Quantity on Hand	
<input type="text"/>	
DRINKS	>
COFFEE	>
BREAKFAST	>
PASTRIES	>

4. Tap the **item** for which you want to enter a limit.



5. Enter the **item quantity**.

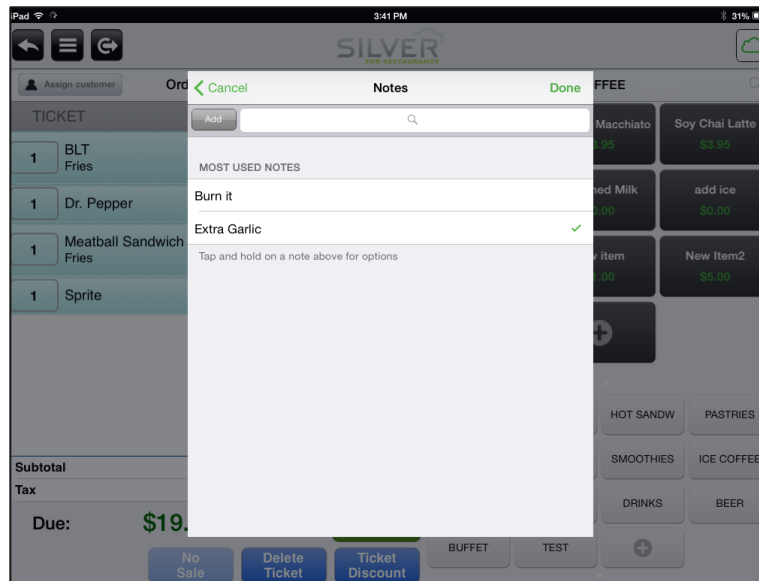


6. Tap **Done**.
7. Select another **item** for which to enter an item quantity, or tap **Close**.

## ADDING NOTES TO AN ITEM ON AN ORDER

You can add notes to any item a customer orders. Additionally, by device, you can create a library of notes, such as 'Rush!!' or 'Don't make,' which you can use with other orders without having to type the note again. When you add a note to an item, the note appears under the item in the guest check.

1. Tap the **item** to which you want to add a note. The item detail screen appears, or if the item contains a variable or a modifier, the 'Add note' button appears in the bottom left of the 'Modify Item' screen.



2. Tap **Notes** or **Add Note**. The 'Notes' screen appears.
3. Select a **note** from the library, and then tap **Done**.

-OR-

If an existing note does not apply or exist, tap **Add**, enter the **text** for the note, tap **Add**, and then tap **Done**.

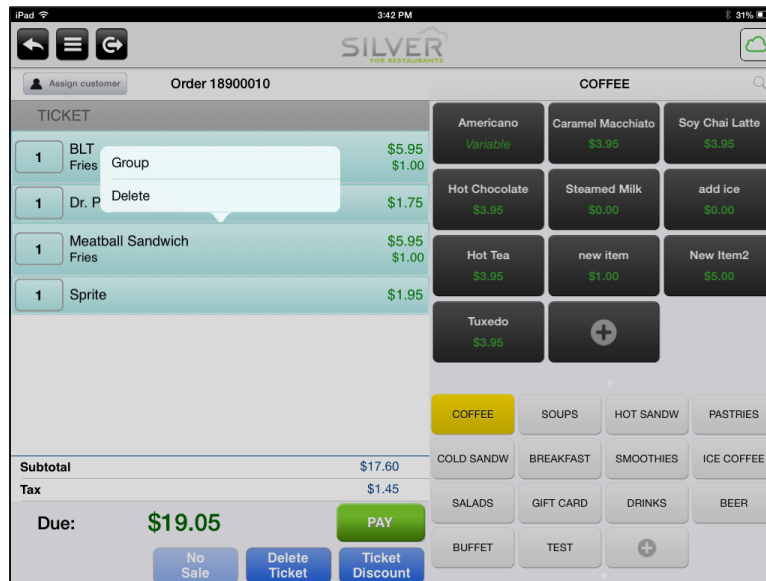
4. Tap **Done**.

## DELETING AN ITEM FROM THE GUEST CHECK

In some instances, such as the incorrect selection of an item, or when a customer changes their mind, you may need to remove an item from an order. You can delete items from the guest check.

1. Swipe the **item** to delete from right to left. The Delete option appears.





2. Tap **Delete**.

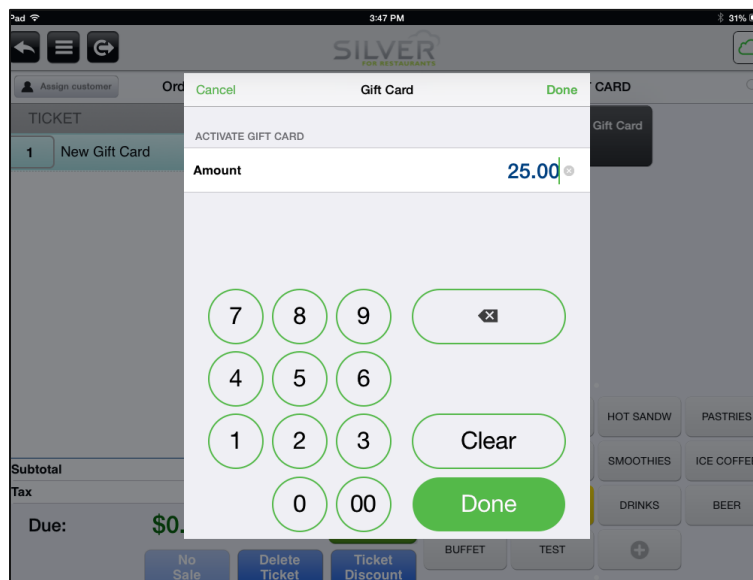
## GIFT CARDS

You sell gift cards at the order entry screen.

### ADDING MONEY TO A NEW OR EXISTING GIFT CARD

You can sell a new gift card or reload an existing gift card with additional funds.


1. From the order entry screen, tap the **Gift Card** category.
2. Tap **New Gift Card** to initiate a new gift card or **Reload Gift Card** to add additional funds to an existing gift card. The 'Gift Card' screen appears.

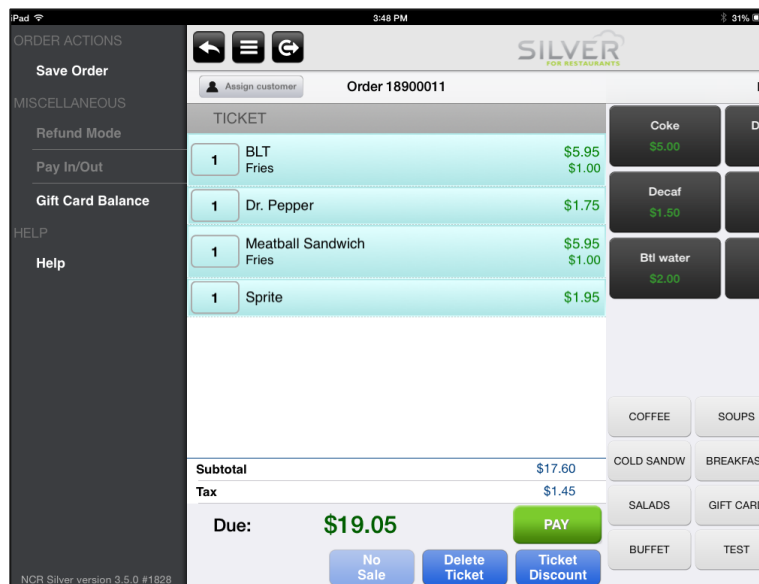




3. Enter the **amount** to load onto the gift card.
4. Tap **Done**.
5. Slide the **gift card** through the reader or enter the gift card number manually.
6. Tap **PAY** to finalize the transaction and receive **payment** for the order.

## CHECKING A GIFT CARD BALANCE

1. From the order entry screen, tap  to display a slide out menu.



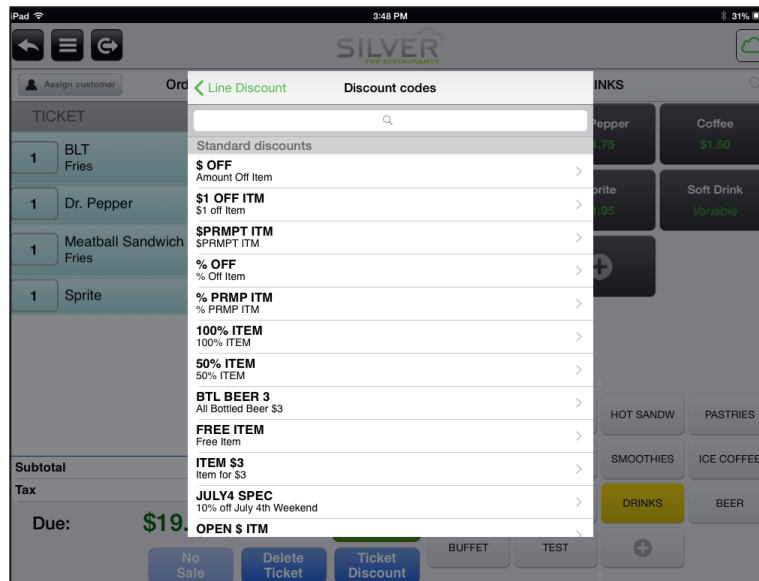
2. Under Miscellaneous, tap **Gift Card Balance**.
3. Slide the **gift card** through the reader or enter the **gift card number** manually. The **gift card balance** appears on the screen.

## DISCOUNTS & PROMOTIONS

You can provide a discount to customers at either the item level or the guest check level. If you do not have proper access, obtain manager authorization to complete a discount.

### APPLYING A DISCOUNT TO AN ITEM

1. With the guest check active, swipe the item you wish to discount to the left. A pop up appears.
2. Tap **Line discount**. The 'Discount codes' screen appears with the available discounts.



3. Tap the **discount** to apply to the item.  
If prompted, enter an **amount** or **percentage** for the discount and tap **Done**.
4. Tap **Done**. The discount appears under the item in the guest check.  
To remove an item discount, tap the item in the guest check, tap Line discount in the item detail screen, tap Remove discount code, and tap Done.

### APPLYING A DISCOUNT TO A TICKET

1. With the guest check active, tap **Ticket Discount**, located under the guest check. The 'Discount codes' screen appears with the available discounts.
2. Tap the **discount** to apply to the guest check.  
If prompted, enter an amount or percentage for the discount, and tap Done.
3. Tap **Done**. The discount appears above the subtotal in the guest check.  
To remove the guest check discount, swipe the **discount** to the left, and tap **Remove**.

### APPLYING A PROMOTION TO A GUEST CHECK

For promotions that apply automatically to a guest check, you do not need to do anything to add the promotion. The system adds the promotion discount as soon as the guest check meets the requirements. For non-automatically applied promotions, you must either select the promotion from a list or scan a barcode.

1. With the guest check active, tap **Ticket Discount**. The Discount/Promotion screen appears with all the applicable ticket discounts and eligible promotions.
2. Tap the **promotion** to apply

-OR-

If the promotion requires a barcode, tap **Barcode**. Tap **Scanner/Manual** to use the barcode scanner to scan the barcode (Note: You can also scan the barcode with the scanner at the guest check screen.) or to enter the barcode



number. Tap **Camera** to use the iPad camera to read the barcode. (Note: In some instances, iPad 2 cameras can have difficulty reading barcodes.)

If your user role does not contain the permission to apply a promotion, the Supervisor's approval screen appears.

The system applies the promotion to the guest check and the discount appears as a line item under the affected items.

## ASSIGNING A CUSTOMER OR NAMING AN ORDER

Capturing customer information allows customers to earn loyalty rewards for Silver Built in Loyalty, and enables the restaurant to email receipts and coupons to customers.

NCR Silver Pro Restaurant allows you to assign a customer to an order OR to name an order. The Assign Customer button is a feature designed to build a database of customers. That database can be used to send email marketing, earn points through Silver Pro built-in loyalty, or simply track customer spending and historical sales.

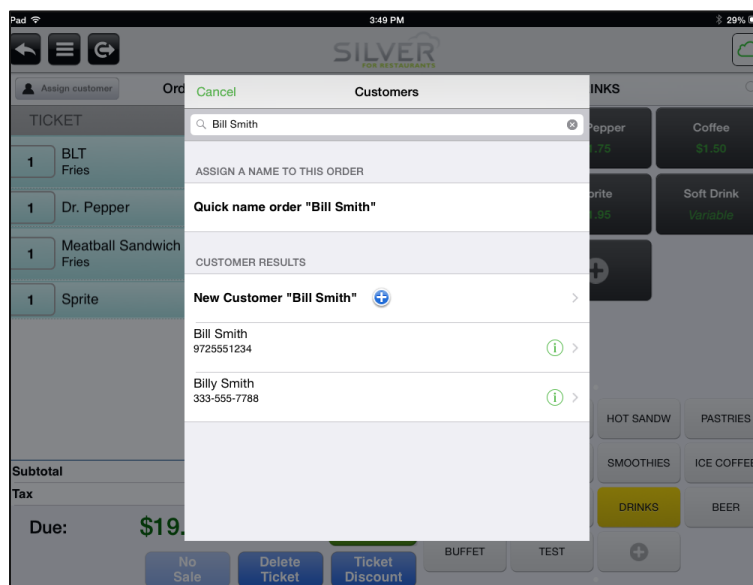
The **'Quick Name an Order'** is a feature to allow you to attach a simple identifier to a customer, such as 'Mike.' Quick names are not saved in any database and do not require you to do anything other than enter **1 identifier**.

## ASSIGNING A CUSTOMER

Assigning a customer add them to your Silver Back Office customer database. You use the Assign customer button to assign a customer to the guest check. At least two fields on the customer screen must be completed to create the customer profile.

## ASSIGNING A NEW OR EXISTING CUSTOMER TO A GUEST CHECK

1. With the guest check active, tap **Assign customer**, located above the guest check. The customer search screen appears.



2. Type a **customer name** or **phone number**. The matching results appear on the screen.
3. Tap the **customer name** to assign to the guest check.

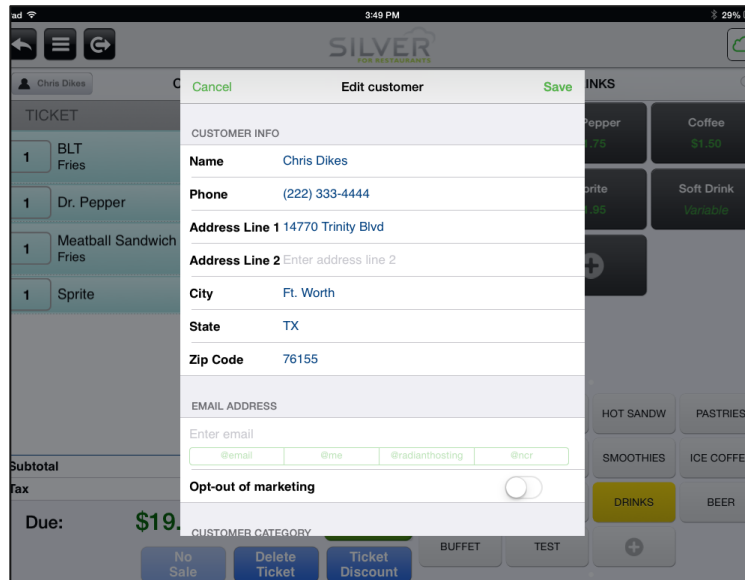


-OR-

If the customer does not appear in the results, tap **New Customer** to enter customer information and tap **Save**. You must enter the customer name and at least two other pieces of information to save the customer record.

## EDITING CUSTOMER INFORMATION

1. With the guest check active, tap the **customer name**, located above the guest check. The 'Edit customer screen' appears.



2. Tap Edit customer.
3. Edit the customer information.
4. Tap **Save**.

## REMOVING A CUSTOMER FROM THE GUEST CHECK

1. With the guest check active, tap the **customer name**, located above the guest check. The 'Customer' screen appears.
2. Tap **Remove customer from ticket**.

## NAMING AN ORDER

Naming an order allows you to assign a name to an order without adding the customer to your database.

1. With the guest check active, tap the **Order number button**, located above the guest check and to the right of the Assign Customer button. The name order screen appears.



Cancel	Name Order	Done
ASSIGN A NAME TO THIS ORDER		
John		
USE THE DEFAULT NAME		
Order 19800004		

2. Type a **name** for the order  
OR  
or tap **Order [xxxxxxx]** to use the order number for the order name.
3. Tap **Done**.

## LOYALTY PROGRAM

NCR Silver Pro Restaurant Edition enables you to use a loyalty program to connect with your customers and increase sales from visitors to your restaurant. You can use the Silver Pro built-in loyalty program, or a third-party loyalty program. With the built-in loyalty program, NCR Silver Pro Restaurant keys off the customer record, so there is no need for cards or other devices. When the customer earns a reward, the POS app prompts you to offer the option of applying the discount reward to the guest check. With a third-party loyalty program, NCR Silver Pro Restaurant keys off of the customer phone number, or by scanning a bar code or QR code. When the customer earns a reward according to the terms of your loyalty program, they can apply the reward to their guest check. This guide documents how to assign customers to a guest check, apply loyalty rewards to guest checks, and review rewards earned by the customer. Determine the loyalty program you are using, and follow those procedures.

### SILVER BUILT-IN LOYALTY PROGRAM

You must assign a customer to a guest check for them to accrue loyalty points and earn rewards. When a customer earns a loyalty reward, the POS app prompts you to either apply the loyalty reward to the guest check, or to save the reward for a later visit.

### ASSIGNING A CUSTOMER TO A GUEST CHECK

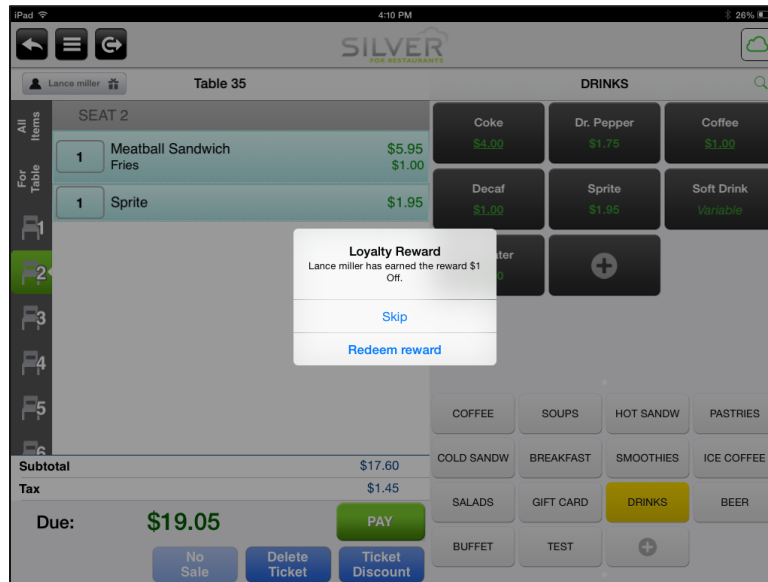
1. With the guest check active, tap **Assign Customer**, located above the guest check. The customer search screen appears.
2. Type the **customer name** or **phone number**.  
The matching results appear.
3. Tap the **customer name** to assign it to the guest check.  
-OR-



If the customer does not appear in the search results, tap **New Customer** to type the customer information and tap **Save**. You must enter the customer name and at least two other pieces of information to save a customer record.

## APPLYING A LOYALTY REWARD

1. At the order entry screen, assign the **customer** to the guest check.
2. Tap **PAY**. When you assign a customer who has unredeemed rewards to the guest check, a prompt appears.



3. Tap **Redeem reward** to apply the loyalty reward to the guest check. You can also tap **Skip** to apply the reward later.

If you tap **Skip**, you can apply the loyalty reward to the guest check later. Tap the **customer name** at the top left portion of the order entry screen. The customer screen appears. Under 'LOYALTY,' tap **Redeem**.

Once you apply a reward and close the guest check, you can modify only the tender. You cannot modify or void any items or discounts.

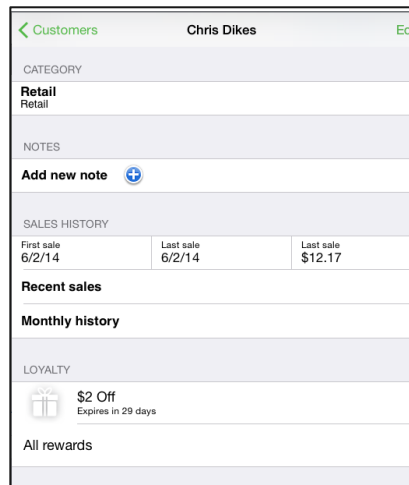
4. Tap **Customers** to return to the search screen, and tap **Cancel** once to clear the search screen and **again** to return to the order entry screen.

## TRACKING LOYALTY REWARDS FOR THE SILVER BUILT-IN LOYALTY PROGRAM

The Silver built-in loyalty program provides two options for tracking loyalty rewards. The POS app allows you to view the customer sales history and see if a reward exists for the customer to apply to their ticket. In Silver Back Office, you can track the earned rewards for the customer as well as any rewards redeemed by the customer.

### To track loyalty rewards in the POS app:

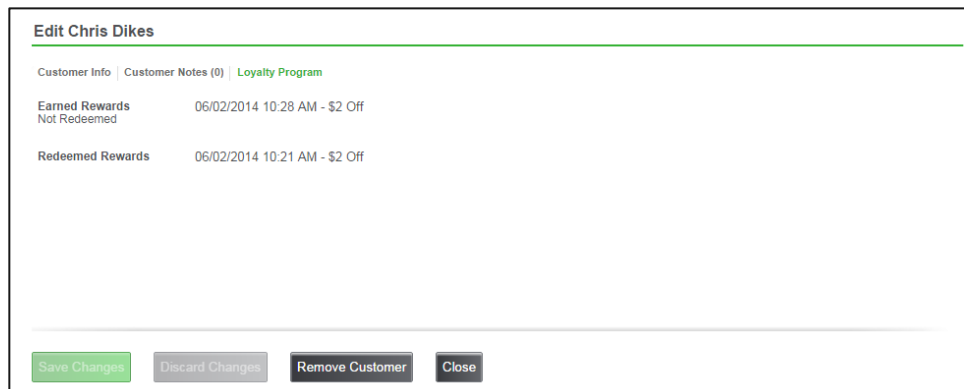
1. At the order entry screen, tap **Assign customer**. The search screen appears.
2. Enter the **customer name** or **phone number**. The matching results appear on the screen.
3. Under 'CUSTOMER RESULTS,' tap next to the customer name. The selected customer record appears.



4. Under 'SALES HISTORY,' view the **desired sales history**. You can see the first sale, last sale, recent sales, and sales history by month.
5. Under 'LOYALTY,' view the **available earned rewards**.
6. Tap **Customers** to return to the search screen, and tap **Cancel** once to clear the search screen and **again** to return to the order entry screen.

#### To track loyalty rewards in Silver Back Office:

1. In Silver Back Office, select **CUSTOMERS > CUSTOMERS**.
2. Click the **customer** for whom you want to view loyalty information.

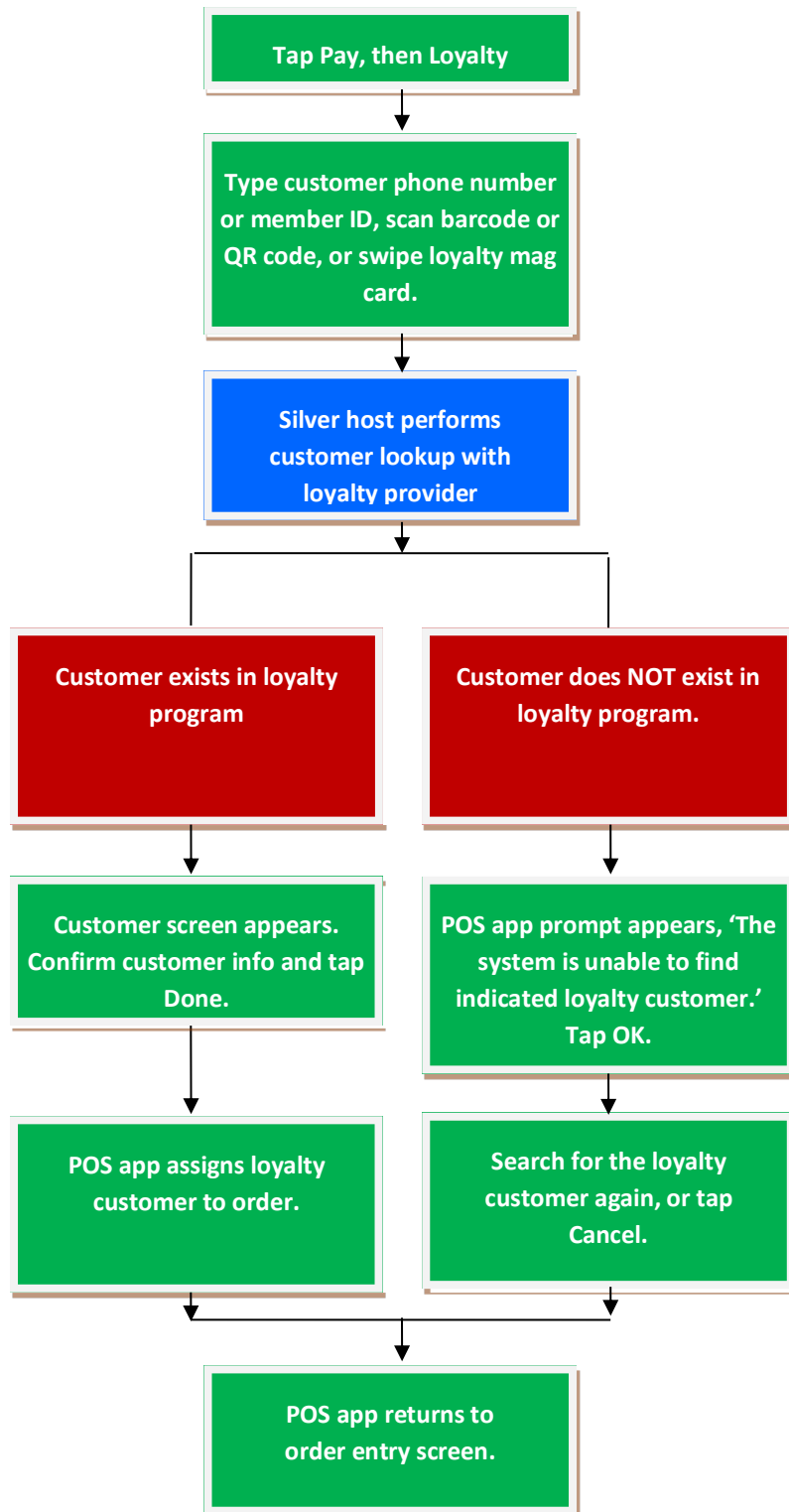


3. Select **Loyalty Program**. You can view the earned and redeemed rewards for the customer.
4. Click **Close** to return to the CUSTOMERS screen.

### THIRD-PARTY LOYALTY PROGRAM

Depending on the loyalty program provider, you can assign customers to a guest check by phone number, member id, scanning a bar code or QR code, or by swiping a loyalty card. The Silver host communicates with the loyalty program provider to confirm the customer as a loyalty customer. Depending on your loyalty program, when the customer earns a reward, the loyalty program provider may either send a notification to the Silver host or they may send a discount coupon to the customer.

To confirm a customer as a loyalty program member and to retrieve rewards on behalf of customers requires an Internet connection for the POS app, and that the loyalty program provider host be online.



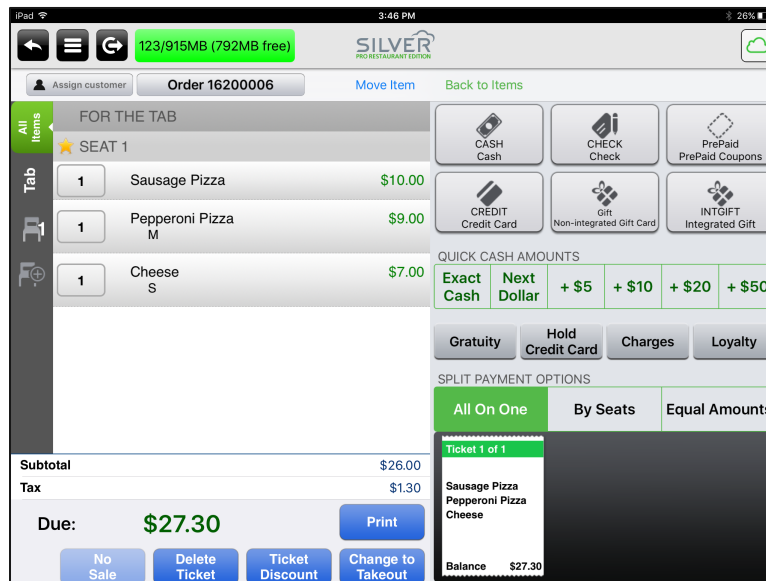
## ASSIGNING A LOYALTY CUSTOMER TO A CHECK

When using a third-party loyalty program, and assigning a loyalty customer to a guest check, the Silver host checks with your loyalty program host to confirm the customer as a loyalty customer.

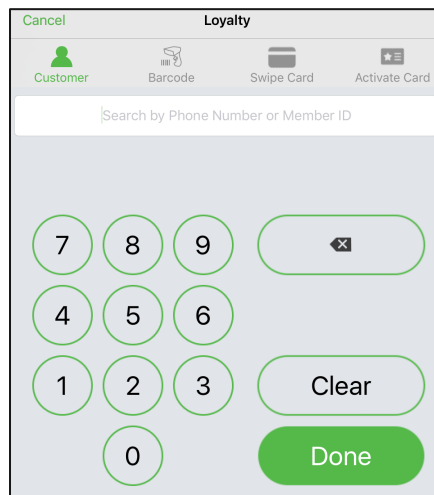
If the Silver host cannot reach the loyalty provider, you can still assign the customer to the guest check; however, the Silver host cannot confirm the presence of the customer account with the loyalty program provider. The Silver host continues to attempt to reach the loyalty program provider, and when it does so, the Silver host transmits the customer and transaction information to the loyalty program provider, provided the customer has a loyalty program account.

If the customer has earned loyalty rewards, the Loyalty host may send those to the POS. An automatic reward requires no action on the part of the employee to add the reward discount to the check, whereas prompted loyalty rewards can require an employee to apply the reward or to select a reward amount.

1. With the guest check active, tap **Pay**.



2. Tap **Loyalty**. The Loyalty screen appears with loyalty customer search options.





At the Customer screen, type the **customer phone number** without dashes or the **customer member ID**.

-OR-

Tap **Barcode**. The barcode screen appears. Scan the **customer barcode** or **QR code** using the iPad camera. When the iPad camera recognizes the code, a green rectangular box appears and the POS initiates a search. You can also type the barcode number and tap **Done**.

-OR-

Tap **Swipe Card** and swipe the **loyalty card** through the MSR or type the **loyalty card number** and tap **Done**.

When the POS initiates a search, a spinning Lookup dialog appears while the Silver host attempts to confirm the customer account with the loyalty program provider.

A screenshot of a mobile application screen titled 'John Doe'. At the top, there are 'Cancel' and 'Done' buttons. Below the title bar, there are two icons: a person icon labeled 'Customer Profile' and a card icon labeled 'Loyalty Rewards'. The main section is titled 'CUSTOMER INFORMATION' and contains four rows of data: 'Name' with the value 'John Doe', 'Member ID' with the value '755123', 'Phone' with the value '8171234567', and 'EMail' with the value 'John.Doe@email.com'.

If the customer exists in the loyalty program, the POS app assigns the customer to the guest check, executes a check for any loyalty rewards, and a customer profile appears.


If the customer does not exist in the loyalty program, a prompt appears. Tap **OK**. You can either search for the customer again, activate a loyalty account for the customer if your program allows you to do so at the POS, or tap **Cancel** to return to the guest check.


3. Tap **Loyalty Rewards**. The Loyalty host may send a **loyalty discount** reward to the POS. These rewards may be automatic or optional. Automatic rewards apply to the guest check with no action required on your part. Optional rewards can require you to apply the reward or allow you to change the amount of the reward to a lesser amount. Additionally, these rewards may apply to a line item or to the ticket.

Check with your loyalty program provider to confirm the details of how customers receive loyalty rewards.

If no Internet connection exists for the POS app, or if the loyalty program provider host is offline, the POS app cannot retrieve earned customer rewards and apply them to the guest check.

Cancel
John Doe
Done


Customer Profile


Loyalty Rewards

LOYALTY MESSAGE

Thank you for being a part of our loyalty program.

REWARDS

Happy Birthday Reward	\$1.00
Valued Customer Rewards	\$3.00 >
<del>Honored Customer Rewards</del>	<del>\$2.00</del> <input type="checkbox"/>

Rewards with a strikethrough across them and a ☐ to the right of the amount require you to select the checkbox to apply the reward. When you select the checkbox, the system removes the strikethrough.

Rewards for a prompted amount contain a  to the right of the amount. The POS applies the entire amount possible. If the customer chooses to use a lesser amount, tap and a reward amount screen appears. Type the **new amount** and tap **Done**. The system returns to the Loyalty Rewards screen.

Rewards with nothing to the right of the amount are automatic rewards. They require no action from the employee to apply them to the guest check.

Tap **Done**. The POS returns to the payment screen.

4. Close the check as normal.

## ACTIVATING A LOYALTY ACCOUNT

Some loyalty providers allow you to activate a loyalty account from the POS.

1. With the guest check active, tap **Pay**.
2. Tap **Loyalty**. The Loyalty screen appears.
3. Tap **Activate Card**. If you do not see Activate Card, you cannot activate a loyalty account from the POS.
4. Swipe the **loyalty card** or type the **loyalty card number** and tap **Done**. A spinning dial appears as the POS seeks to activate the loyalty card. A prompt appears.
5. Tap **OK**.



## REMOVING A LOYALTY CUSTOMER FROM THE GUEST CHECK

In some cases, you may have selected the wrong loyalty customer profile. You can remove the customer from the guest check.

1. After you have attached a loyalty customer to the guest check, tap **Done**. The POS returns to the guest check screen.
2. Tap **Loyalty**. The previously selected customer profile appears.





Cancel John Doe	
 Customer Profile	 Loyalty Rewards
CUSTOMER INFORMATION	
Name	John Doe
Member ID	A1234
Phone	8171234567
EEmail	john.doe@loyalty.test.email.com
Remove loyalty customer	

3. Tap **Remove loyalty customer**. A warning prompt appears.
4. Tap **YES**. The system removes the loyalty customer from the ticket and returns to the guest check screen.

#### ADDING A TRANSACTION TO A LOYALTY PROFILE AFTER CLOSING THE GUEST CHECK

In some situations, such as a customer deciding to join your loyalty program after you close the guest check or an employee forgetting to assign the customer to the guest check, a customer may be able to add the transaction to their loyalty profile, provided your loyalty program provider allows customers to do so **AND** your system prints the required barcode on the customer receipt. Some loyalty program providers provide an app for customers to download, and a customer can scan the barcode from the receipt into the app to have the transaction count toward their loyalty rewards.

#### TRACKING LOYALTY REWARDS FOR THE THIRD-PARTY LOYALTY PROGRAM

For third-party loyalty programs, you track customer progress toward rewards and view earned rewards through your third-party loyalty program provider.

## CHARGES

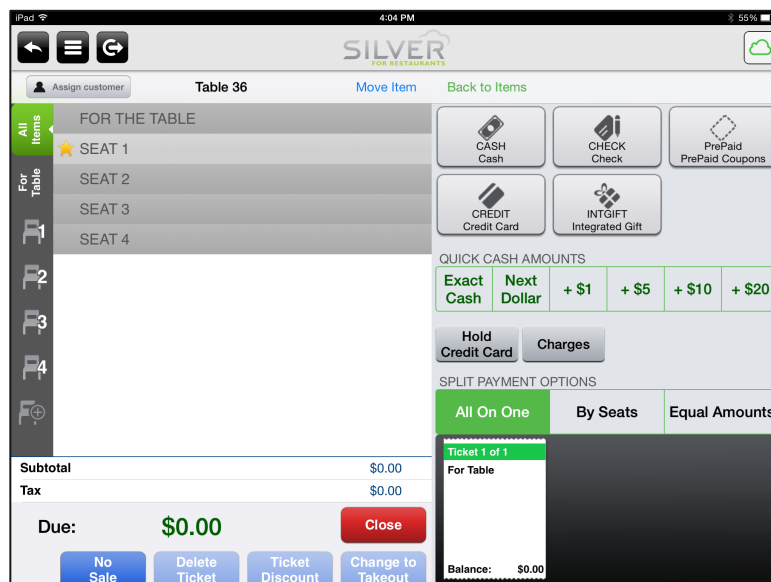
With NCR Silver Pro Restaurant, charges can be applied automatically or manually to the guest check. Automatically applied charges appear as soon as you select an order mode with an assigned charge. For a manually applied charge, you must select the charge from the Charges screen, accessible by tapping Charges on the Payment screen.

Charges appear on the guest check as a line item.

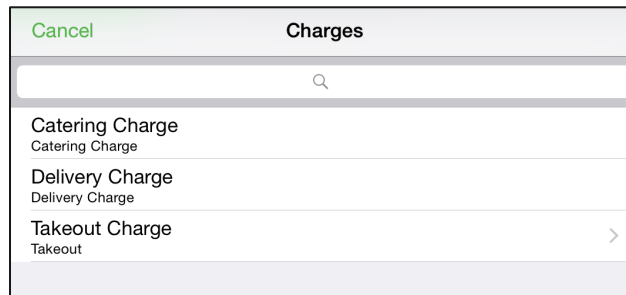


To manually add a charge to a guest check:

1. At the guest check screen, tap **PAY**.



2. Tap **Charges**. The Charges screen appears.



3. Select the **charge** to add the guest check.
  - For a **flat amount charge**, the system adds the charge as a line item.
  - For a **prompt for price charge**, the Charge price screen appears. Type the **amount** for the charge and tap **Done**. The system adds the charge as a line item.
  - For a **percentage charge**, the system adds the charge as a line item. The amount of the charge is calculated as a percentage of the subtotal.
4. Complete the **order** as normal.

#### To increase the quantity of a charge on a guest check:

You can only adjust the quantity of a manually applied charge.

1. At the guest check screen, tap the **number** to the left of the charge. A popup appears.
2. Select the **new quantity** for the charge.
3. Tap **Done**.

#### To discount a charge on a guest check:

You can only apply a line item discount to a charge.

1. At the guest check screen, swipe the **charge** to the left. A popup appears.





2. Tap **Line Discount**. The Line Discount screen appears.
3. Select the **discount** to apply to the charge.

#### To remove a charge from a guest check:

1. At the guest check screen, swipe the **charge** to the left. A popup appears.
2. Tap **Delete**. The system removes the charge from the guest check.

## HOUSE ACCOUNTS

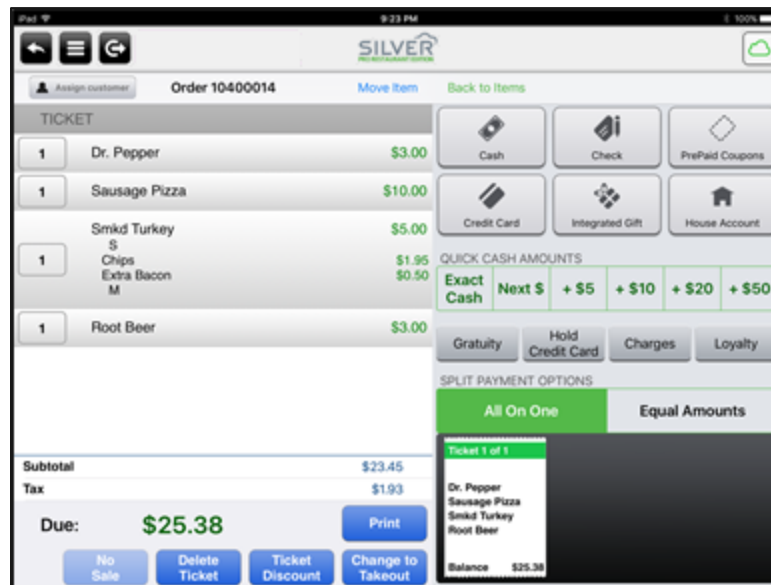
House Accounts enable you to charge customers at the time of the transaction and bill them later. Prior to assigning a house account to a guest check, the house account must first be created in Silver Back Office.

At the POS, you can close a guest check to a house account as well as receive payment for an outstanding balance to a house account.

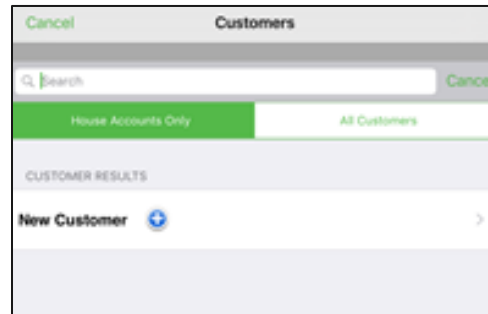
### CLOSING A CHECK TO A HOUSE ACCOUNT

Prior to closing a check to a house account, you must first create the house account in Silver Back Office. When searching for a house account, you search by the linked customer name rather than the house account name. Additionally, without an Internet connection to Silver Back Office, you cannot close a check to a house account.

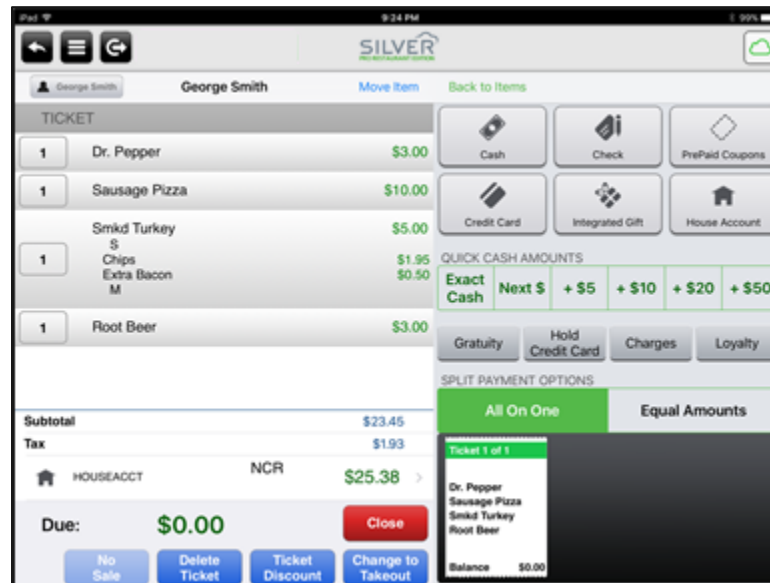
1. At the order entry screen, after you have added items to the guest check, tap **PAY**.



2. Tap **House Account**. The customers screen appears.



3. Type the **customer name** linked to the house account. A list of customer results appears.
4. Tap the **customer name**.
5. Confirm the **amount** to charge to the house account and tap **Done**. The name of the house account appears on the house account tender line.



NOTE: If you wish to change the house account selected, first remove the house account payment from the ticket. Then, tap the customer name on the top left of the screen. The customer screen appears. Tap remove customer from ticket.

6. Tap **Close**.

## RECEIVING PAYMENT FOR A HOUSE ACCOUNT AT THE POS

In addition to receiving payment for a house account in Silver Back Office, you can also receive payment at the POS. You do so by adding a house account payment charge to the check, which then prompts you to select the customer linked to the house account. When you create your first house account, the system creates a house account payment charge. You may use this charge to receive payments or you may create additional charges by which to receive house account payments.

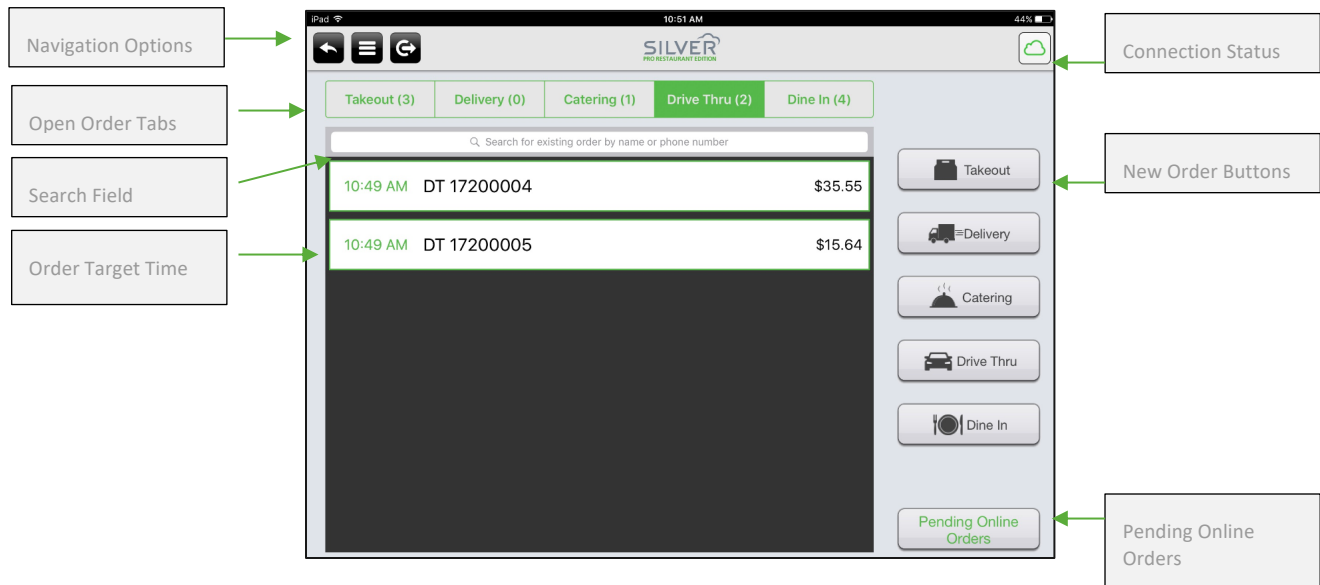
1. At the order entry screen, tap **PAY**.
2. Tap **Charges**.

Cancel	Charges
<input type="text"/>	
Percent Max	
Del Percent	
Delivery	
Percent Min	
Prompt	>
Percent	
Takeout A	
Test Takeout	
Percent Round	
House Account Paymnt	>
House Account Payment	
TEST	
TEST	
takeout no tax	
takeout no tax	

3. Tap the **charge** for house account payments. The customers screen appears.
4. Search for the **customer** linked to the house account. A list of customer names appears.
5. Select the **customer**.
6. Confirm the **amount** for payment. The system loads the total balance due.
7. Tap **Done**.
8. Receive **payment** and close out the **check** as normal.

## PHONE/DRIVE THRU ORDERS

The Phone/Drive Thru home screen of NCR Silver™ Pro Restaurant Edition enables you to create, manage, and track takeout and delivery orders.



**Navigation options** — Tap a button to navigate the app. Tap to return to the previous screen, tap to see a slide out menu, or tap to log out of the app.

**Open orders** — Tap one of the order type tabs to see a list of open orders for the specified order mode. The number inside the parentheses next to the order mode indicates the number of open orders.

**Search field** — Enter a customer name or phone number to search for an existing takeout or delivery order.

**Order target time** — Indicates the promise time for the order.

**Connection status** — Indicates the connection status of the device to the host, and Silver Server, if configured. A green signal indicates connected, and a red signal indicates disconnected.

**New Order Buttons** — Tap to initiate a new order. Available order types are configurable in the back office.

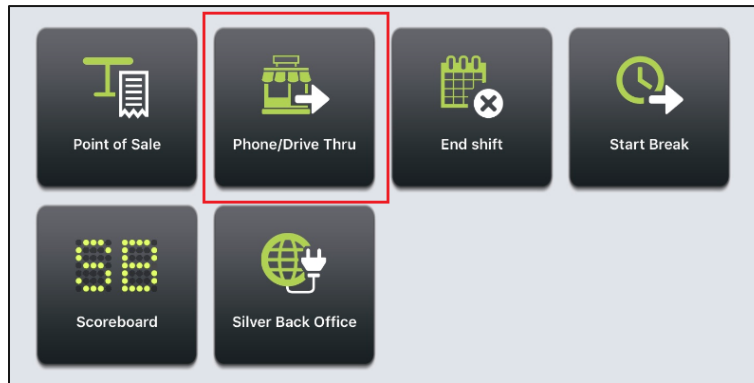
- **Takeout**
- **Delivery**
- **Catering**
- **Drive Thru**
- **Dine-in**

**Pending Online Orders** — Tap to review online orders which have not yet downloaded to the takeout or delivery queue.

## ABOUT PHONE/DRIVE THRU

You enable additional order modes in Back Office. Access **Settings > Store > Store Options**, select the order mode you wish to enable, and click **Save**. You can configure additional charges associated with the order type if needed.

Access the Phone/Drive Thru home screen on the device by tapping Takeout/Delivery at the POS home screen. It is necessary to activate a financial shift prior to accessing the Takeout and Delivery home screen.

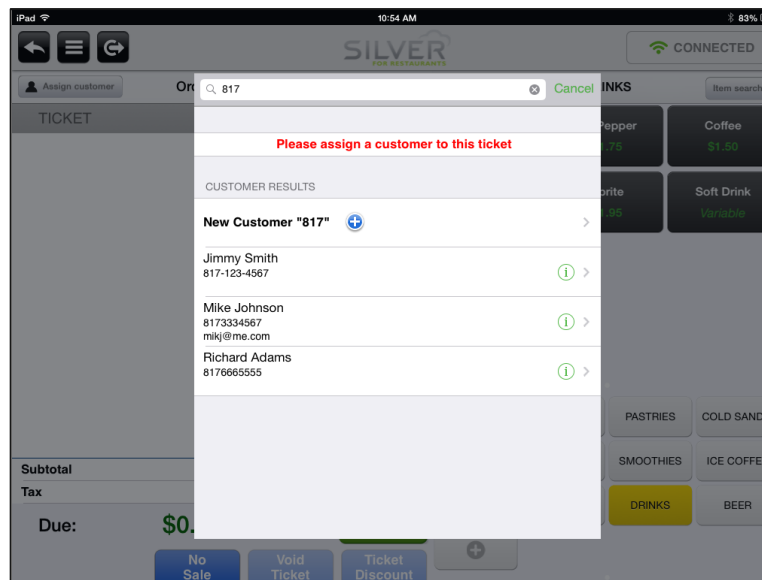


Phone/ Drive Thru orders require a customer name and phone number, and delivery orders require a customer name, phone number, and address.

The app does not calculate a promise time. The app prompts you to enter a target time for the order, which is the time for the order to be ready for pickup or for a driver to leave the store with the items.

### ENTERING A PHONE/DRIVE THRU ORDER

1. At the Phone/ Drive Thru home screen, tap the desired **New Order Button** on the right of the screen.
2. Enter a **customer name** or **phone number** in the search field. The app populates the CUSTOMER RESULTS field with potential matches.



3. Certain customer information is required based on the order type you select. Tap a **customer name** in the search results to assign a customer to the order,

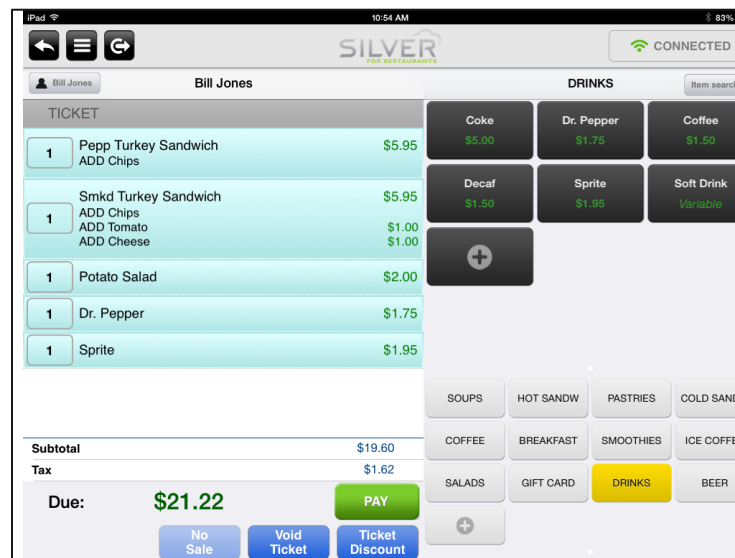
-OR-



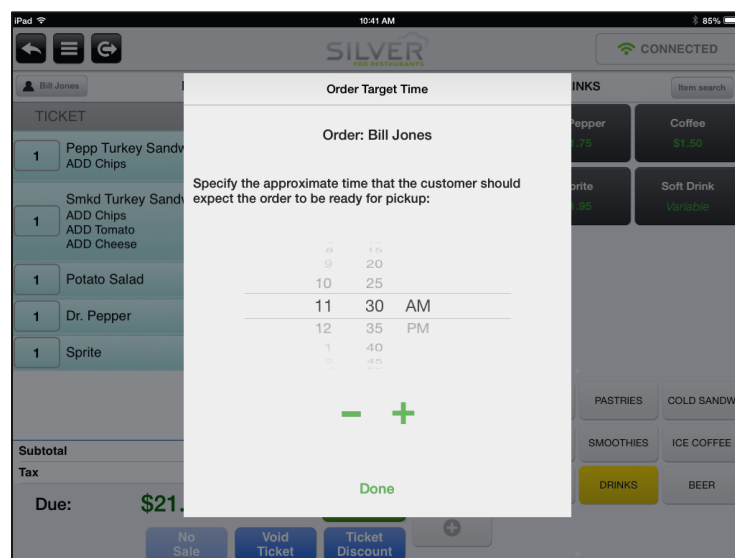
Tap **New Customer** to add a customer. The New customer screen appears. Enter the **customer information**, and then tap **Save**.

Once you select a customer, the order entry screen appears.

For delivery orders, tap the customer name on the top left side of the order entry screen and verify the customer address information for the delivery. If necessary, tap **Edit customer** to edit the address information.



4. Tap the **items** to include on the order.
5. Tap **PAY**. The Order Target Time screen appears. Catering, Drive Thru, and Dine In orders do not require a target time.



6. Scroll to select the **hours**, **minutes**, and **time period**, or use '-' and '+' to select a target time for order completion.
7. Tap **Done**.
8. Finalize the **order** by tapping or by tapping **PAY** to enter payment information.

## SEARCHING FOR AN OPEN PHONE/DRIVE THRU ORDER

Search for a customer order when you need to close the order, to apply a payment to an order, or when a customer wants to modify an open order. You can also tap Takeout or Delivery to view a list of open orders for the selected order mode.

1. At the Phone/Drive Thru home screen, tap one of the open order type tabs.
2. Tap the **search field**.
3. Enter a **customer name** or **phone number**. The matching results appear.
4. Tap the **desired customer** in the search results field. The order entry screen appears.

## MODIFYING THE ORDER TARGET TIME

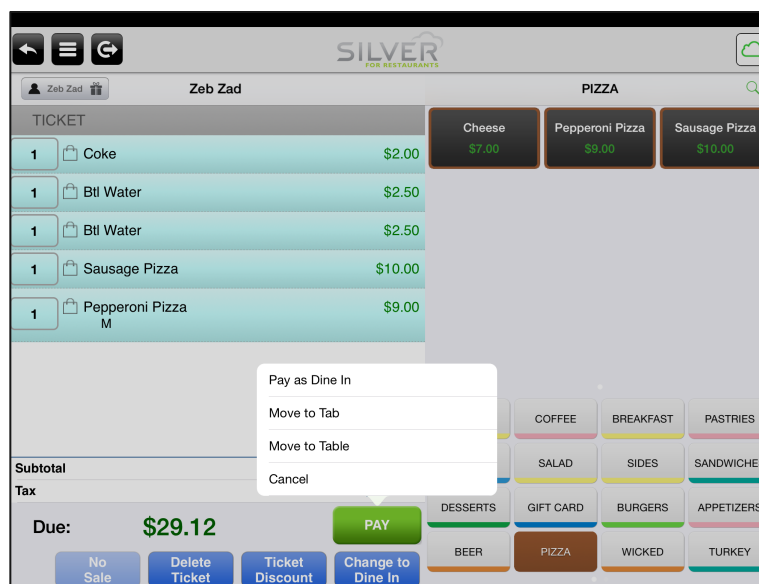
In some instances, you may need to adjust the order target time for an open order.

1. At the Phone/Drive Thru home screen, select the order type tab search for the **customer order**.
2. In the search results, tap the **time** next to the customer name. The Order Target Time screen appears.
3. Scroll to select the **hours**, **minutes**, and **time period**, or use '-' and '+' to select a target time for order completion or delivery.
4. Tap **Done**.

## CONVERTING A TAKEOUT/DELIVERY ORDER TO A DINE IN ORDER

You can easily transfer a takeout/delivery order to a table or a tab (Table Service) or to a saved order (Quick Service).

1. At the Takeout and Delivery home screen, tap Takeout **or** Delivery.
2. Search for the **customer order** and tap the **order** to select it. The order entry screen appears.



3. Tap **Change to Dine In**. A pop-up appears:



- **Pay as Dine In** — Tap to pay the takeout/delivery order as a dine in order. The system recalculates the taxes and remains at the guest check screen.
- **Move to Tab (Table Service only)** — Tap to move the takeout/delivery order to a tab. The tab screen appears. Tap **Add Tab**. The Name Tab dialog appears. Confirm the **name**, or change the name for the tab, and tap **OK**.
- **Move to Table (Table Service only)** — Tap to move the takeout/delivery order to a table. The floor plan appears. Tap the **room** for which you want to transfer the order and tap the **table** to which you want to transfer the order.
- **Store Order as Dine In (Quick Service only)** — Tap to move the takeout/delivery order to the saved orders queue.
- **Cancel** — Tap cancel to stop the conversion of the takeout/delivery order.



## ONLINE ORDERING

When you use online ordering with NCR Silver Pro Restaurant Edition you are able to reach more customers and better serve your current customers. NCR Silver Pro Restaurant provides an application programming interface (API), which a third-party online ordering system uses to submit orders to your Silver host. Silver Back Office manages the online orders by sending them to the takeout and delivery queue of the Point-of-Sale (POS) app. When the online order arrives at the POS app, the system prints a kitchen chit with the order details. You finalize your online orders from the takeout and delivery queue as you would a normal takeout and delivery order.

Customer accesses the online ordering system.

Customer enters their order details and submits the order.

Online ordering system finalizes the customer order, and sends the order to the Silver host using Silver API.

The Silver host stores the customer order as a 'Submitted ' order.

The Silver host sends an order confirmation to the online ordering system.

The online ordering system provides an order confirmation to the customer.

When the order meets the download time threshold limit, the Silver host sends the order to the POS app.

Customer arrives at the store to pick up the order, or a driver delivers the order to the customer.



## WORKING WITH ONLINE ORDERS

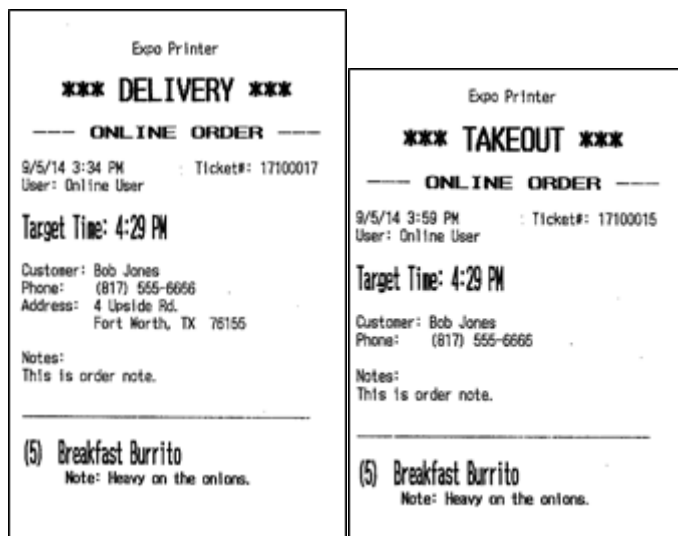
You work with online orders in the POS app. When an order reaches the download threshold time limit, the Silver host releases the order to the POS app. For takeout orders, the download threshold time limit is 30 minutes, and for delivery orders, the limit is 60 minutes. For example, if the target time for a takeout order is 11:45, the Silver host sends the order to the POS app at 11:15.

The POS app requires an Internet connection to receive online orders when they reach the download threshold limit. Without an Internet connection, the POS app cannot receive the online orders.

If necessary, you can pull the online order to the iPad that has not yet downloaded to the iPad, rather than waiting for the order to reach the threshold time limit.

When the POS app receives an online order from the Silver host, the configured printer prints a kitchen chit, identifying the order as an online order, and the following information:

- Identifies the specific order type.
- Identifies the order as an 'ONLINE ORDER.'
- Provides the target time for the order.
- Includes the customer name and information. For delivery orders, this includes the delivery address.
- Includes the order notes, if any.
- Identifies the items for order, and notes, if any.



## COMPLETING ONLINE ORDERS

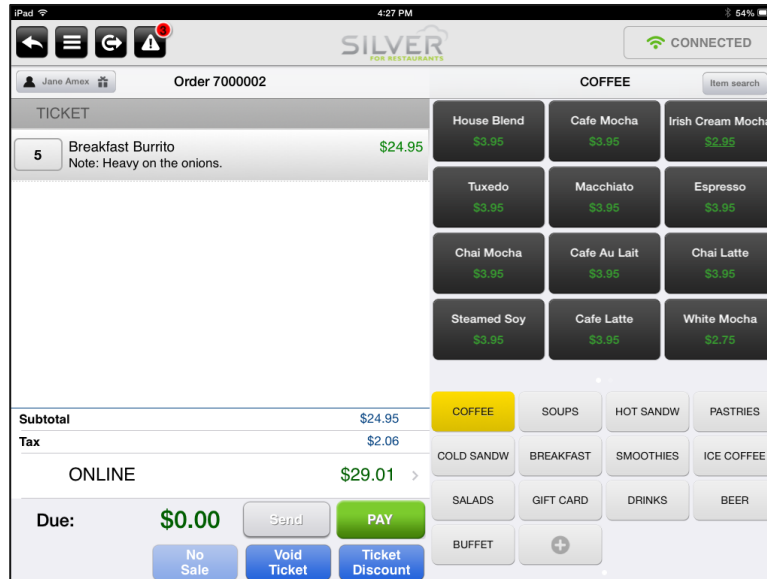
You complete online orders from the takeout and delivery queue of the POS app. You complete the orders the same as you would a normal takeout and delivery order, except with online orders, the customer may have already paid for the order. If the customer paid for the order online, the tender type appears as ONLINE on the guest check, includes the amount paid, and indicates an amount due, if any.

In some cases, online orders for a restaurant may be set to auto-close fully paid orders. In this scenario, when the POS receives the fully paid online order, in addition to the kitchen chit printing, the POS prints a customer receipt and closes the order.



## COMPLETING A SAME DAY ONLINE ORDER

1. At the Takeout/Delivery screen, select the **order**. The guest check screen appears.



2. Tap **Pay**. The tender screen appears.
3. If the customer paid for the order online, 'ONLINE' appears as the tender type and the amount due is '\$0.00.' Tap **Close** to complete the order.

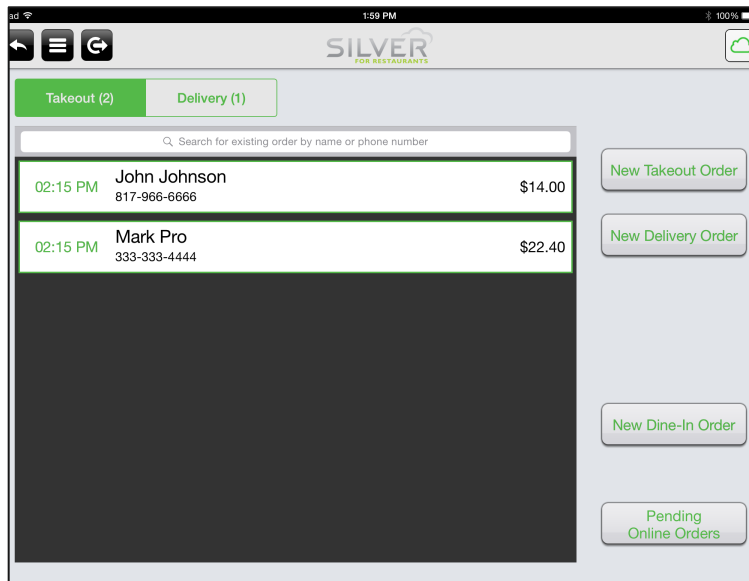
-OR-

If the customer owes money for the order, an amount due appears on the guest check. Receive **payment** for the order, and tap **Close**.

The system returns to the Takeout/Delivery screen.

## PULLING AN ONLINE ORDER TO THE IPAD

In some instances, such as a same day order for later in the day, you may wish to pull an online order to the iPad for processing. When you pull the order to the iPad, a prompt appears allowing you to change the target time for the order. Although you can view future day orders, you can only pull same day online orders.



1. From the Takeout/Delivery screen, tap **Pending Online Orders**.

Close		Online Orders	Refresh
TUESDAY, APRIL 28, 2015			
06:15 PM	John Stone	#11600116	<div>Send</div>
WEDNESDAY, APRIL 29, 2015			
06:15 PM	steve.stevens@e...	#11600115	

The Online Orders screen appears with the online orders that have not yet downloaded to the iPad because they have not reached the target threshold time.

For orders listed on the Pending Online Orders screen, you can only view the target time, order name, and ticket number. To view ticket details, access POS Transactions in Silver Back Office.

2. Tap **Send** next to the order you want to process. A Send Online Order prompt appears.
3. Tap **YES**. The Order Target Time screen appears with the target time assigned to the order.
4. Tap **Done** to accept the target time

-OR-

Scroll to select the **hour**, **minutes**, and **time period**, or use '-' and '+' to select a target time for order completion.

A kitchen chit prints to the defined printer. The system removes the order from the Online Orders screen and places it in the Takeout or Delivery queue, depending on the order type.

5. Tap **Close**.



---

## COMPLETING FUTURE DAY ONLINE ORDERS

NCR Silver Pro Restaurant enables you to accept future day online orders. When the customer elects to pay in the store, the system manages these future day orders as it does same day orders. The system holds the order until it meets the download time threshold limit, and then it sends the order to the POS app.

When the customer pays online for a future day order, Silver Pro Restaurant handles the order as follows:

- The system creates two separate tickets on the Silver host.
- The first ticket is for the business date on which the customer placed the order. This ticket contains only one line item representing the pre-payment with a positive amount and a payment record for the amount. The receipt displays 'ONLINE' as the payment type and the POS Transactions Payments description is 'Pre-Payment.'
- The system then creates a second ticket for the order due date. The second ticket contains the actual line items ordered by the customer. The receipt reflects the tender type as 'PPD-ONLINE' and the POS Transactions Payments description is 'Prepaid.'
- On the Store Summary report, ONLINE represent an actual payment whereas PPD-ONLINE is the application of a previous payment to the ticket.

---

## VOIDING AN ONLINE ORDER

In some scenarios, you may need to cancel an online order once the system downloads it into the POS app.

When you void an order for which a customer paid online, this can create a financial reconciliation discrepancy between the online ordering system and the Silver host.

1. Select the **order** from the Takeout and Delivery queue. The guest check screen appears.
2. Tap **Void Ticket**. A prompt appears.
3. Tap **Yes**. If your user role does not allow you to void the ticket, the 'Supervisor's approval needed' screen appears, and a manager must enter their **four-digit PIN** to void the ticket.
3. The system returns to the Takeout and Delivery queue.



## APPLYING A TAX EXEMPTION

For customers who qualify, it is possible to apply a tax exemption.

1. With the guest check active, tap the **Tax line item**, located at the bottom of the guest check. The 'Tax' screen appears with each type of tax listed separately, if more than one type of tax applies.



2. Tap the **tax** to exempt and tap **Exempt** from the menu that appears, or tap **Exempt all**. The exempted taxes appear in red.
3. Tap **Close**. The tax amount appears adjusted on the screen.

To undo a tax exemption, tap the **tax line item** at the bottom of the guest check, the 'Tax' screen appears, tap **Nonexempt all**, and tap **Close**.

## SPLITTING THE CHECK INTO EQUAL AMOUNTS

1. With the guest check active, tap **PAY**. The tender screen appears.



2. Tap **Equal Amounts** and enter the **number** of guests splitting the payment.
3. Tap **Done** to return to the tender screen. The new tickets appear under Equal Amounts.
4. Continue to close the **check**.


## PRINTING, REPRINTING, OR EMAILING A GUEST CHECK

### PRINTING THE GUEST CHECK

1. With the guest check active, tap **PAY** to access the tender screen. The Print button replaces the Pay button.
2. Tap **Print**. The receipt prints to the defined printer.
3. Tap **Back to Items** to return to the guest check.

### REPRINTING OR EMAILING A RECEIPT

You can reprint or email a receipt for a customer.

1. Tap  to display the **slide out menu**.
2. Tap **Recall/Reprint**.
3. Under Completed Tickets, tap the **ticket** to reprint or email. The 'Receipt' screen appears.
4. Tap **Email receipt** to email a copy to the customer. The 'Email receipt' screen appears. Tap the customer to which to email the receipt, or tap to the right of the customer name to edit the customer information prior to emailing the receipt.

-OR-

Tap **Print receipt** to print a receipt for the customer.

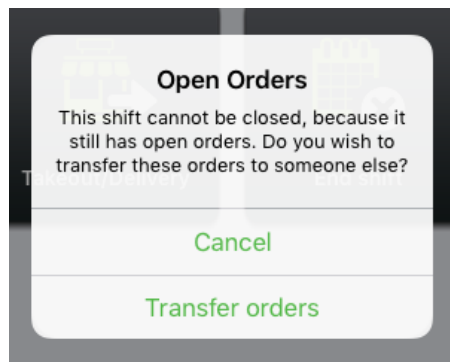


## TAKING OWNERSHIP OF OPEN ORDERS

Often times, cashier's operating a QS restaurant will attempt to end their shift while they still have ownership of some open transactions, like a phone order. You can use the **Take Ownership** function to transfer open orders to a different employee before closing the shift. Employees will need both "Recall Any Order" and "Order Ownership" activated to take ownership.

1. From the ticket entry screen or the slide out menu, tap **Recall**
2. Search for and tap on the open order
3. Tap **Take Ownership**

Alternately, during the End Shift process, the departing cashier can give ownership of all open orders to another employee. During the End Shift process, if open orders exists, the departing employee will see a message prompting them to transfer open orders.



1. Tap **Transfer Orders**.
2. Select an employee from the list that appears. The list includes all employees with an active financial shift.
3. Either the employee receiving the open order or a manager with the "Order Ownership" permission will need to enter their POS PIN to complete the transfer.

## DELETING A GUEST CHECK

Use the Delete Ticket function to void an entire ticket.

Use caution when using the Delete Ticket function.

1. With the guest check active, tap **Delete Ticket**. The 'Void ticket' screen appears  
For split checks, you delete each check individually, or tap **All On One** to combine all the tickets together, and then delete the one ticket.
2. Tap **Yes**. Obtain manager authorization, if necessary.

## CLOSING A CHECK

Depending on your configuration, you can close a check to cash, check, credit card, gift card, and prepaid coupons. The manner in which you close a check to credit card can vary depending on whether you are using a credit card reader (MSR) or an EMV terminal.



## CLOSING A CHECK TO CASH

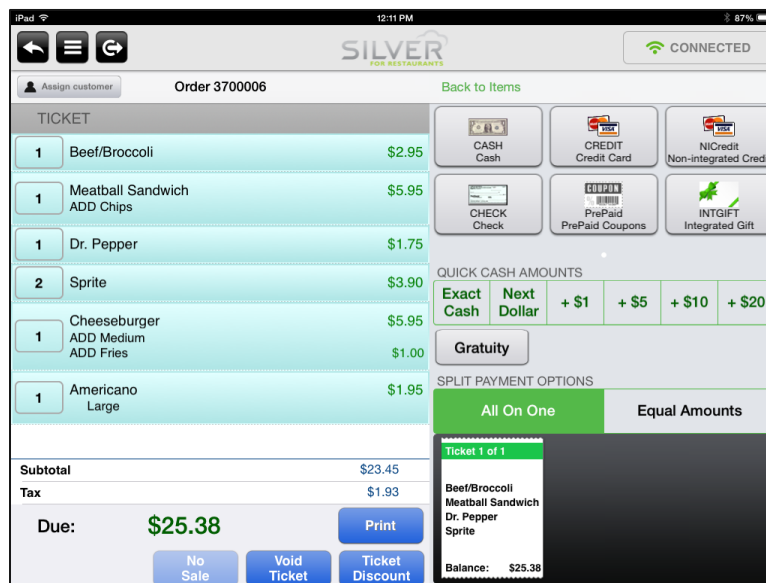
1. With the guest check active, tap **PAY** to access the tender screen.

If the checks are split, select the correct check before you apply the payment. The selected ticket number appears in green.

2. Tap a **Quick Cash Amount**. The change due amount appears in the guest check. Continue to step three.

-OR-

Tap **Cash**. The 'Amount' screen appears. Enter the **amount** received and tap **Done**. The change due amount appears in the guest check.



3. Tap **Close** to close the check.

The system advances to the next ticket, or if there are no other checks to close, the order entry screen appears.

## CLOSING A CHECK TO A GIFT CARD

1. With the guest check active, tap **PAY** to access the tender screen.
2. Slide the **gift card** through the card reader. If the gift card balance is not sufficient to pay the remaining balance, return to the tender screen to select another method of payment. If the gift card contains a remaining balance, the amount prints on the customer receipt.
3. Note: You have the option to use the POS device's camera to scan QR-coded gift cards (like from a third party loyalty application). Press **Camera** on the gift card payment screen, and scan the QR code with the camera. The gift card number will populate and you can proceed.

## CLOSING A CHECK TO A CREDIT CARD WITH A CREDIT CARD READER

With a credit card reader (MSR), you can save a card to a check and close the check.

## SWIPING A CREDIT CARD THROUGH YOUR MSR

The following are a list of tips for sliding a credit card through your MagTek iDynamo MSR.

- Ensure the MSR is securely plugged into the device.
- Check to avoid magnetic interference from nearby devices.
- Slide the customer credit card with the undamaged magnetic stripe facing the magnetic read head. If the POS is facing toward you, hold the card with the magnetic stripe facing away from you. When you slide the card through the MSR, do so in a flat, smooth, and steady motion.
- Do not slide the card too slow or too fast through the MSR.
- Slide the card in a flat movement. Make sure the card is fully inside the adaptor, and do not lift the card too soon.

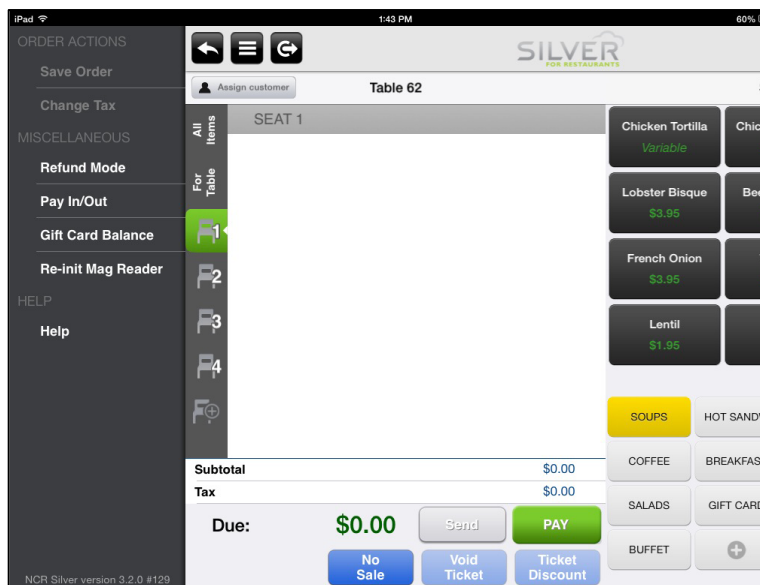
## TROUBLESHOOTING YOUR MSR

Follow these guidelines to troubleshoot your MSR.

## RE-INITIALIZING YOUR MSR

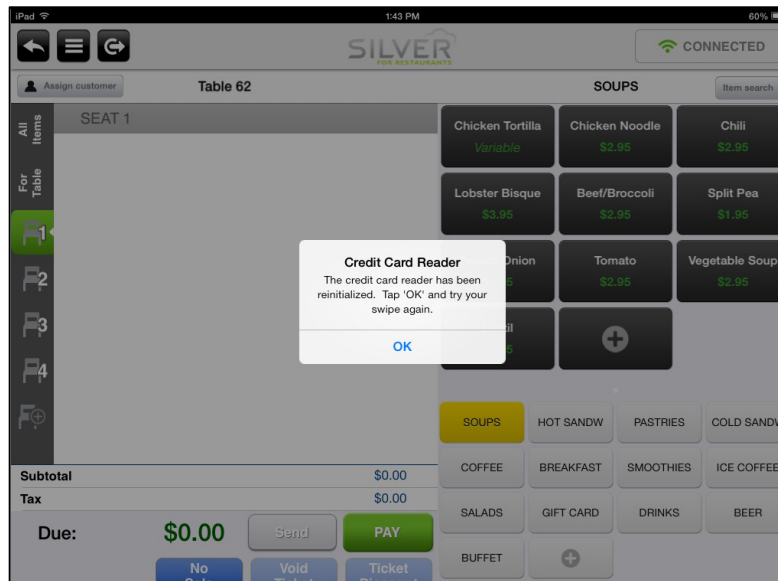
If your MSR fails to respond, it is necessary to re-initialize your MSR.

1. At the order entry screen, tap  to display the slide out menu.



2. Tap **RE-Init Mag Reader**. The system re-initializes your MSR. When the process finishes, a Credit Card Reader prompt appears.

If you do not see the option to Re-Init Mag Reader, your device is not recognizing your MSR as connected. Close NCR Silver Pro, disconnect the MSR, reconnect the MSR, and re-launch NCR Silver Pro.




3. Tap **OK**, and slide the **credit card** again.

## VERIFYING YOUR MSR CONNECTION

If your MSR fails to respond after re-initializing, verify NCR Silver Pro recognizes your MSR as connected.

1. At the POS home screen, tap  to display the slide out menu.
2. Tap **Details** to access the Details screen.

Details	
DETAILS	
User	Chris Dikes
Store	Shawn Hagist's Shop
Events	 >
Login	5/14/14, 2:06 PM
Scanner Information	MagTek: Connected
DEVICE	
Name	Chris's iPad
Plan Type	Primary
Number	245
SILVER SERVER	
Address	192.168.66.109:9060

3. Verify **MagTek:Connected** appears in Scanner Information.

If the MSR does not appear in Scanner Information, remove the MSR, inspect it for damage, and then reconnect the MSR. You may also need to close the NCR Silver Pro app, and then re-launch it.

4. Tap **Close** to exit the Details screen.

If your MSR still does not recognize a credit card, clean the read head with an alcohol swab pad. These pads were included in the shipment with your MSR, and instructions for cleaning the read head with the pad are located on



the pad. If your MSR stills fails to recognize a credit card, contact the Silver Pro Customer Care team at 1-877-270-3475.

#### CLOSING A CHECK TO A CREDIT CARD WITH A CREDIT CARD READER

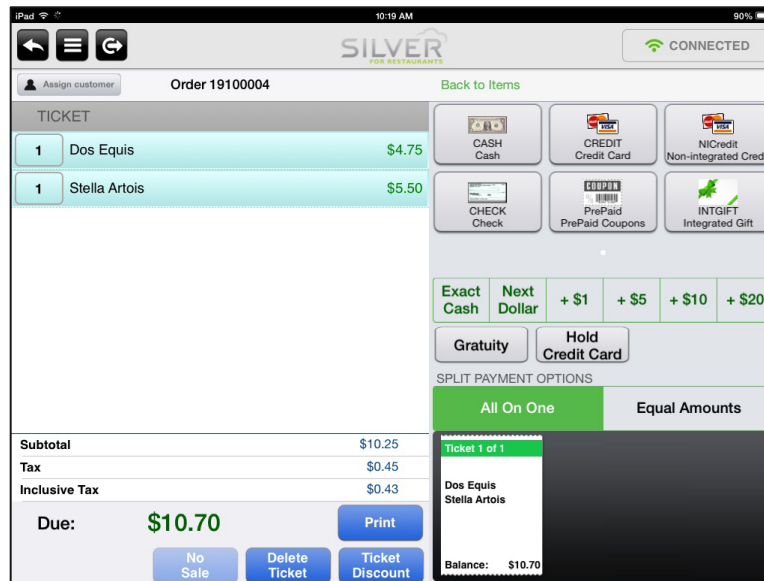
1. With the guest check active, tap **PAY** to access the tender screen.
2. Slide the **credit card** through the card reader to charge the entire amount to the card.  
-OR-  
Tap **Credit Card** to enter an amount to charge to the card. Enter the **amount** to charge to the credit card, tap **Done**, and then slide the **credit card** through the card reader.
3. Have the customer sign the **signature screen** with his or her finger, or a stylus, if prompted. The customer can add a tip while on the signature screen. Tap **Accept**, and then tap **Close**.  
-OR-  
Have the customer sign a **printed receipt**, if prompted. Tap **Accept**, and then tap **Close**.

#### SAVING A CREDIT CARD TO A GUEST CHECK

In some scenarios, such as a bar, you may allow customers to run a tab. Rather than physically holding the customer credit card until they are ready to finalize their ticket, you can save the customer credit card to the guest check and return the credit card to the customer. When the customer is ready to check out, you can process the credit card saved to the order, or remove the credit card and accept another form of payment.

If an iPad with a credit card saved to a guest check loses an Internet connection, you cannot process the saved credit card as an offline credit card transaction. You must slide the credit card through the MSR again.

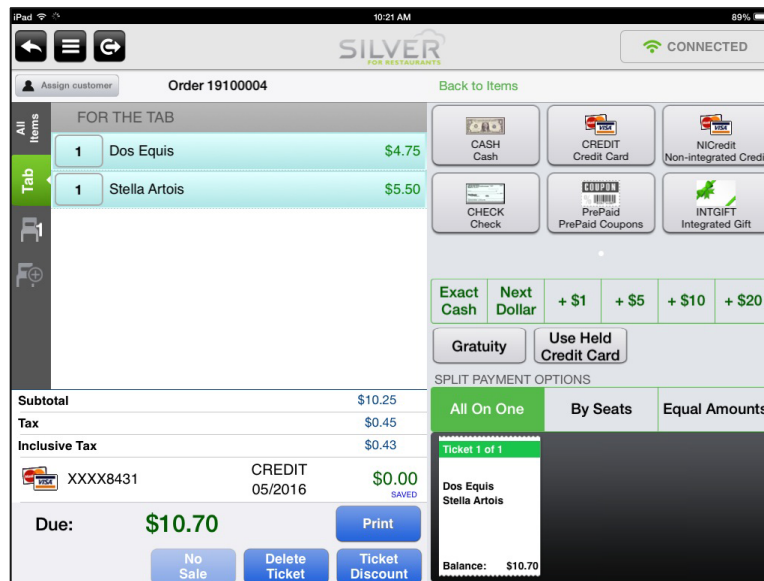
1. At the guest check screen, enter the **items** for order by the customer.
2. Tap **Pay**.
3. Ask the **customer** if they plan to split the guest check. You must split the guest check before saving a credit card to it. If you do not, and later want to split the guest check, you must remove the credit card from the guest check, split the guest check, and then save the credit card again.



4. Tap **Hold Credit Card**. The Swipe card screen appears.

You must tap Hold Credit Card before sliding the credit card through the MSR. If you slide the credit card through the MSR before you tap Hold Credit Card, the system processes the card as a credit card purchase.

5. Slide the **credit card** through the MSR. The Saving Credit Card for Ticket spinning dial appears.



The Hold Credit Card button changes to Use Held Credit Card, and the held card information appears in the amount due section of the guest check.

6. Tap **Save**.  
Assign a customer to the guest check, if you have not already done so.
7. When the customer is ready to close out their order, tap **Recall**.
8. Select the **order** and tap **Recall**.





9. Tap **Pay**.

10. Tap **Use Held Credit Card**. The Authorizing Payment spinning dial appears.

If the customer wants to use a different form of payment, in the amount due section of the guest check, swipe the credit card to the left and tap Remove. Finalize the guest check using the new form of payment from the customer.

11. Tap **Close**.

## CLOSING A CHECK WITH AN EMV TERMINAL

If you previously used NCR Silver Pro Restaurant without EMV, you will notice a difference in the way you process credit card transactions when using EMV.

With a non-EMV terminal, such as an MSR, you could swipe the credit card at any time during the transaction and adjust tips at a later time. With EMV, you must follow certain steps before you can swipe a credit card and you cannot adjust tips. Only the customer can enter a tip amount, which they do on the EMV terminal. Additionally, EMV terminals do not allow for the manual entry of a credit card number.

The process of closing a guest check with a credit card may vary, depending on the verification methods required. At times, you may be prompted to enter an Operator PIN to continue the transaction. The Operator PIN is the four-digit PIN you used to log in to the app.

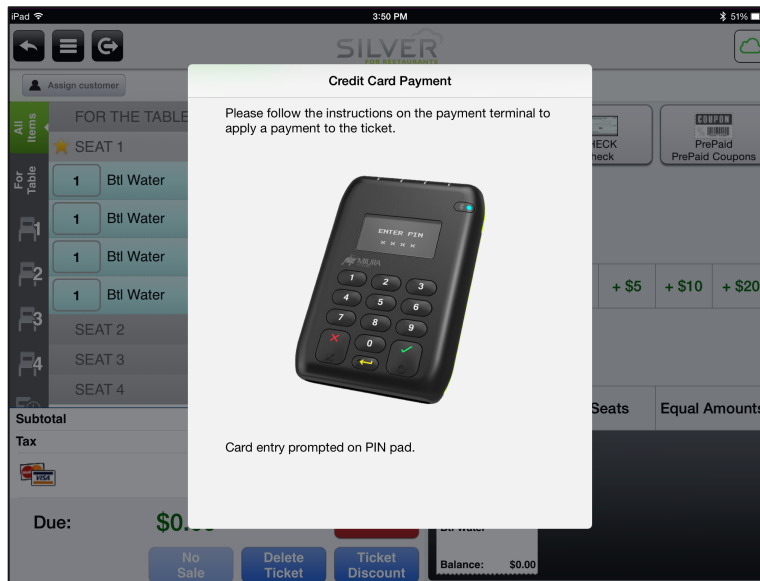
The following section outlines various transaction scenarios with EMV.

### To close a guest check when a customer PIN is required:

1. The employee adds **items** to the guest check.
2. The employee taps **PAY**.
3. The employee taps **CREDIT**. The Amount screen appears.
4. The employee confirms the **amount** to charge to the credit card and taps **Done**.

-OR-

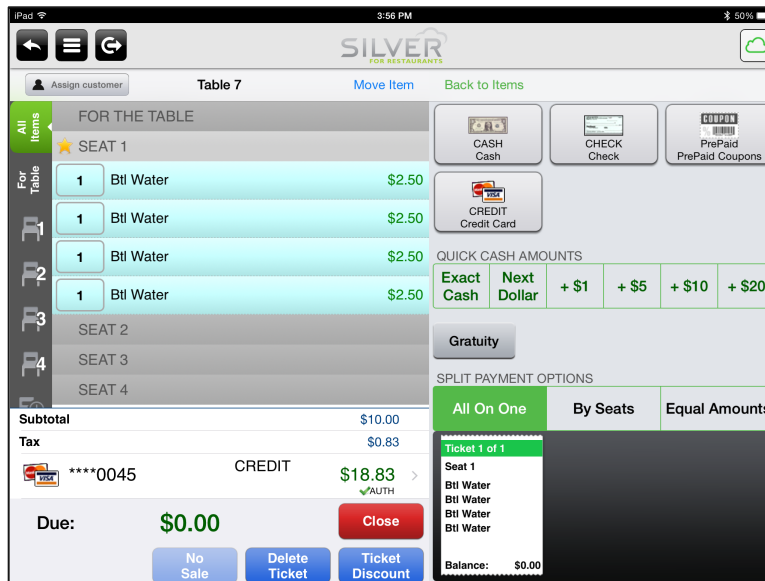
The employee enters a **different amount** and taps **Done**. The amount you enter cannot be more than the total amount due.



The Credit Card Payment screen appears on the app.

5. The customer swipes their chip card, swipes their credit card, or holds the card up to the device for near field communication (NFC) payment. If prompted, the customer inserts their credit card into the bottom of the EMV terminal.
6. If you accept tips, the EMV terminal prompts the customer with the option to provide a gratuity. (If you do not accept tips, skip to the next step.) The customer presses the **green checkmark button** to add a gratuity or the **red 'X' button** to not do so.
1. If the customer elected to provide a gratuity, they must enter the **amount of the tip** and press the **green checkmark button**.
7. The EMV terminal prompts the customer to confirm the total amount to charge to their credit card. The customer confirms the **total amount** by pressing the **green checkmark button**. To cancel the credit card payment, the customer presses the **red 'X' button**.
8. When prompted by the EMV terminal, the customer types their **PIN number** onto the EMV terminal and presses the **green checkmark button**.

The system authorizes the transaction. On the app, the system returns to the guest check screen.



9. The employee taps Close to finalize the transaction.

#### To close a guest check when a customer signature is required:

These procedures outline the steps for closing a check with a credit card when a customer signature is required. You may capture signatures digitally or on paper, depending on the Check Close options selected for the iPad. The Check Close options are accessible from the Settings menu on the POS app home screen.

1. The employee adds **items** to the guest check.
2. The employee taps **PAY**.
3. The employee taps **CREDIT**. The Amount screen appears.
4. The employee confirms the **amount** to charge to the credit card and taps **Done**.

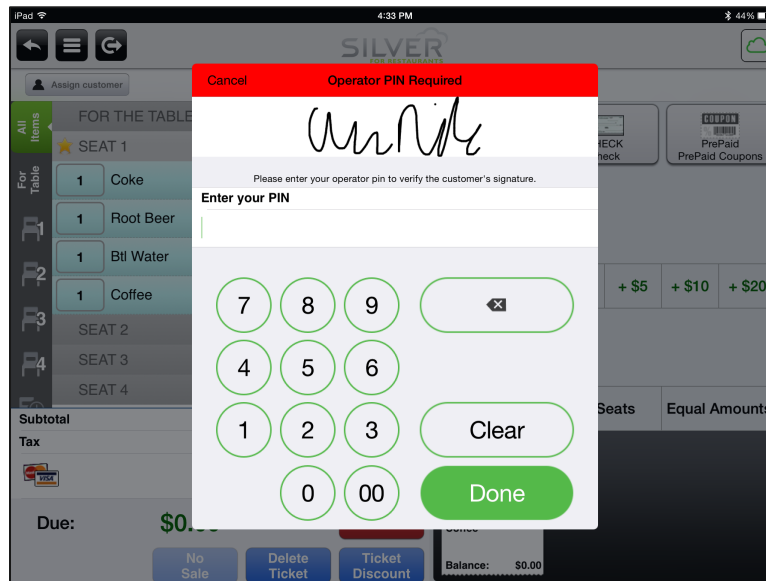
-OR-

The employee enters a **different amount** and taps **Done**. The amount you enter cannot be more than the total amount due.



The Credit Card Payment screen appears on the app.

5. The customer inserts their chip card, swipes their credit card, or holds the card up to the device for near field communication (NFC) payment.. If prompted, the customer inserts the **credit card** into the bottom of the EMV terminal.
6. If you accept tips, the EMV terminal prompts the customer with the option to provide a gratuity. (If you do not accept tips, skip to the next step.) The customer presses the **green checkmark button** to add a gratuity or the **red 'X' button** to not do so.
7. If the customer elected to provide a gratuity, they must enter the **amount of the tip** and press the **green checkmark button**.
8. The EMV terminal prompts the customer to confirm the total amount to charge to their credit card. The customer confirms the **total amount** by pressing the **green checkmark button**. To cancel the credit card payment, the customer presses the **red 'X' button**.
9. For the capture of signatures digitally, the customer provides **their signature** on the iPad and taps **Accept Total**.

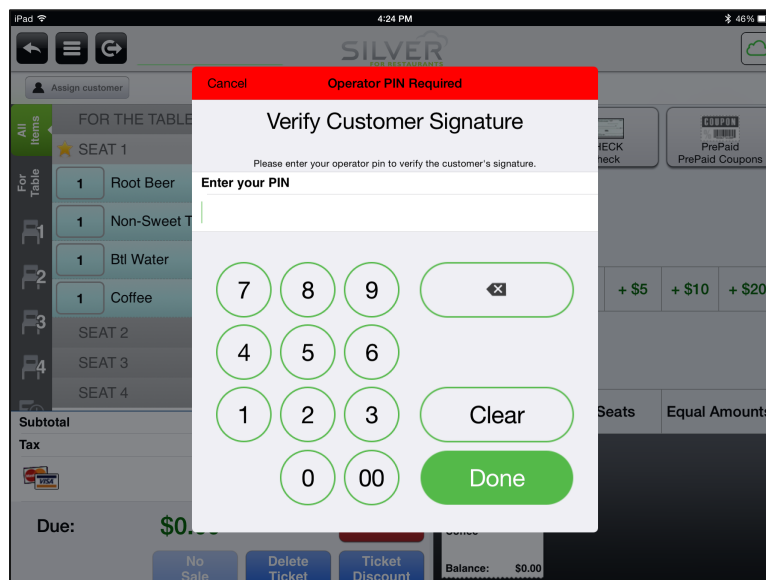


The Operator PIN required screen appears with the customer signature.

The employee enters their **four-digit operator PIN** and taps **Done**. This is the PIN number they used to log into the NCR Silver Pro Restaurant app.

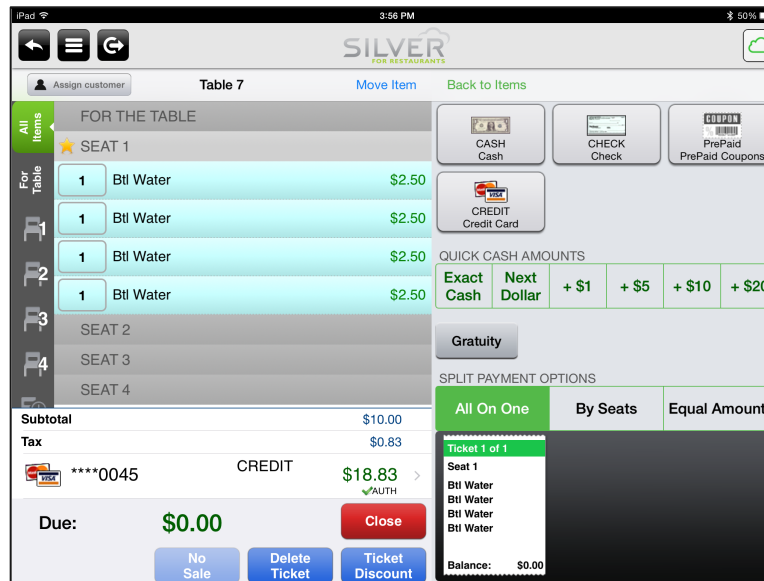
-OR-

For the capture of customer signatures on paper, the POS app prints a customer signature receipt for the customer to sign.




The Operator PIN required screen appears.

The employee enters their **four-digit operator PIN** and taps **Done**. This is the PIN number they used to log into the NCR Silver Pro Restaurant app.




10. The employee taps **Close** to finalize the transaction.

#### To remove a credit card payment from a closed guest check:


1. Tap  to access the slide out menu.
2. Tap **Recall/Reprint**. The Recall/Reprint screen appears.
3. Select the **ticket** for which you want to remove the payment.
4. Tap **Reopen**.
5. Swipe the **payment line** to the left and tap **Remove**.
6. Receive **payment** for the transaction and close the check.

#### To void a closed guest check with a credit card payment:

You can void a credit card payment on the POS prior an employee ending a financial shift and before the batch settles.

1. Tap  to access the slide out menu.
2. Tap **Recall/Reprint**. The Recall/Reprint screen appears.
3. Select the **ticket** for which you want to remove the payment.
4. Tap **Reopen**. The system opens to the guest check.
5. Tap **Delete Ticket**. The Delete Ticket screen appears.
6. Tap **Yes**. Obtain manager authorization, if necessary.

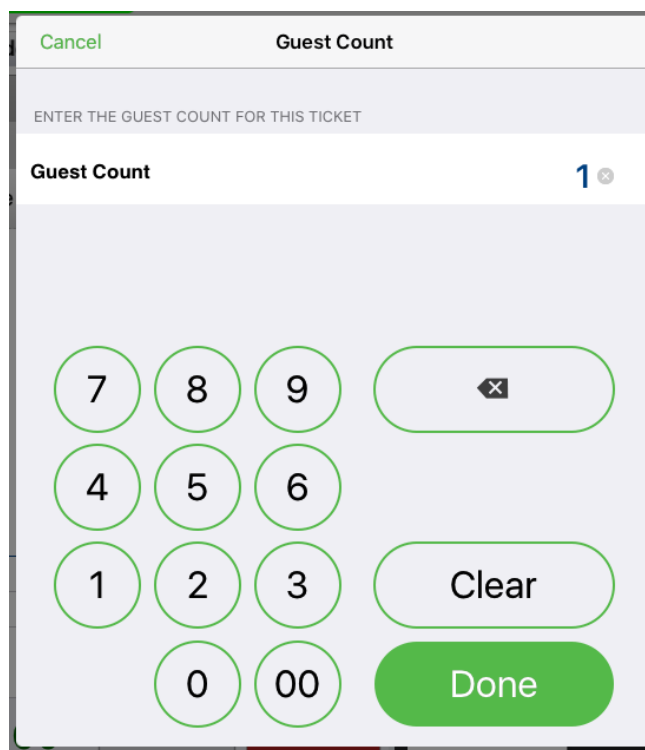
#### To refund a guest check:

1. Tap  to access the slide out menu.
2. Tap **Refund Mode**.
3. Enter the **items** onto the guest check for which you want to provide a refund.
4. Tap **Refund**.

5. Tap **Credit**.
6. Confirm the **amount** to refund and tap **Done**. The Credit Card Refund screen appears on the POS.
7. The customer swipes their **credit card** through the top of the EMV terminal. If prompted, the customer inserts the credit card into the bottom of the terminal. (refund using chip or nfc?)
8. The customer confirms the **amount** of the refund by tapping the green checkmark button on the EMV terminal. The customer can press the red 'X' button to cancel the transaction. The system processes the refund and returns to the order entry screen.
9. Tap **Close** to finalize the transaction.

## GUEST COUNTING

By default, guests are counted by transaction. You can adjust the guest counting method in the back office. If you select guest counting **by prompt**, you will be prompted to enter the guest amount during ticket close. The guest count appears in the **Silver Scoreboard**.



The screenshot shows a mobile application interface for entering a guest count. At the top, there is a 'Cancel' button on the left and the title 'Guest Count' in the center. Below the title, a light gray bar contains the text 'ENTER THE GUEST COUNT FOR THIS TICKET'. The main area of the screen is white and features a numeric keypad with buttons for digits 0-9, a '00' button, a 'Clear' button, and a 'Done' button. A small blue '1' with a circular arrow icon is displayed in the top right corner of the main area, indicating the current guest count.

## ADJUSTING A TIP

You can adjust a tip for a credit card payment prior to or after closing the check, and prior to closing a financial shift.

NOTE: If you are using an EMV terminal, you cannot adjust tips.



## ADJUSTING A TIP PRIOR TO CLOSING THE CHECK

1. With the guest check active, before tapping Close, tap the **credit card line item** located at the bottom of the check. A numeric keypad appears.
2. Enter the **tip amount**.
3. Tap **Done**.
4. Tap **Close**.

## ADJUSTING A TIP AFTER CLOSING THE CHECK

1. At the POS home screen, tap to display the **slide out menu**.
2. Tap **Adjust Tips**. The Adjust Tips screen appears with a list of the guest checks paid by credit card. An alert icon appears next to the guest checks with tip percentages below 5% or above 100%.

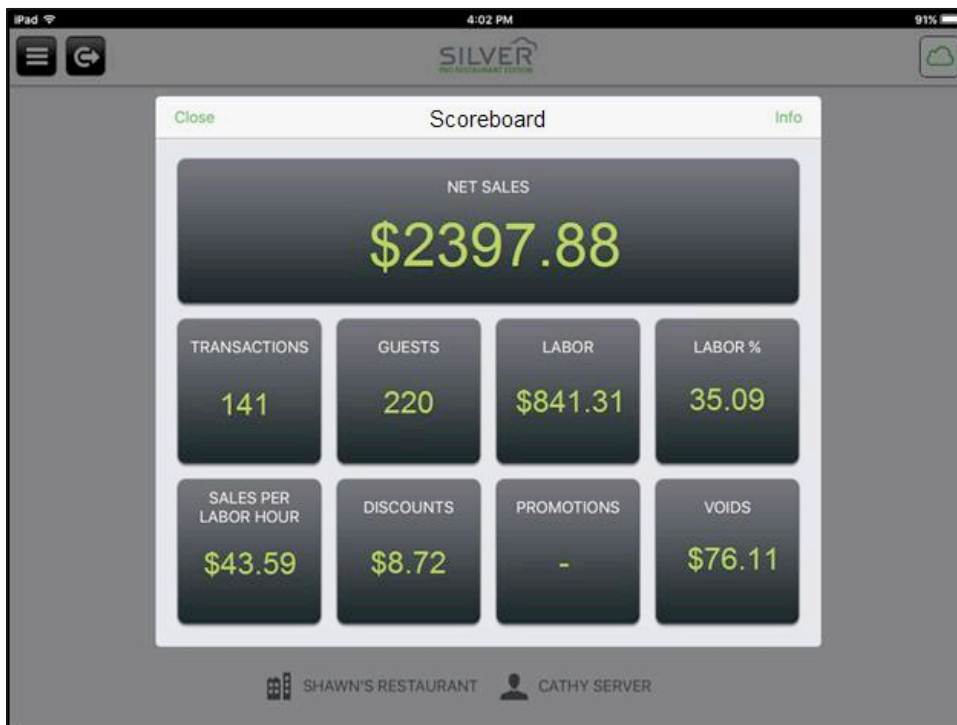
Done		Adjust Tips	
AMEX TRACK 1 AND 2	Order 18900003	check subtotal	\$11.85
Ticket #18900043	AMEX XXXX8431	Tip	\$2.00
10/28/14 07:33 PM		%	16%
AMEX TRACK 1 AND 2	Order 18900004	check subtotal	\$24.79
Ticket #18900044	AMEX XXXX8431	Tip	\$4.00
10/28/14 07:34 PM		%	16%
AMEX TRACK 1 AND 2	Order 18900005	check subtotal	\$43.39
Ticket #18900045	AMEX XXXX8431	Tip	\$0.00
10/28/14 07:34 PM		%	0%
AMEX TRACK 1 AND 2	Order 18900006	check subtotal	\$22.95
Ticket #18900046	AMEX XXXX8431	Tip	\$4.00
10/28/14 07:35 PM		%	17%
AMEX TRACK 1 AND 2	Order 18900007	check subtotal	\$20.60
Ticket #18900047	AMEX XXXX8431	Tip	\$0.00
10/28/14 07:35 PM		%	0%
AMEX TRACK 1 AND 2	Order 18900009	check subtotal	\$11.85
Ticket #18900049	AMEX XXXX8431	Tip	\$15.00
10/28/14 07:42 PM		%	126%

3. Tap the **guest check** for which you want to adjust the tip.
4. Enter the **amount** for the tip.
5. Tap **Done**. The Authorizing spinning dial appears followed by a Tip Adjusted prompt.
6. Tap **OK**.
7. Repeat **steps 3 through 6** for the remaining guest checks for which you want to adjust the tip.
8. Tap **Done** to exit the Adjust Tips screen.

## POS REPORTING

Any user with POS settings permission can access the **Silver Scoreboard** from the POS home screen. The Silver Scoreboard provides a top-level report of important shift metrics.







## ENDING SHIFTS

Prior to clocking out, it is necessary to first end your financial shift. The system does not allow you to end your financial shift if you have open orders. You must first close or transfer the open orders.

### ENDING A FINANCIAL SHIFT WITHOUT A CASH DRAWER

Once you end a financial shift, if you tap Point of Sale or Takeout/Delivery, the POS app prompts you to begin another financial shift.

1. At the POS home screen, tap **End Shift**. The 'End Shift' screen appears.
2. Tap **Yes**. The Adjust Tips prompt appears.
3. Tap **Yes** to review and adjust tips. The Adjust Tips screen appears. Refer to 'Adjusting a Tip After Closing a Check' for instructions on how to adjust the tips on guest checks. After you close the Adjust Tips screen, you can no longer adjust the tips for guest checks.  
-OR-  
Tap **No** to not review and adjust tips.  
-OR-  
Tap **No (Don't show me this again)** to no longer receive the Adjust Tips prompt at the end of a financial shift.  
Your manager can reactivate the Adjust Tips prompt in Silver Back Office.
4. Continue to the **next procedure** to clock out.

### ENDING A FINANCIAL SHIFT WITH A CASH DRAWER

If you assigned yourself to a cash drawer, when you tap End Shift, you have the option to close the cash drawer or to un-assign yourself from the cash drawer.

#### To un-assign yourself from the cash drawer:

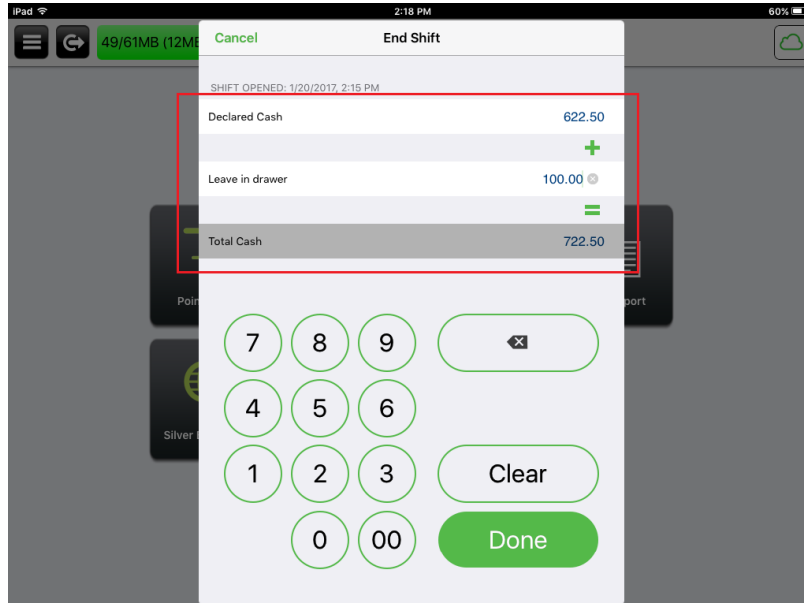
1. At the POS home screen, tap **End Shift**. The End Shift Options screen appears.
2. Tap **De-assign yourself from drawer**.
3. Continue to the **next procedure** to clock out.

#### To close a cash drawer:

1. At the POS home screen, tap **End Shift**. The End Shift Options screen appears.
2. Tap **Close cash drawer totals**.
3. Tap **Yes** to review and adjust tips. The Adjust Tips screen appears. Refer to 'Adjusting a Tip After Closing a Check' for instructions on how to adjust the tips on guest checks. After you close the Adjust Tips screen, you can no longer adjust the tips for guest checks.  
-OR-  
Tap **No** to not review and adjust tips.  
-OR-  
Tap **No (Don't show me this again)** to no longer receive the Adjust Tips prompt at the end of a financial shift.

Your manager can reactivate the Adjust Tips prompt in Silver Back Office.

4. Tap **Open** to open the cash drawer or tap **Skip** to not open the cash drawer.



5. (Drawer Checkout Only) Enter the **Declared Cash** (total cash counted) you are turning in. Do not include total tip amounts.
6. (Drawer Checkout Only with Ask for Ending Bank option on) Enter the **Cash Amount** you are leaving in the drawer.
7. (Drawer Checkout Only) the **Total Cash** displays the amount you will be removing from the drawer.
8. (Drawer Checkout Only) Tap **Done**. The cash reconciliation screen appears with an over/short amount.

Recount	Cash Reconciliation	Confirm
SHIFT		
2/16/2016, 12:32 PM through 2/16/2016, 12:35 PM		
Starting Amount (paid in)		\$100.00
Cash Payments		\$7.58
Paid In/Out		\$0.00
Leave in drawer (paid out)		(\$100.00)
Expected Amount		\$7.58
Declared Amount		\$7.58
Over/Short		\$0.00

9. (Drawer Checkout Only) To accept the cash reconciliation amount, tap **Confirm**.

OR



To recount the cash, tap **Recount**. A supervisor's approval screen may appear.

The End Shift report prints with the employees who were assigned to the cash drawer. Also, additional chits, such as a Drawer Paid Out and a Drawer Deposit, will print if you declared a leave in drawer amount.

## UNDERSTANDING THE POS SHIFT END REPORT

The Shift End report determines the amount of money owed by or to an employee at the end of a financial shift. The Shift End Report includes an accounting of all sales activity of the employee, including sales, discounts, taxes, gift cards sold, payments, petty cash transactions, voids, and credit card tips.

[illegible]



Report Section	Description
Header	Header includes: <ul style="list-style-type: none"> <li>The store name.</li> <li>The name of the employee.</li> <li>The shift the employee worked.</li> <li>The date and time of the printing of the report.</li> </ul>
Gross Category Sales	Gross Category Sales includes: <ul style="list-style-type: none"> <li>The breakdown of gross sales by category.</li> <li>The total amount of gross sales.</li> </ul>
Net Category Sales	Net Category Sales includes: <ul style="list-style-type: none"> <li>The total amount of all discounts and promotions redeemed.</li> <li>The total amount of inclusive taxes collected.</li> <li>The breakdown of net sales by category.</li> <li>A total of net sales, calculated as: Gross Sales - Discounts/Promotions - Inclusive Taxes.</li> </ul>
Total Net + Tax + GC	Total Net + Tax + GC + Chrg includes: <ul style="list-style-type: none"> <li>The breakdown of taxes collected by type.</li> <li>The total amount of taxes collected.</li> <li>The total amount of gift cards sold.</li> <li>The total amount of charges assessed.</li> <li>The total amount of net sales, taxes, gift cards, and charges.</li> </ul>
Total Payments	Total Payments calculates: <ul style="list-style-type: none"> <li>The total amount received for each tender type for which the employee received payment. Non-cash tender summaries include tips.</li> <li>The total amount received for all tender types, including non-cash tips received.</li> </ul>
TOTAL CASH OWED	<p>TOTAL CASH OWED includes:</p> <ul style="list-style-type: none"> <li>The breakdown of tips collected by each non-cash tender type.</li> <li>The total amount of tips collected.</li> <li>The total amount of gratuity collected.</li> <li>The details of any Pay In and Pay Out transactions.</li> <li>The total amount of Paid In/Out transactions.</li> <li>TOTAL CASH OWED calculates any money owed by or to the employee.</li> </ul> <p>If your employees keep credit card tips in the form of cash at the end of their shift, the system calculates TOTAL CASH OWED as: Gross Sales - Discounts - Refunds - Inclusive Taxes + Tax Total + Gift Cards Sold + Charges - Credit Card Tender Types (including tip amounts) - Gift Cards Redeemed - Paid Outs + Paid Ins.</p> <p>If your employees do not keep credit card tips in the form of cash at the end of their shift, the system calculates TOTAL CASH OWED as: Gross Sales - Discounts - Refunds - Inclusive Taxes + Tax Total + Gift Cards Sold + Charges - Credit Card Tender Types (including tips) - Gift Cards Redeemed - Paid Outs + Paid Ins + Electronic Tips + Gratuity.</p>



## CLOCKING OUT

1. At the POS home Screen, tap **Clock Out**. The Clock Out prompt appears.
2. Tap **Yes** to return to the PIN entry screen.



## HELP

## NCR Silver Customer Care: 877-270-3475

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