# NCR Silver v4.6 Release Notes





Our latest release is here!

With our latest version, we're bringing you more great features that will make running your business even smoother and more time efficient! For detailed information and articles, please log in to your

back office and click on HELP.

## COUNT AND RECEIVE INVENTORY AT THE POS

To simplify inventory operations in store, users with the proper user role permissions access the Count and Receive Inventory option on the POS slide-out-menu. If a user does not have permission to access the count and receive feature, they will be prompted for manager approval.

iPad 🗢			SILVER			\$ 44% <b>E</b>
🗐 Tic	cket Entry	🔒 Info	Towels	•	*	ର୍ 🔳
🖶 Silv	ver Swim Shop g Out (Sara Ford)	icket:	Solid	Stripes	Monogram	Polka dots
s Ck	ose Shift		10.99 ^	22.00	2.99	10.99
r Pa	iy In / Out		Disney Designs	Paisley	Floral	Geometric
() INC	LOOKUP		24.99	20.00	20.00	20.00
💥 Cu	istomers		Tie Dye	Plaid	Super Hero Designs	super soft
🗳 Git	ft Card Balance		20.00	1.99 ^	10.99	20.00
🕚 Tin	me Clock store		Categories	•		
Σ Co	ount/Receive Inventory			Tourste	Cuite	Clip Class
🚍 Ba	ack office (Web)		<b>X</b>	Towers	Suits	Flip Flops
🕜 He	elp (Web)		Sunscreen	Gift Card	Goggles	Sunglasses
🖸 Se	ttings ter Training Mode		Bags	Snacks	Drinks	Sand Toys

Users can search for an item they want to count or receive three ways:

- Manually type the item name (3-character minimum)
- Scan an item
- Tap the barcode icon to manually enter a barcode



Items with variations will display a +/- that allows the user to view/hide the variations. Once an item is selected, a user can select **Count**, **Receive** or **Item Detail**.

	SILVER			\$ 54%
	Count	Receiv	e Item Detail	
100	Monogram			\$2.99
_	Monogrammed Towel			
	Category To	owels	Quantity	35
	Sold by	Each	Tax	VAT 20%
	Barcode		Variations	Monogram 🛈
	Vendor Polyester	Man		
+				
	-	+	+	triate M     SILVER Count Receive Item Detail     Monogram     Monogram     Monogram     Category Towels Quantity     Sold by Each     Tax     Barcode Variations     Vendor Polyester Man +

Important notes on completing a count or receive on the POS:

- The POS must be online and able to reach the NCR Silver host
- When performing a count, a user can enter the number of packages, as well as the number of units they have on hand
- When the count is saved, it will replace the current quantity on hand value in the SBO
- When receiving inventory, a user can enter the total number of packages received



- When the receive is saved, it will add to the current quantity on hand value in the SBO
- This feature is not available on iPhone

Pud ♥ 0		SILVER		¥ 53% 🗰 >	Pod 🗢 🤉		SILVER		\$ 64% 🔿
Σ Count/Receive Inventory		Count	Receive	lterri Detail	Σ Count/Receive Inventory		Count	Receive	Item Detail
۹. Tow	101	Units in package: 1 Packages:	La:	st Counted: 2/26/18 9:49 AM	Q Tow	100	Units in package: 1	Las	t Received: 2/26/18 9:48 AM
Monogram Managrammed Tower		Units:	68	0	Monogram Managemented Reveal		Total Received (Units):		
Single Initial		Total on Hand (Units):	68		Single Initial				
Initials		7	8	9	Initials		7	8	9
Word		4	5	6	Word		4	5	6
Picture		1	2	3	Picture		1	2	3
Monogram This Towel		•	0	00	Monogram This Towel		Ø	0	00
Monogrammed Towel					Monogrammed Towel				
Polka dots Polka dot Towel	+	Discard Changes		Replace Current Quantity	Polka dots Poles dot Towel	+	Discard Changes		Add to Current Quantity

# **CUSTOM TENDERS**

Custom Tenders provide a way for merchants to create generic payment types, but allow more detailed payment reporting.

Custom Tenders	Add a Custom Tender	r	0	Add a Custom Tende
Custom Tenders allo	* Indicates required field. Tender Code *: Tender Name *: Active: © External ID	Code(10 char max) Name(20 char max)	t type	s in your POS
	David Changes	Close	-	

**Example**: Silver Snack Shop is doing takeout business using generic delivery services, such as UberEats and Grubhub. They also use Groupon to create special offers for their customers to redeem. They can use custom tenders to close out orders for the various delivery services types and report them separately.



On the POS, each custom tender appears as its own payment method button.

On reports, each custom tender is its own line under payment types.

Reports		< Go Back				Print
Shift Summary	>	Non-revenue Iter	ns	0		\$0.00
Store Summary	>	Non-revenue Dis	counts	0		\$0.00
Hourly Sales	>	Ticket Total		28		\$39,267.27
Offline Credit	>	Payment Types	Qty	Tip amt	Total	(+/-
		CASH	14		\$38881.04	
		CHECK	1		\$18.69	
		CREDIT	12	\$30.57	\$305.54	
	•	Groupon	1		\$40.00	
		PrePaid	1		\$22.00	



## **OPTIONAL EMAIL MARKETING PROMPT**

If you require customers to sign digitally on the POS screen for credit card transactions, the system prompts your customers to enter their email address if they want to receive marketing emails. This prompt occurs after a transaction is completed.



This prompt is on by default but can now be turned off under **Settings** >**Checkout Options**.



## SUPPORT FOR KILOGRAMS ON THE GRS60 SCALE

The GRS60 scale supports kilograms as a unit of measure. You can select Kilograms as an item's unit of measure in the Silver Back office. Kilograms use three decimal place precision for both the item weight and tare weight.



## ASSIGN SALES ASSOCIATE

A ticket can now be given a specific sales associate. The sales associate defaults to the logged in user, but if the sale should be credited to someone besides the cashier, you can change the sales associate by accessing the ticket info tab.

Pad 🗢		SILVER	* 43% 🔳 🛆
Ticket * Customer	Info	Select Sales Associate	for this ticket
Future Order	$\bigcirc$	Q Search	
Notes	>	Sara Ford SFORD	~
Sales Associate	>	Angela Stanhope astanhope	
		Cashier 2 4444	
		Cashier Plus 3333	
		Jon Smith JSmith	

The sales associate will be printed on the customer receipt and can be viewed in the SBO from the POS Transaction Viewer.



## CHANGE DUE FOR REFUNDS

When a refund was performed to a credit or gift card, the "Change Due" message, which appears after a transaction is completed, showed the amount of the return.

To avoid confusing users, the "Change Due" now shows as \$0.00 for non-cash payment methods. There is not a case that you would refund a non-cash payment and owe a customer change.



## PRINT AND EMAIL RECIEPT OPTION

A new receipt option has been added that allows a user to print and email the receipt at the same time.



# ACCEPT SCAN IN CUSTOMER SEARCH - IOS

iOS users can scan a QR or bar code when on the customer search screen, and the search field will be populated with the information from the scan.

This was already implemented in Android in a previous release.

Customer 🖪 Info	SILVER Snacks	Popsorn	Fruit	* 51% • C Q Sno Cons
earch or Add New Add New	1.51	1.00	5.99	1.99
Enter a name, address, phone or email to find a customer.				(+)
i nree character minimum.	1.00	1.99	1.99	
2 3 4 5 Q W E R 1	6 F Y	7 8 U I	9 0	P ×
A S D F	G H	J	K L	Search
Ż X C V	B	N M	1 ?	•
23 🌐 Q			.?	123



## **BULK ITEM EDIT**

The Item Import tool can now be used to edit existing items in addition to adding new items. To do this, you will need to prepare an item import with the desired edits.

When importing, the system will look to see if the items already exist in the database using the item name. If yes, the existing items are updated with the data from the import. If no, the items are added to the database.

Editable attributes include item name, price, barcode and more. Note that units on hand cannot be updated in the import tool.

**IMPORTANT-** When editing existing items, if a user leaves any field blank that was previously populated (except for modified by), this will result in the field value being updated to a blank value.

## **BULK CUSTOMER EDIT**

Like the item tool, The Customer Import tool can now be used to edit existing customers in addition to adding new customers. To do this, you will need to prepare a customer import with the desired edits.

When importing, the system will look to see if the customers already exist in the database using the customer external ID. If yes, the existing customers are updated with the data from the import. If no, the customers are added to the database.

**IMPORTANT** - When editing existing customers, if a user leaves any field blank that was previously populated (except for Loyalty Balance), this will result in the field value being updated to a blank value.

**Note**: To make the process for exporting customers out and importing them back in again easier, the columns on the Customer List report and the columns on the Customer Import Template have been reordered and renamed so that they match more closely.

## ITEM ASSINGMENT FOR NEW STORES (FOR MULTI-STORES)

When adding a new store to a multi-store, you can select how you want to assign items to that store, simplifying your inventory set up.



The selection pop-up is displayed on the Inventory page for the new store after it has been added to your multi-store account.

You can assign all items, Copy the item assignment from an existing store, or not assign any items.

## DEFAULT MODIFIER ASSIGNMENT FOR NEW ITEMS

When creating a new item, modifiers are no longer assigned by default. A user must specify which modifiers to assign. This also applies to items made via the item import tool.

## **PROMOTION RANKING**

We have made it easier and faster to rank promotions to determine the order in which they are applied on the POS. By pressing **Sort Order** on the promotions page, you can edit the rank field next to each unexpired promotion.

We have also enabled setting a promotion rank via the Promotions API for our 3<sup>rd</sup> party partners.

MY STORE       RESULTS       INVENTORY       CUSTOMERS       EMPLOYEES       ECOMMERCE       HELP         CATEGORIES & ITEMS       MODIFIERS       DEPARTMENTS       DISCOUNTS       PROMOTIONS       MANAGE         Search All Promotions       Search All Promotions       Search All Promotions       Add a Promotions         RANK () _ NAME       START DATE       END DATE       POS AC         1       BOGO Towels       07/23/2015       07/23/2018       Yes         2       Disney Towel Sale       08/25/2016       12/25/2018       Yes         3       Buy 3 Get \$5 Off       03/05/2018       03/14/2018       Yes         4       1/2 Price Suits       1/2 Price Suits       03/05/2018       03/14/2018       Yes		LVER	Sara's Swim Sh	ор		:	Sara.Ford		Settings 🔅
CATEGORIES & ITEMS       MODIFIERS       DEPARTMENTS       DISCOUNTS       PROMOTIONS       MANAGE         Search All Promotions       Search All Promotions       Search All Promotions       Image: Comparison of the promotion of the p		MY STORE	RESULTS	INVENTORY	CUSTOMERS	EMPLOY	EES E	COMMERCE	HELP
Search All Promotions         Search All Promotions         Image: Search All Promotions         Image: Search All Promotions         RANK © _ NAME       START DATE       END DATE       POS Add a Provided			CATEGORIES & ITEMS	MODIFIERS	DEPARTMENTS	DISCOUNTS	PROMOTION	IS MANAGE	I
NAME         START DATE         END DATE         POS Add a Prod           1         BOGO Towels         07/23/2015         07/23/2018         Yes           2         Disney Towel Sale         08/25/2016         12/25/2018         Yes           3         Buy 3 Get \$5 Off         03/05/2018         03/14/2018         Yes           4         1/2 Price Suits         03/14/2018         Ots         Yes							Search All	Promotions	Q
RANK     NME     START DATE     END DATE     POS ACT       1     BOGO Towels     07/23/2015     07/23/2018     Yes       2     Disney Towel Sale     08/25/2016     12/25/2018     Yes       3     Buy 3 Get \$5 Off     03/05/2018     03/14/2018     Yes       4     12 Price Suits     03/14/2018     Yes	PROM	IOTIONS						Done Sorting	Add a Promotio
BOGO Towels         07/23/2015         07/23/2018         Yes           2         Disney Towel Sale         08/25/2016         12/25/2018         Yes           3         Buy 3 Get \$5 Off         03/05/2018         03/14/2018         Yes           4         12 Price Suits         03/05/2018         03/14/2018         Yes	RANK 🕜 🔺	NAME				START DATE		END DATE	POS ACTIVE
2         Disney Towel Sale         08/25/2016         12/25/2018         Yer           3         Buy 3 Get \$5 Off         03/05/2018         03/14/2018         Yer           4         1/2 Price Suits         03/05/2018         03/14/2018         Yer	1	BOGO Towels				07/23/2015		07/23/2018	Yes
3         Buy 3 Get \$5 Off         03/05/2018         03/14/2018         Yes           4         1/2 Price Sults         03/05/2018         03/14/2018         Yes	2	Disney Towel Sale				08/25/2016		12/25/2018	Yes
4 1/2 Price Suits 03/05/2018 03/14/2018 Yes	3	Buy 3 Get \$5 Off				03/05/2018		03/14/2018	Yes
	4	1/2 Price Suits				03/05/2018		03/14/2018	Yes
BOGO Goggles 08/18/2015 02/28/2018 Ye		BOGO Goggles				08/18/2015		02/28/2018	Yes

Important notes on ranking promotions:

- When setting new ranks, if two promotions are assigned the same rank, the first promotion in alphabetical order will get the set rank and the other promotion will get the set rank +1.
- If a rank is entered that is greater than the total number of promotions, it will be ranked last.
- If you have multiple pages of promotions, Changes to ranks are remembered across pages.
- Expired promotions cannot be ranked. Future dated promotions can be ranked

# NEW COLUMNS ON THE POS TRANSACTION EXPORT

When you export your transaction details from the POS Transaction page you receive a **POS Transactions** file and a **Ticket Details** file.

On the **Ticket Details** export, there are now columns with data for Operator (which employee's PIN was used to log into the POS), Sales Associate and Station.

# MANAGING LARGE CUSTOMER DATABASE

In the past, your stores' customers have been stored locally on the POS device. We found that when a store had a large amount of customer data, registering a new device or syncing data could take long periods of time.

To reduce the work required by the device and speed up theses processes, a device will now only store 25,000 customers locally. Any customers beyond that will be stored and accessible in the cloud.

The system chooses which customers to save locally based on the store(s) those customers have purchased at and their last purchase date. The POS will check for additional customers every 3 minutes, and purge any excess customers based on who has the oldest last purchase date.

#### ON the POS

When searching for a customer (I.E: for loyalty or to view their customer profile), if the customer cannot be found on the device, the user will be given the option to search the host, where the rest of the customers are stored.



There is an option to search host for a customer when sending an email receipt as well.

#### **Redownloading Customers**

As part of the app upgrade to 4.6, we will purge all customers from the device and redownload all customers so that stores will receive the most recent 25,000 customers.

For Multi-store merchants with more than 25,000 customers, the system will first filter the customers by store so that devices receive customers who have made purchases at the device's specific store.

#### OPEN LOYALTY

Silver now supports an Open Loyalty API which allows more 3<sup>rd</sup> party loyalty providers to integrate with Silver. Check with a customer care or concierge team member to see if your loyalty provider is in the process of integrating.

# COMPLEX PASSWORDS FOR SILVER BACK OFFICE

To increase the security of Silver Back Office, passwords must now meet the following requirements:

- 8 25 characters
- At least one uppercase and one lowercase letter
- At least one number
- Cannot use previous password

#### **OTHER FIXES**

- Android Block additional swipes on the customer display and show "Please wait"
- iOS App crash when adding inventory using the scanner
- iOS MSR is disabled if the user powers down the Bluetooth scanner or if it goes to sleep
- iOS "Remember" loyalty rewards until the ticket qualifies for the reward
- iOS 350 plus is printing slow on Bluetooth with iOS11
- Host Items sold by weight are not calculating in the inventory snapshot correctly
- Host Reply to email for bulk emails is <u>Silver@ncrsend.com</u> instead of the From email configured by the merchant